



SmartCare™ October 2025 MSP Release Notes (Changes)- Part 2

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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' (9)

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
54	EII # 132416	Changes are implemented to Add Update/Resend capability to Message Interface screen.	Message Interface
55	EII # 132021	Updates to the 'MAT-Bottle-Transaction (mg)-Report'.	Methadone
56	EII # 132030	MAT: Updates Needed to the 'MAT Spilled Medication by Date' Report Logic.	Methadone
57	EII # 132454	MAT: Enhanced the Medication Inventory Transaction list screen by updating the existing filters and creating additional columns in the grid.	Methadone
58	EII # 132042	MAT—Pre Pour Transaction Report: Enhancing reporting efficiency by displaying the total Pre Pour dose (in mg) for transactions where the Current Status is 'Pre-Pour Dose Poured', grouped by Medication Type and Location.	Methadone
59	EII # 132076	MAT Transactions by Bottle Report.	Methadone
61	EII # 131702	Implementation of the "To Do" logic in the 'My Documents' list page and 'Service Note'.	My Documents List Page
75	EII # 132327	Dispense Qty is Not Calculating for Patches, Implants, Films and Lozenges.	RX Application
76	EII # 132495	Implementation to display full Strength formulation instead of abbreviated formulation across all medication-related screens and reports.	RX Application

TASKS LIST - 'PASSIVE CHANGE' (37)

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.

SI. No	Task No	Summary	Module Name
38	EII # 126858	Implementation of Guarantor Accounts in the SmartCare.	Guarantor/Family Cost Share
39	EII # 130736	Data synchronization between the client record and guarantor record when client is linked to guarantor.	Guarantor/Family Cost Share
40	EII # 132039	A new date overlap logic is implemented for client to have only one Guarantor/Financially Responsible person at a time and new 'Guarantor' Tab is added to Client Information© based on permissions.	Guarantor/Family Cost Share
41	EII # 131946	Navigating from Guarantor List page to Guarantors Accounts list page when clicked on 'Guarantor Balance' hyperlink.	Guarantor/Family Cost Share
42	EII # 125469	Guarantor: New List page and Detail Page - Family Cost Share	Guarantor/Family Cost Share
43	EII # 126859	Guarantor: Client Fee Details changes.	Guarantor/Family Cost Share
44	EII # 130350	Implementation of Guarantor Payments and logic.	Guarantor/Family Cost Share
45	EII # 130351	Guarantor Payments: Phase 1 Guarantor Concept - Back End	Guarantor/Family Cost Share
46	EII # 130646	Guarantor Statements: Phase 1 Guarantor Concept - Front-end	Guarantor/Family Cost Share
47	EII # 132401	Guarantor Concept: Client Account and Guarantor Accounts screen changes.	Guarantor/Family Cost Share
48	EII # 130735	UMDAP Family 3.0 - Guarantor concept: Providing the 'Missing Guarantor Report' for the live customer to create Guarantor records.	Guarantor/Family Cost Share
49	EII # 130397	Inpatient Activity Details - Report/List page for updating incorrect Billing Procedure for which the Bed Service is created.	Inpatient Activity Details
50	EII # 132477	Changes are implemented for Inpatient Activity Details - Report/List page for updating incorrect Billing procedure with the existing Configuration key functionality.	Inpatient Activity Details

51	EII # 132032	Implemented backend changes to update the required billing procedure codes for Inpatient disposition activities.	Inpatient Activity Details
52	EII # 130993	Changes are implemented to generate HL7 Outbound ORM messages for client orders marked with "Onsite Specimen Collection".	Interfaces
53	EII # 131814	Changes are implemented to include all USCDI v3 data elements, and logic is updated to generate the CCD XML file.	Interfaces
60	EII # 132552	MAT - Update to Pre-Pour Transactions Storage and Display Logic.	Methadone
62	EII # 132127	Changes in the filter logic for 'Revenue Report'.	My Reports
63	EII # 128408	To disable/enable the auto-completion functionality for a lab order based on the SetDualReviewForLabOrderCompletion configuration key setup	Orders
64	EII # 132627	Implementation of New System Configuration Key to enable/disable the Med-Sig hyperlink in Client Orders Screen	Orders
65	EII # 131698	Changes are implemented to capture and record specimen details for all lab orders	Orders
66	EII # 132435	Intelichart: Implementation to Synchronize the patient signed version of document pdf to SmartCare via API.	Patient Portal
67	EII # 132629	Implementation of synchronization for client appointment data with the Intelichart Portal.	Patient Portal
68	EII # 131670	Changes are implemented to populate 'ProviderClients' Table Automatically.	Provider Client
69	EII # 132165	The 'Quicklink Detail' screen is updated to eliminate the possibility of incorrect setup.	Quicklink
70	EII # 132237	Implementation of 'Staff Safety Checks' Report.	Reports
71	EII # 132112	Changes made in the 'Service Note Reviewer' report filter dropdown field values.	Reports
72	EII # 132461	RWQM Rule Detail: A new 'Copy' icon has been added.	RWMQ Rule
73	EII # 124626	Implementation to display Controlled Substance Certification Number (CSC#) into electronic prescriptions for Controlled substance medications within SmartCare Rx.	RX Application
74	EII # 131627	Windows service ensures that CSC# number is added in the request message XML to the	RX Application

		SureScripts in the place of 'StateLicenseNumber'	
77	EII # 132699	Implementation to enable/disable the Med-Sig hyperlink in Rx screen of SmartCare application through EnableFreeTextSigPopup Configuration Key.	RX Application
78	EII # 132641	Free-Text Sig (instructions for medication) is being incorrectly overwritten during medication reorder or modification—even when no Sig-related fields are changed.	RX Application
79	EII # 132474	To triggered Prescriber popup uniformly for all user regardless of their role whenever the required PMP criteria are not satisfied.	RX Application
80	EII # 132281	Implementation of the new System Configuration Key 'SetDefaultDateFiltersForListPages'.	Services
81	EII # 132376	MCO ISP Goals/Objectives to initialize into Service Note(s) -ISN and Misc G/O.	Services/Notes
82	EII # 131754	Telehealth: Microsoft Graph API changes to allow creation of meetings on the behalf of other users.	Telehealth
83	EII # 128442	Telehealth: Configuration Improvements.	Telehealth

Functionality Task Details

Guarantor/Family Cost Share

Reference No	Task No	Description
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39	EII # 130736	Data synchronization between the client record and guarantor record when client is linked to guarantor
40	EII # 132039	A new date overlap logic is implemented for client to have only one Guarantor/Financially Responsible person at a time and new 'Guarantor' Tab is added to Client Information© based on permissions.
41	EII # 131946	Navigating from Guarantor List page to Guarantors Accounts list page when clicked on 'Guarantor Balance' hyperlink.
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44	EII # 130350	Implementation of Guarantor Payments and logic.
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38. EII # 126858 (Feature # 339971): Implementation of Guarantor Accounts in the SmartCare.

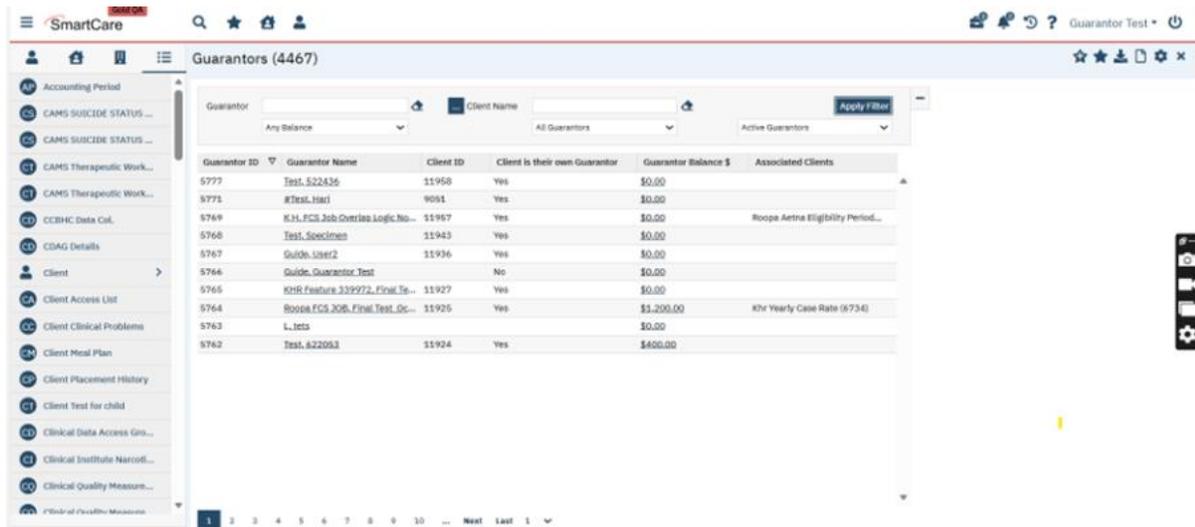
Note: This is a Passive change.

What's Changed:

With this new enhancement, the 'Guarantors (My Office) List page, 'Guarantor Details (My Office) page are implemented and Guarantors are linked to Client Information screen based on the permission given for the 'Guarantor tab' in Client Information(C).

Note: By Default, for the 'Guarantor' tab in Client Information (C) permission is denied for all users.

I. Guarantors List page



1)The Filter section details

Guarantor: Typeable search textbox with eraser icon. Default value is blank.

Client Name: Textbox with Client Search button and eraser icon. Default value is blank.

Guarantor Balance > \$0.00: Dropdown field with Guarantor Balance > \$0.00 and Any Balance values. Default value is "Any Balance".

Client is their own Guarantor: This is a dropdown with values Client is their own Guarantor, Client is not their own Guarantor, All Guarantors. Default value is "All Guarantor".

Active Guarantors: This is a dropdown with values All Guarantors, Active Guarantors and Inactive Guarantors.

Default value is "Active Guarantors".

2) Grid Section Details.

Guarantor ID: Guarantor ID is displayed for the associated record

Guarantor Name: This is hyperlink and displays the Guarantor's name in Last Name, First Name Middle Name format. Upon clicking on hyperlink, the Guarantor Details screen is displayed.

Client ID: will display the Client Id, If the Guarantor record has a Client Id.

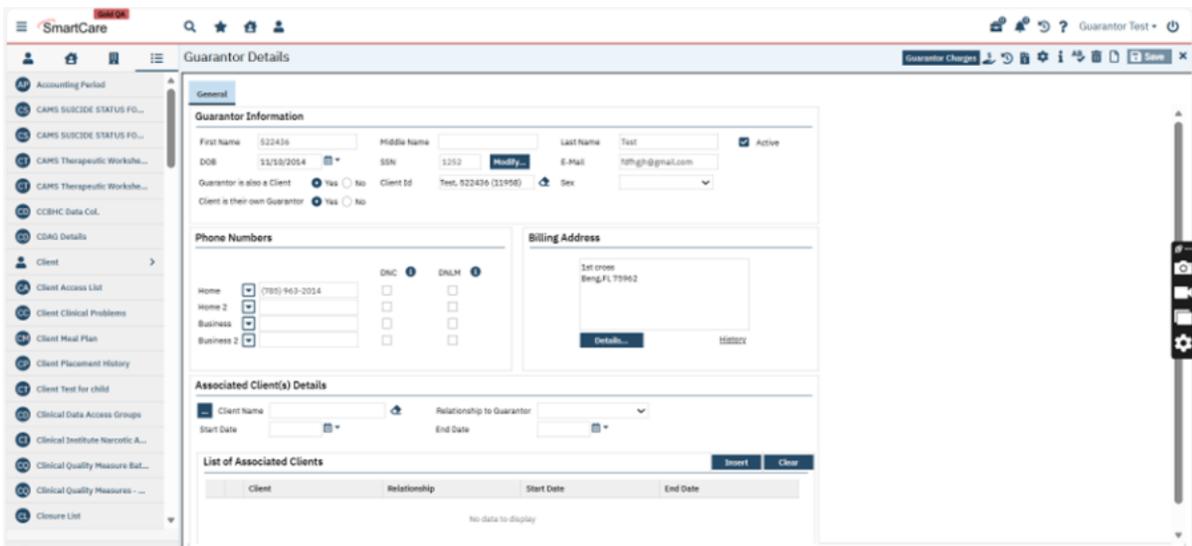
Client is their own Guarantor: will display Yes or No values.

Guarantor Balance: This is a hyperlink and displays the guarantor's total self-pay balance and on clicking on hyperlink the Guarantor Accounts (My Office) screen is displayed for that guarantor.

The default values are specific to the first time the user opens the screen. Filter values are saved as per the user selection before navigating away from the list page.

--On Click of Export button the data can be saved to file.

II. Guarantor Details screen



Below are the sections present in the Guarantor Details screen.

1) Guarantor Information section is displayed with below fields.

First Name: This is a text box field.

Middle Name: This is a text box field.

Last Name: This is a text box field.

Active: This is a checkbox and by default the check box will be checked.

DOB: This is a Calendar Control field

SSN: This is a textbox field with Modify... button

E-Mail: This is a text box field.

Guarantor is also a Client: This is a radio button with Yes and No options.

1) If the guarantor record being created is for someone who is themselves a client, the "Yes" radio button should be selected.

2) If the guarantor record being created is for someone who is not a client in SmartCare, the "No" radio button should be selected.

Client ID: This is a textbox field and includes erase icon.

1) If "Guarantor is also a client" radio button is set to "Yes," then the guarantor's ClientId is required to be displayed/entered.

The Client Id field is enabled and allows client search (by name or ID) so that end users can manually link the ClientId to the guarantor record if needed.

2) If "Guarantor is also a Client" radio button is set to "No," the Client Id field should be left blank and the field is disabled. If there is a value in the field once the No radio button is selected, the value is automatically cleared.

3) If neither radio button is selected for "Guarantor is also a Client" radio button, then the field is left blank and disabled.

Sex: This is a dropdown, the values are fetched from the new Global Code: SEX

Client is their own Guarantor: This is a radio button field with Yes and No options.

1) If the client is their own guarantor, the "Yes" radio button is selected.

2) If the client is not their own guarantor, the "No" radio button is selected.

3) If the "Guarantor is also a Client" radio button is set to "No," automatically the system sets this radio button to "No" and disables the field. If the "Guarantor is also a Client" radio button is updated to "Yes," then clear the "No" radio button in this sequence and enable the field again.

Warning pop up is displayed on trying to save for the potential match of guarantor.

Warning pop up message is displayed as "Potential guarantor record found. Do you want to proceed with creating this guarantor record?" with 'Continue' and 'Cancel' buttons.

The combinations that would signify a potential duplicate guarantor are:

*Same First OR Last Name and DOB

*Same SSN

The pop-up will only display when creating the guarantor record for the first time upon saving.

2) Phone Number section

Phone number: This is a textbox with PHONETYPE Global Code dropdowns and DNC/DNLM checkboxes.

3) Billing Address section

-Billing Address: Billing Address has different fields Home, Business and Other. This is a textbox with Details... button. Details button used to format the address.

Note: Address Type is not needed as only the "Billing" Address is required for guarantor records.

History: This is a hyperlink. The guarantor's address history will need to be retained for correct guarantor self-pay billing. Clicking in the hyperlink will open Guarantor Address History

Guarantor Address History pop up

The 'Guarantor Address History' pop up will have the below mentioned columns in the grid.

Address

City

State

Zip

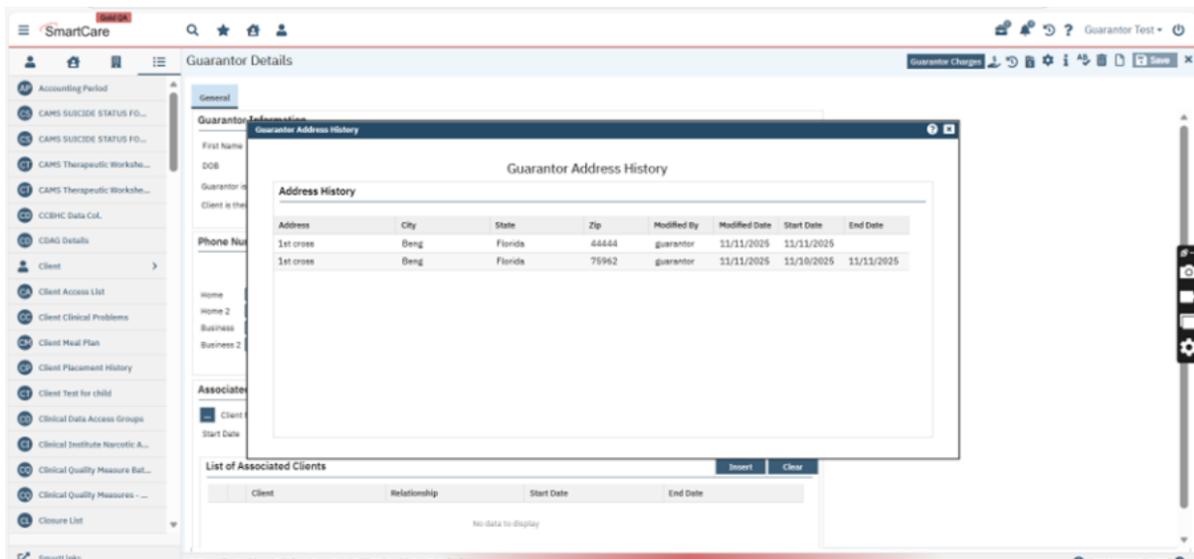
Modified By

Modified Date

Start Date

End Date

Screenshot for the Address History pop up.



4) Associated Client(s) Details section.

Client Name: This is a textbox with Client Search button and Erase icon.

Relationship to Guarantor: This is a dropdown and will initialize the values from existing Global Code RELATIONSHIP.

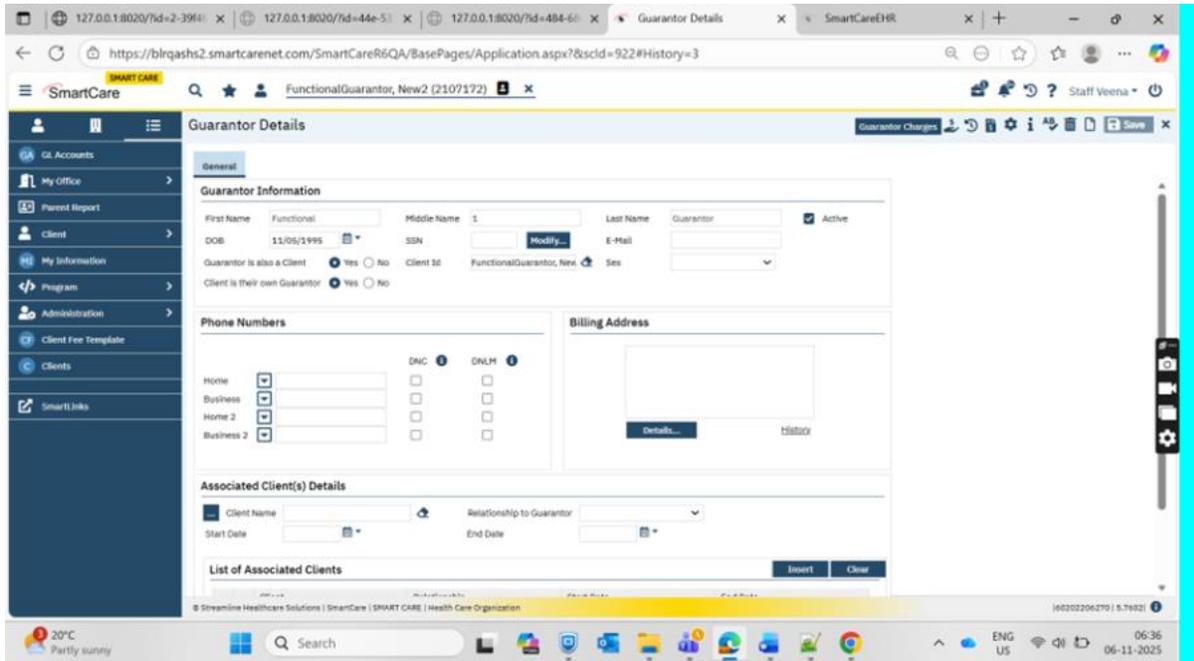
If a client is being added to a Guarantor's record, once the Client's name is selected, the Relationship to Guarantor field is completed before the record can be inserted/modified and saved.

Start Date: This is a Calendar Control textbox.

If a client is being added to a Guarantor's record, once the Client's name is selected, the Start Date field is completed before the record can be inserted/modified and saved.

End Date: This is a Calendar Control textbox.

Insert/Modify and Clear buttons: This is for inserting the data in the Associated Client (C) Details grid.



Associated Client(s) Details

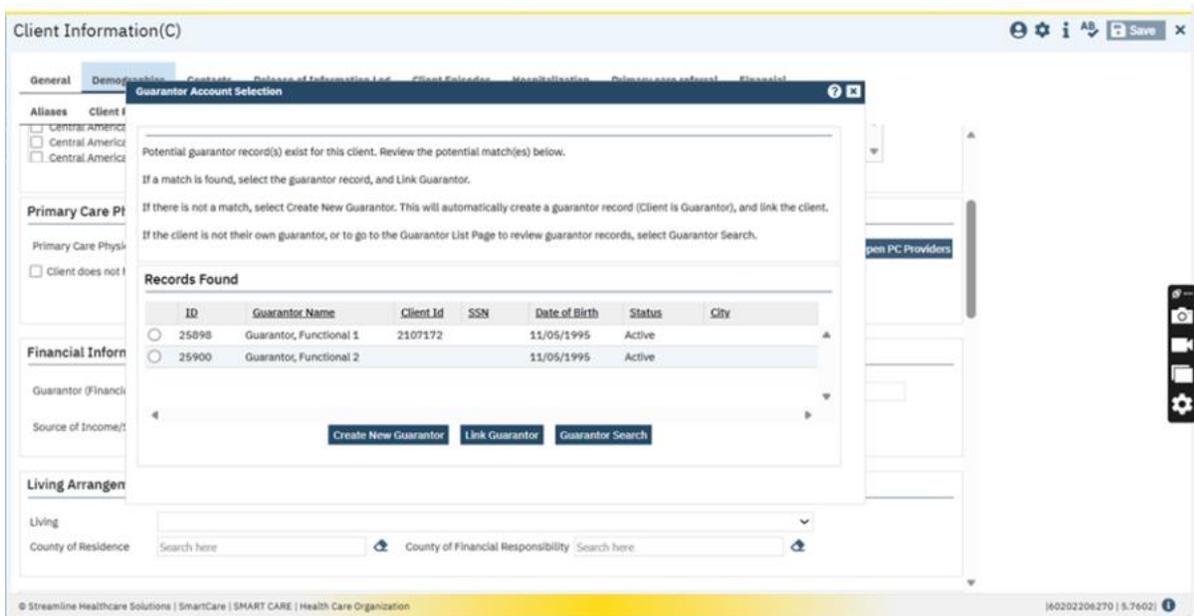
Client Name Relationship to Guarantor

Start Date End Date

List of Associated Clients Insert Clear

	Client	Relationship	Start Date	End Date
X	Test SR, Anand (3816)	Daughter	07/01/2025	
X	Archana, Test7495 (3889)	Friend	07/16/2025	

A new pop up "Guarantor Account Selection" is added in Client Information(C) screen for potential matching records upon 'Save'.



The Guarantor Account Selection pop-up window will only display for below conditions.

- *Client Type is Individual.
- *One or more potential match records are found.
- *ClientId is not linked to any guarantor record.

Combinations to look for, for a potential match to an existing guarantor record:

- *First Name OR Last Name and DOB
- OR
- *SSN
- OR
- *Client ID

- 1)If a match is found, select the guarantor record, and click on"Link Guarantor" button in pop up.
- 2)If there is not a match, select "Create New Guarantor" button in pop up. This will automatically create a guarantor record (Client is Guarantor), and link the client.
- 3)If the client is not their own guarantor, select "Guarantor Search" button and this will navigate to the Guarantor List Page to review guarantor records.

Where To Find It:

- Path 1:** Go Search – Guarantors (My Office).
- Path 2:** Go Search – Guarantor Details (My Office).

Path 3: Client Search – select the client – Client Information (C) screen-- Guarantor Tab is showing blank data – fill the data and click on Save – “Guarantor Account Selection” Pop up is displayed for matching records / new guarantor is created if matching record is not present.

How it Helps:

The purpose of this change is to meet each of the Guarantor data and financial information details along with the dependent data and details.

Data Model Changes:

Added below mentioned New Tables.

Guarantors

GuarantorPhones

GuarantorClients

GuarantorAddressHistory

39. EII # 130736 (Feature # 531375): Data synchronization between the client record and guarantor record when client is linked to guarantor.

Note: This is a Passive change.

What's Changed:

Below are the fields for which the data sync will work from client Information(C) to Guarantor Details and Guarantor Details to Client Information©.

- For **First Name, Middle Name, Last Name, DOB, E-Mail, Sex** fields below is the logic for sync:

1. It will be excluded from data sync if the field contains a value and is updated to blank/NULL.
2. If the field was blank/NULL and a value is added, the data sync will update the corresponding field in the other table.

- For **'Billing Address'** field, below is the logic for sync:

1. Client Info table: **ClientAddresses.Billing** must = "Yes;" all addresses in Client Info where Billing = "Yes" will be updated.
2. Will be excluded from data sync, if the field contained a value and is updated to blank/NULL.
3. If the field was blank/NULL and a value is added, the data sync will update the corresponding field in the other table.
4. When syncing the address from Guarantor Details to Client Information, the "Home" Address Type will be used in ClientAddress.AddressType.

- For **'Phone Numbers'** field below is the logic for sync:

The Primary radio button Selection is not part of the data sync.

1. ClientPhones.PhoneType must match between tables for the phone number to be included in the data sync - In addition, if PhoneType is not already available in Client Info, then it will be added with the phone number as part of the data sync.
2. Will be excluded from data sync if field contained a value and is updated to blank/NULL.

3. If the field was blank/NULL and a value is added, the data sync will update the corresponding field in the other table.

Note: When values are overridden by the data sync in either table, the overwritten values will not be retained. This can lead to lost data in either table if clients and guarantors are linked inappropriately.

- **Refresh Logic in Guarantor Details screen.**
 - When changing the radio button "**Client is their own Guarantor**" from **No** to **Yes** in Guarantor Details screen the "Refresh logic" will be executed and the fields like FirstName, Middle Name, LastName, Email will change the data as per the selected client.
 - This refresh logic will ensure when a client Id is linked the valid client data is initialized instead of outdated or incorrect data.

New configuration key is introduced for the data sync to work below are the details.

System Config Key: EnableGuarantorDataSync

Read Key as: Enable Guarantor Data Sync.

Allowed Values: Yes, No

Default Value: No

Modules: SCM Client Intake

Description: This Configuration Key controls syncing data between the Client Information and Guarantor Details screens. When a client is their own guarantor and demographics are updated on either screen, the demographics can be synced to update the other screen automatically.

If the key value is set to No:

- The demographics will not sync between the two screens and updates will need to be made manually to each screen. This will be the default value of the key.

If the key value is set to Yes:

- **Guarantor Post Update SP:** Will sync demographic data from Guarantor Details to Client Information screen.
- **Client Info Post Update SP:** Will sync demographic data from the Client Information to Guarantor Details screen.
- The Guarantor data sync is specific to the Individual Client Type only.
- The Guarantor data sync does not sync any information to or from Client Contacts.

Note:

If the value of the key is updated with any value apart from the allowed values, the system will consider the default behavior, same as the key value being set to No.

Prerequisites: The data sync will work as per the logic below:

1. Type of Client = Individual
2. Client is their own Guarantor field = "Yes" AND Guarantors. ClientId field contains a value (ClientId) in Guarantor Details screen.
3. The configuration Key "**EnableGuarantorDataSync**" is set to 'Yes'.

Note: The Guarantor and Client Information data sync will be enabled when the **EnableGuarantorDataSync** Configuration Key is set to 'Yes' AND when the Guarantor tab is **Active** and the Staff has **Access** to it.

Where to Find It:

Path 1: Go Search – select the client – alter the demographics data for client – click on 'Save' – go to the Guarantor Details screen – The client is linked to the Guarantor in the 'Guarantor Information' section – The modified data is reflected in the guarantor's details screen.

Path 2: Open Guarantor Details screen – The client is linked to the Guarantor in the 'Guarantor Information' section – modify the data in guarantors data and click on 'Save' – go to the Client Information© of the linked client – The modified data is reflected in the client Information© screen.

How it Helps:

Implementation of new logic for data sync to ensure the integrity of a client's record with Guarantor records when changes/updates are made to the demographics.

40. EII # 132039 (Feature # 569306): A new date overlap logic is implemented for client to have only one Guarantor/Financially Responsible person at a time and new 'Guarantor' Tab is added to Client Information© based on permissions.

Note: This is a Passive change.

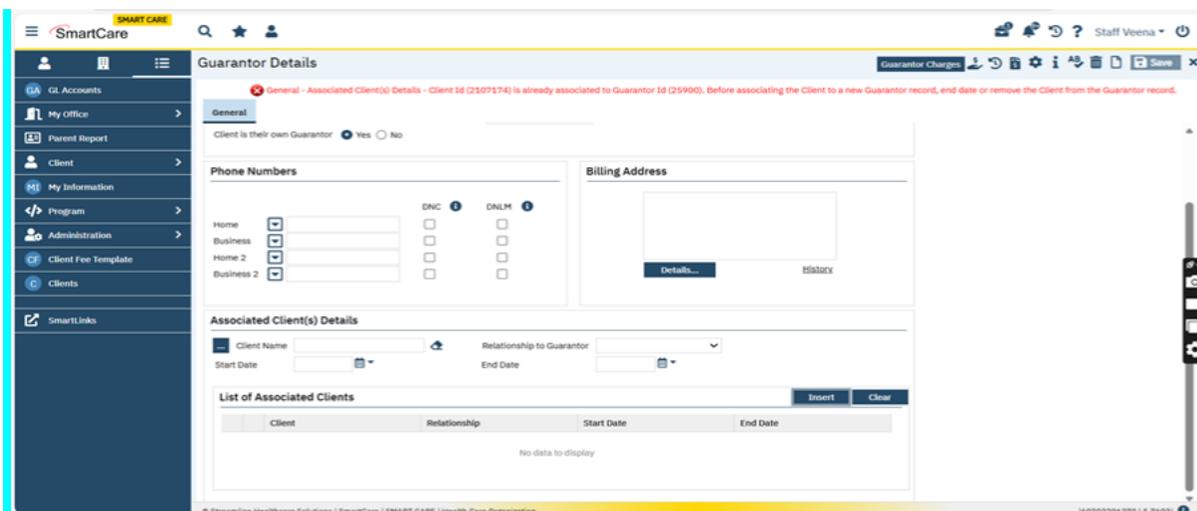
What's Changed:

With this enhancement, a new date overlap logic is implemented so that at a time only one Guarantor/Financially responsible person is present for the client.

Below are the scenarios for the date overlap logic for the client id added in Guarantor Information section or Associated Client(s) Details section of Guarantor details screen.

- The client (123) is already added in Associated Client(s) Details section of Guarantor(1) with end date as null/future date.
 - o When the Guarantor(2) tries to add the same client in the Associated Client(s) Details section. The mentioned validation is displayed.

Validation Message: "General - Associated Client(s) Details - Client Id (1234) is already associated to Guarantor Id (1). Before associating the Client to a new Guarantor record, end date or remove the Client from the Guarantor record."

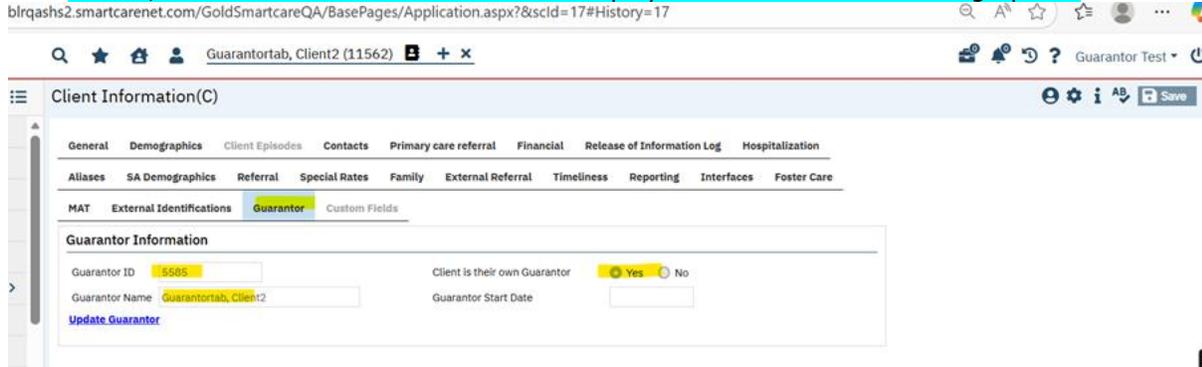


- The Start date and end date are included and in between is considered for the date overlap logic. When either of the dates are overlapped, then below mentioned validation is displayed.

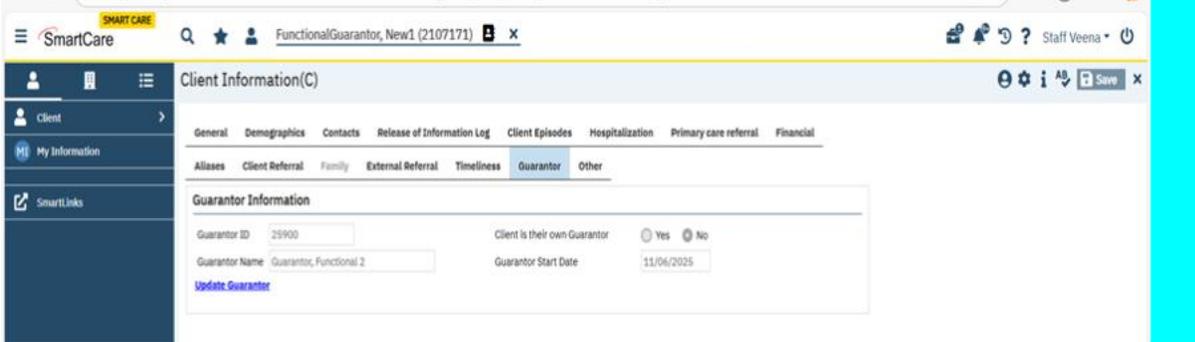
Validation Message: "Start Date/End Date entered for Client Id (1234) overlaps with Guarantor Id (1)."

Guarantor Tab:

- 1. The "Guarantor" Tab is inactive for all customers. The permission needs to be provided to the staff based on the Client Information© with guarantor details.
- If a Client Id is present in the "Guarantor Information" section and 'Client is their own guarantor = YES', then the Guarantor details will be displayed in Client Info -> Demographics.



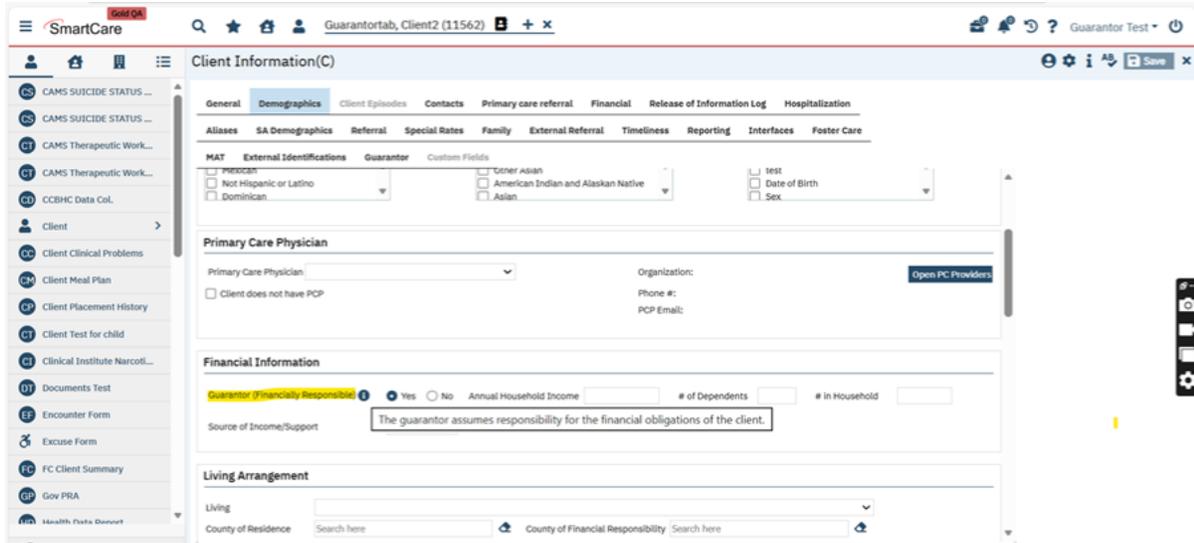
- If Client Id present in "Guarantor Information" section and Client is their own guarantor = NO in Guarantor Details screen, then the system will look for Client Id in associated client's section.



Based on the Guarantor tab permission, the below changes are seen in the Demographics and Contacts tab of client information© screen.

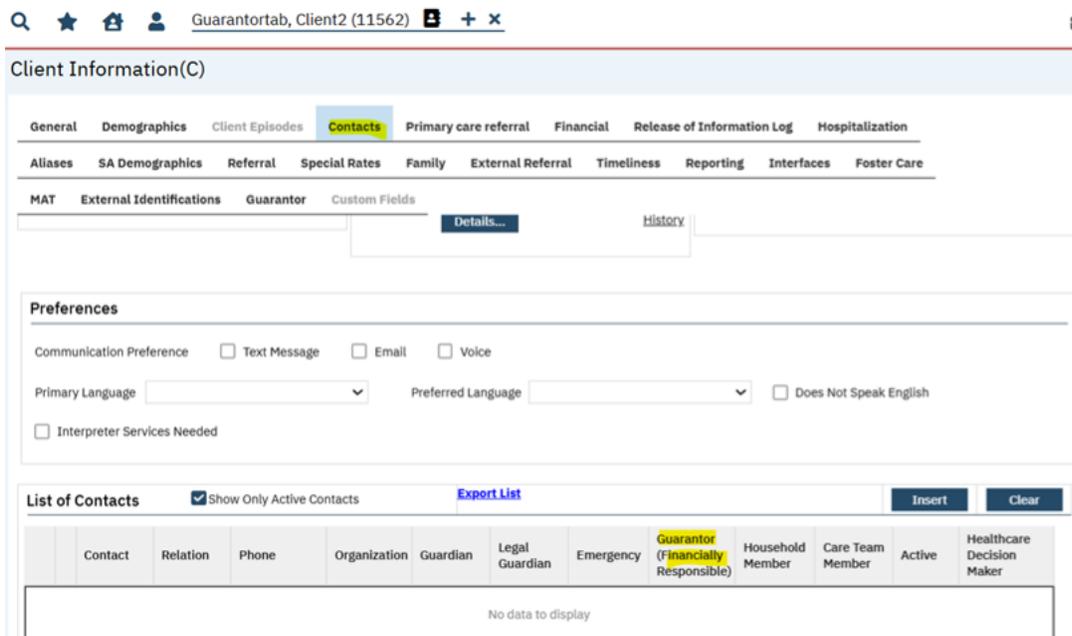
Demographics Tab:

- In Client Information -- Demographics tab -- Financial Information section -- Label changed from "Guarantor" to "Guarantor (Financially Responsible)"
- Info icon "I" is displayed on Client Information -- Demographics tab -- Financial Information section.



Contacts Tab:

- In Client Information -- Contacts tab – the checkbox label 'Financially Responsible' has been changed to 'Guarantor (Financially Responsible)'.
- Custom grid header on Client Information -- Contacts Tab – the label 'Financially Responsible' has been changed to 'Guarantor (Financially Responsible)'.



Note: The Guarantor and Client Information data sync will be enabled when the EnableGuarantorData Sync Configuration Key is set to 'Yes' AND when the Guarantor tab is active and the staff has access to it.

Prerequisite:

The Permission is present for the Guarantor Tab of Client Information© screen.

Where to Find It:

Path 1: Go Search – Guarantors Details (My Office).

Path 2: Client Search – select the client – Client Information© screen – Demographics Tab – Contacts Tab – Guarantor Tab.

How it Helps:

The purpose of this change is to have only one Financially Responsible person at a time for client. By default, the permissions are denied for the Guarantors tab for all customers.

41. EII # 131946 (Feature # 564264): Navigating from Guarantor List page to Guarantors Accounts list page when clicked on 'Guarantor Balance' hyperlink.

Note: This is a Passive change.

What's Changed:

With this enhancement, the Guarantor Accounts data is displayed in Guarantor Accounts List Page by clicking on the Guarantor Balance hyperlink in Guarantor list page.

Where to Find It:

Path 1: Go Search – Guarantors (My Office) – click on Filter with some default data – The result is displayed in the Grid of list page – click on Guarantor Balance hyperlink – The Guarantor Accounts list page is displayed for that guarantor record.

How it Helps:

implemented the logic to enable the user to navigate from Guarantor List page to Guarantor Accounts List (My Office) screen, with on click of Guarantor Balance column hyperlink.

42. EII # 125469 (Feature # 286305): Guarantor: New List page and Detail Page - Family Cost Share

Note: This is a passive change.

What's Changed:

A new Family Cost Share List Page and Family Cost Share Details Page are introduced, allowing end users to:

1. View, search, and filter Family Cost Share records under *My Office*.
2. Create, update, or delete Family Cost Share records using the new Details page.
3. Define daily, weekly, monthly, or yearly cost share limits and track remaining balances.
4. Associate Family Cost Share records with guarantors, clients, programs, procedures, and service areas.
5. Automatically calculate and display the total, current met, and remaining Family Cost Share amounts.
6. Enforce validations for overlapping records, required fields, and date consistency.

Global Codes: A new Global Code category '**FamilyCostShareType**' is created:

Global Code Details:

- Category Code: FamilyCostShareType
- Category Name: Family Cost Share Type
- 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: Codes created in this Global Code will be used to define different Family Cost Share Types.

'Family Cost Share' List page:

Family Cost Share Id	Guarantor	Start Date	End Date	Family Cost Share Type	Associated Clients	Cap Unit Type	Amount	Current Amount Met Yearly	Remaining Amount Yearly	Date Family Share Met
131	Khr_Bug_471561	06/20/2025	06/20/2025	RKH Family Cost Shar...		Daily	\$250.56	\$20.00	\$15.89	
139	Khr_Case_Rate_2	04/16/2025	04/22/2025	RKH Family Cost Shar...		Monthly	\$100.00			
140	Roooa_Monthly	07/11/2025	07/11/2025	RKH Family Cost Shar...		Daily	\$154.56	\$30.00	\$66.56	
141	Rkh_bug_523733	07/01/2025		RKH Family Cost Shar...		Daily	\$40.00	\$50.00	\$50.00	
144	FCS_12_KHR	07/30/2025		RKH Family Cost Shar...		Daily	\$250.00			
145	Khr_Bug_471561	06/20/2025	06/20/2025	RKH Family Cost Shar...		Daily	\$250.56	\$20.00	\$15.89	
146	KHR_Use_case_3	07/01/2025	08/01/2025	RKH Family Cost Shar...		Daily	\$25.56	\$3.00	\$562.00	
147	Roooa_Case_Rat	07/01/2025		RKH Family Cost Shar...		Daily	\$100.00	\$14.00	\$0.00	07/31/202
150	Roooa_BCBS_Aet	07/04/2025		RKH Family Cost Shar...		Monthly	\$66.00			
151	KHR_Bug_48376	07/02/2025		RKH Family Cost Shar...		Yearly	\$100.00	\$50.00	\$50.00	
153	Roooa_Bug_513	07/10/2025		RKH Family Cost Shar...		Daily	\$200.00			
160	Roooa_Case_Rat	08/14/2025		RKH Family Cost Shar...		Weeklv	\$18.00			

Filter Section:

- **Guarantor:**
 - This is an optional field with a textbox search and eraser icon.
 - It allows users to search by guarantor name or ID.
 - The format displayed is "LastName, FirstName MiddleName (GuarantorId).
 - Selecting the eraser icon clears the field.
 - The system pulls all guarantor records for selection.
- **Client Name:**
 - This is an optional field with a textbox and Client Search button, including an eraser icon.
 - When a client is selected as a filter, all guarantors associated with that client are displayed.
- **Family Cost Share Type:**
 - This is an optional field with a typeable dropdown.
 - The dropdown includes all active values configured in the Global Code: *Family Cost Share Type*.
- **Service Area:**
 - This is an optional field with a typeable dropdown.
 - The dropdown includes all active Service Areas.
 - Initialize a list of all active service areas.
 - "All Service Areas" option is available in the filter.
- **Program:**
 - This is an optional field with a typeable dropdown.
 - The dropdown includes all active Programs.
 - Initialize a list of all active programs.

- An "All Programs" option is available in the filter.
- **Procedure:**
 - This is an optional field with a typeable dropdown.
 - The dropdown includes all active Procedures.
 - Initialize a list of all active procedures.
 - An "All Procedures" option is available in the filter.
- **Start Date:**
 - This is an optional field with a calendar control displayed in MM/DD/YYYY format.
 - By default, the field is blank when the page is opened.
- **End Date:**
 - This is an optional field with a calendar control displayed in MM/DD/YYYY format.
 - By default, the field is blank when the page is opened.
- **Yearly Family Cost Share:**
 - This is an optional field with a dropdown field type.
 - This filter is specific to displaying Family Cost Share records that are configured for a Yearly Cap/Maximum.
 - This filter determines which Family Cost Share records display based on whether the Yearly Cap has been met or not.
 - The dropdown includes the following response options:
 - ♣ All: The "All" option is pre-selected by default when the list page is opened.
 - ♣ Met: Display only records where the Yearly Cap is met.
 - ♣ Not Met: Display only records where the Yearly Cap is not met.

Grid Section:

- **Family Cost Share ID:**
 - The grid displays the Family Cost Share ID for each record.
 - Each Family Cost Share ID is a hyperlink that opens the corresponding record in the Family Cost Share Details screen.
- **Guarantor:**
 - The Guarantor column displays the name of the guarantor associated with each Family Cost Share record.
 - The Guarantor name includes a hyperlink to open the Guarantor Details screen.
- **Start Date:**
 - The Start Date column displays the value from the Family Cost Share Details.
- **End Date:**
 - The End Date column displays the value from the Family Cost Share Details.
 - If the End Date field is null, it is displayed as blank.
- **Family Cost Share Type:**
 - This column displays the Family Cost Share Type from the Family Cost Share Details.
- **Associated Clients:**
 - This column displays all clients associated with the guarantor for the selected record.
 - If multiple clients are associated, their names are separated by commas and displayed in "First Last" format.
 - The field is blank if no clients are associated.
- **Cap Unit Type:**
 - This column displays the cap type used for the Family Cost Share record (Daily, Weekly, Monthly, or Yearly) in the Family Cost Share Details.
- **Amount:**
 - This column displays the Family Cost Share cap amount entered in the Family Cost Share Details.
- **Current Amount Met Yearly:**
 - This column displays the current amount met for the yearly Family Cost Share cap in the Family Cost Share Details.
 - The field is blank if no value exists.
- **Remaining Amount Yearly:**
 - This column displays the remaining amount for the yearly Family Cost Share cap in the Family Cost Share Details.

- The field is blank if no value exists.
- **Date Family Cost Share Met Yearly:**
 - This column displays the date on which the Family Cost Share cap was met for yearly records in the Family Cost Share Details.
 - The field is blank if no value exists.
- **Program(s):**
 - This column displays all programs associated with the Family Cost Share record.
 - The field is blank if no data is available.
- **Procedure(s):**
 - This column displays all procedures associated with the Family Cost Share record.
 - The field is blank if no data is available.
- **Service Area(s):**
 - This column displays all service areas associated with the Family Cost Share record.
 - The field is blank if no data is available.
- **Sorting:** The grid is configurable. The default sort order is by Family Cost Share ID, but all grid columns can be sorted by the user.

Toolbar Section:

- The toolbar contains standard SmartCare functionality, including Favorites, Export, New, and other standard options.
- Selecting the New icon opens a blank Family Cost Share Details screen for data entry.
- The Export option in the toolbar includes an Excel icon in the dropdown menu.
- The list page can be exported as an Excel document, allowing users to view and analyze Family Cost Share data outside the application.

Family Cost Share Details Screen:

- The Family Cost Share Details screen allows end users to create and maintain Family Cost Share records for guarantors and associated clients.
- Charges are adjusted based on the services received by the guarantor and any associated clients, consistent with how Client Fees are calculated. The total combined charges determine the amounts reflected in the guarantor self-pay accounts and guarantor (client) statements.
- The toolbar includes standard icons such as New, Save, and Delete.
- Multiple Family Cost Share records with overlapping dates are allowed to retain historical data and define different cap criteria as needed.

Family Cost Share Section:

- **Start Date:** This is a required field with a calendar control. If the field is left blank and the user tries to save; the system displays the standard validation message: 'Start Date is required.'
- **End Date:** This is an optional field with calendar control. If a Yearly Family Cost Share Cap is entered, this field becomes required.
- **Guarantor:**
 - This is a required field with a textbox search and eraser icon.
 - Users can search by guarantor name or ID, displayed as "LastName, FirstName Middle Name (Guarantor Id)."
 - The eraser icon clears the field.
 - If the field is left blank and the user tries to save; the system displays the standard validation message: 'Guarantor is required.'
- **Associated Clients:**
 - This field is display-only and automatically populated or Initialized from the new Guarantor table with all clients associated with the selected guarantor for the specific date(s) the Family Cost Share record is being created.
 - If the guarantor is self-associated (i.e., the client is their own guarantor), this field remains blank.
 - The field includes a hyperlink to the guarantor's details page, allowing users to quickly navigate and update the guarantor record if needed.
 - This field is disabled for editing because it is for display purposes only.
- **Family Cost Share Type:**

- This is a required field with a dropdown field type.
- The dropdown includes all active values configured in the Global Code: *Family Cost Share Type*.
- If the field is left blank and the user tries to save; the system displays the standard validation message: 'Family Cost Share Type is required.'
- **Family Cost Share Cap (Header):**
 - This is a header for the Family Cost Share Cap Fields "**Daily, Weekly, Monthly, and Yearly.**"
 - Each of these fields captures a currency value that defines the cap amount for the corresponding time interval. Currency entries allow up to two decimal places, and all values represent dollar amounts only (no percentages).
- **Daily Cap:** Allows entry of a daily cost share cap.
- **Weekly Cap:** Based on a Sunday-Saturday week structure.
- **Monthly Cap:** Reflects the full month based on the Start Date entered.
 - Example: If the Start Date is 2/14/2025, the first monthly interval is 2/1/2025-2/28/2025.
- **Yearly Cap:**
 - The yearly cost share amount is determined based on the Start Date and End Date of the Family Cost Share record (not the calendar year).
 - If a yearly cap is entered without an End Date, the system displays a hard-stop validation message: **Warning Message:** "Yearly Family Cost Share Cap requires a Start and End Date."
 - **Workflow note:** If more than one Family Cost Share time interval value is needed, separate records should be created with the priority fields set.
- **Additional Yearly Cap Details:**
 - This is a header for the additional Yearly Cap details.
 - These fields are displayed only when a Yearly Family Cost Share cap is entered. They remain hidden for Daily, Weekly, or Monthly records.
 - Once a Yearly value is provided, the fields display automatically and function as described below.
- **Total Family Cost Share Amount:**
 - This is a Required field.
 - Auto-populates with the Yearly cap amount entered in the Yearly field.
 - This field is non-editable and formatted as currency (two decimal places).
 - It mirrors the Yearly cap to provide a clear reference for the total yearly obligation.
- **Current Amount Met:**
 - This is a Required field.
 - Displays the total self-pay charges for the guarantor and all associated clients.
 - The value is automatically calculated and shown in real time when the Family Cost Share record is accessed.
 - Accepts currency values with up to two decimal places.
 - The field remains editable, allowing users to make manual adjustments if required.
 - The entered value cannot exceed the Total Family Cost Share Amount.
 - If the entered value exceeds the total, the system displays a standard validation message prompting correction.
 - "Current Amount Met should never be greater than the Total Family Cost Share Amount"
- **Remaining Amount:**
 - This is a Required field.
 - Automatically calculates the remaining balance based on the following formula:
Total Family Cost Share Amount- Current Amount Met = Remaining Amount.
 - Displays the remaining Family Cost Share balance for the guarantor and associated clients.
 - Accepts currency values with up to two decimal places.
 - The field is read-only and non-editable, as it is system-calculated.
 - Updates dynamically when the Current Amount Met value changes.
- **Date Family Cost Share Met:**
 - This field uses calendar control for date selection.
 - The field defaults to NULL when a new record is created.
 - Once the Remaining Amount equals \$0.00, the system automatically populates this field with the date on which the balance was met.

- The field remains editable, allowing end users to manually update the date if adjustments are needed.
- Supports standard date formatting (MM/DD/YYYY).
- The Date Family Cost Share Met field cannot be updated or selected when the Remaining Amount is greater than \$0.00.
- Attempting to do so prevents interaction and displays the validation message: "Unable to update the Date Family Cost Share Met because Remaining Amount is not \$0.00."
- **Service Area(s)... :**
 - Represented as a blue button on the Family Cost Share Details screen.
 - When selected, the system opens a Family Cost Share pop-up window displaying all active Service Areas available for selection.
 - The pop-up includes the following options:
 - Service Area(s): Text box with search functionality.
 - Radio button: *Show only selected Service Area(s)*
 - Radio button: *Show all*
 - Checkbox: *Service Area(s)*— allows users to select all Service Areas at once.
 - The selected Service Areas are saved and associated with the current Family Cost Share record.
 - The field is optional and may be left blank if no Service Area association is required.
- **Program(s)... :**
 - Represented as a blue button on the Family Cost Share Details screen.
 - When selected, the system opens a Family Cost Share pop-up window displaying all active Programs available for selection.
 - The pop-up includes the following options and controls:
 - Program(s): Text box with search functionality.
 - Radio button: *Show only selected Program(s)*
 - Radio button: *Show all*
 - Checkbox: *Program(s)* — allows users to select all Programs at once.
 - Selected Programs are saved and associated with the current Family Cost Share record.
 - The field is optional and can remain blank if no Program association is needed.
- **Procedure Code(s)... :**
 - Displayed as a blue button on the Family Cost Share Details screen.
 - When clicked, a Family Cost Share pop-up opens showing all active Procedures available for selection.
 - The pop-up includes the following options:
 - Procedure(s): Text box with search capability.
 - Radio button: *Show only selected Procedure(s)*
 - Radio button: *Show all*
 - Checkbox: *Procedure(s)*— allows users to select all Procedures at once.
 - Selected Procedures are linked to the current Family Cost Share record.
 - The field is optional and may remain unpopulated if no Procedure association is required.
- **Comments:**
 - Displayed as a multi-line text box on the Family Cost Share Details screen.
 - Allows users to enter freeform text related to the Family Cost Share record.
- **Priority:**
 - Displayed as an optional text field on the Family Cost Share Details screen.
 - Default value: 100, following current system behavior.
 - Used to determine the priority order of Family Cost Share records when multiple records exist.
- **Overlapping Family Cost Share Record Validation:** Added a validation to check to see if the guarantor and/or associated clients already have an active Family Cost Share record with overlapping criteria and the same priority.
 - The Validation message will trigger upon Save. "Guarantor and/or Associated Client(s) have an overlapping Family Cost Share record with the same criteria. Please add a Priority or update existing Family Cost Share Record."

Note: Current state: The Family Cost Share (FCS) Details screen allows more than one Cap amount to be entered and saved. The backend logic does not account for multiple Cap amounts in a single FCS

record and will only process the first amount entered. Users must ensure that only one time period interval is selected per Family Cost Share record.

Future state [EPIC 630251]: A validation message will display if an end user enters more than one Cap amount and attempts to save. The end user will need to update the FSC record accordingly.

Prerequisites: Ensure the following configurations exist prior to using the Family Cost Share feature:

1. Guarantor Records: Valid guarantor records exists in the system.
2. Clients: Client records is linked to their respective guarantors.
3. Programs, Procedures, and Service Areas: All relevant items are active and configured.

Where to Find It:

Path 1: 'MY Office' – 'Family Cost Share' list page – click on New Button – 'Family Cost Share Details' page.

How it Helps:

This enhancement introduces a new core functionality to manage and monitor Family Cost Share records at the guarantor level. It ensures that fiscal limits and client self-pay obligations are applied accurately and consistently across services and billing. The new pages simplify user workflow by consolidating data management and enabling historical record tracking through overlapping effective dates.

Data model changes: New tables added: **FamilyCostShares, FamilyCostSharePrograms, FamilyCostShareServiceAreas , FamilyCostShareProcedureCodes**

43. EII # 126859 (Feature # 339972): Guarantor: Client Fee Details changes.

Note: This is a passive change.

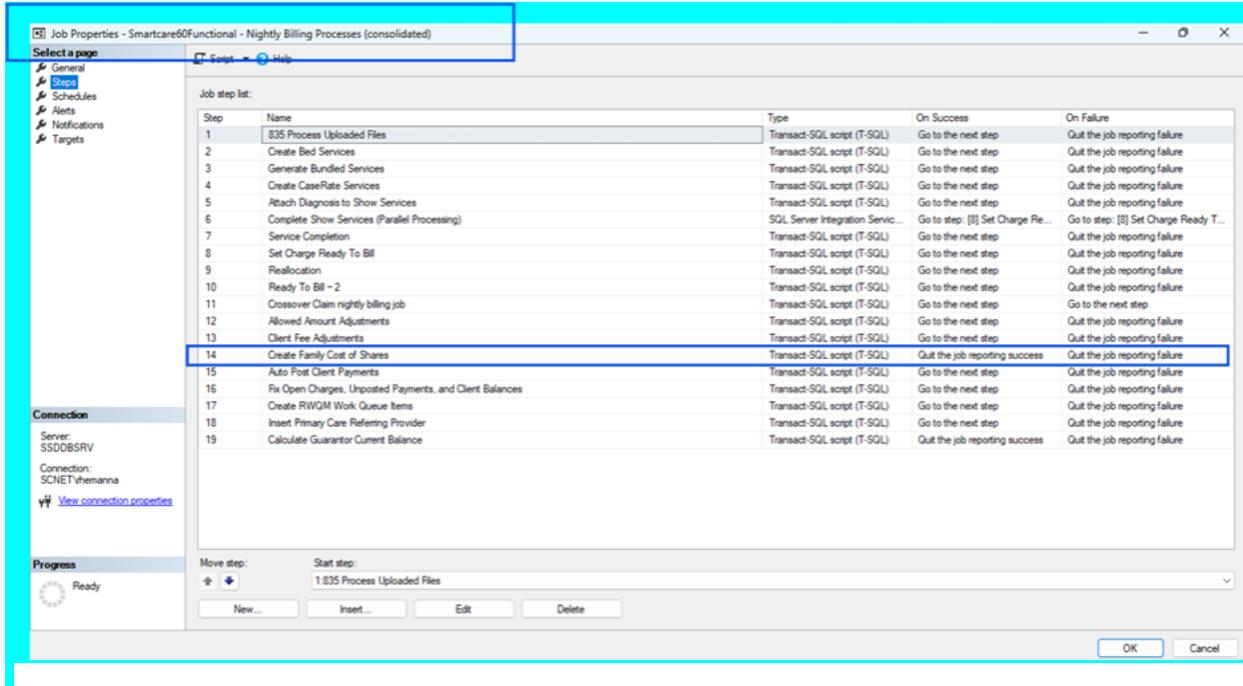
What's Changed:

The Family Cost Share Fam Cost Share Logic and ON job, Guarantor Charges Report, Guarantor: Connect Guarantor Charge Report to Guarantor and Associated Clients and Guarantor Concept: Guarantor Balance Updates have been implemented.

Fam Cost Share Logic and ON job:

1. Overnight Billing Job Step: A new Job step, Step ID: 14, Step Name: "Create Family Cost of Shares" is added to the ON Nightly Billing Processes (consolidated) Job to automatically adjust self-pay charges based on active Family Cost Share (FCS) records and update applicable fields for Family Cost Share Caps "Daily, Weekly, Monthly, and Yearly".

Fam Cost Share Job step "Create Family Cost of Shares ":



Execution Order: The step runs nightly and executes after the Client Fee Adjustment step, with Client Fee processing retaining priority over Family Cost Share processing.

Logic includes:

- The system reviews all active Family Cost Share records, including the guarantor and any associated clients, and identifies self-pay charges that fall within the Start Date and/or End Date of the FCS record.
- The system applies all relevant criteria, such as Programs, Service Areas, and any other configuration specified in the FCS record.
- The system applies adjustments to all qualifying self-pay charges in accordance with the Family Cost Share rules.
- Multiple Family Cost Share (FCS) records with overlapping dates are allowed. Each record can specify different criteria and be assigned a priority to determine which record applies when overlaps occur, while still retaining historical data for reference and reporting.
- For Yearly Family Cost Share records, the system calculates the total amount of adjusted self-pay charges and records the sum in the Current Amount Met field.
- For Yearly FCS records, the system evaluates the Remaining Amount field. When the value equals \$0.00, the system populates the Date Family Cost Share Met field with the date the cap is met.
- On all subsequent nightly job runs, the system automatically adjusts off at 100% any new self-pay charges that exceed the Family Cost Share cap amount.

Additional Rules:

- The step uses Global Code ID 2762 – Client Copayment as the default adjustment code; however, this code is configurable and may be updated by the customer.
- All adjustments created by this process are recorded in the Ledger Entries screen, enabling end users to clearly identify that a charge was adjusted due to a Family Cost Share record.

- Logic for Determining Applicable Charges: The system determines whether a guarantor's and/or associated clients' self-pay charges fall under a Family Cost Share (FCS) record by evaluating the charge against the criteria defined within the active FCS configuration.

Logic includes:

- The system **reviews the Start Date, End Date, and all specified criteria** configured in the Family Cost Share record, including any filters selected through the blue-button options (e.g., Programs, Service Areas).
- The system **determines whether the client is their own guarantor.**
- If the client is their own guarantor and all FCS criteria are satisfied, the system **classifies the charge as part of the Family Cost Share record.**
- If the client is not their own guarantor, the system evaluates the guarantor record to determine whether the charge falls within the guarantor's FCS Start/End Dates and meets all applicable criteria.
- If the charge meets the date requirements and all specified criteria, the system includes the charge in the Family Cost Share calculation.
- If the charge does not meet the required dates or criteria, the system excludes the charge from the Family Cost Share record.

Processing a Newly Created Family Cost Share Record: When a new **Family Cost Share (FCS)** record is created and saved, the system performs specific actions to ensure it is properly incorporated into the billing workflow.

System Behavior Upon Save:

- The system **adds the new Family Cost Share record to the dedicated Family Cost Share table**, where it becomes available for evaluation during nightly billing operations.
- During the next execution of the **ON Billing Job**, the system **reviews all self-pay charges** for the guarantor and any associated clients that fall within the Start Date, End Date, or, when applicable, only the Start Date of the FCS record.
 - The system **applies the required adjustments** to all qualifying charges.
- When the FCS cap amount is reached, the system **adjusts all remaining applicable charges at 100%.**
- The system then **updates all relevant fields**, including yearly FCS fields such as Current Amount Met and the Date Family Cost Share Met.
- Updating an Existing Family Cost Share Record:

When an existing **Family Cost Share (FCS)** record is updated and saved, the system applies adjustments based on the newly saved values while adhering to established billing rules.

System Behavior Upon Update:

- During the next execution of the **ON Billing Job**, the system **reviews all self-pay charges** for the guarantor and any associated clients that fall within the Start Date, End Date, or relevant date range of the updated FCS record.
- The system **applies adjustments according to the updated Family Cost Share values.**

- Previously adjusted charges are **not automatically reprocessed**. End users must **manually correct prior adjustments** if retroactive changes are required. This may involve reversing prior adjustments or modifying adjustment amounts.
- This behavior is **consistent with the current Client Fee logic**.

Ledger Entries (Example)_ Screenshot:

The screenshot displays the 'Ledger Entries' window. On the left, 'Service Information' shows a DOS of 11/10/2025 8:20 AM, a procedure of 'Test Sanity 30.00 Minutes', and a charge of \$151.50. The 'Payers' section shows a total current balance of \$107.03 and a table with columns: Payer, Charges, Unbilled, Payments, Adj, and Balance. The table lists 'Client' with charges of \$151.50, unbilled of \$107.03, payments of \$0.00, and an adjustment of (\$44.47), resulting in a balance of \$107.03. Below this, a table of ledger entries is shown with columns: Financial Activity Line ID, Service Id, Charge Id, Date, Activity, Payer, Type, Code, Amount, Check#, Reason Codes/Desc, and Remittance Advice Remark Codes/Desc. Two entries are visible: one for adjustment (\$44.47) and one for service (\$151.50). A 'Client Copayment' button is located below the table.

Family Cost Share Details_Yearly Cap (Example)_ Screenshot:

The screenshot shows the 'Family Cost Share Details' window. It includes fields for 'Start Date' (01/01/2025) and 'End Date' (12/31/2025). The 'Guarantor' is 'Khr, Bcbs' and 'Associated Clients' are 'Khr, F 339972, Rkh pcn, 837'. The 'Family Cost Share Type' is 'RKH FamilyCostShare' and 'Priority' is '100'. Under 'Family Cost Share Cap', the 'Yearly' cap is set to '\$1,268.53'. The 'Additional Yearly Cap Details' section shows: 'Total Family Cost Share Amount' (\$1,268.53), 'Current Amount Met' (\$1,268.53), 'Remaining Amount' (\$0.00), and 'Date Family Cost Share Met' (11/10/2025). Below these are lists for 'Program(s)', 'Procedure Code(s)', and 'Service Area(s)'. The 'Comments' section contains two entries: 'RKH_Retest_Nov 10 2025' and 'Roopa K H_FCS JOB_Yearly_Oct MSP 2025_Test_Nov 6 2025'.

Note:

Current state: The Family Cost Share (FCS) Details screen allows more than one Cap amount to be entered and saved. The backend logic does not account for multiple Cap amounts in a single FCS record and will only process the first amount entered. Users must ensure that only one time period interval is selected per Family Cost Share record.

Future state [EPIC 630251]: A validation message will display if an end user enters more than one Cap amount and attempts to save. The end user will need to update the FSC record accordingly.

1. **Guarantor Charges Report:**

A new **Guarantor Charges Report** is implemented. Which will allow user to:

1. View, search, and filter guarantor charges under My Office and via a new blue button on the **Guarantor Details** screen.
2. Generate a report showing guarantor information, associated client charges, and total balances.
3. Filter charges by date range, guarantor, and client.
4. Access detailed charge information including Service ID, Procedure Name, Program, and Self-Pay Amount.
5. Export the report to Excel/CSV for analysis outside the application.

- **Report Access: My Office:** Users search, filter, and generate guarantor charges reports for any guarantor or client. When accessed from **Reports (My Office)**, the Guarantor filter defaults to Blank/NULL.

• **Guarantor Details Screen:**

- A new blue button opens the Guarantor Charges report.
- When accessed from **Guarantor Details**, the Guarantor filter defaults to Blank/NULL.

Note: When accessing the Guarantor Charges report from the Guarantor Details screen, the Guarantor filter ideally defaults to the currently open guarantor record. Currently, this functionality is not feasible; therefore, the filter always defaults to Blank/NULL regardless of the access point.

Filter Section:

Start Date: 1/1/2025 End Date: 11/14/2025 Guarantor: [v] Client Id: [] NULL View Report

Guarantor Charges Report

Guarantor Id	Guarantor Client Id	Guarantor Name	Charge Id	Charge Amount	Service Id	Date of Service	Program	Procedure Name	Self Pay Amount
5051	10832	KHR Feature 286305, Guarantor Family Cost Share (5051)	48011	100.00	269695	01/15/2025	KHR Program 1	KHR Procedure 1	100.00
	10832	KHR Feature 286305, Guarantor Family Cost Share (5051)	48012	100.00	269696	10/15/2025	KHR Program 1	KHR Procedure 1	100.00
	Client Id	Client Name	Charge Id	Charge Amount	Service Id	Date of Service	Program	Procedure Name	Self Pay Amount
	8413	Feature 417801, Rkh (8413)	45307	100.00	165041	02/01/2025	RKH Program 8539	RKH Procedure 8539	100.00
	8413	Feature 417801, Rkh (8413)	48015	100.00	269699	03/05/2025	KHR Program 1	KHR Procedure 1	100.00
	10473	Rkh feature 319304, AR Report (10473)	48266	300.00	212664	07/04/2025	RKH Feature 319304 Program 1	RKH Procedure 6	300.00
	10473	Rkh feature 319304, AR Report (10473)	48267	98.80	216077	07/15/2025	RKH Feature 319304 Program 1	RKH Procedure 6	98.80
	10473	Rkh feature 319304, AR Report (10473)	48018	100.00	269698	09/15/2025	KHR Program 1	KHR Procedure 1	100.00
Total Guarantor Balance									898.80

Start Date:

- This is a required field with a calendar control displayed in MM/DD/YYYY format.
- Determines the starting date for charges included in the report.
- Users enter the **Start Date** to include charges with date(s) of service that fall within the selected date range. The report displays charges for the guarantor if they are also a client and their own guarantor, as well as charges for any associated clients.

End Date:

- This is a required field with a calendar control displayed in MM/DD/YYYY format.
- Determines the ending date for charges included in the report.
- Users enter the **End Date** to include charges with date(s) of service that fall within the selected date range. The report displays charges for the guarantor if they are also a client and their own guarantor, as well as charges for any associated clients.

Guarantor:

- This is an optional field with a textbox search and eraser icon.
- Allows users to search by guarantor name or ID.
- The format displayed is "LastName, FirstName MiddleName (GuarantorId)."
- Selecting the eraser icon clears the field.
- End users can search for a guarantor by name or Guarantor ID. A NULL checkbox is included, allowing users to select records with no Guarantor specified.

Client:

- This is an optional field with a textbox search and eraser icon.

- Allows users to search by client name or ID.
- End users can search for a client by name or Client ID. A **NULL checkbox** is included, allowing users to select records with no client specified.
- When a client is selected, the report shows charges for all guarantors associated with that client.

Report Grid Section:

The report is **grouped by Guarantor ID**, with guarantor information displayed first, followed by associated client information if applicable. All values below are specific to the guarantor. If the guarantor did not receive services or there are no charges within the selected Start/End Dates, the columns remain blank, except for the following: **Guarantor ID, Guarantor Client ID (if the guarantor is also a client), and Guarantor Name.**

Guarantor Information:

- **Guarantor ID:** Displays the unique Guarantor ID from the new Guarantor table. This ID only appears on the first line of the guarantor's section and does not repeat for additional rows.
- **Guarantor Client Id:** If the guarantor is also a client, their Client ID is displayed in this column.
- **Guarantor Name:** Displays the full name of the guarantor as recorded in the new Guarantor table.
- **Charge Id:** Displays the Charge ID associated with each service provided to the guarantor or their associated clients.
- **Charge Amount:** Displays the total amount for each charge in currency format.
- **Service ID:** Displays the unique Service ID for each charge recorded in the system.
- **Date of Service:** Displays the date when the service was rendered in MM/DD/YYYY format.
- **Program:** Displays the program in which the service was provided.
- **Procedure Name:** Displays the name of the procedure linked to the service provided.
- **Self-Pay Amount:** Displays the portion of the charge that is the responsibility of the guarantor, formatted as currency.

Associated Client Information:

The report displays all clients for whom the guarantor is financially responsible within the selected Start/End Dates. All values are specific to each client. If a client did not receive services during the Start/End Dates, the columns remain blank. If the guarantor has no associated clients during the selected period, no client data is displayed.

- **Client ID:** Displays the unique Client ID for each client financially associated with the guarantor.
- **Client Name:** Displays the full name of each associated client.
- **Charge ID:** Displays the Charge ID associated with each service provided to the client.
- **Charge Amount:** Displays the total amount for each client charge in currency format.

- **Service ID:** Displays the unique Service ID linked to each client charge.
- **Date of Service:** Displays the date when the service was rendered in MM/DD/YYYY format.
- **Program:** Displays the program under which the service was provided.
- **Procedure Name:** Displays the procedure name linked to each client service.
- **Self-Pay Amount:** Displays the portion of the charge the client is responsible for, formatted as currency.
- **Total Guarantor Balance:** Displays the total sum of all self-pay charges for the guarantor, including charges for associated clients. This value is automatically calculated and displayed in currency format.
- **Blank Row:** A blank row is inserted between each guarantor record in the report to improve readability and visually separate records.

2. Guarantor: Connect Guarantor Charges Report to Guarantor and Associated Clients:

The Guarantor Charges Report has been updated to integrate with the finalized Guarantor Data Model, including Guarantor Details and Associated Clients. This ensures that all guarantor and associated client charges are accurately reflected in the report according to the updated Guarantor-Client relationships.

Key Enhancements:

1. Integration with Finalized Data Model:

- Report logic now references the new Guarantor and Associated Client tables.
- Ensures charge data is fully aligned with the current Guarantor Details structure.

2. Inclusion Logic Updates:

- When *Client is their Own Guarantor = Yes*, charges for the guarantor are included.

Note: The report uses the Client ID field to determine which charges belong to the guarantor.

- When *Client is their Own Guarantor = No*, charges for associated clients within the report's Start/End Dates are included.

3. Associated Client Inclusion Logic and Examples:

- Compare the report's selected Start/End Dates to each associated client's Start/End Dates in the Guarantor Details record.
- Include charges for any associated clients whose active dates overlap with the report's filtered date range.

Examples:

- Report Filters: 02/01/2025 - 02/29/2025

Client is their own Guarantor = Y

Associated Client: 01/01/2025 to Present

Output: Charges for the Guarantor and Associated Client for that entire time period.

- Report Filters: 03/01/2025 - 03/31/2025

Client is their own Guarantor = N

Associated Client: 01/01/2025 to Present

Output: Charges for the Associated Client for that entire time period.

- Report Filters: 04/01/2025 - 04/30/2025

Client is their own Guarantor = Y

Associated Client: 04/15/2025 to Present

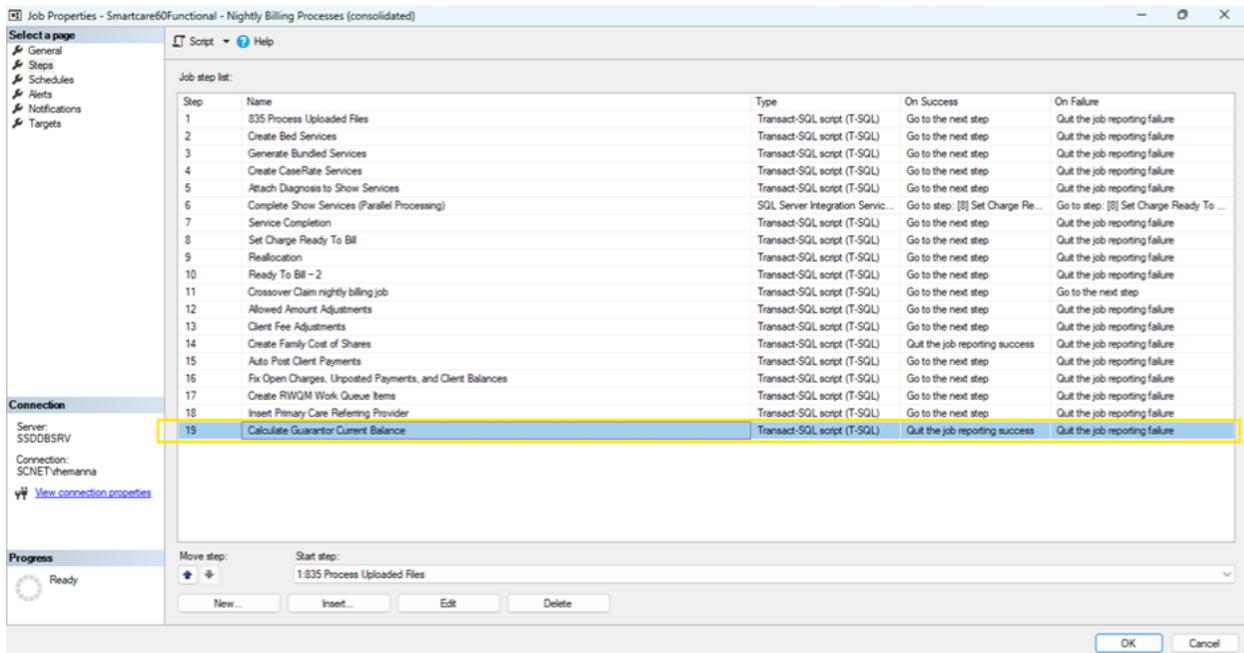
Output: Charges for the Guarantor for the entire time period and charges for the Associated Client for 04/15/2025 to 04/30/2025.

4. **Guarantor Concept: Guarantor Balance Updates:**

This update refines the balance calculation logic so that it accurately represents the **cumulative balances** of all clients linked to each guarantor, including scenarios where the guarantor is also a client.

- **Key Enhancements: Overnight Billing Job Step:** A new job step, **Step ID 19, Step Name "Calculate Guarantor Current Balance,"** has been added to the **Nightly Billing Processes (consolidated)** job to accurately calculate and update each guarantor's current balance by summing all active associated client balances, respecting time-bound guarantor-client associations, and ensuring alignment with the updated Guarantor Data Model.

Calculate Guarantor Current Balance' Job step screenshot:



- **Accurate Balance Calculation:**
- Guarantor balances now reflect the cumulative balances of all active associated clients.
- Balances also include cases where the guarantor is simultaneously a client.

Time-Bound Associations:

- Calculations respect effective start and end dates of client-guarantor associations.
- If a client has multiple guarantors over time, only the relevant portion of their balance is attributed to each guarantor.

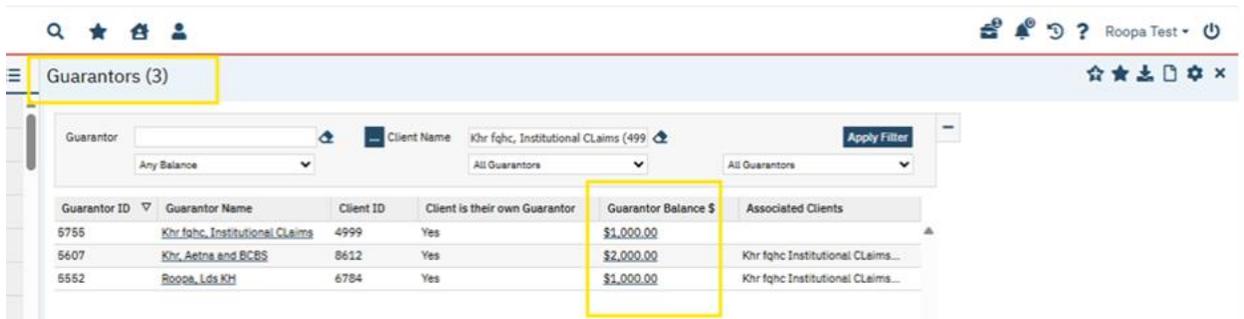
Performance Optimization:

- Logic designed to support either real-time calculation or scheduled nightly updates, depending on configuration.
- Ensures balance accuracy without impacting list page performance.

Consistency Across Modules:

- The updated guarantor balance aligns with data reflected in **Guarantor List page**, **Guarantor Accounts** and **Guarantor Charges Report**, ensuring a unified financial view.

'Guarantor List page' screenshot:



Prerequisites:

1. **Family Cost Share (FCS) Setup:** FCS screen exists and allows entry of a single Cap amount per record.
2. **Overnight Billing Job:** Available to process FCS adjustments automatically.
3. **Adjustment Code:** Default code **Global Code ID 2762 – Client Copayment** exists and editable if needed.
4. **Guarantor Setup:** Guarantor table exists with relationships defined for all client/guarantor scenarios, including:
 - I. Guarantor is a client and their own guarantor (client is guarantor).
 - II. Guarantor is a client, their own guarantor and guarantor for one or more clients (family members).
 - III. Guarantor is NOT a client but is the guarantor for one or more clients (family members).
 - IV. Guarantor is a client, and the guarantor for one or more clients (family members). But client is NOT their own guarantor.
5. **Guarantor Balances** – Tracked and updated based on FCS adjustments and client charges.
6. **Reporting** – Guarantor Charges Report is configured to display guarantor and associated client charges accurately.

Key Terms (for reference):

- **Deductible:** Amount paid out-of-pocket before insurance coverage starts.
- **Family Cost Share:** Amount guarantor and family members must pay in a specified timeframe (SmartCare-specific).
- **Guarantor:** Individual/entity responsible for financial obligations of themselves and associated clients.
- **Spendedown/Share of Cost:** Amount a client/family must pay monthly before Medicaid/insurance covers costs.

Where to Find It:

Path 1: 'MY Office' -- 'Family Cost Share' list page -- click on New Button -- 'Family Cost Share Details' page.

Path 2: Nightly Billing Processes (consolidated) -- Job Step ID 14 -- Job Step Name: "Create Family Cost of Shares".

Path 3: 'MY Office' -- Guarantor Charges Report -- or -- Guarantor Details screen -- click on a new blue button on the toolbar -- Guarantor Charges Report opens -- enter Start Date and End Date -- click on 'View Report' button.

Path 4: Nightly Billing Processes (consolidated) -- Job Step ID: 19 --- Job Step Name: "Calculate Guarantor Current Balance".

How It Helps:

- Automate adjustments of self-pay charges based on Family Cost Share records.
- Ensure accurate tracking of yearly caps and associated amounts.
- Improve accuracy and visibility of guarantor balances and charges.
- Enhance reporting capabilities for guarantors and associated clients.

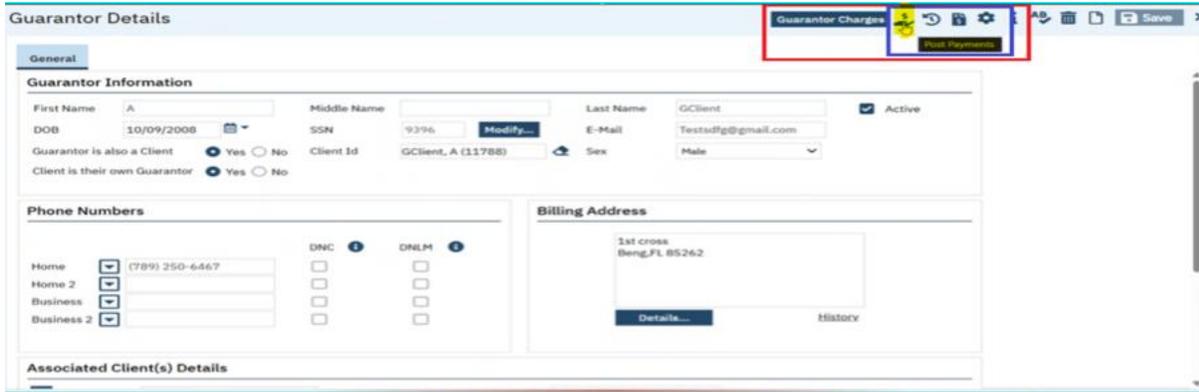
Data Model Changes: New table added: **ARLedgerFamilyCostShares**

44. EII # 130350 (Feature # 513223): Implementation of Guarantor Payments and logic.

Note: This is a passive change.

What's Changed:

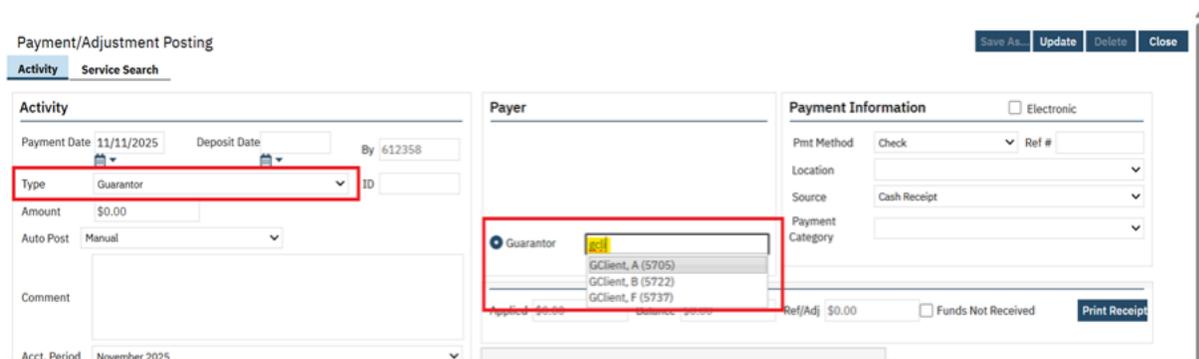
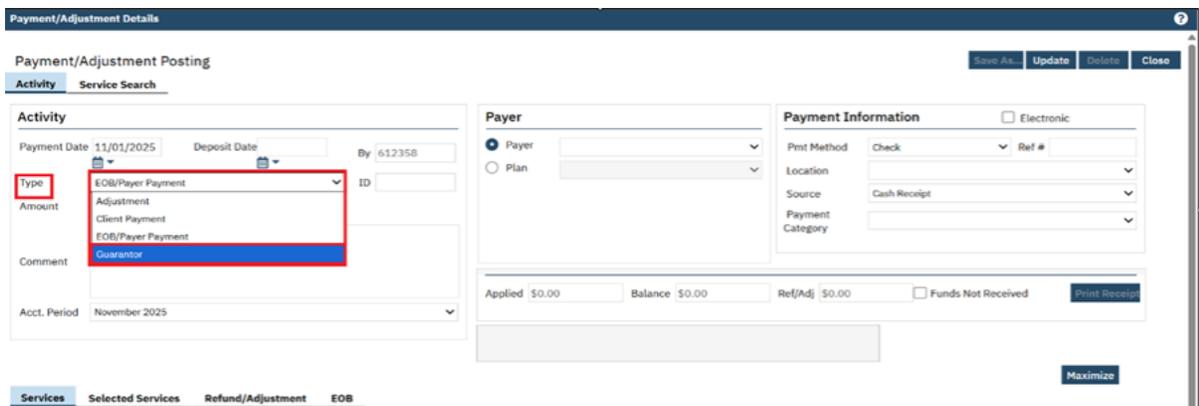
Guarantor Details:



- A new icon named 'Post Payments' icon has been added to the toolbar of the Guarantor Details screen and on hover over the icon, displays the text "Post Payments. Clicking the icon opens the Payment/Adjustment Details popup.
- The system automatically selects the guarantor in the **Payer** section. The system pre-fills the **Type** dropdown with the value '**Guarantor**'.

Payment/Adjustment Details Pop-up:

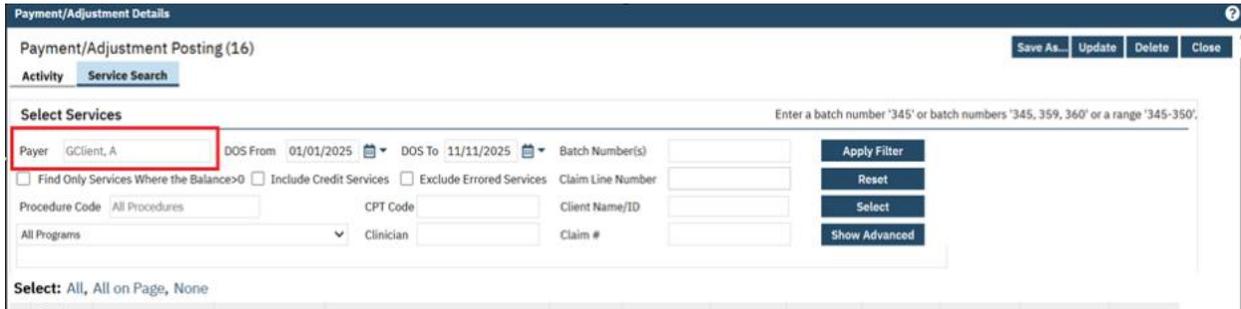
Activity Tab:



- 'Guarantor' value has been added in the **Type** dropdown along with existing values: Adjustment, Client Payment, and EOB/Payer Payment.
- If the user accesses the Payment/Adjustment Details pop-up either from the 'Payments/Adjustments' list page or from the Client account screen the system drives the existing behavior.
- A "Guarantor" typeable search textbox has been introduced in the **Payer** section.

- When the user selects "Guarantor" as the Type, the Payer section presents a searchable text box, enabling the user to search for guarantors by either Guarantor Name or Guarantor ID.
- After selecting a guarantor, the text box displays the guarantor's last name followed by the first name, separated by a comma.

Service Search tab:



- The system automatically populates guarantor details in the **Payer** field within the **Service Search** tab of the **Payment/Adjustment Posting** pop-up. When users select **Guarantor** in the **Activity** tab, the system fills the **Payer** field with the guarantor's last name and first name, separated by a comma. This behavior remains consistent when users access the **Payment/Adjustment Details** pop-up from either the **Payments/Adjustments list page** or the **Client Account** screen.
- The **Service Search** tab within the **Payment/Adjustment Details** pop-up provides comprehensive information about all client-pay services relevant to the selected guarantor. When users select a guarantor manually or when the system auto-fills the guarantor from the Guarantor Details screen, the system retrieves and displays both client-pay services where the client acts as their own guarantor and client-pay services for other clients mapped to the selected guarantor. The system applies the same behavior to the Service Search tab when users access the Payment/Adjustment Details pop-up from either the **Payments/Adjustments list page** or the **Client Account**

Where to Find It:

Path 1: My Office -- 'Guarantor' -- 'Guarantor' List Page -- click on new button or 'Guarantor Name' hyper link -- 'Guarantor Details' screen -- click on Post Payment icon -- 'Payment/Adjustment Posting' pop-up.

Path 2: 'My Office' -- 'All Services' -- 'Payments/Adjustments' -- 'Payments/Adjustments' list page -- click on 'New EOB/Payment/Adjustment' button -- 'Payment/Adjustment Posting' pop-up.

Path 3: 'Client' -- 'Finance' -- 'Client Account' -- Client Account screen -- click on Post Payment icon -- 'Payment/Adjustment Posting' pop-up.

How it Helps:

A new enhancement introduces a feature called Guarantor Payments, enabling guarantors to make payments on behalf of multiple clients simultaneously. This ensures that payments are accurately applied across all accounts. When a guarantor is selected, the system will display all outstanding charges associated with their clients.

Data model changes:

Table: Payments

Column: GuarantorId

45. EII # 130351 (Feature # 513227): Guarantor Payments: Phase 1 Guarantor Concept - Back End

Note: This is a passive change.

What's Changed:

Backend functionality has been enhanced to support posting guarantor payments seamlessly across all applicable screens, ensuring accurate payment allocation, proper handling of partial or unapplied amounts, and consistent ledger and timestamp integrity.

1. Guarantor – Post Payments [New]:

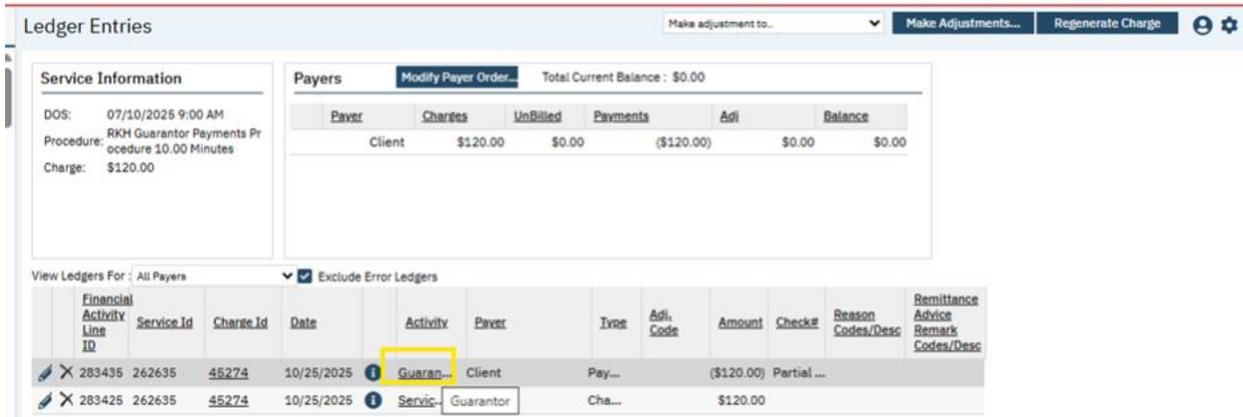
- Enabled backend support for posting payments directly from the Guarantor Details screen.
- Guarantors can make payments for one or multiple clients they are financially responsible for.
- Payments are applied correctly across all client balances, including Family Cost Share records.
- Payment application logic supports oldest balance first by default, with manual override if needed.
- Partial/unapplied payment amounts are accurately recorded and reflected in payment history and ledger.
- When a guarantor is selected, backend logic ensures all associated clients' charges (including the guarantor if they are also a client) are retrieved and available for posting.
- Ledger timestamps and transactional integrity are maintained for all guarantor payment postings.

Posting payments directly from the Guarantor Details screen:

The screenshot displays the 'Payment/Adjustment Posting' window. The 'Activity' section has 'Type' set to 'Guarantor' and 'Amount' to '\$500.00'. The 'Payment Information' section shows 'Print Method' as 'Check' and 'Ref #' as 'Partial Payment_R'. Below the form, a table lists ledger entries with columns for Id, Client Name, DOS, Procedure, Flagged, Balance, Charge, Payment, Adjustments, Transfers, and Comment.

Id	Client Name	DOS	Procedure	Flagged	Balance	Charge	Payment	Adjustments	Transfers	Comment
283435	Guarantor Payment...	07/10/2025 9:00 ...	RIKH Guarantor Pay...			\$120.00	\$120.00	\$0.00	\$0.00	
283436	Khr. Bug 529621	08/20/2025 1:00 ...	RIKH Guarantor Pay...		\$340.00	\$480.00	\$140.00	\$0.00	\$0.00	
283434	Roopa, GPpayments	08/01/2024 11:0...	RIKH Guarantor Pay...			\$240.00	\$240.00	\$0.00	\$0.00	

Ledger Entries timestamps:



2. **Existing Payments/Adjustments Screen:**

- Extended existing backend payment services to support Guarantor-type payments.
- When 'Guarantor' is selected in the Activity tab, backend automatically populates the Payer field in the Service Search tab with the corresponding guarantor.
- Backend ensures correct retrieval of charges for all clients linked to the guarantor.
- Payment application logic applies to multiple client charges in one transaction, respecting oldest balance first or manual application as instructed.
- Partial/unapplied payment amounts are stored and reflected in ledger records.

3. **Existing Client Account Screen:**

- Backend now supports posting Guarantor payments from the Client Account screen without impacting existing payment flows.
- Payment transactions are processed consistently with the Payments/Adjustments screen logic.
- When a guarantor is selected, backend retrieves all outstanding charges for their associated clients, including self if applicable.
- Payment application honors oldest balance first or manual allocation and ensures ledger integrity and timestamp accuracy.

4. **Guarantor Payment – Supported Scenarios (Backend):** The following workflows are supported for Guarantor payments:

- **Guarantor is a client and their own guarantor** – The client posts a payment for themselves. This is the most common scenario.
- **Guarantor is a client, their own guarantor, and guarantor for one or more clients (family members)** – Payments can be applied to both the guarantor and associated clients.
- **Guarantor is NOT a client, but is the guarantor for one or more clients** – Payments are posted for associated clients only.
- **Guarantor is a client and the guarantor for one or more clients, but not their own guarantor** – Payments are posted only to associated client accounts, excluding the guarantor themselves.

Note: These backend changes were implemented to support the Payment/Adjustment Details pop-up consistently across all three screens, maintaining existing workflows and integrating the new Guarantor functionality seamlessly without affecting standard client payment processing.

Prerequisite:

1. At least one client is configured as their own guarantor.
2. The client may also have one or more associated clients (family members).
3. A guarantor makes a payment for a specific client they are financially responsible for.
 - Guarantor receives a statement for the client.
 - The end user posts the payment to the guarantor and associated clients via Guarantor Details or Payments/Adjustments or Client Account screens.
 - End users select to either apply the payment manually or to the oldest balance first.
 - Payment is applied accordingly.
4. A guarantor makes a single payment for multiple clients they are responsible for.
 - End user selects Guarantor name in the 'Payment/Adjustment Details' pop up window or screen.
 - End user navigates to the Service Search tab and sees charges for all clients linked to the guarantor.
 - End user manually posts the payment or chooses to apply it to the oldest balance first.
 - The system applies the payment across all client charges based on the selected payment logic (oldest balance first).
5. A single payment posting must support:
 - Applying to the oldest balance first.
 - Partial or unapplied payments.
 - Correct posting across all associated client accounts.
 - Accurate ledger timestamps reflecting the actual payment posting time.

Where to Find It:

Path 1: My Office -- Guarantors -- New (or open existing) -- Guarantor Details -- click on Post Payments icon in the toolbar -- Payment/Adjustment popup triggers -- initializes Guarantor as the Type -- auto-populates the Guarantor in the Payer section and Payer field of the Service Search tab -- enter a dollar Payment Amount -- select "Oldest Balance First" or "Manual" -- click on Update -- Payment posts to the guarantor's (or client's) service lines.

Path 2: My Office -- Payments/Adjustments -- New EOB/Payment/Adjustment -- Payment/Adjustment popup -- Activity = Guarantor -- Select guarantor -- Payer auto-fills in Service Search -- Enter a dollar Amount for the payment -- Select "Oldest Balance First" or "Manual" -- click on 'Update' -- Payment posts to guarantor's service lines.

Path 3: Client -- Client Account -- Post Payments -- Payment/Adjustment popup -- Activity = Guarantor -- Select guarantor -- Payer auto-fills in Service Search -- Enter a dollar Amount for the payment -- Select "Oldest Balance First" or "Manual" -- click on 'Update' -- Payment posts to guarantor's service lines.

How It Helps:

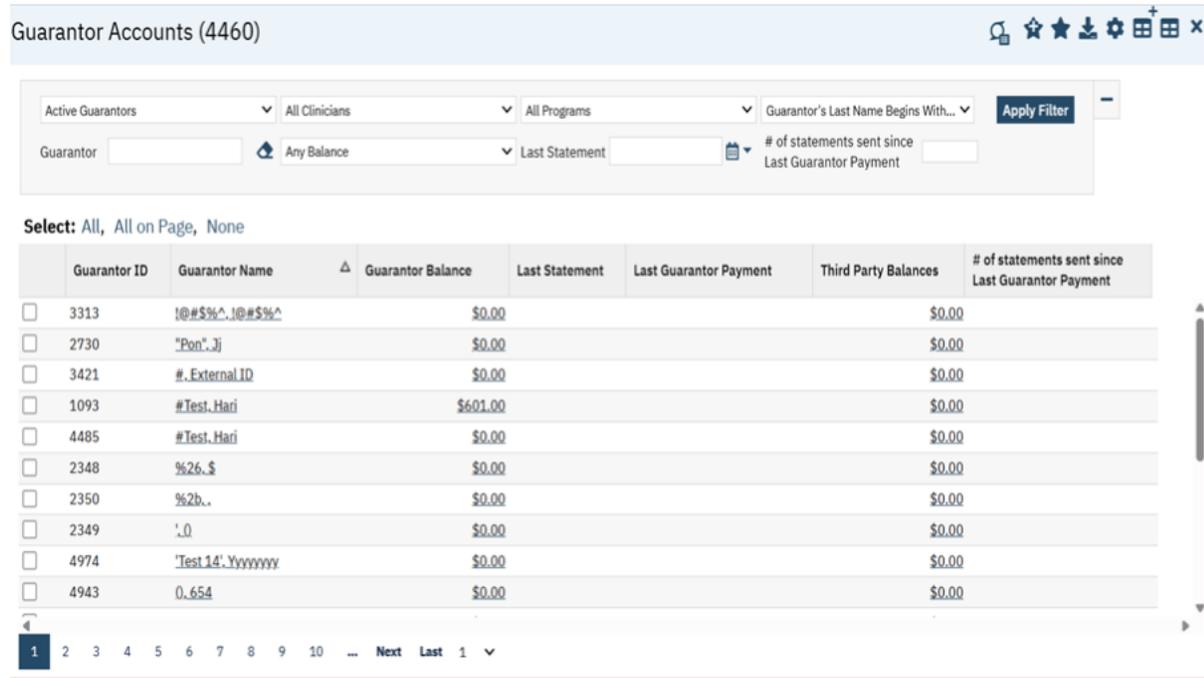
- Introduce a **Post Payments** icon on the **Guarantor Details** screen for direct access to guarantor payment posting.
- Reuse and maintain existing Payment/Adjustment Details pop-up and logic from the **Payments/Adjustments** and **Client Account** screens to ensure consistency and reduce user learning curve.
- Enable guarantors to post payments for one or multiple clients, applying payments efficiently, including family cost share balances.

46. EII # 130646 (Feature # 526862): Guarantor Statements: Phase 1 Guarantor Concept - Front-end.

Note: This is a Passive change.

What's Changed:

A new list page named **Guarantor Accounts**, along with a corresponding Guarantor Statement feature to present detailed financial information for each guarantor.



Filter section: The 'Guarantor Accounts' list page includes the following filters, each providing specific information:

- **'Guarantors' dropdown:** The Guarantor drop-down includes the following options, with 'All Guarantors' selected by default:
 - All Guarantors
 - Active Guarantors
 - Inactive Guarantors

- **'Clinicians' dropdown:** The 'Clinicians' drop-down displays a list of all clinicians and supports single selection only, with 'All Clinicians' set as the default option. When the list page is filtered using 'All Clinicians', the Guarantor Accounts page displays data for every clinician in the system.
- **'Program' dropdown:** The 'Program' drop-down displays a list of all programs and supports single selection only, with 'All Programs' set as the default option. When the list page is filtered using 'All programs,' the Guarantor Accounts page displays data for every program related data.
- **'Guarantor's Last Name Begins With...' dropdown:**
 - The dropdown lists all alphabets (A to Z), with 'Guarantor's Last Name Begins With◆' as the default value. When the list page is filtered by a specific alphabet, it displays guarantors whose last names begin with that letter.
- **'Guarantor' typeable search box.**
 - The Guarantor filter is a typeable search box that automatically retrieves matching guarantor details (Last Name, First Name, and Guarantor ID) as relevant information is entered into the text field.
- **'Guarantor Balance' dropdown.**

The Balance drop down has the following options and the default will be 'Guarantor Balance > 0'.

1. Guarantor Balance > 0: The Grid displays the value of the guarantors whose balance is greater than zero.
2. Any Balance: The Grid displays the value of the guarantors whose balance either it might be greater than zero, equal to zero and lesser than zero.
3. Guarantor Balance < 0: The Grid displays the value of the guarantors whose balance should be less than zero.

- **'Last Statement' Calendar field.**

- The Last Statement text box is a calendar control text field, upon clicking on Last Statement icon the calendar displays. The default value is blank.
- The system displays guarantor information according to the date of the most recently generated guarantor statement. If no statement was printed on that date, the Guarantor Accounts screen remains empty.
- **'# of statements sent since Last Guarantor Payment' text field.**
 - The '# of statements sent since Last Guarantor Payment' is a text field type filter sorting.
 - The text field will only allow numerical values. The default value is blank.
 - The system fetches the guarantor information if the inserted values in text field matches the number of guarantor statements generated and sent since the last guarantor payment.
 - If the inserted number in text field does not match with any guarantor payments, then the list page fetches no values in the grid.

- **'Apply Filter' button:** The Guarantor Accounts list page displays relevant data based on the selected filters once the Apply Filter button is clicked.

'All, All on Page, None' options in 'Guarantor Accounts' screen.

- The 'All', 'All on Page', and 'None' options are positioned between the filter section and the data grid on the Guarantor Accounts list page.
- Clicking the 'All' button selects all checkboxes across every page in the grid.
- Clicking the 'All on Page' button selects all checkboxes on the current page only.
- Clicking the 'None' button deselects all checkboxes in the grid.

'Guarantor Accounts' screen Grid labels.

The Grid value in 'Guarantor Accounts' screen has following labels and respective descriptions.

1. Check box: The check box is present for each row of Guarantor Accounts.

2. Guarantor ID: The Guarantor ID column displays the Guarantor ID of the respective guarantor.

3. Guarantor Name: The column retrieves and displays the corresponding Guarantor Name in the format: Last Name, First Name. The column presented as a hyperlink, which, when clicked, navigates the user to the 'Guarantor Details' screen.

4. Guarantor Balance: The Guarantor Balance column shows the outstanding balance for services rendered to the client. This column presented as a hyperlink, which, when clicked, it redirects the user to the 'Client Accounts' list page.

5. Last Statement: The column retrieves the date of the guarantor's most recent statement in MMDDYYYY format. The Last Statement column is a hyperlink, which, when clicked, redirects the user to the 'Guarantor Details' screen.

6. Last Guarantor Payment: The system retrieves and displays the guarantor's most recent payment in the Last Guarantor Payment column. The column displays data is \$ with posted amount and MMDDYYYY format. The column has a hyperlink, which, when clicked, it redirects the user to the 'Payment/Adjustment Posting' pop-up.

7. Third Party Balances: The system retrieves the Third-Party balance associated with each guarantor. The Third-Party Balances column has a hyperlink, which, when clicked, will redirect the user to the 'Client Accounts' list page.

8. # of statements sent since Last Guarantor Payment: The system retrieves the total count of statements issued since the guarantor's last payment.

Guarantor Accounts Icons :

The icons on the Guarantor Accounts list page are located at the top-right corner and include the following options:

Generate Guarantor Statement

- Upon clicking on the 'Generate Guarantor Statement' icon system displays the Generate Guarantor Statement pop-up.
- System displays the 'At least one row should be selected' warning message when clicks on the icon without selecting the any guarantor check box.
- **Export:** Clicking the Export icon generates and downloads the list page data as an Excel spreadsheet.

- **System Configuration:** Upon clicking on the system configuration key icon, the system redirects to the configuration key list page.
- **Favourite and New Favourite:** The icon is used to save the automatic sorting preferences for the list page.

Guarantor Statements:

The Guarantor Statement functionality has been implemented in a similar manner to the Client Statement feature. However, there is a key distinction between the two.

- When generating a **Client Statement**, the system includes all services provided to the client, this encompasses both client services and those covered by the guarantor.
- When generating a **Guarantor Statement**, the system exclusively includes services for which the guarantor is financially responsible. Any services billed directly to the client are excluded from this statement.
- This separation ensures that each statement accurately reflects the appropriate financial responsibility, allowing for clearer communication and more precise billing.
- Guarantor Statements can be generated from two locations:
 1. The Guarantor Accounts list page
 2. The Guarantor Details screen
- On the Guarantor Accounts list page, users can generate statements for multiple guarantors simultaneously, similarly how statements can be generated for multiple clients on the Client Accounts list page.
- On the Guarantor Details screen, users can generate statements for individual guarantors, just as they can generate statements for specific clients on the Client Accounts screen.
- On the Guarantor Details screen, users have access to the View Past Statement feature, similarly how they can view past statements for individual clients on the Client Accounts screen.

Guarantor Statement Header part: The Guarantor Statement header has been implemented in a manner similar to the Client Statement header. Below are the fields included, along with their detailed specifications.

- **Logo:** The logo is located at the top left corner of the statement. If the 'ShowCustomerLogoOnClientStatement' configuration key is set to No, the logo will not be displayed on the Guarantor Statement.

Agency and Address (yellow highlighted)

- The agency and address information are fetched from the agency table.
- The section displays the Agency name, along with details such as address, city, state abbreviation, ZIP code, billing phone number, and fax, all retrieved from the agency table.

Guarantor Information (orange highlighted)

- The guarantor information is displayed on the left side, positioned below the agency details section.
- The guarantor information includes the following details: Last Name, First Name, Guarantor ID, Address, City, State Abbreviation, and ZIP Code.

Statement date and Balance Due On (Blue highlighted)

- The statement date and balance due on information is displayed on the right side, positioned below the agency details section.
- The Guarantor Statement generated date is shown as the Statement Date, formatted in MM/DD/YYYY.
- The Balance Due On Date indicates the charge balance due date, formatted as MM/DD/YYYY.
- The Balance Due On Date logic for the Guarantor Statement has been implemented similarly to the Client Statement, and is governed by the configuration key 'CLIENTSTATEMENTBALANCEDUEONDDAYS'.
- If the 'CLIENTSTATEMENTBALANCEDUEONDDAYS' configuration key value is null, then the system displays the default date, which is 30 days ahead of the statement generation date.

Example: If the statement generation date is 10/23/2025, then the balance due date should be 11/22/2025.

- If the 'CLIENTSTATEMENTBALANCEDUEONDDAYS' configuration key value is any allowed value, then the system consider the key value.

Example: If the key value is 20 and statement generation date is 10/23/2025, then the balance due date should be 11/12/2025.

Client Information (Purple highlighted)

- The client information displays at the top of the grid.
- The client information should contain the Client's last name, first name and client ID in brackets.

Guarantor Statement Grid.

|

Similar to the client statement, Guarantor Statement Grids shows client-specific data for each client linked to the Guarantor.

Date of Service:

- The date of service column in grid displays the service date of selected client in MM/DD/YYYY format. **Example:** If the date of service is 15th March, then it should display like 03/15/2025.
- **Procedure / Duration:** The Procedure/Duration column displays the name of the procedure to provide the service and the total duration of the service.
- **Provider:** The provider column displays the service provider's last name.
- **Fee :** The fee column displays the service fee amount with \$.
- **Insurance Payment:** The insurance payment column displays the payer-paid amount from the service charge with \$.
- **Adjustment:** The adjustment column displays the adjustment amount from the service charge amount with the \$ symbol. If there is no adjustment, then the adjustment column displays \$0.00.
- **Client Payment:** The Client Payment column displays the client payment from the service charge amount with the \$ symbol. If there is no client payment, then the Client Payment column displays \$0.00.
- **Insurance Balance:** The Insurance Balance column displays the unpaid balance amount from the payer against the service charge with the \$. If there is no Insurance Balance, then the Insurance Balance column displays \$0.00.

- **Client Balance:** The Client Balance column displays the unpaid balance amount from the Client, against the service charge with the \$. If there is no Client Balance, then the Client Balance column displays \$0.00.
- **Totals:** Totals display the grand total of 3rd party balance and client balance under Insurance balance and client balance column respectively.
- **Labels:** The system displays the following labels below the grid.
- *Prior Balance – Transactions with activity 30 days prior to the Statement Date are combined in the Prior Balance line.
- Please return the bottom portion of this bill with your payment.
- **Total Due from Guarantors:** The column displays the total sum of the due amount from the guarantor and associated client and the client's balance.

Guarantor Statement footer part: The Guarantor Statements footer part is like the client statement footer part.

- **Payable to and remit payments to (yellow highlighted):** Payable and remit payments are fetching from the agency table Agency name, along with details such as address, city, state abbreviation, ZIP code, billing phone number, and fax, all retrieved from the agency table.
- **Guarantor information along with Statement Date and Balance due on (green highlighted):** Guarantor last name, First name and Guarantor ID displays at footer section. Similar to the header section, the footer of the statement also displays the Statement Date and Balance Due On Date.

Guarantor Statements when the Guarantor is also a client.: When a client also serves as their own guarantor in Guarantor Details screen, the system treats them as both. In this scenario, all services provided to the client are considered guarantor-responsible, and therefore, every service record is included and displayed in the Guarantor Statement.

The screenshot below illustrates the configuration setup on the Guarantor Details screen for a scenario where the client also acts as the guarantor.

The PDF screenshot below displays the total services for ClientID (11832) under guarantor ID (5737).

- **Yellow highlighted:** Guarantor name and guarantor ID
- **Green highlighted:** Client ID
- **Square mark in Red colour:** Services created for the coverage plan and total balance.
- **Square mark in green colour:** Services created for client and total balance.

The screenshot below displays the total guarantor balance and 3rd party balances for the Guarantor ID 5737.

- Yellow highlighted: Guarantor Name and ID
- Green highlighted: Guarantor balance
- Red highlighted: Insurance balance.

The guarantor balance and third party balances column data matching with the guarantor statement (Image: Guarantor 002).

Guarantor Statements for the associated clients.

- When a client is linked to a guarantor as an associate, the system assigns financial responsibility to the guarantor for that client's services, effective only for the specified duration.
- If any services are provided to the associated client outside the defined start and end dates, the system will not assign financial responsibility to the guarantor for those services.

The screenshot below illustrates the configuration setup on the Guarantor Details screen for a scenario where the guarantor mapped with associated clients.

- **Blue highlighted:** In the Associated Clients section, two clients have been mapped—Client IDs 11813 and 11814, which are highlighted in red.

The PDF screenshot below displays the total services for ClientID (11832) under guarantor ID (5737).

- Yellow Highlighted: Guarantor Name and ID
- Red highlighted: Client Name and ID
- Green Highlighted: 3rd party balance from both of the client (11813 and 11814 is 40\$ + 160\$ = 200\$)
- Blue Highlighted: Client balance from both clients 90\$ +40\$ = 130\$

The screenshot below displays the total guarantor balance and 3rd party balances for the Guarantor ID 5722.

- **Blue highlighted:** The blue-highlighted amount of \$130 matches the balance for both clients shown in Image 005, i.e., \$130 each.
- **Green highlights:** The green-highlighted amount of \$200 corresponds to the insurance balance for both clients, as shown in Image 005, i.e., \$200 each.

Guarantor Statement and view past statements.

The Generate Guarantor Statement and View Past Statements icons are located in the toolbar of the Guarantor Details screen. When hovering the mouse over these icons, the system displays the tooltips "Generate Guarantor Statement" and "View Past Statements", respectively.

- **Red Marked:** View Past Statements
- **Green Marked:** Generate Guarantor Statement

Generate Guarantor Statements

Upon clicking on the Generate Guarantor Statements icon the system displays the Generate Guarantor Statements pop-up with following information.

1. Statement From text box:

- The Statement From is a calendar control type text box.
- If the 'Statement From' date is not selected any values, then system displays the warning message stating ' Please enter Details From'.
- The default date is 30 prior day from the current day.

2. Statement To text box.

- The Statement From is a calendar control type text box.
- If the 'Statement To 'date is not selected any values, then system displays the warning message stating ' Please enter Details To'.
- The default date is current day.

3. Ok Button.

- If no values are entered in the 'Statement From' and 'Statement To' text boxes, the system displays a warning message: "Please enter Details From."
- Additionally, if the 'Statement From' date is later than the 'Statement To' date, the system prevents further action and shows the warning: "Date From cannot be greater than Date To."
- Once valid dates are provided and the OK button is clicked, the system proceeds to generate the statement

4. Cancel Button.

- When the **Cancel** button is clicked, the system closes the **Generate Guarantor Statement** pop-up and redirects the user to the **Guarantor Details**

View Past Statements:

Upon clicking on the view past statement icon the system displays the view past statements pop-up with following information.

1. Close Button.

The Close button is located at the top right corner of the View Past Statements pop-up. When clicked, the system closes the pop-up and redirects the user back to the Guarantor Details screen.

2. View Button.

- A View button positioned at the left margin of each row within the 'Guarantor Statements' pop-up
- Upon clicking the View button, the system displays the corresponding Guarantor Statement.

3. Date Label.

The Date label is displayed in the grid of the pop-up, and the Date column shows the statement generation date in MM/DD/YYYY format.

4. Balance Label.

The Balance label appears in the grid of the pop-up, and the Balance column shows the corresponding statement balance, formatted with the \$ currency symbol.

5. Sent To Label.

The 'Sent To' label appears in the grid of the pop-up, and the Sent To column displays the Guarantor Name linked to the statement, formatted as Last Name, First Name.

6. Sent To Address Label.

- The 'Sent To' label is displayed in the grid of the pop-up.
- The Sent To Address column shows the address where the statement was sent.
- The address is formatted as Street, City, State, Zip Code.

Where to Find It:

Path 1: My Office -- 'Guarantor Accounts' – 'Guarantor Accounts' List Page.

Path 2: My Office -- 'Guarantor' – 'Guarantor' List Page.

How it Helps: A new enhancement introduces a dedicated list page designed to facilitate batch processing of guarantor statements, streamlining financial workflows and improving operational efficiency. Additionally, an option will be added to the Guarantor Details screen, enabling users to generate individual guarantor statements directly, offering greater flexibility and control in managing guarantor-related financial documentation.

Data model changes:

New Tables are created as below:

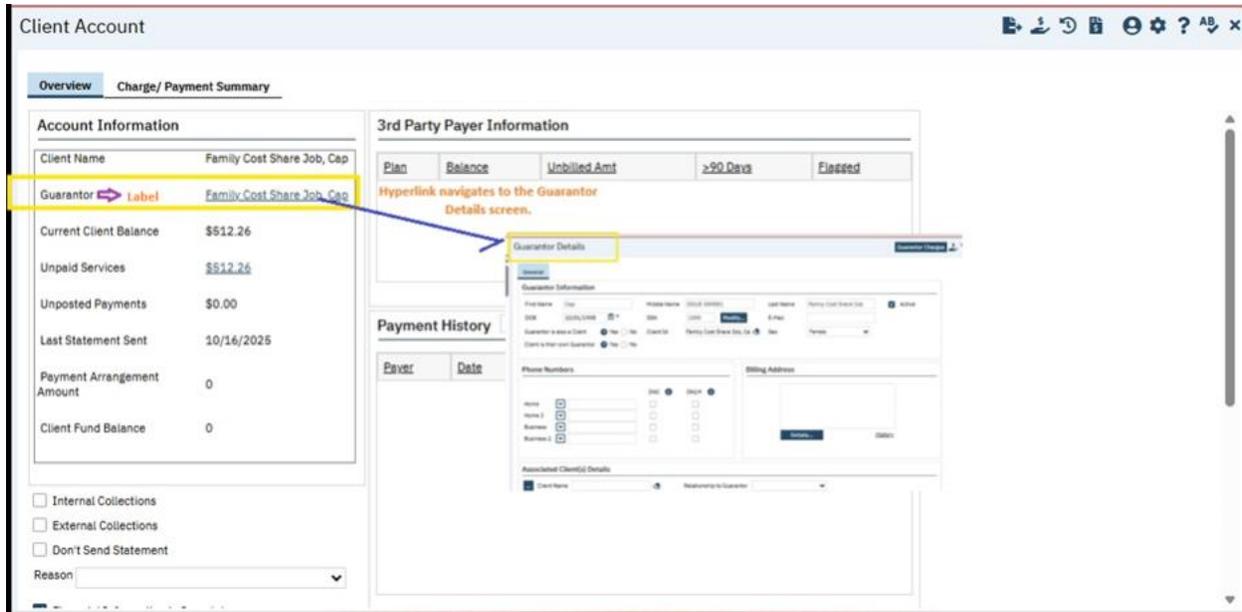
GuarantorStatementBatches, GuarantorStatements, GuarantorStatementClients, GuarantorStatementDetails.

47. EII # 132401 (Feature # 591987): Guarantor Concept: Client Account and Guarantor Accounts screen changes.

Note: This is a passive change.

What's Changed:

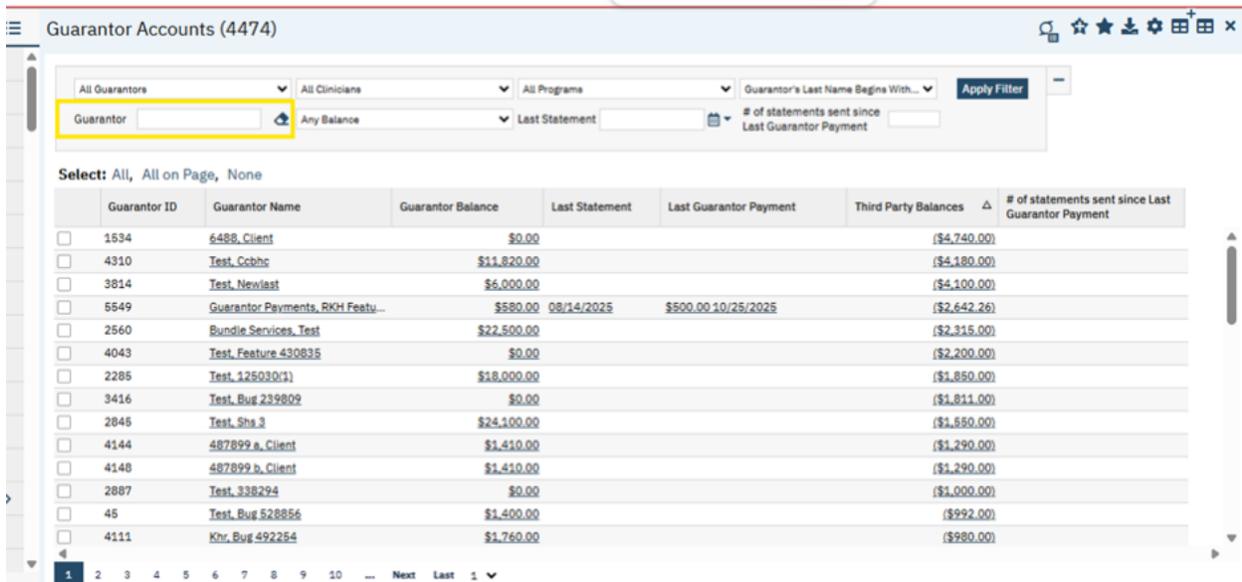
Client Account (Client):



We have implemented new Configuration Key **'ShowGuarantorOnClientAccountScreen'** to create a control that allows the end user to view the Guarantor label and the associated Guarantor's name and also updated the Guarantor Name hyperlink to navigate to the Guarantor Details screen.

- When the key is set to **Yes**, the screen displays the **"Guarantor"** label and the Guarantor's name, which serves as a hyperlink to the **Guarantor Details** screen.
- When the key is set to **No**, the screen continues to display the **"Financially Responsible"** label, and the hyperlink navigates to the **Client Information** screen.

Guarantor Accounts (My Office):



The **Guarantor Accounts (My Office)** screen now includes an additional **searchable text box filter** that allows users to search for and view an individual Guarantor record by **Guarantor Name** or **Guarantor ID**, enabling visibility into that Guarantor's account balance, last statement sent, and other helpful information about that Guarantor record.

- A searchable textbox has been added in the Filter section where end users can search for a specific Guarantor by Guarantor Name or Guarantor ID.
- The filter includes a standard eraser icon to clear the search when selected.
- The filter defaults to blank when navigating to the Guarantor Accounts screen for the first time.
- The new filter is placed under the existing 'All Guarantors' filter for Active/Inactive Guarantors.
- Display Format: LastName, FirstName Middle Name (Guarantor ID).

Configuration Key Details:**System Config Key: ShowGuarantorOnClientAccountScreen**

Read Key as: Show Guarantor on Client Account Screen.

Allowed Values: Yes, No

Default Value: No

Modules: SCM Accounting, SCM Client Intake, SCM Financial 1

Screen: Client Account (321), Guarantor Details (62960)

Description:

This is a change to the existing Client Account (Client) screen of our core product by introducing a system configuration key.

When using the Guarantor features in SmartCare, this Configuration Key will align the Client Account (Client) screen with the Guarantor functionality. Specifically, it will display the Guarantor label and the Guarantor Name hyperlink will navigate end users to the Guarantor Details screen.

A) If the key value is set to "No," the Financially Responsible label will display on the screen, and the Financially Responsible Name hyperlink will navigate the end user to the Client Information screen. This will be the default value of the key

B) If the key value is set to "Yes," the Guarantor label will display on the screen, and the Guarantor Name hyperlink will navigate the end user to the Guarantor Details screen.

Note: If the value of the key is set to anything other than Yes or No, the key **will default to the No value, which is current SmartCare behavior.**

Where to Find It:

Path 1: Client -- Client Account – Account Information section.

Path 2: My Office -- Guarantor Accounts – Filter section.

How it Helps:

This implementation provides configuration flexibility and improve usability by allowing users to:

- Configure whether the Client Account (Client) screen displays the Financially Responsible or Guarantor label.
 - Easily search for and view individual Guarantor records within the Guarantor Accounts (My Office) screen.
-

48. EII # 130735 (Feature # 531373): UMDAP Family 3.0 - Guarantor concept: Providing the 'Missing Guarantor Report' for the live customer to create Guarantor records.

Note: This is a passive change.

What's Changed:

This release introduces a one-time migration script for live customers to create Guarantor records for clients in SmartCare and generates a report for any clients where the system cannot create a Guarantor record.

- Team Accounting provides the 'Missing Guarantor Report' to identify errors or clients without a Guarantor record, enabling end users to update or correct those clients as needed.
- This is a one-time script for live customers, and there is no need to retain the creation status of Guarantor records in a separate table.
- The report, titled "Live Customer Script Missing Guarantor Report", highlights clients for whom the system cannot create a Guarantor record.

'Live Customer Script Missing Guarantor Report' enhancement:

The report includes the following information:

1. **Client ID:** This field displays the unique identifier assigned to the client.
2. **Client Name:** This field displays the Client Name in LastName and FirstName format.
 - If only LastName is present, the LastName displays without a trailing comma.
 - If only FirstName is present, the FirstName displays without a leading comma.
 - If both LastName and FirstName are missing, the Client Name field is completely blank.
3. **Date of Birth:** This field displays the client's date of birth; leaves the field blank if missing. Clients with missing DOB are included in the report.
4. **Financially Responsible:** This field displays whether the client is financially responsible, reported as Y (Yes) or N (No) based on the Clients.FinanciallyResponsible value.
5. **Current Balance:** This field displays the client's current balance at the time the script runs; reports 0.00 for clients with null balances, formatted as a numeric value with two decimal places.
6. **Last Service Date:** This field displays the most recent DateOfService with Status = 75 for the client at the time the script runs; leaves the field blank if no completed service records exist.
7. **Scheduled Services:**
 - "Scheduled Services" column shows 'Y' when clients have one or more scheduled services with Service Status = 70.
 - "Scheduled Services" column shows 'N' for clients with scheduled services where all Service Status values are not equal to 70.

Note: Inactive clients do not appear in the report. Only active clients will be processed by the script.

Where To Find It:

Path: My Office -- Missing Guarantor Report -- 'Live Customer Script Missing Guarantor Report'.

How It Helps:

The live customers can transition existing clients to the new Guarantor model while maintaining accurate financial responsibility tracking and enabling end users to address any missing Guarantor records.

Inpatient Activity Details

Reference No	Task No	Description
49	EII # 130397	Inpatient Activity Details - Report/List page for updating incorrect Billing Procedure for which the Bed Service is created.
50	EII # 132477	Changes are implemented for Inpatient Activity Details - Report/List page for updating incorrect Billing procedure with the existing Configuration key functionality.
51	EII # 132032	Implemented backend changes to update the required billing procedure codes for Inpatient disposition activities.

49. EII # 130397 (Feature # 514810): Inpatient Activity Details - Report/List page for updating incorrect Billing Procedure for which the Bed Service is created.

Note: This is a passive change.

What's Changed:

- Added new field **Update Billing Procedure** to the filter section in the **BedBoard** and **BedCensus** screens and provides a hyperlink to navigate to the new list page. The hyperlink is enabled based on the permission granted to the user under the screen permission item in the staff detail screen.

BedBoard

The screenshot shows the BedBoard interface with a table of beds and a filter section. The filter section includes a date (11/10/2025), a dropdown for 'All Units', a dropdown for 'All Client Types', a dropdown for 'Occupied', and a dropdown for 'Other'. There is an 'Apply Filter' button and a search bar. A red box highlights the 'Update Billing Procedure' link in the filter section. The table below shows the following data:

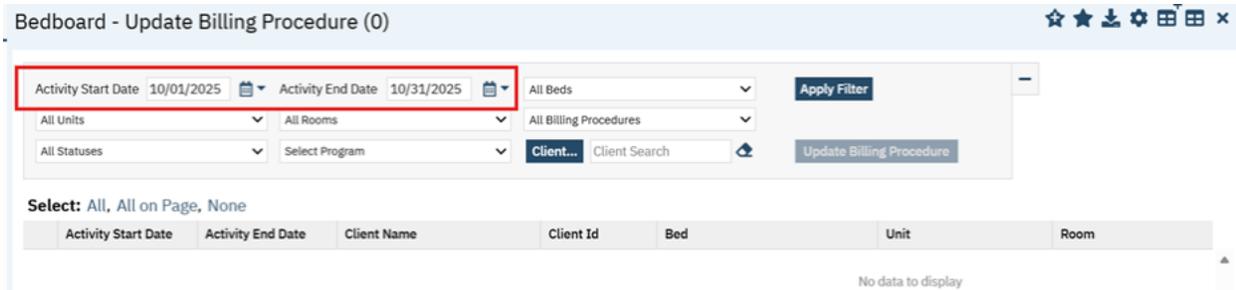
Bed	Unit	Client Type	Client	Client Id	Status	Note	Time
bed.bed	bed unit	Adult	New Client 1	2105521	Occupied		4:01PM
bed.bed.2	bed unit 2	Adult	Acacianna Rowena	2105145	Occupied		7:43PM
core	core	Adult	Test_Bedchange co...	2107167	Occupied		6:30PM
Inpatient	Inpatient	Adult	Test_Bedchange sh...	2107165	Occupied		4:45PM
Inpatientdos	inpatientdos	Adult	Test_Inpatientfea...	2107149	Occupied		4:51PM
NPI Bed	NPI Unit	Adolescent	Test_Feature Inju...	2105492	Occupied		4:20PM
S.Bed	S Unit	Adult	D.Suma	2104975	Occupied		10:37A

Bed Census screen also displays **Update Billing Procedure** hyperlink in the same way.

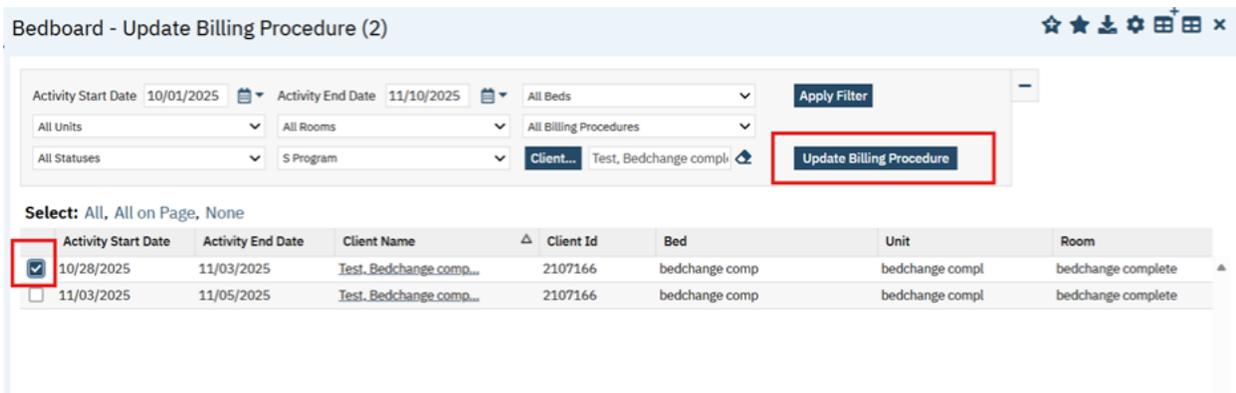
- A new list page called "**BedBoard - Update Billing Procedure**" has been introduced, allowing users to correct billing codes that were previously locked when the field became disabled after bed changes or discharge. This ensures accurate billing and clinical documentation without workflow disruptions, with the above-mentioned filter values and the grids.

Filter section fields:

- **Activity Start Date:** Calendar Control text box initializes the previous month's start date.
- **Activity End Date:** Calendar Control text box initializes the previous month end date.

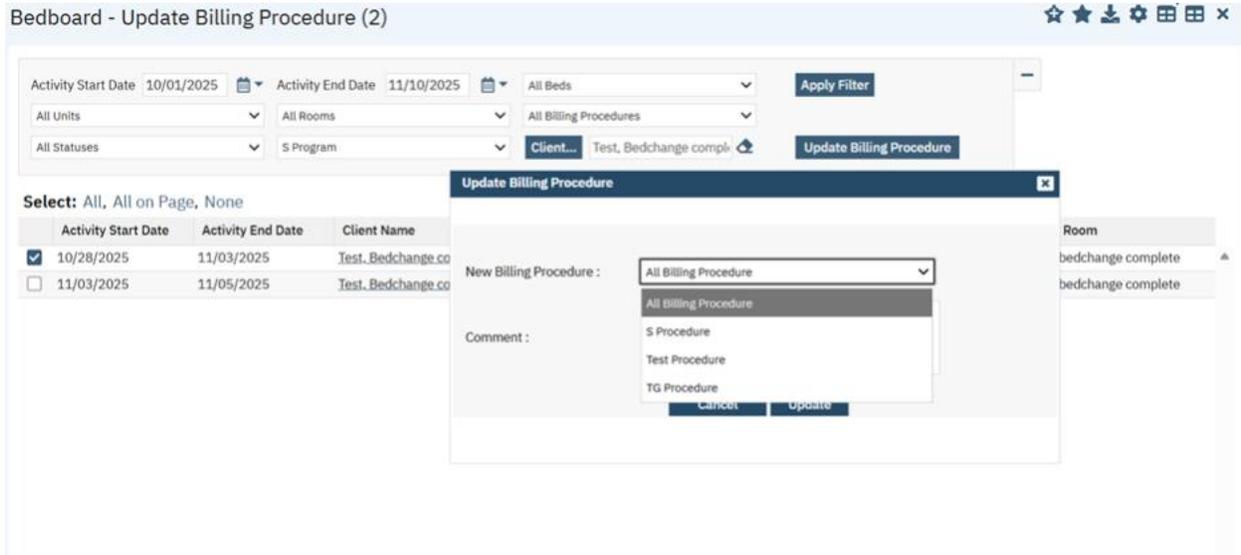


- All Beds dropdown that displays all active beds.
- All Units dropdown that displays all active Units.
- All Rooms drop down that displays all active Rooms.
- All Statuses drop down that displays all active Statuses.
- Select Program dropdown that displays all active Programs and it's a mandatory field.
- All Billing Procedure dropdown that displays all active Billing Procedures
- Client typeable search textbox.
- Apply filter button – on click on this, the system displays the records based on selected filter criteria.
- Update Billing Procedure button: Button will be enabled when at least one checkbox is selected. When clicked on this button, pop up will be opened to update the new billing procedure.



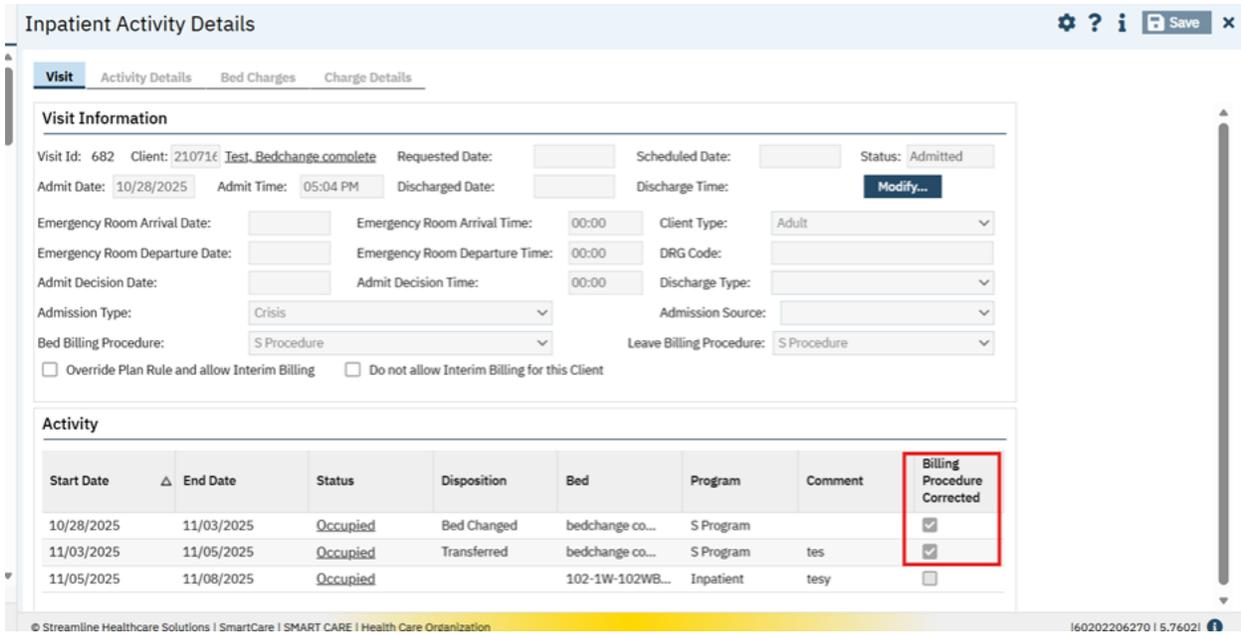
- **Update Billing Procedure (pop up)**

- New Billing Procedure dropdown displays all active billing procedures based on the selected Program in the Select Program drop down. When update button is clicked without selecting the procedure, validation message will be displayed.
- Comment Textbox - This is required field; user can update the comment to change the billing procedure. When update button is clicked without entering the value, validation message will be displayed.
- Update button - On clicking "Update" button the newly selected billing procedure will be updated to the older records.
- Cancel button - On clicking "Cancel" the pop-up exits.



Grid fields:

- a. Client Name label displays Client Name in "LastName, FirstName" format for the activity record being listed.
 - b. Client Id Label displays Client ID for the activity record being listed.
 - c. Activity Start Date label displays the Start Date of the activity record being listed.
 - d. Activity End Date Label displays the End Date of the activity record being listed.
 - e. Bed label displays the bed for the activity record being listed.
 - f. Unit label displays the unit for the activity record being listed.
 - g. Room label displays the room for the activity record being listed.
 - h. Status label displays the Status of the activity record being listed.
 - i. Programs label displays the Program for the activity record being listed.
 - j. Current Billing Procedure label displays the Billing Procedure for the activity record being listed.
- Added "Billing Procedure Corrected" column to the Activity grid of Visit tab in Inpatient Activity Details screen. This field will be disabled and will be checked automatically if the Billing Procedure on the respective row/activity was corrected via the "Update Billing Procedure" admin activity.



- Added "Billing Procedure Correction – History" section below the Activity grid in Activity tab of Inpatient Activity Details screen with the below mentioned fields.
- Updated by column displays the name of the staff who updated the Billing Procedure via the "Update Billing Procedure" admin activity.
- Date/Time column displays the date and time of when Billing Procedure on the activity was updated via the "Update Billing Procedure" admin activity.
- Old Procedure column displays the Billing Procedure on the activity before the "Update Billing Procedure" admin activity.
- New Procedure column displays the Billing Procedure on the activity after the "Update Billing Procedure" admin activity (current billing procedure on the activity).
- Comment Column displays the Comment on the activity which are entered by the user in the Update Billing Procedure pop up.

Inpatient Activity Details

Visit **Activity Details** Bed Charges Charge Details

Activity

2107166 Test, Bedchange complete Start Date: 10/28/2025 Time: 00:00
 Status: Occupied Disposition: Bed Changed End Date: 11/03/2025 Time: 00:00
 Action: No actions available Arrival Date: Time: 00:00
 Program: S Program Overflow Firm Hold Bed
 Bed: bedchange comp **Bed Search...** Only show beds for selected program Non-Billable
 Unit: bedchange compl
 Room: bedchange complete Comments:
 Assignment Type: County Bed Reason:
 Location: S Location Billing Procedure: TG Procedure
 Clinician: Aerts, Angela Physician: Anderson, Brookdon

Billing Procedure Correction - History

Updated By	Date/Time	Old Procedure	NewProcedure	Comment
TestingTG,Saha...	11/04/2025 05:37 PM	S Procedure	TG Procedure	bgh

Where to Find It:

Path 1: My Office -- BedBoard – Click on Update Billing Procedure hyper link.

Path 2: My Office -- BedCensus – Click on Update Billing Procedure hyper link.

How it Helps:

The system now allows users to update incorrect **Billing Procedure Codes** for **Inpatient Activity** records.

50. EII # 132477 (Feature # 603371): Changes are implemented for Inpatient Activity Details - Report/List page for updating incorrect Billing procedure with the existing Configuration key functionality.

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:

1. In the 'BedBoard – Update Billing Procedure' screen, programs will display based on the selected CDAG group programs in the 'All Programs' drop-down. When a user selects a Program in the filter, it will display only the Billing Procedures mapped to that Program.

2. In the "BedBoard – Update Billing Procedure" screen, the Program filter is a required field, and based on the selected Program, the corresponding Billing Procedure code is now displayed in the "Update Billing Procedure" pop-up.

3. The Validation message will be displayed when the Program value is not selected.

Validation Message: Please Select Program.

When the Program is selected from the Program dropdown filter, it displays only the Billing Procedures mapped to that Program.

Bedboard - Update Billing Procedure (5)

Activity Start Date: 10/01/2025 | Activity End Date: 10/31/2025 | All Beds | Apply Filter

All Units | All Rooms | All Billing Procedures | Update Billing Procedure

All Statuses | Test Prog 1 | Client Search | Update Billing Procedure

Select: All, All on Page, None

Activity Start Date	Activity End Date	Client Name	Client Id	Bed	Unit	Room
<input type="checkbox"/> 10/03/2025	10/04/2025	Test_V3 (1278)	1278	AK BED	AK UNIT	AK ROOM
<input type="checkbox"/> 10/03/2025	10/03/2025	Test_Shashu (4178)	4178	Bed 2	Test Aishu1	Test Aishu1
<input type="checkbox"/> 10/03/2025	10/04/2025	Testing_Kiran (3928)	3928	Test Bk Bed	Test Bk	test Bk Room
<input type="checkbox"/> 10/03/2025	10/06/2025	Vishnu_888 (1350)	1350	A2	Test Aishu1	Test Aishu1
<input type="checkbox"/> 10/03/2025	10/03/2025	Vishnu_888 (1350)	1350	A2	Test Aishu1	Test Aishu1

When the Update Billing Procedure button is clicked, the Update Billing Procedure pop-up will be displayed. Select the Value from the New Billing Procedure dropdown and then add a Comment, the comment will be initialized to the 'Billing Procedure Correction – History' section of the Inpatient Activity Details screen.

Bedboard - Update Billing Procedure (5)

Activity Start Date: 10/01/2025 | Activity End Date: 10/31/2025 | All Beds | Apply Filter

All Units | All Rooms | All Billing Procedures | Update Billing Procedure

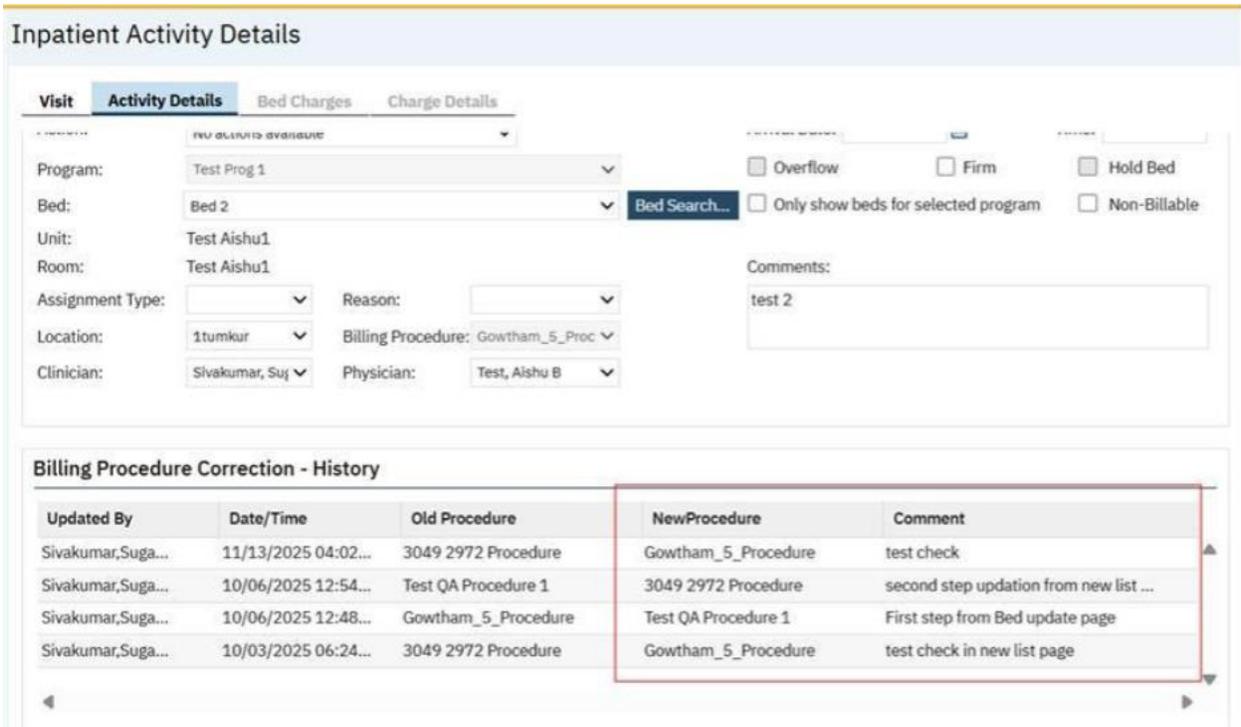
All Statuses | Update Billing Procedure | Update Billing Procedure

Select: All, All on Page,

Activity Start Date	New Billing Procedure :	Comment :	Unit	Room
<input type="checkbox"/> 10/03/2025	Gowtham_5_Procedure		AK UNIT	AK ROOM
<input checked="" type="checkbox"/> 10/03/2025		test	Test Aishu1	Test Aishu1
<input type="checkbox"/> 10/03/2025			Test Bk	test Bk Room
<input type="checkbox"/> 10/03/2025			Test Aishu1	Test Aishu1
<input type="checkbox"/> 10/03/2025			Test Aishu1	Test Aishu1

Cancel | Update

The New Billing Procedure codes are displayed in the 'Billing Procedure Correction – History' section of the Inpatient Activity Details screen.



Prerequisites:

- 1: System configuration key "DisplayCDAGSectionInStaffDetails" is set to 'Yes'.
- 2: System configuration key 'EnableClinicalDataAccessGrouping' is set to 'Yes'.
- 3: The BedBoardLimitDisplayOfProcAndLocBasedOnProgram key is set to Yes.

When the Configuration Key value is set as 'Yes'

The Inpatient Activity Details screen will restrict/limit the values in the Procedure and Location fields based on the selected Program.

When the Configuration Key value is set as 'No'

In the Inpatient Activity Details screen, it will not restrict/limit the values in the Procedure and Location fields based on the selected program.

Where to Find It:

Path 1: Go search - BedBoard- Update Billing Procedure -'All Programs' drop down.

Path 2: My Office-BedBoard - Filter for appropriate date- Click on the Billing Code Changed in the Today Column-under specific bed -Inpatient Activity Details Screen-Billing Procedure Correction - History section- Verify the Comment column.

How It Helps:

The purpose of this change is to display only the Billing Procedures that are mapped to the Program selected from the Program dropdown in the Bedboard-Update Billing Procedure screen.

51. EII # 132032 (Feature # 569067): Implemented backend changes to update the required billing procedure codes for Inpatient disposition activities.

Note: This is a Passive change.

What's Changed:

With this release, when the Billing Procedures are updated via front end on the new list page 'BedBoard - Update Billing Procedure (My office)' for required 'Bed Activities', the Bed board job will process them and do the following actions:

1. If a Completed Service exists with the prior Procedure Code:
 - o It will automatically error out the service.
 - o It will update the linked Financial Activity.
 - o It will Create a new Service with the updated Procedure Code.
2. If a Show Status Service exists with the prior Procedure Code:
 - o It will automatically error out the service.
 - o It will Create a new Service with the updated Procedure Code.
3. If no Service exists yet:
 - o It will automatically create a new Service in Show status using the updated Procedure Code.

Example: When the Billing Procedures are updated in the 'Bedboard-Update Billing Procedure' screen,

The screenshot shows the 'Bedboard - Update Billing Procedure (3)' interface. At the top, there are filters for 'Activity Start Date' (11/01/2025), 'Activity End Date' (11/30/2025), 'All Beds', 'All Units', 'All Rooms', 'All Billing Procedures', and 'All Statuses'. There are also buttons for 'Apply Filter', 'Client Search', and 'Update Billing Procedure'. Below the filters, there is a table with the following data:

End Date	Client Name	Client Id	Bed	Unit	Room	Status	Current Billing Procedure
025	T. r. Gururaj (2107205)	2107206	Bedchange show	bedchange show	bedchange show	Occupied	TG Procedure
025	Sahana, Gururaj (2...	2107205	bedtask	bedtask	bedtask	Occupied	TG Procedure
025	Test, Bedchange comp...	2107166	bedchange comp	bedchange compl	bedchange complete	Occupied	TG Procedure

In the Services list page, it will automatically error out the service with the previous procedure code, and it will create a new Service with Show status with the updated Procedure Code.

T r, Gururaj (2107206) x Sahana TestingTG

Services (14)

Show Services Only All Statuses All Clinician Apply Filter

All Programs DOS From 10/12/2025 DOS To 11/12/2025 Include Services created from Claims

Only include Services with Add On Codes

DOS	Procedure	Group Name	Units	Status	Clinician/Provider	Program	Location	Charge	Payment
11/11/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/11/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/10/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/10/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/09/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/09/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/08/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/08/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/07/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/07/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/06/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/06/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/05/2025 12:00 AM	S Procedure 1 Minutes			Error	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	
11/05/2025 12:00 AM	TG Procedure 1 Minutes			Show	Test, Roopa M.D	S ProgramS Progr...	S Locati...	\$0.00	

Example:

- 1) Client was admitted to bed on (1st Nov)
- 2) Bed Board job was executed on (10th Nov), and a bed service with show status was created from 01/11 to 09/11. (ex, Procedure Code A)
- 3) User will apply the required 'Disposition' activity for a client (example: Discharge)
- 4) User will now update the 'Billing Procedure Code' using the new list page screen 'Bedboard - Update Billing Procedure' for the bed activity. (Ex: Procedure Code B)
- 5) Run the Bedboard job.
- 6) Once the job is executed, the job will error the service created in 2nd step with 'Procedure Code A', and a new service will be created with 'Procedure Code B'.

Note:

1. The billed bed services will only be errored when the 'AllowBedServicesCreationToErrorBilledServices' configuration key is set to 'Yes'. If this key is set to 'No', then billed bed services will not be errored, and no new service with an updated billing procedure code will be created.
2. The bed services with payment record will only be errored when the 'ALLOWSERVICEERRORWITHPAYMENT' configuration key is set to 'Yes'. If this key is set to 'No', then bed services with payment records will not be errored, and no new service with an updated billing procedure code will be created.

Prerequisites:

1. Admit a client to a Bedboard.

Navigation Path: Select the required client – Navigate to 'Bedboard' – filter the required 'unit/room/bed' records – click on the down arrow icon in the status column – click on 'Admit' option – enter the required details in 'Inpatient Activity Details' screen with start date– click on 'Save' button.

2. Run the 'Create Bed Services' step in the 'Nightly Billing Processes (consolidated)' job.

3. Verify required bed services are created based on the admit date.

Navigation Path: 'Client' – 'Services' – verify the bed service is created with 'Show' status (If required, complete the services).

4. Apply the required 'Disposition' activity for a client (example: Discharge/BedChange/Transfer etc.)

Navigation Path: 'My Office' – Select 'Bedboard'– Click on the occupied link – Click on 'Action' drop-down field select the required disposition option – enter the other required details in 'Census Management' screen with an 'End Date' and click on 'Save' button.

5. Update the new billing procedure code using the 'Update Billing Procedure' new list page screen for the bed activity.

Navigation Path: 'My Office' – 'Bedboard - Update Billing Procedure' list page screen – filter the grid section to have the bed activity followed in the step 1 to 4 – select the required record and click on 'Update Billing Procedure' button – select the required procedure code from the 'New Billing Procedure' drop down – enter the comment – and click on 'Update' button – verify the procedure code was updated in the grid section for the records.

6. Run the 'Create Bed Services' step in the 'Nightly Billing Processes (consolidated)' job.

Where To Find It:

Path: 'Client'– 'Services' – verify the services.

How this helps:

1. This change will enhance the automatic error-handling logic in the Bed Board job to support updates made to Billing Procedures via the new list page interface.
2. It ensures accurate financial tracking and service record management when procedure codes are modified for required bed activities.

Interfaces

Reference No	Task No	Description
52	EII # 130993	Changes are implemented to generate HL7 Outbound ORM messages for client orders marked with "Onsite Specimen Collection".
53	EII # 131814	Changes are implemented to include all USCDI v3 data elements, and logic is updated to generate the CCD XML file.
54	EII # 132416	Changes are implemented to Add Update/Resend capability to Message Interface screen.

52. EII # 130993 (Feature # 544005): Changes are implemented to generate HL7 Outbound ORM messages for client orders marked with "Onsite Specimen Collection".

Note: This is a Passive change.

What's Changed:

SmartCare now supports for generating HL7 Outbound ORM messages for client orders marked with "Onsite Specimen Collection".

"Onsite Specimen Collection" Functionality Enhancement:

- A new configuration key 'EnableLabHL7MessageGenerationOnSpecimenCollection' is implemented for HL7 message generation at the time of order signing.
- When the key is set 'Yes', a Client Order has 'Onsite Specimen Collection' checked in the 'Client Order' screen and when Onsite Specimen Collection Date and time is entered on the 'Client Order Detail' Page if Order Status = Active and saved, then the system generates an HL7 Outbound ORM message and send the lab order through the Core Engine.
- Upon successful generation and transmission, the system will automatically update the Order Status to 'Sent to Lab'.
- Scheduled Orders or Recurring Standing Orders will follow the same functionality.
- For orders with a frequency of Once or Other, the nightly job will trigger the generation of the HL7 lab order and update the order status accordingly.

New System Configuration Key:

Key: EnableLabHL7MessageGenerationOnSpecimenCollection

Read Key as: Enable Lab HL7 Message Generation On Specimen Collection.

Default Value: No

Allowed Values: Yes/No

Description: This key is introduced to add an extra check to decide when to generate the HL7 message and send to the Lab.

If the key is set to Yes, Order that has Onsite Specimen collection Checkbox checked will be send to the lab only after entering the Specimen Collection Date in the Client Order Details.

If the Key is set to No, all the orders that are part of the document will be send to the Lab on Signing the Client Order documents irrespective whether the Specimen Collection Checkbox checked or the Collection Date is entered.

Where to Find It:

Path 1: 'Client' -- 'Client Orders' -- 'Client Orders' list page -- New -- 'Client Order' screen -- Enter all the required details -- Check 'Onsite Specimen Collection' checkbox -- 'Save' and 'Sign'.

Path 2: 'Client' -- 'Client Orders' -- 'Client Order Details' -- Enter Collection Date and Time -- 'Save'.

Path 3: 'Administration' -- 'Messages Interface' -- 'Messages Interface' list page -- 'Message Interface Detail' page.

Path 4: Administration -- Configuration Keys - Search and select 'EnableLabHL7MessageGenerationOnSpecimenCollection' -- 'Configuration Key Details'.

How It Helps:

- This update enables automated transmission of lab orders through the Core Engine when a client order is signed in SmartCare, and the "Onsite Specimen Collection" option is selected.
- The system now checks the Onsite Specimen Collection flag and, once a Collection Date and Time are entered, automatically sends the lab order to the Core Engine for processing. This ensures that orders with onsite collection are promptly and accurately transmitted to the lab based on the recorded collection details.

53. EII # 131814 (Feature # 557439): Changes are implemented to include all USCDI v3 data elements, and logic is updated to generate the CCD XML file.

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, a new logic has been implemented to generate the CCD XML file. This logic incorporates SUD/sensitive data restrictions along with CDAG functionality, and includes the new data elements in the following XML data classes:

- Allergies
- Immunizations
- Procedures
- Medications
- Vital Signs
- Goals

Additionally, the following new data classes have been introduced in the XML template:

- Procedures
- Clinical Tests
- Diagnostic Imaging
- Health Insurance Information
- Results
- Care Team Member
- Problems
- SDOH Assessment
- SDOH Goals
- Health Concerns
- Functional Status
- Disability Status
- Mental/Cognitive Status
- Pregnancy Status
- Smoking Status
- Problems
- Vendor-Defined Device Codes
- Assigned Author

Furthermore, the value 'UNK' has been updated to 'UCUM' in the XML structure.

Prerequisite:

- Set 'DisplayCDAGSectionInStaffDetails' to Yes
- Set 'EnableClinicalDataAccessGrouping' to 'Yes'
- Set 'DisplaySUDCheckboxToTagDataAsSUD' to Yes

Where To Find It:

Path 1: Client -- Client Information -- 'Demographics' tab -- 'Contacts' tab -- Alias tab -- Save.

Path 2: Client -- Programs -- New -- Enroll in any program with status as 'Enrolled' -- Save.

Path 3: Client -- Immunizations -- Create New/Edit Immunization details -- Fill required detail -- Save.

Path 4: Client -- Medication Management (RX) -- Create New Order -- 'Prescribe Medication'.

Path 5: Client -- Client Allergies -- New/Edit Client Allergies -- Select Allergy -- Select Reaction -- Select Severity -- Save.

Path 6: Client -- Individualized Service Plan -- New -- Fill all the detail with Goals/Objectives -- Save and Sign.

Path 7: Client -- Assessment -- New -- Select Assessment Group -- Fill the required information -- Save -- Sign.

Path 8: Client -- Coverage -- New -- Fill required information -- Save -- Close -- Enter Start Date and COB Order -- Add.

Path 9: Client -- Summary of Care document -- New -- Fill the required information -- Save -- Sign.

Path 10: Client -- Flow Sheet -- New -- Fill all details with Smoking Status -- Save.

Path 11: Client -- Client Orders -- New -- Select CDAG group -- Select Order Name -- Save and Sign.

Path 12: Client -- Client Orders -- click order with status 'Result obtained' -- Lab Results Tab -- 'Attachments' Tab -- Save/Close.

Path 13: Client -- Health-Related Social Needs Screening Tool -- New -- Fill required information -- Save and Sign.

Path 14: Client -- Services/Notes -- New -- Select Psychiatric Note procedure code -- Fill all the details -- 'Diagnosis' Tab -- Add the diagnosis details -- Save and Sign.

Path 15: Client -- Services -- Open existing Service -- Service Detail -- Select Status as 'Complete' -- Save.

Path 16: Client -- 'USCDI Summary of Care' document -- New -- Select Program -- Enter required details -- Save -- Sign.

How It Helps:

- Generates CCD XML with the newly mapping data classes/Element using the SUD Data being shared to assigned staff and restricted other users to share the information using CDAG logic.

54. EII # 132416 (Feature # 596449): Changes are implemented to Add Update/Resend capability to Message Interface screen.

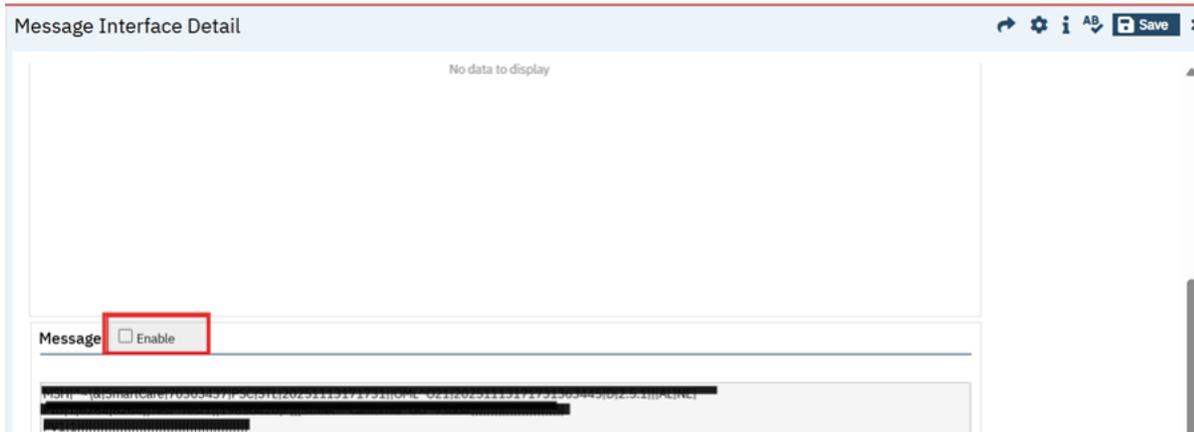
ACTIVE CHANGE

What's Changed:

The SmartCare now provides a mechanism for users to resend failed or any Outbound ORM, HL7 Messages (ADT and SIU) to the Interface. As a result, users can correct and reprocess the messages that encountered transmission errors.

'Messages Interface Detail' Enhancement:

With this release, a new checkbox 'Enable' is added above the HL7 message text area on the 'Message Interface Detail' screen.



- The text area becomes editable, when selects 'Enable' checkbox.
- The user can now open a failed or any Outbound ORM, HL7 Messages (ADT and SIU), enable editing using the 'Enable' checkbox, modify the Outbound ORM, HL7 Messages (ADT and SIU), and save the changes.
- After saving, the system automatically updates the message status to 'Ready for Processing'.
- On the 'Messages Interface Detail' screen, the system displays the Processing State as "Ready for Processing" and the Status as "Success".
- The system marks the original record as RecordDeleted = 'Y' and generates a new ORM, HL7 Messages (ADT and SIU) to send to the Interface.

Where to Find It:

Path: Administration -- 'Messages Interface' -- 'Messages Interface' list page --'Messages Interface Detail' screen.

How It Helps:

- Provides ability to resend failed or any Outbound ORM, HL7 Messages (ADT and SIU) message to the Interface.
- Enables recovery and reprocessing of failed or any Outbound ORM and HL7 Messages (ADT and SIU) without manual database intervention.
- Ensures smoother handling of message failures, reduces manual effort, and improves the reliability of data exchange with the Interface.
- Enhances user control and operational efficiency.

Data Model Changes:

- New Columns: ParentHL7CpQueuemessageId, IsDerived are added to **HL7CPQueueMessages table.**

Methadone

Reference No	Task No	Description
55	EII # 132021	Updates to the 'MAT Bottle Transaction (mg) Report'.
56	EII # 132030	MAT: Updates Needed to the 'MAT Spilled Medication by Date' Report Logic
57	EII # 132454	MAT: Enhanced the Medication Inventory Transaction list screen by updating the existing filters and creating additional columns in the grid.
58	EII # 132042	MAT—Pre Pour Transaction Report: Enhancing reporting efficiency by displaying the total Pre Pour dose (in mg) for transactions where the Current Status is 'Pre Pour Dose Poured', grouped by Medication Type and Location.
59	EII # 132076	MAT Transactions by Bottle Report.
60	EII # 132552	MAT—Update to Pre Pour Transactions Storage and Display Logic.

55. EII # 132021 (Feature # 568118): Updates to the 'MAT Bottle Transaction (mg) Report'.

 **ACTIVE CHANGE**

What's Changed:

The report has been renamed to **MAT Bottle Transaction Summary Report**.

421 Second Street Chicago, IL 60148												
MAT Bottle Transaction Summary Report												
Report Run On: 10/28/2025 05:24 PM												
Transaction Start Date: 10/28/2025				Transaction End Date: 10/28/2025								
Location: All Locations				Medication Type: All Medication Types								
Bottle/Box ID: All Bottle/Box IDs				Report Run By: L550, F550								
Location: Autom_EMNoteLocation						Medication Type: METHADONE HCL						
Medication: methadone 10 mg tablet												
Bottle/Box ID	Transaction Date	Begin Balance (mg)	Transfer In (mg)	Dispensed (mg)	Prepour	Adjustment (mg) +ve	Adjustment (mg) -ve	Transfer To (mg)	End Balance (mg)	Spill (mg)	Variance (mg)	Variance (%)
ChBottleMat10	10/28/2025	9948	0	(20)	0	0	0	0	10052	0	0	0
BottleMat8	10/28/2025	9950	0	(10)	0	20	0	0	9960	(10)	0	0
Total Dispensed (mg): -30												
Total Variance (mg): 0												

Grid Section: The following columns are newly added in the grid of the report:

Transaction Start Date: 10/29/2025 Transaction End Date: 10/29/2025
 Location: test Bottle/Box ID:
 Medication Type: METHADONE HCL

Transaction Start Date: 10/29/2025 Transaction End Date: 10/29/2025
 Location: test Medication Type: METHADONE HCL
 Bottle/Box ID: All Bottle/Box IDs Report Run By: L550, F550

Location: test Medication Type: METHADONE HCL

Medication: methadone 10 mg tablet

Bottle/Box ID	Transaction Date	Begin Balance (mg)	Transfer In (mg)	Dispensed (mg)	Prepour	Adjustment (mg) +ve	Adjustment (mg) -ve	Transfer To (mg)	End Balance (mg)	Spill (mg)	Variance (mg)	Variance (%)
va1234	10/29/2025	945	0	(5)	0	919.5	(25.5)	0	1834	(25.5)	0	0
va12345	10/29/2025	9980	0	0	0	0	(9980)	0	0	0	0	0
newv123	10/29/2025	1000	100	(30)	(45)	110	(5)	0	1130	(15)	100	10
newv1234	10/29/2025	1000	0	0	0	710.5	(1610.5)	(100)	0	(10.25)	(200)	(20)
Prepour-20251029-114921	10/29/2025	0	0	0	5	0	0	0	5	0	0	0
Prepour-20251029-114917	10/29/2025	0	0	0	10	0	0	0	10	0	0	0

Pre-Pour (mg): This is a new column to display the sum Quantity in mg for the Pre-Pour type transactions.

Adjustment(mg) +ve : This is a new column to display the sum total Quantity in mg for all positive Adjustment transactions for the associated Bottle/Box ID for the associated Date.

Adjustment(mg) -ve : This is a new column to display the sum total Quantity in mg for all negative Adjustment transactions for the associated Bottle/Box ID for the associated Date.

Spill (mg): This is a new column to display the sum Quantity in mg, Spilled per bottle/box ID for selected date. The 'MatTransactionSpillReason' recode is used to determine Spill types.

- All transactions related to a single bottle will be displayed in a single row.
- Every negative transaction will be displayed within parenthesis.

Where to Find It:

Path 1: My Office—MAT Medication Adjustments—Select Client—Select Pre-Pour Bottle Id—Select Transaction Type.

Path 2: My Office—Medication Inventory Transaction—Select Bottle—Select Medication—Select Transaction Type.

Path 3: 'My Office'—'MAT Management List page'—click on 'Dispense' icon—MAT Management Details page.

Path 4: 'My Office'—'Reports'—'MAT Bottle Transaction Summary Report'.

How It Helps:

This task is for enhancement of the MAT Bottle Transaction (mg) Report. Modifications to existing

report based on beta customer input. This will help their staff to view the report according to their requirement.

56. EII # 132030 (Feature # 569055): MAT: Updates Needed to the 'MAT Spilled Medication by Date' Report Logic.

ACTIVE CHANGE

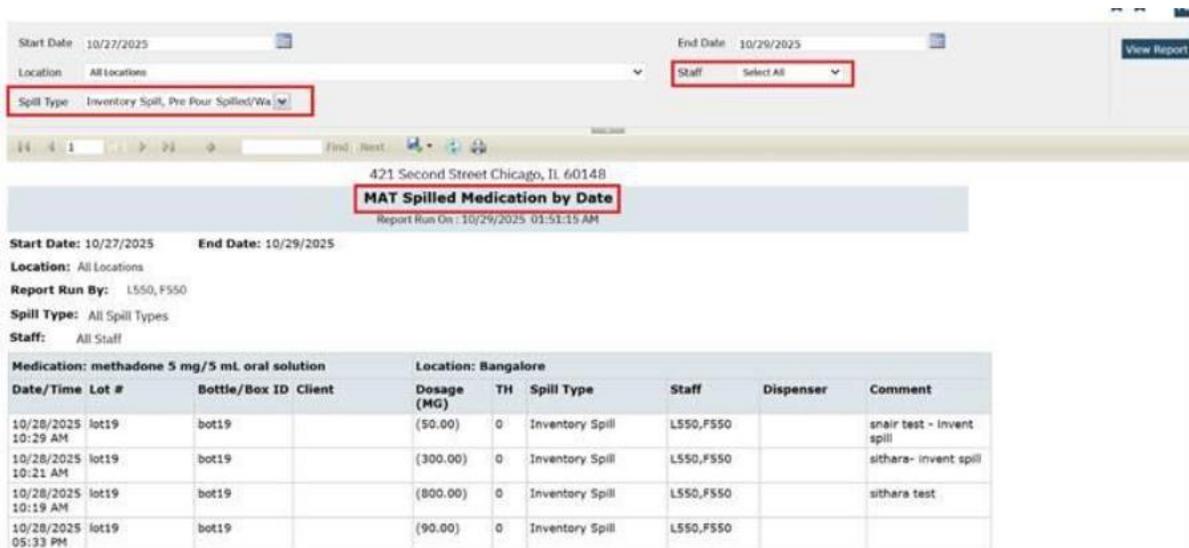
What's Changed:

Recode: MatTransactionSpillReason

- This recode has been used to identify MAT Spills
- If this Recode has been end dated by specifying the FromDate and ToDate, then it will be considered as Inactive.

Global Code: Renamed the existing MARSTATUS Global code 'MAT Spill' to '**MAT Revert Spill**'.

The changes implemented in 'MAT Spilled Medication by Date Report' are explained as follows



- Added new filters 'Spill Type' and 'Staff' in the report. 'Spill Type' is a dropdown and will have the values such as: Inventory Spill, Pre Pour Spilled/Wasted and Spill. 'Select All' will be displayed by default.
- 'Staff' is a dropdown field and will display all the active staff and 'Select All; will be displayed by default.
- Added a new column 'Spill Type' to display all the spill types in the report.

Start Date: 10/28/2025 End Date: 10/29/2025
Location: Location05 Staff: Roopa, Test
Spill Type: Inventory Spill, Pre Pour Spilled/Wa

421 Second Street Chicago, IL 60148
MAT Spilled Medication by Date
Report Run On: 10/29/2025 02:44:17 AM

Start Date: 10/28/2025 End Date: 10/29/2025
Location: Location01
Report Run By: L550, F550
Spill Type: All Spill Types
Staff: Roopa, Test

Medication: Suboxone 2 mg-0.5 mg Sublingual Film Location: Location01

Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/28/2025 12:27 PM	sub2	Prepour-20251028-120331	Test, Anoopama(2003)	(4.00)	1	Spill	Roopa,Test		spill for 30 oct
10/28/2025 11:24 AM	sub2	Prepour-20251028-112420	Test, Anoopama(2003)	(4.00)	0	Pre Pour Spilled/Wasted	Roopa,Test		ss
10/28/2025 11:24 AM	sub2	Prepour-20251028-112447	Test, Anoopama(2003)	(4.00)	0	Pre Pour Spilled/Wasted	Roopa,Test		ss

Re-Dispense: The re-dispense with the reason spill will be displayed in the report as 'Spill' and the Client column will display the associated client name.

HelioTest, Sithara (2622)

MAT Management Details

General Dispensing Notes (0)

Dispense Date: 10/29/2025 Order End Date: 10/29/2025

Dispense & No Show History

Medication	Dose (mg)	Disp
SN_MAT_HelioTest	17	10/29/2025

10/29/2025
17 mg
[Icon]

MAT ReDispense Popup

Strength: 10mg/mL, syrg, oral
Date: 10/29/2025
Dose: 17
Reason: Spill
Comment: Re-dispense Test

Re-Dispense Close

Screenshot of Re-Dispense spill displaying in the 'MAT Spilled Medication by Date Report'

Start Date: 10/29/2025 End Date: 10/29/2025
Location: All Locations Staff: L550, F550
Spill Type: Inventory Spill, Pre Pour Spilled/Wa

421 Second Street Chicago, IL 60148
MAT Spilled Medication by Date
Report Run On: 10/29/2025 02:00:02 AM

Start Date: 10/29/2025 End Date: 10/29/2025
Location: All Locations
Report Run By: L550, F550
Spill Type: All Spill Types
Staff: L550, F550

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY) Location: Bangalore

Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/29/2025 01:59 AM	AJN25	bot5656	HelioTest, Sithara(2622)	(17.00)	0	Spill	L550,F550		Re-dispense Test
10/29/2025 01:27 AM	AJN25	Prepour-20251029-012535	HelioTest, Sithara(2622)	(17.00)	0	Pre Pour Spilled/Wasted	L550,F550		prepour
10/29/2025 01:24 AM	AJN25	bot5656	HelioTest, Sithara(2622)	(17.00)	0	Spill	L550,F550		dsa

Reason for Reverting Dispense: The reverted dispense using 'r' icon in the MAT Management Details screen will be displayed as 'Spill' in the report. The Client column will display the associated client name for the Revert Spill.

HelioTest, Sithara (2622)

MAT Management Details

General Dispensing Notes (0)

Dispense Date: 10/30/2025 Order End Date: 11/01/2025

Medication	Dose (mg)	Disp	Administered By	Scheduled
SN_MAT_HelioTest	10	10/25	550, F550	10/31/2025
SN_MAT_HelioTest	17	10/25	550, F550	11/01/2025
SN_MAT_HelioTest	17	10/25	550, F550	
SN_MAT_HelioTest	17			
SN_MAT_HelioTest	17			

Commence Pre-pour

10/30/2025
10 mg
r

MAT Dispenses Adjustment

Reason for Reverting Dispense: Spill

Comment: Revert spill

Continue Cancel

421 Second Street Chicago, IL 60148

MAT Spilled Medication by Date

Report Run On: 10/29/2025 02:18:23 AM

Start Date: 10/29/2025 End Date: 10/29/2025
Location: All Locations
Report Run By: L550, F550
Spill Type: All Spill Types
Staff: All Staff

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY) Location: Bangalore

Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/29/2025 12:18 AM	AJN25	bot5656	HelioTest, Sithara(2622)	(10.00)	1	Spill	L550, F550		Revert spill
10/29/2025 01:59 AM	AJN25	bot5656	HelioTest, Sithara(2622)	(17.00)	0	Spill	L550, F550		Re-dispense Test
10/29/2025 01:27 AM	AJN25	Prepour-20251029-012535	HelioTest, Sithara(2622)	(17.00)	0	Pre Pour Spilled/Wasted	L550, F550		prepour

Pre-Pour Spill: The pre-pour spill from the MAT Management Details screen will be displayed as 'Pre Pour Spilled/Wasted' in the report and the Client column will display the associated client name.

HelioTest, Sithara (2622)

MAT Management Details

General Dispensing Notes (0)

Dispense Date: 10/30/2025 Order End Date: 11/01/2025

Medication	Dose (mg)	Disp
SN_MAT_HelioTest	10	
SN_MAT_HelioTest	10	10/25
SN_MAT_HelioTest	17	10/25
SN_MAT_HelioTest	17	10/25
SN_MAT_HelioTest	17	

Commence Pre-pour

10/30/2025

10 mg

MAT Disposes Adjustment

Reason for Reverting Dispense: Pre Pour Spilled/Wast

Comment: Pre pour spill

Continue Cancel

Administered By: 550, F550

Scheduled: 10/31/2025, 11/01/2025

All selected

Start Date: 10/29/2025 End Date: 10/29/2025
 Location: All Locations Staff: Select All
 Spill Type: Inventory Spill, Pre Pour Spilled/Wa

421 Second Street Chicago, IL 60148

MAT Spilled Medication by Date

Report Run On: 10/29/2025 02:26:35 AM

Start Date: 10/29/2025 End Date: 10/29/2025

Location: All Locations
 Report Run By: L550, F550
 Spill Type: All Spill Types
 Staff: All Staff

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY)				Location: Bangalore					
Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/29/2025 02:25 AM	AJN25	Prepour-20251029-022251	HelloTest, Sithara(2622)	(10.00)	1	Pre Pour Spilled/Wasted	L550,F550		Pre pour spill
10/29/2025 02:18 AM	AJN25	bot5656	HelloTest, Sithara(2622)	(10.00)	1	Spill	L550,F550		Revert spill
10/29/2025 01:59 AM	AJN25	bot5656	HelloTest, Sithara(2622)	(17.00)	0	Spill	L550,F550		Re-dispense Test

- **Inventory Spill:** The inventory Spill from the 'Medication Inventory Transaction' screen will be displayed as 'Inventory Spill' in the report. The Client column will be blank for the Inventory Spill.

Medication Inventory Transaction Detail

Transaction Detail

Transaction Detail

Location: Location01
 Transaction Date: 10/29/2025
 Medication/Strength: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY)
 Bottle/Box ID: BOT6677 Lot #: LOT6677
 Expiration Date: 10/18/2026 Manufacturer: Merck and Co., Inc.
 Transaction Type: Adjustment Reason: Inventory Spill
 Transfer To Bottle/Box ID: Transfer To Lot #:
 Quantity: -30 ml Balance (Prior to Transaction): 31991 mg
 Comment:
 Client:

Start Date: 10/29/2025 End Date: 10/29/2025
 Location: All Locations Staff: Select All
 Spill Type: Inventory Spill, Pre Pour Spilled/Wa

421 Second Street Chicago, IL 60148
MAT Spilled Medication by Date
 Report Run On: 10/29/2025 02:32:08 AM

Start Date: 10/29/2025 End Date: 10/29/2025
 Location: All Locations
 Report Run By: L550, F550
 Spill Type: All Spill Types
 Staff: All Staff

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY) Location: Location01

Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/29/2025 02:30 AM	LOT6677	BOT6677		(300.00)	0	Inventory Spill	L550,F550		
SubTotal: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY)				(300)	0				

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY) Location: Bangalore

Date/Time	Lot #	Bottle/Box ID	Client	Dosage	TH	Spill Type	Staff	Dispenser	Comment
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- **Date/Time:** Date and Time has been combined and will display together in the MM/DD/YYYY HH:MM AM/PM format and the column name is renamed to 'Date/Time' in the report and will appear as the first column in the report.
- **Comment:** The Comment column has been moved to the right end of the report.
- A new column has been added before the **Comment** column to display the window or dispenser from which the medication was re-dispensed.

Start Date: 10/28/2025 End Date: 10/29/2025
 Location: Location01 Staff: Roopa, Test
 Spill Type: Inventory Spill, Pre Pour Spilled/Wa

131913

SubTotal: Suboxone 2 mg-0.5 mg Sublingual Film (24) 2

Medication: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY) Location: Location01

Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment
10/28/2025 09:11 PM	LOT6677	BOT6677	HelloTest, Sithara(2622)	(19.00)	0	Spill	Roopa,Test		revert spill 19 mg
10/28/2025 09:10 PM	LOT6677	BOT6677	HelloTest, Sithara(2622)	(19.00)	0	Spill	Roopa,Test	machine 7552	19 mg redi spill
10/28/2025 07:40 PM	LOT6677	Prepour-20251028-194022	HelloTest, Sithara(2622)	(17.00)	0	Pre Pour Spilled/Wasted	Roopa,Test		pre pour spill wasted 17 mg
10/28/2025 07:39 PM	LOT6677	BOT6677	HelloTest, Sithara(2622)	(10.00)	0	Spill	Roopa,Test		redispensed reverted 10 mg
10/28/2025 07:38 PM	LOT6677	BOT6677	HelloTest, Sithara(2622)	(9.00)	0	Spill	Roopa,Test		dispensed revert with spill 9 mg
SubTotal: methadone 10 mg/mL oral syringe (FOR ORAL USE ONLY)				(74)	0				
Grand Total:				(98)	2				

Page 1 of 1

- All the negative transactions will be displayed in the report within the parenthesis.

Start Date: 10/28/2025 End Date: 10/29/2025
 Location: Location01 Staff: Roopa, Test
 Spill Type: Inventory Spill, Pre Pour Spilled/Wa

421 Second Street Chicago, IL 60148

MAT Spilled Medication by Date
 Report Run On : 10/29/2025 02:44:17 AM

Start Date: 10/28/2025 End Date: 10/29/2025
 Location: Location01
 Report Run By: L550, F550
 Spill Type: All Spill Types
 Staff: Roopa, Test

Medication: Suboxone 2 mg-0.5 mg Sublingual Film			Location: Location01							
Date/Time	Lot #	Bottle/Box ID	Client	Dosage (MG)	TH	Spill Type	Staff	Dispenser	Comment	
10/28/2025 12:27 PM	sub2	Prepour-20251028-120331	Test, Anoopama(2003)	(4.00)	1	Spill	Roopa,Test		spill for 30 oct	
10/28/2025 11:24 AM	sub2	Prepour-20251028-112420	Test, Anoopama(2003)	(4.00)	0	Pre Pour Spilled/Wasted	Roopa,Test		ss	
10/28/2025 11:24 AM	sub2	Prepour-20251028-112447	Test, Anoopama(2003)	(4.00)	0	Pre Pour Spilled/Wasted	Roopa,Test		ss	

- The downloaded PDF document of 'MAT Spilled Medication by Date Report' will be displaying all the newly added filters and column correctly with its data.

Where to Find It:

Path 1: 'Client' search — 'Client Orders' screen — Click on 'New' icon — Search and select a 'MAT Medication Order' — Enter required data — Click on 'Insert' button — Click on 'Save/Sign' button.

Path 2: 'My Office' — 'MAT Management' screen — Click on 'Dispense' icon — 'MAT Management Details' screen — Click on 'Dispense' icon — Click on 'i' icon to revert — Select 'Reason for Reverting Dispense' as 'Spill' — Add comment and click on 'Continue' button.

Path 3: 'My Office' — 'MAT Management' screen — Click on 'Dispense' icon — 'MAT Management Details' screen — Click on 'Dispense' icon — Click on 'Re-dispense' icon — Select reason as 'Spill' — Add comment and click on 'Re-dispense' button.

Path 4: 'My Office' — 'MAT Management' screen — Click on 'Dispense' icon — 'MAT Management Details' screen — Select 'Commence Pre pour' checkbox — Click on 'Dispense' icon — Click on 'i' icon to revert — Select 'Reason for Reverting Dispense' as 'Pre-Pour Spill/Wasted' — Add comment and click on 'Continue' button.

Path 5: 'My Office' — 'Medication Inventory Transaction' screen — Click on 'New' icon — Enter Location, Medication/Strength and 'Bottle/Box ID' — Select the 'Transaction Type' = 'Adjustment' — Select the 'Reason' = 'Inventory Spill' — Enter a 'Quantity' — Click on 'Save/Sign' button.

Path 6: 'My Office' — 'MAT Spilled Medication by Date Report'.

How It Helps:

This enhancement ensures that all valid spill types are displayed in the existing 'MAT Spilled Medication by Date Report,' improving inventory accuracy and regulatory compliance.

57. EII # 132454 (Feature # 600556): MAT: Enhanced the Medication Inventory Transaction list screen by updating the existing filters and creating additional columns in the grid.

ACTIVE CHANGE

What's Changed:

With this release, filtering on the Medication Inventory Transaction list screen is enhanced and this improves data analysis and operational efficiency.

- New columns provide better audit trails and accountability.
- Improved clarity in transaction types and inventory changes.
- Time based analysis of spills/removals/voids.

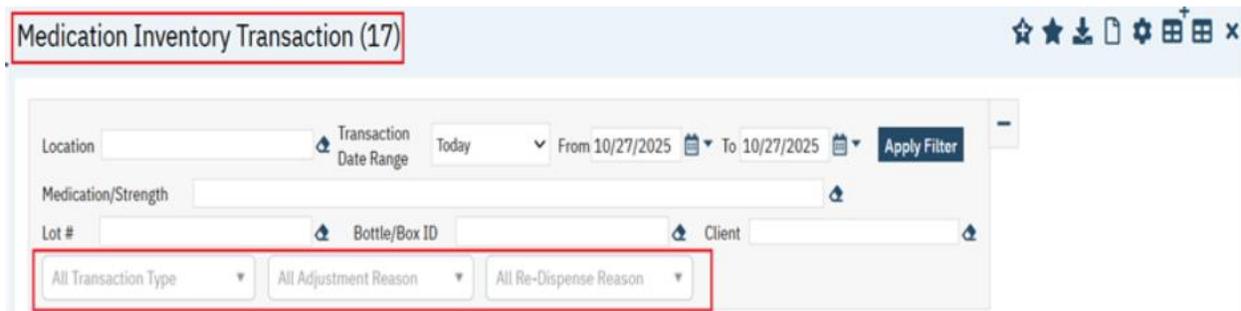
1. Updated the existing single select Transaction Type, Adjustment Reason, and Re-Dispense Reason filters to multi select filters.
2. New columns are added in the grid as mentioned below:
 - a. 'Staff' to identify the Staff who performed the transaction.
 - b. 'MAT Dispense Type' to identify whether the Dispense was a Clinic dose or a Take Home dose.
 - c. 'MAT Spill/Remove/Void Date/Time' to identify when a Dispense was marked as a Spill/Remove/Void.
 - d. 'Spilled/Removed/Voided By' to identify the Staff who marked the Dispense as Remove/Void/Spill.
3. Updated the existing 'Quantity' column to display any negative transactions with parentheses around the value.

In the Medication Inventory Transaction list page,

Filter section:

1. **Transaction Type:** 'Prepour' is a newly added option.
2. **Adjustment Reason**
3. **Re-Dispense Reason**

—These are the existing filter updated as a multi-select dropdown.



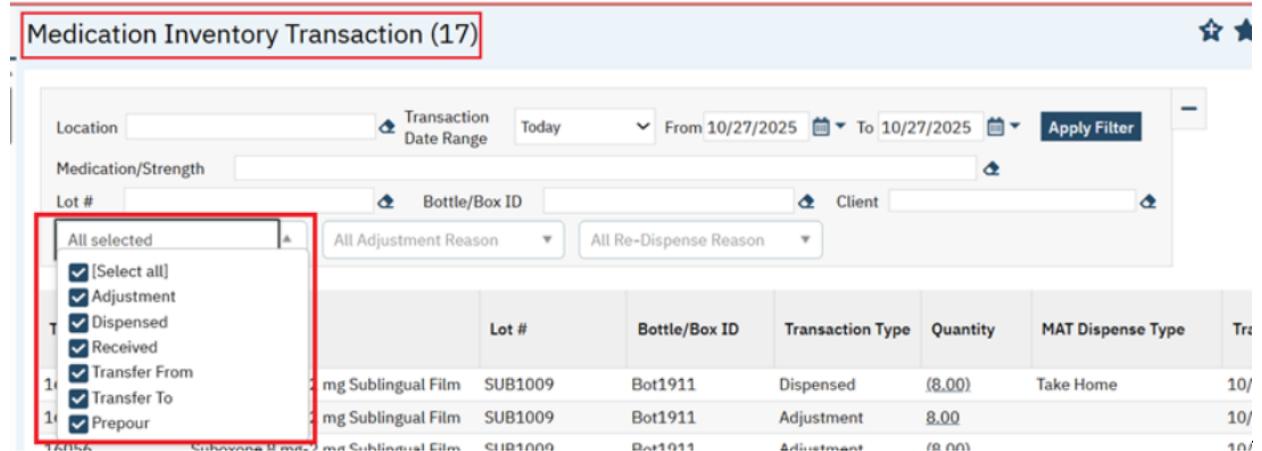
—Default No Selection, which will consider ALL values

—<Select All> as top selection: When <Select All> is selected, it will check all boxes in multi-select dropdown.

Note: If the user wants to search for just 1 or 2 options, they can unselect <Select All>, which will uncheck all boxes. Users may then select the options they want.

—When the user clicks 'Apply Filter', display the data in the grid below according to the filter selection(s).

'Transaction Type' multi-select dropdown filter:



'Adjustment Reason' dropdown filter and 'Re-Dispense Reason' dropdown filters are also displayed similarly.

Grid Section:

Newly added read-only columns

1. **'Transaction ID'** displays the TransactionId for the associated Transaction.
—Received, Pre pour, Dispensed, Re-Dispensed, Transfer From, Transfer To, Positive and Negative Adjustments.
2. **'Staff'** displays the Staff who performed/saved the associated Transaction (Created By).
3. **'MAT Dispense Type'** displays 'Clinic' (Face to Face) or 'TH' Dispense Type
—If Transaction was not a MAT Dispense, then displays Blank.

Newly added Columns: Transaction ID, MAT Dispense Type, Staff

Medication Inventory Transaction (21)

Location: Transaction Date Range: Today From 10/27/2025 To 10/27/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client:

All Transaction Type All Adjustment Reason All Re-Dispense Reason

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff
16083	Suboxone 8 mg-2 mg Sublingual Film	SUB1009	Bot1911	Dispensed	(8.00)	Take Home	10/27/2025 11:48 AM	10/28/2025	Test, Madhu2025
16084	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 11:53 AM	11/06/2025	Test, Madhu2025
16085	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 12:26 PM	10/28/2025	Test, Madhu2025
16087	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 12:27 PM	10/28/2025	Test, Madhu2025
16088	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	30.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16089	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	(20.00)		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16090	Methadone 10 mg/ml, Oral Concentr...	Helio	SeptHF17	Adjustment	30.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16091	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	20.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16092	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	(20.00)		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16093	Methadone 10 mg/ml, Oral Concentr...	Helio	SeptHF17	Adjustment	20.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025
16097	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Received	100.00		10/27/2025 02:01 PM		Patil, Chaitali
16098	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot3	Transfer To	(8868.00)		10/27/2025 01:59 PM		Patil, Chaitali
16099	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Transfer From	8868.00		10/27/2025 02:02 PM		Patil, Chaitali

4. **'MAT Spill/Remove/Void Date/Time'** displays the Date/Time for the associated MAT Dispense Adjustments.

- If the Transaction was a Dispense and then was marked as a Spill / Remove / Void via the 'MAT Management Details' or 'MAT Medication Adjustment' screen, then in the same row as the original Dispense transaction, includes the Date/Time the Dispense was Removed/Voided or marked as a Spill and Redispensed. This Date/Time should match the Transaction Date/Time of the associated Redispense/Remove/Void.
- If Dispense transaction happened normally (no Spill/Remove/Void) then display Blank.
- Standard format MM/DD/YYYY HH:MM AM/PM

5. **'MAT Spilled/Removed/Voided By'** displays the Staff Name for the associated Transaction

- If the Transaction was a Dispense and then was marked as a Spill via the MAT Management screen, then includes the Staff Name who Removed/Voided the Dispense or who marked the Dispense as a Spill and Redispensed.
- This will be included in the original Dispense row as additional data to the existing row.
- The Staff listed here will be the same Staff of the Re-dispense/Remove/Void transaction.
- If Dispensed transaction happened normally (no Spill/Remove/Void), then display Blank

Medication Inventory Transaction (34)

Location: Transaction Date Range: Today From 10/28/2025 To 10/28/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client: Helio, 1 (2613)

All Transaction Type All Adjustment Reason All Re-Dispense Reason

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff	Client	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Removed/Void By
16099	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Transfer From	8868.00		10/27/2025 02:02 PM		Patil, Chaitali	Helio, 1 (2613)			
16098	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot3	Transfer To	(8868.00)		10/27/2025 01:59 PM		Patil, Chaitali	Helio, 1 (2613)			
16097	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Received	100.00		10/27/2025 02:01 PM		Patil, Chaitali	Helio, 1 (2613)			
16093	Methadone 10 mg/ml, Oral Concentr...	Helio	SeptHF17	Adjustment	20.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16092	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	(20.00)		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16091	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	20.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16090	Methadone 10 mg/ml, Oral Concentr...	Helio	SeptHF17	Adjustment	30.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16089	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	(20.00)		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16088	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Adjustment	30.00		10/27/2025 12:30 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16087	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 12:27 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16085	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 12:26 PM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			
16084	Methadone 10 mg/ml, Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 11:53 AM	11/06/2025	Test, Madhu2025	Helio, 1 (2613)			
16083	Suboxone 8 mg-2 mg Sublingual Film	SUB1009	Bot1911	Dispensed	(8.00)	Take Home	10/27/2025 11:48 AM	10/28/2025	Test, Madhu2025	Helio, 1 (2613)			

Updates in the existing read-only columns

- 6. **'Re-Dispense Reason'** updated logic to display "Spill" reason in the original dispense row.
 - If a Dispense was Re-Dispensed with Re-Dispense Reason = Spill, then displays "Spill" in the original Dispense row.

Medication Inventory Transaction (2)

Location: Hello location Transaction Date Range: All Dates From: To: Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Hello1 Client: Dispensed All Adjustment Reason All Re-Dispense Reason

Transaction ID	Medication	Lot #	Bottle/B ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff	Client	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Removed/Void By	Location
656	Methadon...	Hello	Hello1	Dispensed	(100.00)	Take ...	10/27/2025 05...	10/30/2025	Staff, Hello	Hello, ...	Spill	10/27/2025 05:53 ...	Staff, Hello	Hello loca
658	Methadon...	Hello	Hello1	Dispensed	(50.00)	Take ...	10/27/2025 05...	10/30/2025	Staff, Hello	Hello, ...	Re-dispensed dose			Hello loca

- If a Dispense was Re-Dispensed with any other Re-Dispense Reason (such as "Client Threw Up or any"), then displays the non-Spill Re-Dispense Reasons in the same row as the Re-Dispense (and NOT in the original Dispense row):

Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff	Client	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Rerr By
Adjustment	10.00		10/28/2025 04:...						
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/04/2025				10/28/2025 05:05 ...	
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/05/2025					
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/06/2025					
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/07/2025					
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/08/2025					
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/09/2025					
Dispensed	(10.00)	Take ...	10/28/2025 05:...	11/10/2025					
Adjustment	0.00		10/28/2025 05:...	11/04/2025					
Dispensed	(10.00)	Clinic	10/28/2025 06:...	10/28/2025		original dispense			
Dispensed	(20.00)	Clinic	10/28/2025 06:...	10/28/2025		Redispensed	Client threw-up	10/28/2025 06:08 ...	

- 7. **'Quantity'** existing Read Only with hyperlink column
 - If it's a negative transaction (removed from inventory), then displays in the standard negative format with parentheses around the number

Example of display format for a negative transaction: (50)

—Dispensed, Transfer To, negative Adjustments

Example of display format for a positive transaction: 50

Medication Inventory Transaction (21)

Location [] Transaction Date Range Today From 10/27/2025 To 10/27/2025 Apply Filter

Medication/Strength []

Lot # [] Bottle/Box ID [] Client []

All Transaction Type [] All Adjustment Reason [] All Re-Dispense Reason []

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date
6083	Suboxone 8 mg-2 mg Sublingual Film	SUB1009	Bot1911	Dispensed	(8.00)	Take Home	10/27/2025 11:48 AM	10/28/2025
6084	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 11:53 AM	11/06/2025
6085	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Dispensed	(30.00)	Take Home	10/27/2025 12:26 PM	10/28/2025
6087	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Dispensed	(20.00)	Take Home	10/27/2025 12:27 PM	10/28/2025
6088	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Adjustment	30.00		10/27/2025 12:30 PM	10/28/2025
6089	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Adjustment	(30.00)		10/27/2025 12:30 PM	10/28/2025
6090	Methadone 10 mg/mL Oral Concentr...	Helio	SeptHF17	Adjustment	30.00		10/27/2025 12:30 PM	
6091	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Adjustment	20.00		10/27/2025 12:30 PM	10/28/2025
6092	Methadone 10 mg/mL Oral Concentr...	Helio lot	Helio3	Adjustment	(20.00)		10/27/2025 12:30 PM	10/28/2025
6093	Methadone 10 mg/mL Oral Concentr...	Helio	SeptHF17	Adjustment	20.00		10/27/2025 12:30 PM	
6097	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Received	100.00		10/27/2025 02:01 PM	
6098	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot3	Transfer To	(8868.00)		10/27/2025 01:59 PM	
6099	Suboxone 8 mg-2 mg Sublingual Film	lot2	bot4	Transfer From	8868.00		10/27/2025 02:02 PM	

Prerequisites:

1: Create one MAT Program via the path below:

Path: Go Search — Program (Admin) — Program List page — click on New — Add Program name — fill other required fields — under the 'Categories' section — select the 'MAT Program' checkbox — Save.

2: Client has 'MAT Program' with 'Enrolled' Status. Via the **path below**.

Path: Perform client search — Go search programs(client) — Program List page — click on 'New' — select MAT Program from Program Name down — select status as enrolled — fill another required field — click on Save.

Where to Find It:

Path 1: Administration' — Orders' — Orders' list page — New — Order Details' screen — Select 'Medication' Order Type — Enter the required fields — Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes, under 'Medication Assisted Treatment' section — under the 'Option' section display program? is 'Yes' for MAT Orders — Save.

Path 2: My Office — 'Medication/Lot/Bottle' list page — New — 'Medication/Lot/Bottle Details' screen — Enter the required fields — Select Location — Insert — Save.

Path 3: 'Client' — 'Client Orders' — 'Client Orders' list page — New — 'Client Order details' screen — Select the Order created in Navigation Path 1 — Enter the required fields — select Program — Insert — Save and sign.

Path 4: My Office — MAT Management List page — Connect to a machine and inventory — Click on Dispense icon — MAT Management Details screen — Perform dispense/Revert/Spill/Redisperse.

Path 5: My Office — Medication Inventory Transaction list page — enter required fields — Apply Filter.

How It Helps:

- 1. Enable users to filter and analyze inventory transactions more effectively.
- 2. Provide better traceability of staff actions and transaction types.
- 3. Improve identification of spills, voids, and Re-dispenses.

58. EII # 132042 (Feature # 569852): MAT Pre Pour Transaction Report: Enhancing reporting efficiency by displaying the total Pre-Pour dose (in mg) for transactions where the Current Status is 'Pre-Pour Dose Poured', grouped by Medication Type and Location.

ACTIVE CHANGE

What's Changed:

With this release, in the MAT Pre-Pour Transaction Report, Totals only appear when **Current Status = Pre-Pour Dose Poured**.

Grid Header grouping

Total Amount (MG): Displays total Pre-Pour Amount (mg) across selected Location and Medication Type when Current Status = 'Pre-Pour Dose Poured'.

Example: For Location01, Medication Type BUPRENORPHINE HCL/NALOXONE HCL, when Current Status is 'Pre-Pour Dose Poured', Displays the total Pre-Pour Amount (mg) in the grid Header as **Total Amount (MG): 48.00**.

MAT Pre Pour Transaction Report				
Report Run On : 10/28/2025 02:57:56 PM				
Date Range: 10/27/2025 - 10/27/2025				
Location: Location01				
Pre-Pour Status: Pre-Pour Dose Poured				
Client: All Clients				
Report Run By: Staff, Hello				
Medication Type: BUPRENORPHINE HCL/NALOXONE HCL		Location: Location01		Total Amount (MG) :48.00
Pre Pour ID: Prepour-20251027-181548	Date Poured: 10/27/2025	Amount (MG): 12.00	Current Status: Pre-Pour Dose Poured	Client: Test, Anup(2565)
Date/Time of Pre-Pour Activity	Pre-Pour Activity Status	Scheduled For Date	Bottle/Box ID	Comments
10/27/2025 6:15 PM	Pre-Pour Dose Poured	10/30/2025	Prepour-20251027-181548	Pre-Pour Poured

Grid Sub footer: Includes two different types of totals:

- 1. **'Total Per Location'** label: Displays total Pre-Pour Amount (mg) across selected Location and Medication Type when Current Status = 'Pre-Pour Dose Poured'

Example: For Location01, Methadone HCL, Pre-pour Dose Poured, Total Amount is displayed per Location in the sub footer as **Total Per Location: 20.00**

Medication Type: METHADONE HCL		Location: Location01		Total Amount (MG) :20.00	
Pre Pour ID: Prepour-20251027-194115		Date Poured: 10/27/2025	Amount (MG): 10.00	Current Status: Pre-Pour Dose Poured	Client: HelloTest, Sithara(2622)
Date/Time of Pre-Pour Activity	Pre-Pour Activity Status	Scheduled For Date	Bottle/Box ID	Comments	
10/27/2025 7:41 PM	Pre-Pour Dose Poured	10/27/2025	Prepour-20251027-194115	Pre-Pour Dose Poured	
Pre Pour ID: Prepour-20251027-220816		Date Poured: 10/27/2025	Amount (MG): 10.00	Current Status: Pre-Pour Dose Poured	Client: Mat4, Client4(2607)
Date/Time of Pre-Pour Activity	Pre-Pour Activity Status	Scheduled For Date	Bottle/Box ID	Comments	
10/27/2025 10:08 PM	Pre-Pour Dose Poured	11/06/2025	Prepour-20251027-220816	Pre-Pour Dose Poured	
Total Per Location: 20.00					

2. 'Total Dose (MG)' label: For Current Status = 'Pre-Pour Dose Poured', displays the Total Dose (mg) across all the selected Medication Type, Location and Date range in the sub footer as Total Dose (MG):

Example: Across all the selected Location and Date range, **Total Dose (MG):68.00** will be displayed at the sub footer of the Report for the Current Status(Pre-pour Dose poured):

Total Per Location: 48.00					
Medication Type: METHADONE HCL		Location: Location01		Total Amount (MG) :20.00	
Pre Pour ID: Prepour-20251027-194115		Date Poured: 10/27/2025	Amount (MG): 10.00	Current Status: Pre-Pour Dose Poured	Client: HelloTest, Sithara(2622)
Date/Time of Pre-Pour Activity	Pre-Pour Activity Status	Scheduled For Date	Bottle/Box ID	Comments	
10/27/2025 7:41 PM	Pre-Pour Dose Poured	10/27/2025	Prepour-20251027-194115	Pre-Pour Dose Poured	
Pre Pour ID: Prepour-20251027-220816		Date Poured: 10/27/2025	Amount (MG): 10.00	Current Status: Pre-Pour Dose Poured	Client: Mat4, Client4(2607)
Date/Time of Pre-Pour Activity	Pre-Pour Activity Status	Scheduled For Date	Bottle/Box ID	Comments	
10/27/2025 10:08 PM	Pre-Pour Dose Poured	11/06/2025	Prepour-20251027-220816	Pre-Pour Dose Poured	
Total Per Location: 20.00					
Total Dose (MG): 68.00					

Where to Find It:

Path: My Office' — 'My Reports' — 'MAT Pre-Pour Transaction Report' — select the Filters — Click on 'View Report'.

How It Helps:

- This change in the reporting efficiency is enhanced by displaying the total Pre-Pour dose (in mg) for transactions where the Current Status is 'Pre-Pour Dose Poured', grouped by Medication Type and Location.
- The total will be displayed in both the header and footer, aggregated across the selected date range.

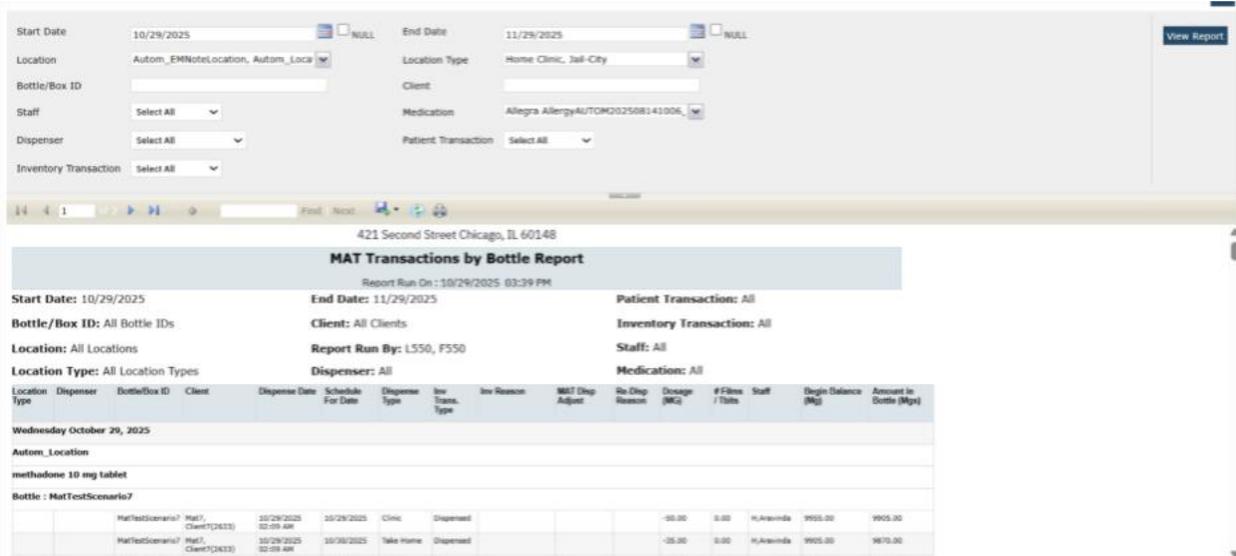
59. EII # 132076 (Feature # 570640): MAT Transactions by Bottle Report.

ACTIVE CHANGE

What's Changed:

With this release, the report has been improved and renamed **MAT Transactions by Bottle Report**, with new filters, better sorting, clearer dosage logic, and more detailed bottle-level inventory information.

Filter Section: The below fields are present in the Filter Section:



The screenshot shows the filter section for the 'MAT Transactions by Bottle Report'. The filters include Start Date (10/29/2025), End Date (11/29/2025), Location (Autom_EMNoteLocation, Autom_Loca), Location Type (Home Clinic, 3rd-City), Bottle/Box ID, Client, Staff (Select All), Medication (Allegra AllergyAU/TOMD02508141006), Dispenser (Select All), Patient Transaction (Select All), and Inventory Transaction (Select All). Below the filters, the report title 'MAT Transactions by Bottle Report' is displayed, along with the report run date and time (10/29/2025 03:39 PM). The report summary shows filters for Start Date, End Date, Bottle/Box ID, Client, Location, Location Type, Report Run By, Dispenser, Patient Transactions, Inventory Transaction, Staff, and Medication. The data table below shows columns for Location Type, Dispenser, Bottle/Box ID, Client, Dispense Date, Schedule For Date, Dispense Type, Inv Trans. Type, Inv Reason, WBT Disp Adjust, No. Disp Reason, Dosage (MG), # Pills / Tabs, Staff, Begin Balance (Mg), and Amount in Bottle (Mg). The table contains two rows of data for 'methadone 10 mg tablet'.

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	WBT Disp Adjust	No. Disp Reason	Dosage (MG)	# Pills / Tabs	Staff	Begin Balance (Mg)	Amount in Bottle (Mg)
Autom_Location				10/29/2025 02:09 AM	10/29/2025	Clinic	Dispensed				10.00	1	HAlexisA	9905.00	9905.00
				10/29/2025 02:08 AM	10/29/2025	Take Home	Dispensed				10.00	1	HAlexisA	9905.00	9870.00

Start Date: The date control field is a required field only when Bottle/Box ID is not present in the Bottle/Box ID filter. By default, Today's Date will be displayed. The date is displayed in the format MM/DD/YYYY.

End Date: The date control field is a required field only when Bottle/Box ID is not present in the Bottle/Box ID filter. By default, it displays a date to one month from Current Date. Date is displayed in the format MM/DD/YYYY.

NULL Check box: when only Bottle/Box ID is selected and Start and End Date is not selected, then Null check box must be selected.

Location: This is a multiselect dropdown and this is a required field. By default, it will pull all active associated Locations from the 'Locations' table that are linked to a MATLocationType global code value, that is included in the 'SetCodeForLocationType' Recode, with 'Select All'.

Location Type: This is a multiselect dropdown and this is a required field. By default, this will pull the location type specified under Client Information for selecting clinic or jail. Display all MATLocationType global code values, that are linked to the LOCATION(s) from the Locations table that are selected from the 'Location' dropdown and are included in 'SetCodeForLocationType' Recode.

Bottle/Box ID: This is a typeable text box. Allows users to search and select a 'Bottle/Box ID' value from the Medication Inventory Transaction screen, like match. (Can enter a few digits and will search like bottles). The blank default will pull All Bottle #.

Client: This is a textbox, where the user can type the Name or ID. Only consider Clients who meet the following criteria:

- Client with Enrolled MAT Program within the selected date range is to be displayed.
- Allow for just one client entered in the filter with exact match.
- This is to default as blank and pull all Clients by default. 'View Report' Button: On click of this button, the report based on filter criteria will be displayed.

Staff: This is a dropdown which will display the Staff Last Name, FirstName of those who have done the transaction. By default, it will display the select All those who have done the transactions.

Medication: This is a multiselect dropdown. By default, it will display All the Medication name for MAT orders.

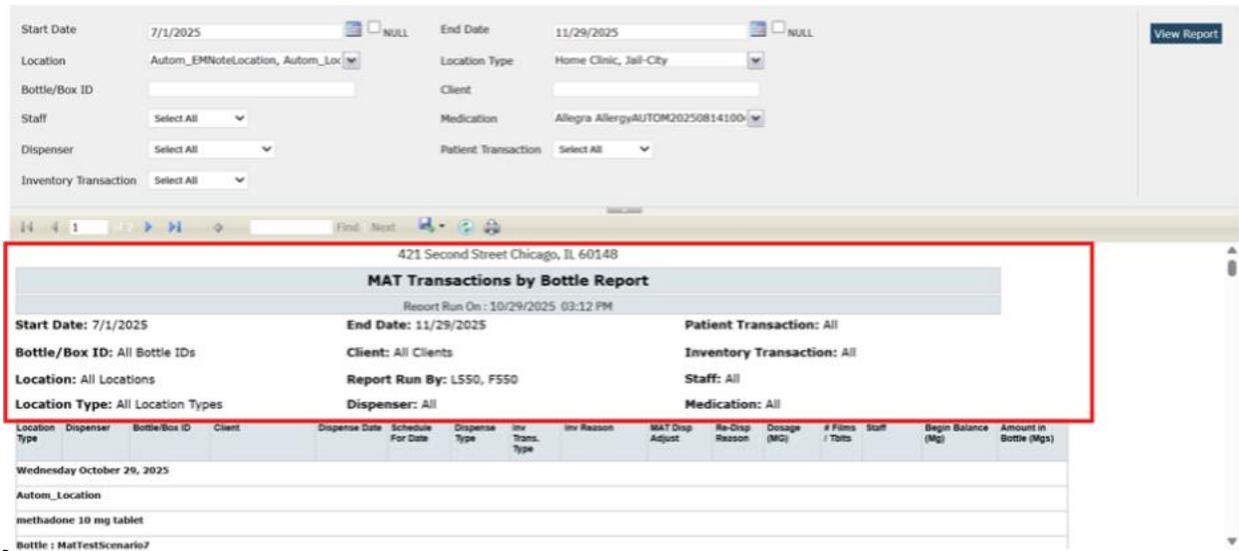
Dispenser: This is a dropdown which will display dispenser name in which medication is dispensed. By default, it will display SelectAll. The "Non Liquid Medication" will be displayed when medication inventory is adjusted at a window in which there is NO DISPENSER associated.

Patient Transaction: This is a dropdown. It has the following options: Dispensed, Pre Pour and Adjustment. By default, Select All will be displayed.

Inventory Transaction: This is a dropdown. It has the following options: Adjustment, Transfer From, Transfer To. By default, Select All will be displayed.

View Report Button: On click of this button, the report will be displayed based on filter criteria.

Header Section: The below fields are present in the Header Section and to be displayed on every page of the report:



Address: The Address field will display the agency address.

Report Name: Renamed the report name to 'MAT Transaction by Bottle Report' from 'MAT Dispensing by Bottle'.

Report Run On label: Date and Time is displayed when the report is run/pulled/executed. This is displayed in MM/DD/YYYY HH:MM:SS AM/PM format.

Sub Header Section: The below fields are present in the Sub Header Section and to be displayed on every page of the report:

Start Date: This is a read only label, and it will display 'Start Date' selected from the filter section in the MM/DD/YYYY format. When the report is displayed on the Bottle/Box ID empty value will be displayed.

End Date: This is a read only label, and it will display 'End Date' selected from the filter section in the MM/DD/YYYY format. When the report is displayed on the Bottle/Box ID empty value will be displayed.

Patient Transaction: This is a read only label, and it will display the Patient Transaction selected from the filter. If no Patient Transaction is selected, All will be displayed.

Bottle/Box ID: This is a read only label, and it will display the Bottle Number selected from the filter. If no Bottle/Box ID is selected, All Bottle/Box IDs will be displayed.

Client: This is a read only label, and it will display the Client Name with Client LastName, FirstName (Client ID) selected from the filter. If no Client is selected, All Clients will be displayed.

Inventory Transaction: This is a read only label, and it will display the Inventory Transaction selected from the filter. If no Inventory Transaction is selected, 'All' will be displayed.

Location: This is a read only label, and it will display the list of Location(s) selected in the filter. If no Location is selected, All Locations will be displayed.

Report Run By: This is a read-only label, and it will display 'Staff Name' who is logged into 'Smart Care' and generates a report. Per users, there needs to be a capability for this report to be run only by users who have permission.

Staff: This is a read-only label, and it will display the Staff Name with Staff Last Name and Staff FirstName selected from the filter. If no Staff is selected, 'All' will be displayed.

Location Type: This is a read-only label, and it will display the 'Location type' selected from the filter. If no Location Type is selected, All Location Types will be displayed.

Dispenser: This is a read-only label, and it will display the 'Dispenser Name' selected from the filter. If no Dispenser is selected, 'All' will be displayed.

Medication: This is a read-only label, and it will display the 'Medication Name' selected from the filter. If no Medication is selected, 'All' will be displayed.

Grid Header Grouping Section: The below fields are present in the Grid Section and to be displayed on every page of the report:

Date: This is a read-only Label displays the Date of Transaction in long date format (e.g. Wednesday September 2, 2025) in grid header grouping section. When the report is run for multiple days, the user can see detail and summary bottle transactions for this day.

Location: This is a read-only label that displays the location that is selected from the filter in grid header grouping section. This will allow the user to run the report for multiple locations, with detail and summary information.

Medication: This is a read-only label that displays the medication name that is selected from the filter in grid header grouping section.

Bottle: This is a read-only label that displays Bottle Id that is selected from the filter name in the grid header grouping section. Display the Bottle/Box ID of each MAT Medication that matches the Grid Header and Sub header groupings that had Transactions during filtered Date Range.

Grid Section: The below fields are present in the Grid Section and to be displayed on every page of the report:

The screenshot shows a report interface with various filters and a data table. The filters include Start Date (7/1/2025), End Date (11/29/2025), Location (Autom_EMNoteLocation, Autom_Loc), Location Type (Home Clinic, Jail-City), Bottle/Box ID, Client, Staff (Select All), Medication (Allegra AllergyAUTOM20250814100), Dispenser (Select All), Patient Transaction (Prepour), and Inventory Transaction (Select All). A 'View Report' button is visible in the top right.

Below the filters, there are summary statistics: Bottle/Box ID: All Bottle IDs, Client: All Clients, Inventory Transaction: All, Location: All Locations, Report Run By: L550, F550, Staff: All, Location Type: All Location Types, Dispenser: All, and Medication: All.

The data table below has the following columns: Location Type, Dispenser, Bottle/Box ID, Client, Dispense Date, Schedule For Date, Dispense Type, Inv Trans. Type, Inv Reason, MAT Disp Adjust, Re-Disp Reason, Dosage (MG), # Films / Tablets, Staff, Begin Balance (Mg), and Amount in Bottle (Mgs). The table shows two rows of data for 'bot5656' with negative dosage values (-10.00 and -17.00).

Location Type: This grid displays the associated 'MATLocationType' Global code value for the associated dispense transaction.

Dispenser: This grid displays the Dispenser / Window name in which medication is dispensed.

Bottle /Box ID: This grid displays the 'Bottle/Box ID' (Medication Inventory Transaction screen) for the associated dispense transaction.

Client: This grid displays the 'Client Name' with Client Last Name, FirstName (Client ID) for all clients who received a dose on date.

Dispense Date: This grid displays the Dispense Date and time (selected Date in Filter) that client received medication dosing in MM/DD/YYYY HH:MM AM/PM format.

Schedule For Date: This grid displays the scheduled date for the Face to Face/Take Home dose in MM/DD/YYYY format. The existing column is renamed from 'Dispense For Date' to 'Schedule For Date'.

Dispense Type: This grid displays the type of dispense as Clinic or Take Home when the row is result of dispense/re-dispense.

If this row is a result of an inventory adjustment, then 'Inv Adjust' will be displayed.

- When the client has been provided either a clinic or take-home medication, the dosage value will be displayed as a negative amount due to the original dose being adjusted when the medication is dispensed(Clinic or Take Home) for the client.
- When client has been provided re-dispense due to instances like Client Request, Client Threw-up, Drug Screen Concerns, Machine Fault, Other, Physician Request, Safety Concerns, Spill, then a row will be displayed with negative dosage(mg) linked to the current bottle in use and the relevant date and time.

Start Date: 7/1/2025 NULL End Date: 11/29/2025 NULL

Location: Autom_EMNoteLocation, Autom_Loc Location Type: Home Clinic, Jail-City

Bottle/Box ID: Client: Medication: Allegra AllergyAUTOM20250814100

Staff: Select All Dispenser: Select All Patient Transaction: Select All

Inventory Transaction: Adjustment

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	MAT Disp Adjust	Re-Disp Reason	Dosage (Mg)	# Films / Tblts	Staff	Begin Balance (Mg)	Amount in Bottle (Mgs)
Wednesday October 29, 2025															
Location01															
methadone 10 mg/ml. oral syringe (FOR ORAL USE ONLY)															
Bottle : BOT6677															
		BOT6677		10/29/2025 02:30 AM		Inv Adjust	Adjustment	Inventory Spill			-300.00	0.00	L550,F350	31991.00	31691.00
Total Per Bottle:											-300.00				
Total Per Medication:											-300.00				
Total Per Location:											-300.00				

Inv Transaction Type: This grid displays the type of transaction as 'Dispense/Adjustment/Prepour' when the row is result of is dispense/inventory type adjustment /pre pour transactions.

1. If this row is a result of Pre-Pour, then 'pre pour' will be displayed. For pre-pour transactions, in the report two transactions will be displayed one a negative dosage(mg) removal from the small bottle and another one a positive dosage(mg) return to the large bottle. Both transactions will be displayed as 'Take Home/Clinic' dispense type with transaction type as 'Pre-Pour' with each transaction linked to the current bottle in use and the relevant date and time.

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	MAT Disp Adjust	Re-Disp Reason	Dosage (Mg)	# Films / Tblts	Staff	Begin Balance (Mg)	
Wednesday October 29, 2025															
Label Location															
methadone 10 mg tablet															
Bottle : 5002															
		5002	Test, Taper4(11797)	10/29/2025 01:08 PM	10/29/2025	Clinic	Prepour				-10.00	0.00	Patil,Chaitali	18936.00	
Total Per Bottle:											-10.00				
Bottle : Prepour-20251029-130831															
		Prepour-20251029-130831	Test, Taper4(11797)	10/29/2025 01:08 PM	10/29/2025	Clinic	Prepour				10.00	0.00	Patil,Chaitali	0.00	

2. If this row is a result of an inventory type adjustment, then 'Adjustment' will be displayed.

3. If this row is a result of an dispense/re dispense, then 'Dispensed' will be displayed.

4. If this row is a result of an transfer from a bottle to another bottle, then 'Transfer To and Transfer From' will be displayed.

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	MAT Disp Adjust	Re-Disp Reason	Dosage (MG)	# Films / Tblts	Staff	Begin Balance (Mg)	Amount in Bottle (Mgs)
Monday October 27, 2025															
Bangalore															
Suboxone 8 mg-2 mg Sublingual Film															
Bottle : bot3															
		bot3		10/27/2025 01:59 PM		Inv Adjust	Transfer To				-8868.00	0.00	Patil,Chaitali	8868.00	0.00

Inv Transaction Reason: This grid displays the reason for inventory adjustment as recorded in Inventory Transaction Detail screen. The following values will be displayed: Inventory Spill, Inventory Correction, Lost, Quarantine, Stolen, Unaccounted, Amount Surrendered, Pre-Pour Returned to Inventory, Variance.

- When nurse has access to edit medication inventory and wants to make adjustment or transfer from a bottle to another bottle then when a positive adjustment is being made to a bottle, a positive amount will be Dosage (MG) column (Ie. 30) and when if the amount of medication in a bottle is being reduced, a negative amount in the Dosage (MG) column (Ie. -30).

For Example : Variance is displayed in the **Inv Reason** column.

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	MAT Disp Adjust	Re-Disp Reason	Dosage (MG)	# Films / Tblts	Staff	Begin Balance (Mg)	Amount in Bottle (Mgs)
Wednesday October 29, 2025															
Office 1															
methadone 10 mg tablet															
Bottle : bolot123															
		bolot123		10/29/2025 01:06 PM		Inv Adjust	Adjustment	Variance			-100.00	0.00	Patil,Vandha	1000.00	900.00

MAT Disp Adjust: This grid displays the reason for reverting dispense as recorded in MAT Dispenses Adjustment popup of MAT Management Details screen. The following values will be displayed: Remove or Void, Spill, Pre-pour Spilled/Wasted.

- When the medication is accidentally spilled by either the nurse or client, in the process of providing client their Clinic or Take-home bottle, then dispense will be marked as 'Spill' and dosage value will be displayed as a negative amount.
- When nurse realizes that the incorrect client has been selected after nurse pours medication into a bottle or cup for a client, then nurse has the rights to return medication to Inventory. In this case the dispense will be marked as 'Remove/Void' and dosage value will be displayed as a positive amount.

Re-Disp Reason: This grid displays the reason for re-dispensing a previously dispensed MAT dose as recorded in MAT Re-Dispense popup of MAT Management Details screen. The following values will be displayed: Client Request, Client Threw up, Drug Screen Concerns, Machine Fault, Other, Physician Request, Safety Concerns, Spill.

Location Type	Dispenser	Bottle/Box ID	Client	Dispense Date	Schedule For Date	Dispense Type	Inv Trans. Type	Inv Reason	MAT Disp Adjust	Re-Disp Reason	Dosage (MG)	# Films / Tblts	Staff	Begin Balance (Mg)	Amount in Bottle (Mgs)
Wednesday October 29, 2025															
Label Location															
methadone 10 mg tablet															
Bottle : 5002															
		5002	Test. Taperweekly(11729)	10/29/2025 02:08 PM	10/29/2025	Clinic	Dispensed			Client threw-up	15.00	0.00	Patil,Chaitali	18911.00	18896.00

Dosage (mg): This grid displays the amount of dosage(mg) which is added/removed from the bottle in the transaction. If medication has been removed from the bottle, then negative dosage value(eg. -30.00) will be displayed. If medication was added to the bottle, then positive dosage value(eg. 30.00) will be displayed.

Films / Tblts: This grid displays the remaining count in the bottle/box for the Films/Tablets for non-liquid medications. This will be displayed in the 00.00 format.

Staff: This grid displays the Staff Name (Staff Last Name, Staff FirstName) who dispensed the MAT dose to the corresponding client on a selected date.

Begin Balance (mg): This grid displays the begin balance in bottle before each dispensing activity. Each time medication is dispensed the next starting amount is the previous amount less the Dosage (MG) provided to the client.

Amount in Bottle (mg): This grid displays the total remaining balance in bottle following each dispensing activity.

Grid Sub Footer Section: The below fields are present in the Grid Section and to be displayed on every page of the report:

Start Date	End Date	Location	Location Type	Bottle/Box ID	Client	Staff	Medication	Dispenser	Patient Transaction	Inventory Transaction
10/27/2025	11/27/2025	268, 3049 2972 L, 314762(Bed Cha	Inpatient, Jail-City, Jail-Country			Patil,Chaitali	10Threshold Methadone 10-1, 2838	Select All	Select All	Select All

5002	Test, Pradeep(6134)	10/27/2025 12:36 PM	10/28/2025	Take Home	Adjustment		Remove or Void			-12.00	0.00	Patil,Chaitali	9881.00	9889.00
5002	Test, Pradeep(6134)	10/27/2025 12:27 PM	10/28/2025	Take Home	Dispensed					-12.00	1.00	Patil,Chaitali	9905.00	9893.00
Total Per Bottle:										-12.00				
Bottle : 5004														
5004	Test, Pradeep(6134)	10/27/2025 12:36 PM		Adjustment	Remove or Void					12.00	0.00	Patil,Chaitali	9989.00	10001.00
Total Per Bottle:										12.00				
Total Per Medication:										0.00				
Total Per Location:										-230.00				
Total Per Date:										-18166.00				
Grand Total										-18166.00				

Total Per Bottle: This is a read only Label display the Total of all Dosages(mg) for all bottles on grid header grouping Bottle.

Total Per Medication: This is a read only Label that displays the Total of all Transactions for the Medication and it will display the summary of dispensed medications.

Total Per Location: This is a read only label that displays the Total of all Transactions for the locations and it will allow the user to run the report for the multiple locations with detail and summary information.

Total Per Date: This is a read only label that displays the total of all Transactions for the date and it will allow user to run the report for multiple days to obtain the detail and summary information for a day.

Grid Footer Section: The below fields are present in the Grid Footer Section:

Grand Total: This Label displays, Total of all Dosages(mg) for all bottles on a selected date.

Prerequisites:

Client has a MAT Medication scheduled and dispensed.

Navigation Path 1: 'Administration' 'Locations' 'Locations' list page Click on 'New' icon 'Location Details' screen Create Location 'Address' section Add the Address Click on Save.

Note: This location needs to be mapped with logged in staff and with the MAT Program as well.

Navigation Path 2: 'Administration' 'Orders' 'Orders' list page Click on New 'Order Details' screen Select 'Order Type' as 'Medication' Enter the required details 'Medication Assisted Treatment' section Select 'Medication Assisted Treatment (MAT)', 'Take Home Allowed', and 'Machine Connection Required' = Yes 'Options' section Select 'Display Program?' = Yes for MAT Orders Enter all the required fields Click on 'Save'.

Navigation Path 3: 'My Office' 'Medication/Lot/Bottle' 'Medication/Lot/Bottle' list page Click on New icon 'Medication/Lot/Bottle Details' screen Select the 'Location' (Created in Navigation path 1) Enter other required fields Click on 'Save'.

Navigation Path 4: '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' Click on 'Save' and 'Sign'.

Navigation Path 5: 'My Office' 'MAT Management' 'MAT Management' list page Click on 'Connect User' icon 'Connection Details' pop up will be displayed Select the 'Machine/Inventory' (Created in Navigation path 3) Select all the required fields Check 'Verified' check box Click on 'Connect'.

Navigation Path 6: 'My Office' 'MAT Management' list page Select the 'Order' (Navigation path 4) Click on 'Dispense icon' 'MAT Management Details' screen Dispense the scheduled dose.

Where to Find It:

Path: My Office 'MAT Transactions by Bottle' Select the required filters Click on 'View Report'.

How It Helps:

- The MAT Transactions by Bottle report is designed to give accurate visibility into medication usage at the bottle level.
- It shows how much medication was dispensed, adjusted, or transferred over a selected date range and location. By including dates, locations, and who performed the transactions, the report helps to track the inventory correctly and supports safety.
- By presenting bottle balances, dosage changes, and responsible staff details, the report supports better inventory control, helps identify usage and ensures traceability for clinical.

60. EII # 132552 (Feature# 600633): MAT Update to Pre Pour Transactions Storage and Display Logic.

Note: This is a Passive Change.

What's Changed:

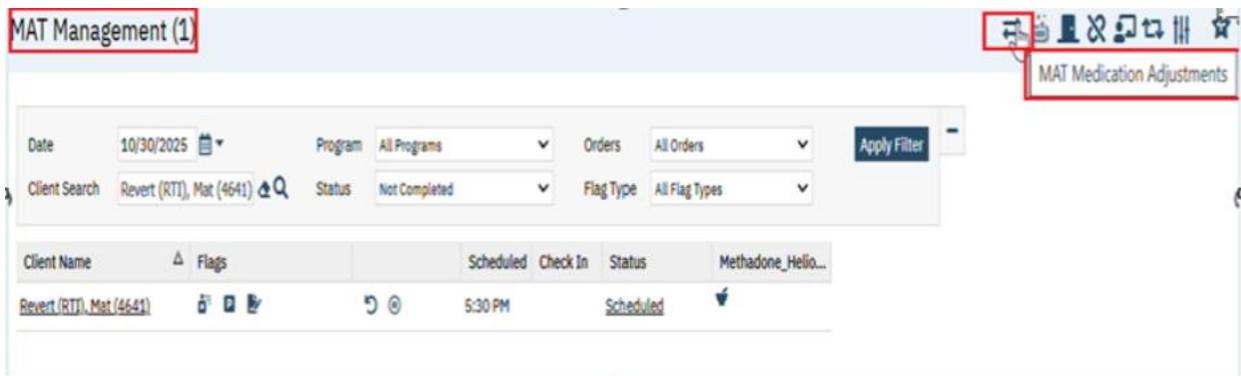
With this release,

1. A new screen named **"MAT Medication Adjustments"** has been introduced.
2. After a dose is **Pre-Poured** or a **Take-Home** dose is dispensed from the **MAT Management Details** screen, the transaction now appears in both the **MAT Medication Adjustments** screen and the **Medication Inventory Transaction** list.
3. Any follow-up action performed from the **MAT Medication Adjustments** screen—such as **Remove/Void, Pre-Pour Return to Inventory, Pre-Pour Spilled/Wasted, Destroy, Spill, Stolen,** or **Quarantine**—is automatically recorded and displayed in the **Medication Inventory Transaction** list for accurate tracking.
4. Users can now return **multiple pre-pour bottles at once** by selecting several records simultaneously within the **MAT Medication Adjustments** screen.
5. The MAT Management screen will continue to be used for revert/remove transactions performed on the current system date. Here, the medication is being placed into the dispensed bottle.
6. In the Medication Inventory Transaction Details screen, 'Pre-Pour Return to Inventory' Adjustment reason has been removed.

1. New Screen: MAT Medication Adjustments

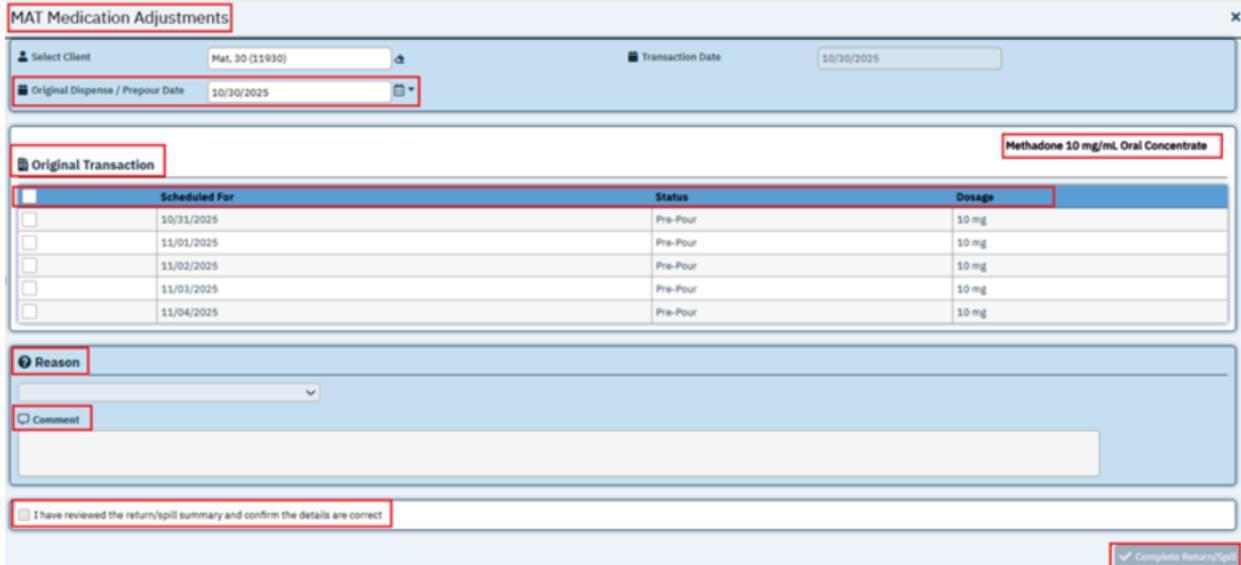
In the MAT Management List screen, a new MAT Medication Adjustments icon  has been added. Clicking this icon opens the MAT Medication Adjustments screen, where users can perform Return to Inventory or Adjustment actions for Pre-Poured or Take-Home bottles.

This screen can also be accessed directly from the (search for: MAT Medication Adjustments (My office)).



This screen will be opened on click of  icon added in the toolbar of 'MAT Management' List page.

Below are the fields present in this screen:



1. **'Select Client'** Searchable Textbox: List the Clients with Lname, Fname(Client ID)
— Allows users to search for clients using either their First Name, Last Name, Client ID, Date of Birth (DOB), Social Security Number (SSN).
2. **'Transaction Date'** label: Auto-populates current date by default and disabled.
3. **'Original Dispense / Pre-pour Date'** Calendar control: Displays blank by default. Selected date should be displayed in the format: MM/DD/YYYY.
4. **'Original Transaction'** Section: Displays the Pre-pour/Take Home transactions for the selected 'Original Dispense / Pre-pour Date'.
 - a. **Checkbox label:** Check, Uncheck
 - b. **'Scheduled For' Label:** Displays the Scheduled Pre-poured/Take Home Dispensed date in the MM/DD/YYYY format.
 - c. **Status:** Displays the status of the original transaction (Take Home or Pre-Pour).
 - d. **Dosage:** Displays the Dose amount in mg selected while signing Client Order.
 - e. **Medication Name:** Order Name added in the Order Setup screen, will be displayed at the top-right corner above the grid.

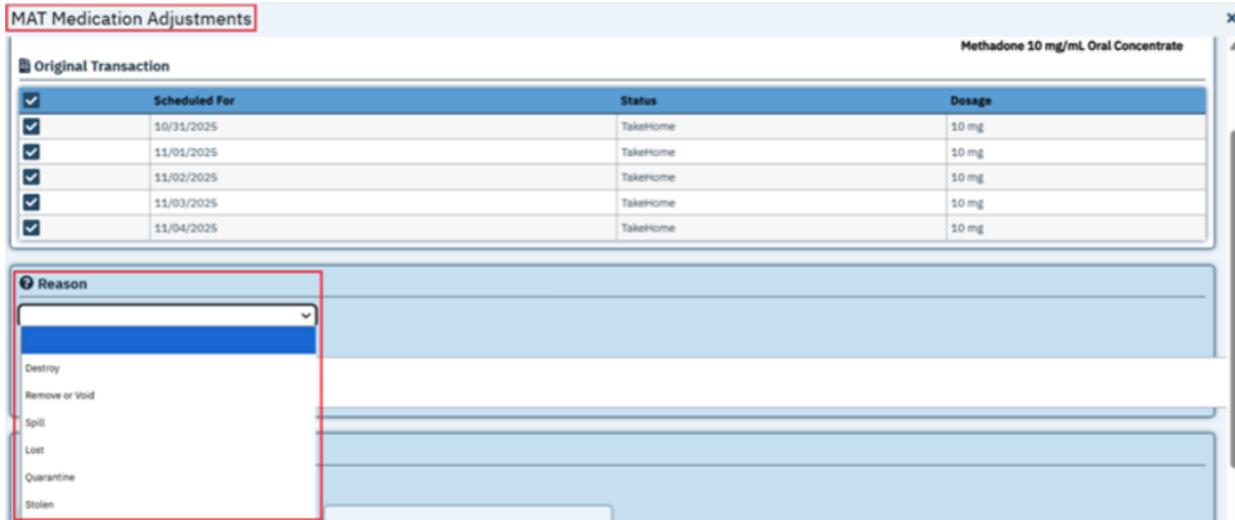
Methadone Medications: Displays quantity in mg for the associated Bottle/Box IDs and Transaction Date.

- f. **Suboxone Medications:** Based on the number of Inventories connected, each column displays respective Inventory connected in the format as mentioned below
"2 mg film/tablet", "8 mg film/tablet", "4mg film/tablet" or 12mg film/tablet.

5. **Reason section:**

Reason dropdown: Lists of the Transactions Reasons based on the Transaction done for the selected Date.

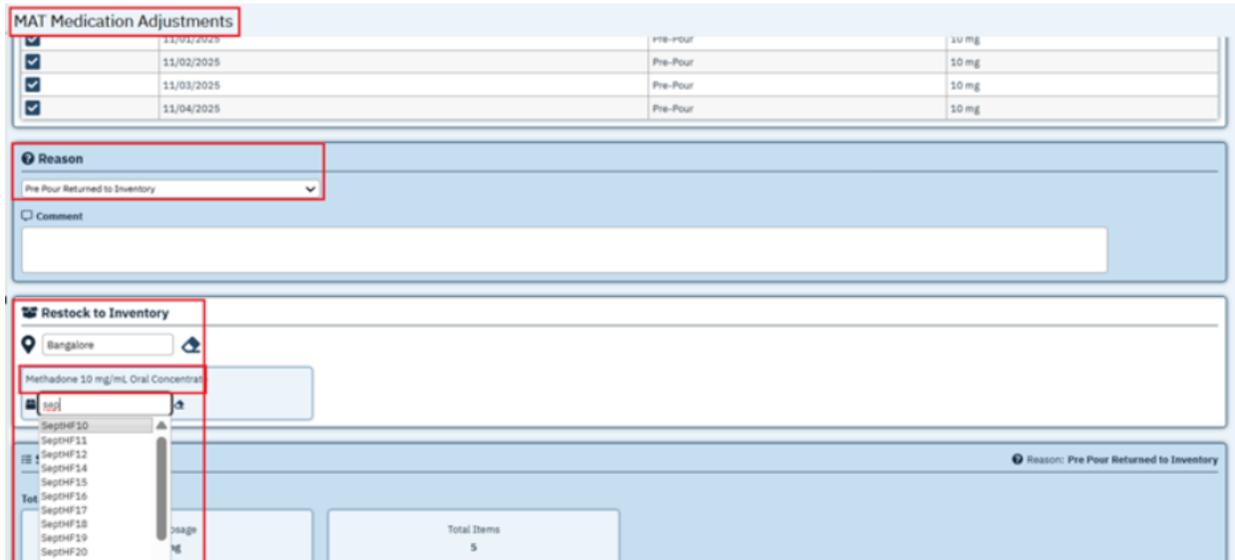
— When **Take Homes** are dispensed for the selected 'Original Dispense / Pre-pour Date', below mentioned Reasons will be displayed — Destroy, Remove or void, Spill, Lost, Quarantine, Stolen.



When **Pre pours** are poured for the selected Original Dispense / Pre-pour Date, the following Reasons will be displayed — Destroy, Lost, Quarantine, Stolen, Pre-Pour Spilled/Wasted, Pre-Pour Returned to Inventory.

g. 'Comment' Text area: It is a text field which allows the user to enter the data.

h. 'Restock to Inventory' Section: When the user selects the reason **"Pre-Pour Return to Inventory"** for a pre-pour transaction or **"Remove or Void"** for a take-home transaction, the **Restock to Inventory** section becomes visible. This section displays the **Location** and corresponding **Bottle/Box ID** related to the selected transaction.



Users must **select the Location first**, and then enter the **Bottle/Box ID** associated with that selected Location.

• **'Enter Location' searchable textbox:** List the Location of the associated transaction.

- **Medication Name' label:** Displays the Order name associated with the Adjustment Details on top of the Enter Bottle/Box ID field.
- **Enter Bottles/Box Id:** List the bottle/box id associated with the selected location.

i. Summary Section:

- a. **'Reason' label:** Display the reason selected in 'Reason' section at the right corner.
- b. **'Total Dosage' label:** Displays the sum, Total dose (mg) for the associated adjustment.
- c. **'Total Items' label:** Display the total count of original transaction selected.

Methadone

MAT Medication Adjustments

Original Transaction

<input checked="" type="checkbox"/>	Scheduled For	Status	Dosage
<input checked="" type="checkbox"/>	10/31/2025	Pre-Pour	10 mg
<input checked="" type="checkbox"/>	11/01/2025	Pre-Pour	10 mg
<input checked="" type="checkbox"/>	11/02/2025	Pre-Pour	10 mg
<input checked="" type="checkbox"/>	11/03/2025	Pre-Pour	10 mg
<input checked="" type="checkbox"/>	11/04/2025	Pre-Pour	10 mg

Reason: Pre-Pour Returned to Inventory

Restock to Inventory

Location: Bangalore

Medication: Methadone 10 mg/mL Oral Concentrate

Summary

Total Dosage: 50mg

Total Items: 5

Subzone: with multiple inventory

MAT Medication Adjustments

<input type="checkbox"/>	Scheduled For	Status	Dosage	0	3	0
<input type="checkbox"/>	11/10/2025	TakeHome	12 mg	0	3	0
<input type="checkbox"/>	11/11/2025	TakeHome	12 mg	0	3	0
<input type="checkbox"/>	11/12/2025	TakeHome	12 mg	0	3	0
<input checked="" type="checkbox"/>	11/14/2025	TakeHome	12 mg	2	0	1

Reason: Remove or Void

Restock to Inventory

Label Location

2mg tablet: 2

8mg tablet: 1

Summary

Reason: Remove or Void

Summary Section: The system will display the medication strength and total tablet count in the following format:

<x> mg tablet

<Total Count of Tablets>

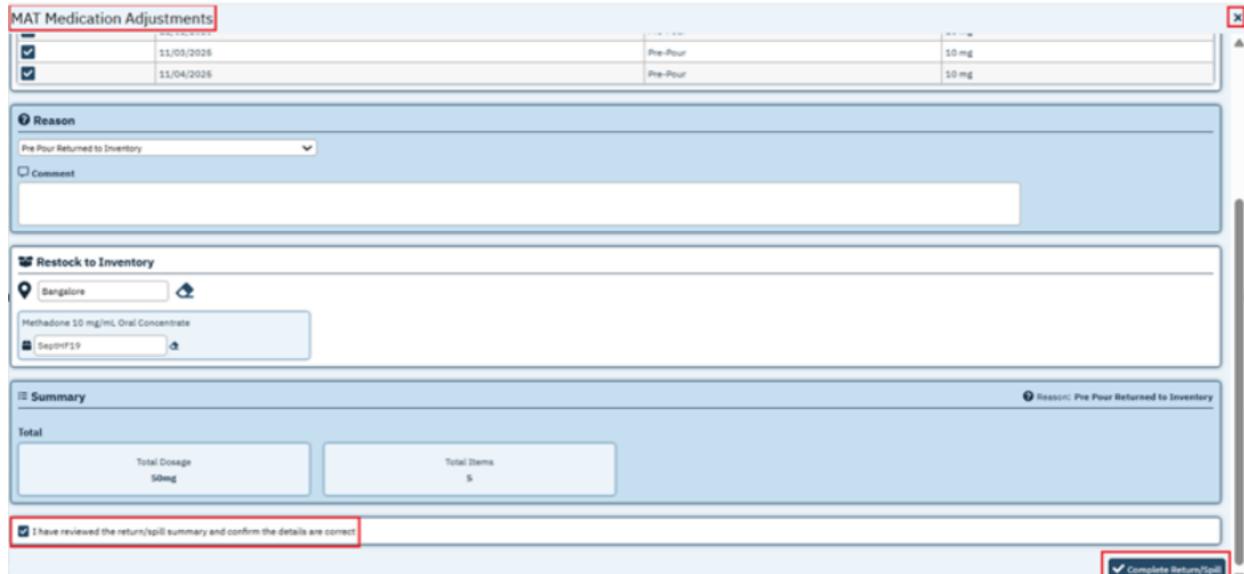
6. Check box for “I have reviewed the return/spill summary and confirm the details are correct”.

— By Default, checkbox will be disabled.

— On selecting Transaction and Reason, checkbox will be enabled. On selecting the checkbox, Complete Return/Spill button will be enabled to click.

7. Complete Return/Spill: On click of this button, subsequent actions (either Return to Inventory or Adjustment) should be performed.

8. Close Button: On click, closes the MAT Medication Adjustments screen.



Below is the functionality for the pre-pour how the transaction will be displayed in 'Medication Inventory Transaction' list page.

1: After pre-pouring the dose from the MAT Management details screen, the system will create two transactions in the Medication Inventory Transaction list screen. Like one record for transfer and one record for received.

One transaction for big bottle with Negative dose for the connected Inventory bottle (which is Transfer) with Transaction type Pre-pour, and one transaction for small Bottle (Pre-pour Bottle) (which is Received) with Transaction type Pre-pour as Positive adjustment.

Pre-pour dose poured in the MAT Management details screen

The screenshot shows the 'MAT Management Details' interface. At the top, it says 'Client has missed 17 dispense(s)' with dates 10/30/2025 and 10/31/2025. Below this is a table titled 'Dispense & No Show History' with columns: Medication, Dose (mg), Dispensed Date & Time, Dispensed for Date, Dose Type, Action Type, and Administered By. The table lists several entries for 'Methadone_Titration STD0' with various dates and actions like 'Re-dispensed' and 'No Show'. Below the table is a 'Commence Pre-pour' section with a 2x4 grid of dates and dosages. The date 11/01/2025 and dosage 1 mg are highlighted with a red box.

Medication	Dose (mg)	Dispensed Date & Time	Dispensed for Date	Dose Type	Action Type	Administered By
Methadone_Titration STD0	9	10/30/2025 10:52 AM	10/31/2025	Take Home	Re-dispensed	Patil, Chaitali
Methadone_Titration STD0	1	10/30/2025 10:51 AM	10/31/2025	Take Home	Dispensed	Patil, Chaitali
Methadone_Titration STD0	1	No Show	10/29/2025	Take Home	No Show	
Methadone_Titration STD0	1	No Show	10/28/2025	Take Home	No Show	
Methadone_Titration STD0	1	No Show	10/27/2025	Take Home	No Show	

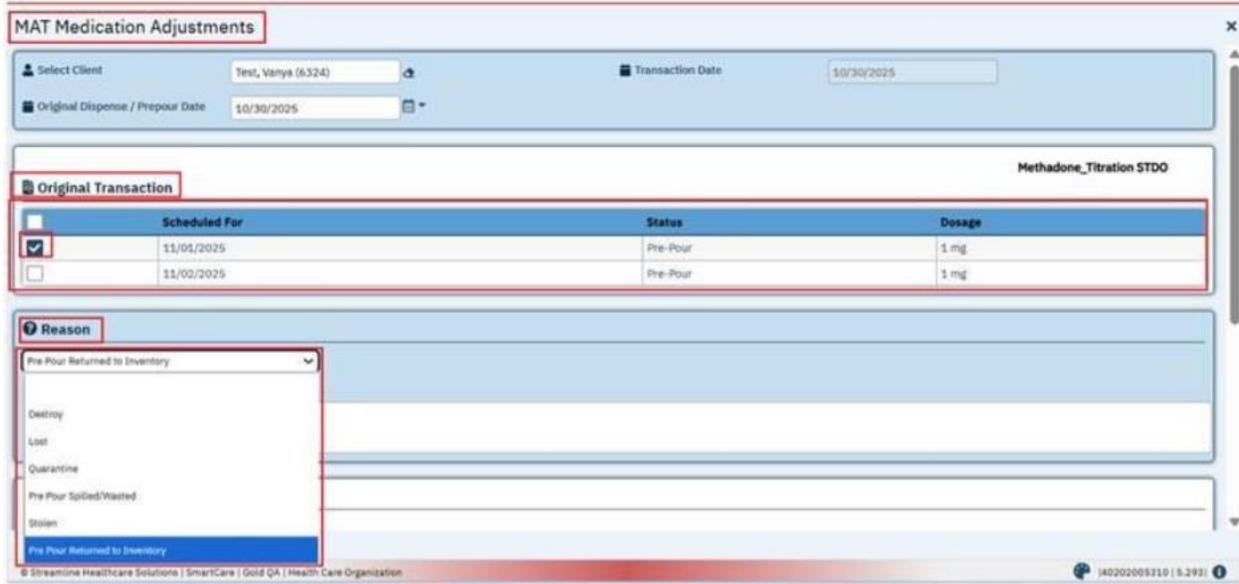
10/30/2025	10/31/2025	11/01/2025	11/02/2025
20 mg	9 mg	1 mg	1 mg

Below transaction will be created in the 'Medication Inventory Transaction list screen'.

The screenshot shows the 'Medication Inventory Transaction (4)' screen. It features search filters for Location, Transaction Date Range, Medication/Strength, Lot #, and Bottle/Box ID. The 'Client' dropdown is set to 'Test SR, Vanya (6324)'. Below the filters is a table of transactions. The table has columns: Transaction ID, Medication, Lot #, Bottle/Box ID, Transaction Type, Quantity, MAT Dispense Type, Transaction Date, and Scheduled For Date. Two rows are highlighted with a red box: Transaction ID 16397 (Prepour) and 16398 (Prepour-20251030-133558).

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date
16395	Methadone 10 mg/ml, Oral Concentr...	Low123	Low125	Dispensed	(1.00)	Take Home	10/30/2025 10:51 AM	10/31/2025
16396	Methadone 10 mg/ml, Oral Concentr...	Low123	Low125	Dispensed	(9.00)	Take Home	10/30/2025 10:52 AM	10/31/2025
16397	Methadone 10 mg/ml, Oral Concentr...	OCT60001	OCT60002	Prepour	(1.00)		10/30/2025 01:35 PM	11/01/2025
16398	Methadone 10 mg/ml, Oral Concentr...	OCT60001	Prepour-20251030-133558	Prepour	1.00		10/30/2025 01:35 PM	11/01/2025

After pre pouring the dose from the MAT Management details screen, **in the new 'MAT Medication Adjustments' screen, those pre pour record will be displayed** and in the reason dropdown corresponding reason will be displayed.



When a user performs any of the following adjustments from the MAT Medication Adjustments screen —such as Remove/Void, Pre-Pour Return to Inventory, Pre-Pour Spilled/Wasted, Destroy, Spill, Stolen, or Quarantine, the corresponding transactions are automatically generated and displayed in the Medication Inventory Transaction list.

A)) Adjustments Reason: for the Pre-pour

- 1: Destroy
- 2: Lost
- 3: Quarantine
- 4: Pre-pour Spilled/wasted
- 5: Stolen
- 6: Pre-pour Return to Inventory

1: Destroy:

When the user selects “**Destroy**” as the reason in the ~~MAT Medication Adjustments~~ screen, the system automatically creates an **Adjustment transaction** in the **Medication Inventory Transaction** list, linked to the corresponding **Pre-Pour Bottle**. For that date, a total of **three transactions** will be displayed, and the **quantity** for the Adjustment transaction is recorded as **0**.

Medication Inventory Transaction (13)

Location: Transaction Date Range: Today From 10/30/2025 To 10/30/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client: Test SR, Vanya (6324)

Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff	Client
hydrocodone 10 mg/ml Oral Concentr...	UK1160002	UK1160002	Adjustment	1.00		10/30/2025 03:13 PM		Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	OCT60003	Adjustment	9.00		10/30/2025 03:13 PM		Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Dispensed	(1.00)	Take Home	10/30/2025 10:51 AM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Dispensed	(9.00)	Take Home	10/30/2025 10:52 AM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Adjustment	1.00		10/30/2025 03:13 PM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Adjustment	(1.00)		10/30/2025 03:13 PM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Adjustment	9.00		10/30/2025 03:13 PM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	Low123	Low125	Adjustment	(9.00)		10/30/2025 03:13 PM	10/31/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	OCT60002	Prepour	1.00		10/30/2025 01:35 PM	11/01/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Prepour	1.00		10/30/2025 01:35 PM	11/01/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	0.00		10/30/2025 03:24 PM	11/01/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	OCT60002	Prepour	1.00		10/30/2025 03:14 PM	11/02/2025	Patil, Chaitali	Test, Vanya (6324)
hydrocodone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Prepour	1.00		10/30/2025 03:14 PM	11/02/2025	Patil, Chaitali	Test, Vanya (6324)

Medication Inventory Transaction (13)

Location: Transaction Date Range: Today From 10/30/2025 To 10/30/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client: Test SR, Vanya (6324)

Scheduled For Date	Staff	Client	Adjustment Reason	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Removed/Voided By	Comment
	Patil, Chaitali	Test, Vanya (6324)	remove or void				remove or void
	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
10/31/2025	Patil, Chaitali	Test, Vanya (6324)			10/30/2025 03:13 PM	Patil, Chaitali	
10/31/2025	Patil, Chaitali	Test, Vanya (6324)		Client Request	10/30/2025 03:13 PM	Patil, Chaitali	x
10/31/2025	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
10/31/2025	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
10/31/2025	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
10/31/2025	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
10/31/2025	Patil, Chaitali	Test, Vanya (6324)	Remove or Void				Remove or void
11/01/2025	Patil, Chaitali	Test, Vanya (6324)	Pre-Pour Dose Poured		10/30/2025 03:24 PM	Patil, Chaitali	Transfer Destroyed: Destroy for 11
11/01/2025	Patil, Chaitali	Test, Vanya (6324)	Pre-Pour Dose Poured		10/30/2025 03:24 PM	Patil, Chaitali	Received Destroyed: Destroy for 11
11/01/2025	Patil, Chaitali	Test, Vanya (6324)	Destroy				Destroy for 11November for Pre pc
11/02/2025	Patil, Chaitali	Test, Vanya (6324)	Pre-Pour Dose Poured				Transfer
11/02/2025	Patil, Chaitali	Test, Vanya (6324)	Pre-Pour Dose Poured				Received

2- Lost:

When the user selects "Lost" as the reason in the **MAT Medication Adjustments** screen, the system automatically creates an **Adjustment transaction** in the **Medication Inventory Transaction** list, linked to the corresponding **Pre-Pour Bottle**. For that date, a total of **three transactions** will be displayed, and the **quantity** for the Adjustment transaction is recorded as **0**.

3- Quarantine:

When the user selects "Quarantine" as the reason in the **MAT Medication Adjustments** screen, the system automatically creates an **Adjustment transaction** in the **Medication Inventory Transaction** list, linked to the corresponding **Pre-Pour Bottle**. For that date, a total of **three transactions** will be displayed, and the **quantity** for the Adjustment transaction is recorded as **0**.

~~4: Pre-pour Spilled/Wasted:~~

When the user selects "~~Pre-Pour Spilled/Wasted~~" as the reason in the ~~MAT Medication Adjustments~~ screen, the system automatically creates an ~~Adjustment transaction~~ in the ~~Medication Inventory Transaction~~ list, linked to the corresponding ~~Pre-Pour Bottle~~. For that date, a total of ~~three transactions~~ will be displayed, and the ~~quantity~~ for the ~~Adjustment transaction~~ is recorded as negative.

~~5: Stolen:~~

When the user selects "~~Stolen~~" as the reason in the ~~MAT Medication Adjustments~~ screen, the system automatically creates an ~~Adjustment transaction~~ in the ~~Medication Inventory Transaction~~ list, linked to the corresponding ~~Pre-Pour Bottle~~. For that date, a total of ~~three transactions~~ will be displayed, and the ~~quantity~~ for the ~~Adjustment transaction~~ is recorded as ~~0~~.

~~6: Pre-pour Return to Inventory:~~

When the user selects "~~Pre-Pour Return to Inventory~~" as the reason in the ~~MAT Medication Adjustments~~ screen, the system automatically creates an ~~Adjustment transaction~~ in the ~~Medication Inventory Transaction~~ list for the bottle that receives the returned dose. For this bottle, an Adjustment record is generated with the corresponding ~~Pre-Pour quantity~~. After performing the ~~Pre-Pour Return to Inventory~~ action, a total of ~~four transactions~~ will be displayed in the ~~Medication Inventory Transaction~~ list for that date.

~~After dispensing the Pre-pour bottles from the MAT Management details screen a new transaction will be automatically created.~~ In the Medication Inventory Transaction List screen and the transaction references the associated Pre-Pour Bottle ID. The transaction type will be displayed as Dispensed and the quantity for the transaction will be recorded as a negative value.

~~When the Pre-Pour dispensed is reverted (Remove/Void) from the new 'MAT Medication Adjustments screen' then in the Medication Inventory Transaction List screen 3 transaction will be created 2 for pre-pour bottle and one for big bottle in which dose is reverted.~~

~~Below is the functionality when the Take Home dose is dispensed in the MAT Management details screen then below transaction will be displayed in 'Medication Inventory Transaction' list page:~~

1: After Dispensing the Take Home dose from the MAT Management details screen system will create one transaction as dispensed (with Negative dose) in the Medication inventory Transaction list screen

~~Take Home dose Dispensed in the MAT Management details screen~~

MAT Management Details Status: Connected

General Dispensing Notes (0)

Dispense Information

Client has Take home bottle(s) to return
 Dispense Date: 10/30/2025 Order End Date: 11/18/2025

Dispense & No Show History See Complete History

Medication	Dose (mg)	Dispensed Date & Time	Dispensed for Date	Dose Type	Action Type	Administered By	Scheduled
Methadone_Hello pre pour	10	10/30/2025 06:24 PM	11/04/2025	Take Home	Dispensed	Patil, Chaitali	No data to display
Methadone_Hello pre pour	10	10/30/2025 06:24 PM	11/03/2025	Take Home	Dispensed	Patil, Chaitali	
Methadone_Hello pre pour	10		11/02/2025	Take Home	MAT Void		
Methadone_Hello pre pour	10	10/30/2025 05:23 PM	11/02/2025	Take Home	Dispensed	Patil, Chaitali	
SN_MAT_Spill Report	5	No Show	10/28/2025	Clinic	No Show		

Commence Pre-pour All selected Print Labels

10/30/2025	10/31/2025	11/01/2025	11/02/2025	11/03/2025	11/04/2025	11/05/2025	11/06/2025	11/07/2025
✓	Ti	Ti	Ti	✓	✓	Ti	Ti	Ti
10 mg								

Below transaction will be created in the 'Medication inventory Transaction list screen'.

Medication Inventory Transaction (18) ☆ ☆ ☆ ⚙ 📄 🏠 ✕

Location: Transaction Date Range: Today From 10/30/2025 To 10/30/2025 Apply Filter

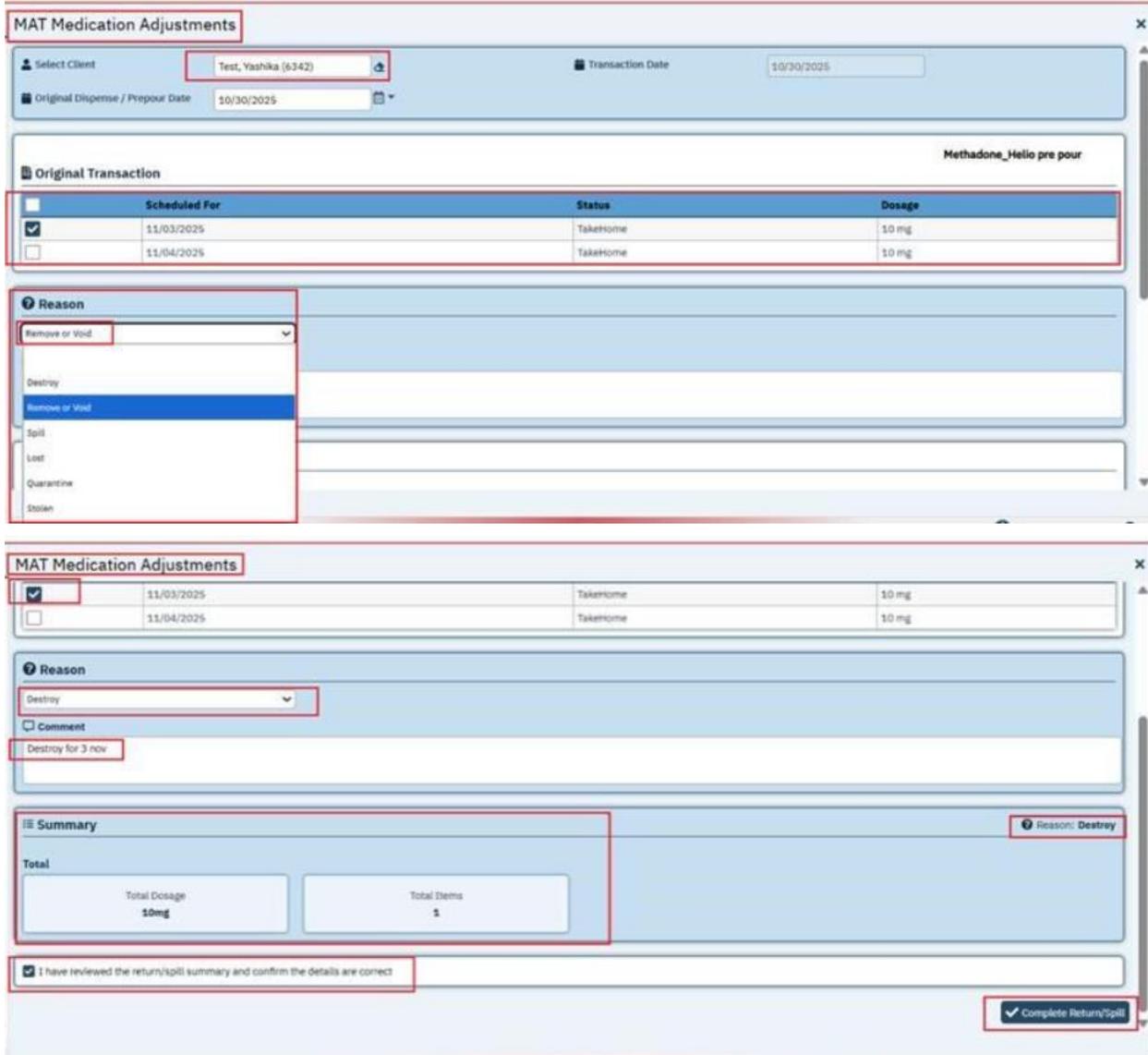
Medication/Strength:

Lot #: Bottle/Box ID: Client: Test JR, Yashika (6342)

All Transaction Type: All Adjustment Reason: All Re-Dispense Reason:

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff
16413	Methadone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Prepour	10.00		10/30/2025 04:17 PM	11/03/2025	Patil, Chaitali
16416	Methadone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	(10.00)		10/30/2025 04:19 PM	10/30/2025	Patil, Chaitali
16417	Methadone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	0.00		10/30/2025 04:25 PM	10/31/2025	Patil, Chaitali
16418	Methadone 10 mg/ml Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	(10.00)		10/30/2025 04:33 PM	11/01/2025	Patil, Chaitali
16419	Methadone 10 mg/ml Oral Concentr...	OCT60001	OCT60003	Adjustment	10.00		10/30/2025 04:33 PM		Patil, Chaitali
16445	Methadone 10 mg/ml Oral Concentr...	Lot410	Bot410	Prepour	(10.00)		10/30/2025 05:22 PM	11/02/2025	Patil, Chaitali
16446	Methadone 10 mg/ml Oral Concentr...	Lot410	Prepour-20251...	Prepour	10.00		10/30/2025 05:22 PM	11/02/2025	Patil, Chaitali
16447	Methadone 10 mg/ml Oral Concentr...	Lot410	Prepour-20251...	Dispensed	(10.00)	Take Home	10/30/2025 05:23 PM	11/02/2025	Patil, Chaitali
16448	Methadone 10 mg/ml Oral Concentr...	Lot410	Prepour-20251...	Adjustment	10.00		10/30/2025 05:35 PM	11/02/2025	Patil, Chaitali
16449	Methadone 10 mg/ml Oral Concentr...	Lot410	Prepour-20251...	Adjustment	(10.00)		10/30/2025 05:35 PM	11/02/2025	Patil, Chaitali
16450	Methadone 10 mg/ml Oral Concentr...	OCT60001	OCT60003	Adjustment	10.00		10/30/2025 05:35 PM		Patil, Chaitali
16495	Methadone 10 mg/ml Oral Concentr...	Lot410	Bot410	Dispensed	(10.00)	Take Home	10/30/2025 06:24 PM	11/03/2025	Patil, Chaitali
16496	Methadone 10 mg/ml Oral Concentr...	Lot410	Bot410	Dispensed	(10.00)	Take Home	10/30/2025 06:24 PM	11/04/2025	Patil, Chaitali

After Dispensing the Take Home, the dose from the MAT Management details screen, **in the new 'MAT Medication Adjustments' screen that record will be displayed** and in the reason dropdown corresponding (Below) reason will be displayed.



When user will do the below Adjustments from this New '**MAT Medication Adjustments**' screen, in the '**Medication inventory Transaction list**' screen below transaction will be created.

B)) Adjustments Reason: for the Take Home Dispense

- 1: Destroy
- 2: Remove or void
- 3: Spill
- 4: Lost
- 5: Quarantine
- 6: Stolen

1: Destroy:

When the user selects "**Destroy**" as the reason in the **MAT Medication Adjustments** screen, the system automatically creates **one Adjustment transaction** in the **Medication Inventory**

Transaction list. For that date, two records will appear — one for the **Dispensed** transaction and one for the **Adjustment (Destroy)**. The **quantity** for the Adjustment transaction is recorded as **0**.

MAT Medication Adjustments

<input checked="" type="checkbox"/>	11/03/2025	Takehome	10 mg
<input type="checkbox"/>	11/04/2025	Takehome	10 mg

Reason

Destroy

Comment

Destroy for 3 row

Summary

Total Dosage 10mg	Total Items 1
-----------------------------	-------------------------

Reason: Destroy

I have reviewed the return/spill summary and confirm the details are correct

Complete Return/Spill

Medication Inventory Transaction (19)

Location: _____ Transaction Date Range: Today From 10/30/2025 To 10/30/2025

Medication/Strength: _____

Lot #: _____ Bottle/Box ID: _____ Client: Test JR, Yashika (6342)

All Transaction Type: _____ All Adjustment Reason: _____ All Re-Dispense Reason: _____

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff
16413	Methadone 10 mg/mL Oral Concentr...	OC-160001	Prepour-20251...	Prepour	10.00		10/30/2025 04:17 PM	11/01/2025	Patil, Chaitali
16417	Methadone 10 mg/mL Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	0.00		10/30/2025 04:25 PM	10/31/2025	Patil, Chaitali
16414	Methadone 10 mg/mL Oral Concentr...	OCT60001	OCT60002	Prepour	(10.00)		10/30/2025 04:17 PM	11/01/2025	Patil, Chaitali
16415	Methadone 10 mg/mL Oral Concentr...	OCT60001	Prepour-20251...	Prepour	10.00		10/30/2025 04:17 PM	11/01/2025	Patil, Chaitali
16418	Methadone 10 mg/mL Oral Concentr...	OCT60001	Prepour-20251...	Adjustment	(10.00)		10/30/2025 04:33 PM	11/01/2025	Patil, Chaitali
16445	Methadone 10 mg/mL Oral Concentr...	Lot410	Bot410	Prepour	(10.00)		10/30/2025 05:22 PM	11/02/2025	Patil, Chaitali
16446	Methadone 10 mg/mL Oral Concentr...	Lot410	Prepour-20251...	Prepour	10.00		10/30/2025 05:22 PM	11/02/2025	Patil, Chaitali
16447	Methadone 10 mg/mL Oral Concentr...	Lot410	Prepour-20251...	Dispensed	(10.00)	Take Home	10/30/2025 05:23 PM	11/02/2025	Patil, Chaitali
16448	Methadone 10 mg/mL Oral Concentr...	Lot410	Prepour-20251...	Adjustment	10.00		10/30/2025 05:35 PM	11/02/2025	Patil, Chaitali
16449	Methadone 10 mg/mL Oral Concentr...	Lot410	Prepour-20251...	Adjustment	(10.00)		10/30/2025 05:35 PM	11/02/2025	Patil, Chaitali
16495	Methadone 10 mg/mL Oral Concentr...	Lot410	Bot410	Dispensed	(10.00)	Take Home	10/30/2025 06:24 PM	11/03/2025	Patil, Chaitali
16498	Methadone 10 mg/mL Oral Concentr...	Lot410	Bot410	Adjustment	0.00		10/30/2025 06:38 PM	11/03/2025	Patil, Chaitali
16496	Methadone 10 mg/mL Oral Concentr...	Lot410	Bot410	Dispensed	(10.00)	Take Home	10/30/2025 06:24 PM	11/04/2025	Patil, Chaitali

Scheduled For Date	Staff	Client	Adjustment Reason	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Removed/Voided By	Comment
10/31/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dose Poured		10/30/2025 04:23 PM	Patil, Chaitali	Received 30mgc dispense for 31 oct
10/31/2025	Patil, Chaitali	Test, Yashika (6342)	Stolen				Stolen for 31 oct
11/01/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dose Poured				Transfer
11/01/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dose Poured				Received
11/01/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Returned to ...				Pre pour Return to Inventory for:
11/02/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dose Poured				Transfer
11/02/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dose Poured				Received
11/02/2025	Patil, Chaitali	Test, Yashika (6342)	Pre-Pour Dispensed		10/30/2025 05:35 PM	Patil, Chaitali	Prepour dispense poured
11/02/2025	Patil, Chaitali	Test, Yashika (6342)	Remove or Void				Pre Pour dispensed remove or vo
11/02/2025	Patil, Chaitali	Test, Yashika (6342)	Remove or Void				Pre Pour dispensed remove or vo
11/03/2025	Patil, Chaitali	Test, Yashika (6342)	Destroy		10/30/2025 06:38 PM	Patil, Chaitali	Destroyed: Destroy for 3 nov
11/03/2025	Patil, Chaitali	Test, Yashika (6342)	Destroy				Destroy for 3 nov
11/04/2025	Patil, Chaitali	Test, Yashika (6342)					

2- Remove or Void:

When the user selects "Remove or Void" as the reason in the MAT Medication Adjustments screen, the system automatically creates three Adjustment transactions in the Medication Inventory Transaction list. For that date, two records are generated for the original (old) bottle and one record for the new bottle with a positive adjustment. The quantity for the Adjustment transaction matches the dispensed amount.

For example, if a 10 mg dose was dispensed, the corresponding Remove or Void transaction will also display 10 mg.

3- Spill:

When the user selects "Spill" as the reason in the MAT Medication Adjustments screen, the system automatically creates one Adjustment transaction in the Medication Inventory Transaction list. For that date, two records will appear—one for the Dispensed transaction and one for the Adjustment (Spill). The quantity for the Adjustment transaction is recorded as 0.

4- Lost:

When the user selects "Lost" as the reason in the MAT Medication Adjustments screen, the system automatically creates one Adjustment transaction in the Medication Inventory Transaction list. For that date, two records will appear—one for the Dispensed transaction and one for the Adjustment (Lost). The quantity for the Adjustment transaction is recorded as 0.

5- Quarantine:

When the user selects "Quarantine" as the reason in the MAT Medication Adjustments screen, the system automatically creates one Adjustment transaction in the Medication Inventory Transaction list. For that date, two records will appear—one for the Dispensed transaction and one for the Adjustment (Quarantine). The quantity for the Adjustment transaction is recorded as 0.

6- Stolen:

When the user selects "Stolen" as the reason in the MAT Medication Adjustments screen, the system automatically creates one Adjustment transaction in the Medication Inventory Transaction list. For that date, two records will appear—one for the Dispensed transaction and one for the Adjustment (Stolen). The quantity for the Adjustment transaction is recorded as 0.

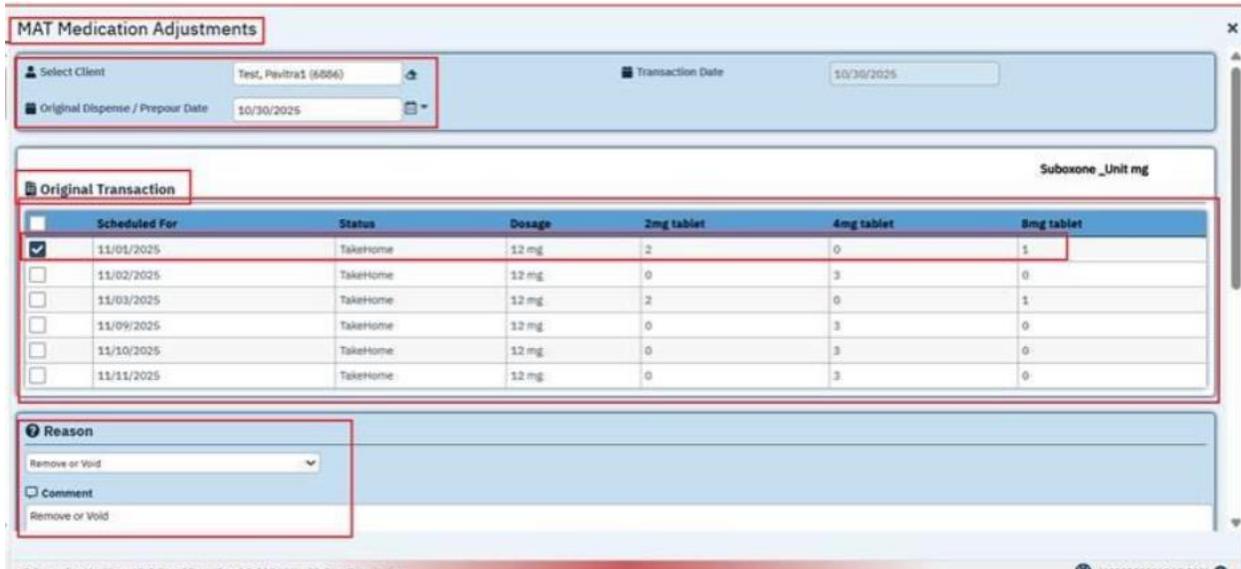
6- For Suboxone transactions—whether Pre-Pour, Pre-Pour Dispensed, or Take-Home Dispensed—the same adjustment reasons are available as for Methadone. The key difference is that

Suboxone may be dispensed from **one or multiple inventories**. Depending on the number of connected inventories, separate columns are displayed in the **MAT Medication Adjustments** screen under the **Original Transaction**, **Restock to Inventory**, and **Summary** sections.

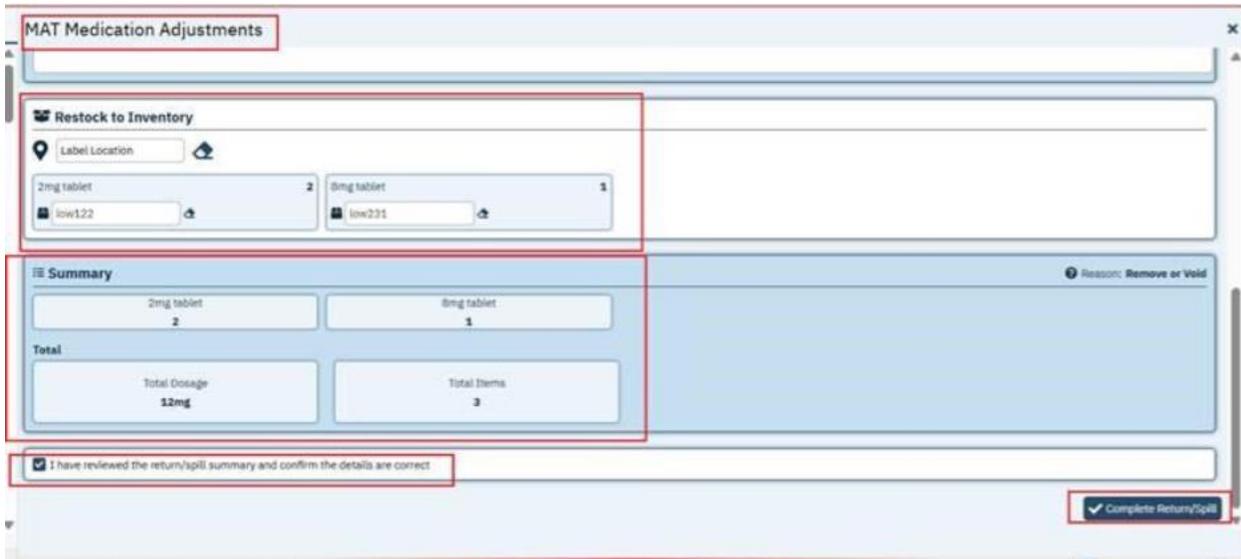
Based on how many inventories are used during dispensing, the corresponding transactions are automatically created in the **Medication Inventory Transaction** list.

Example:

When we do the dispensed from multiple inventories for suboxone then below column will be displayed in the New MAT Medication Adjustments screen under the 'Original Transaction' section:



Restock Inventory and Summary section -



After completing the above Remove or Void in the Medication Inventory Transaction List screen for suboxone below transaction will be displayed:

Medication Inventory Transaction (16)

Location: Transaction Date Range: Today From 10/30/2025 To 10/30/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client: Test SR, Pavitra1 (6886)

Transaction ID	Medication	Lot #	Bottle/Box ID	Transaction Type	Quantity	MAT Dispense Type	Transaction Date	Scheduled For Date	Staff
16563	Suboxone 8 mg-2 mg Sublingual Film	lot1231	low231	Adjustment	8.00		10/30/2025 10:08 PM		Patil, Chaitali
16566	Suboxone 2 mg-0.5 mg Sublingual FL	lot 121	low122	Adjustment	4.00		10/30/2025 10:08 PM		Patil, Chaitali
16557	Suboxone 8 mg-2 mg Sublingual Film	low500	low500	Dispensed	(8.00)	Take Home	10/30/2025 10:00 PM	10/31/2025	Patil, Chaitali
16558	Suboxone 2 mg-0.5 mg Sublingual FL	lotsub2mg	botsub2	Dispensed	(4.00)	Take Home	10/30/2025 10:00 PM	10/31/2025	Patil, Chaitali
16555	Suboxone 8 mg-2 mg Sublingual Film	low500	low500	Dispensed	(8.00)	Take Home	10/30/2025 10:00 PM	11/01/2025	Patil, Chaitali
16556	Suboxone 2 mg-0.5 mg Sublingual FL	lotsub2mg	botsub2	Dispensed	(4.00)	Take Home	10/30/2025 10:00 PM	11/01/2025	Patil, Chaitali
16561	Suboxone 8 mg-2 mg Sublingual Film	low500	low500	Adjustment	8.00		10/30/2025 10:08 PM	11/01/2025	Patil, Chaitali
16562	Suboxone 8 mg-2 mg Sublingual Film	low500	low500	Adjustment	(8.00)		10/30/2025 10:08 PM	11/01/2025	Patil, Chaitali
16564	Suboxone 2 mg-0.5 mg Sublingual FL	lotsub2mg	botsub2	Adjustment	4.00		10/30/2025 10:08 PM	11/01/2025	Patil, Chaitali
16565	Suboxone 2 mg-0.5 mg Sublingual FL	lotsub2mg	botsub2	Adjustment	(4.00)		10/30/2025 10:08 PM	11/01/2025	Patil, Chaitali
16545	Suboxone 4 mg-1 mg sublingual film	Lot420	Botsub420	Dispensed	(12.00)	Take Home	10/30/2025 09:55 PM	11/02/2025	Patil, Chaitali
16559	Suboxone 8 mg-2 mg Sublingual Film	low500	low500	Dispensed	(8.00)	Take Home	10/30/2025 10:00 PM	11/03/2025	Patil, Chaitali
16560	Suboxone 2 mg-0.5 mg Sublingual FL	lotsub2mg	botsub2	Dispensed	(4.00)	Take Home	10/30/2025 10:00 PM	11/03/2025	Patil, Chaitali

Medication Inventory Transaction (16)

Location: Transaction Date Range: Today From 10/30/2025 To 10/30/2025 Apply Filter

Medication/Strength: Lot #: Bottle/Box ID: Client: Test SR, Pavitra1 (6886)

Scheduled For Date	Staff	Client	Adjustment Reason	Re-Dispense Reason	MAT Spill/Remove/Void Date/Time	MAT Spilled/Removed/Voided By	Comment
	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
10/31/2025	Patil, Chaitali	Test, Pavitra1 (6886)					
10/31/2025	Patil, Chaitali	Test, Pavitra1 (6886)					
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)			10/30/2025 10:08 PM	Patil, Chaitali	
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)			10/30/2025 10:08 PM	Patil, Chaitali	
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
11/01/2025	Patil, Chaitali	Test, Pavitra1 (6886)	Remove or Void				Remove or Void 1 nov
11/02/2025	Patil, Chaitali	Test, Pavitra1 (6886)					
11/03/2025	Patil, Chaitali	Test, Pavitra1 (6886)					
11/03/2025	Patil, Chaitali	Test, Pavitra1 (6886)					

Where to Find It:

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

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

Path 3: 'Client' 'Client Orders' 'Client Orders' list page - New 'Client Order details' screen - Select the Order created in (Navigation Path 1) - Enter the required fields - Insert order details into grid - Save and sign.

Path 4: 'My Office' - 'MAT Management' list page - click on 'Connect User' icon - Connection Details pop-up will be displayed - select the Machine /Inventory which created in (Navigation path 2) and other required fields - Click on 'Verified' check box - and click on connect - Machine/Inventory get connected.

Path 5: 'My Office' - 'MAT Management' list page - Select the Order (Navigation path 3) and click on 'Dispense icon' - MAT Management Details - Dispense the scheduled dose OR Pre pour the Dose.

Path 6: My Office' - 'MAT Medication Adjustments' - select the 'Client' - select the 'Original Dispense / Prepour Date' - and verify under the 'Original Transaction' section dispensed/pre pour record should be displayed - select the records - select the reason as 'Remove or Void' for dispensed dose - select the 'location' and bottle and - check the 'I have reviewed the return/spill summary and confirm the details are correct' checkbox - click on 'Complete Return/Spill' button - revert action completed successfully.

Path 7: My Office' - 'Medication Inventory Transaction' list page - and verify the Transaction details for dispensed/Pre pour and 'Remove or Void' etc.

How It Helps:

This enhancement restructures how Pre-Pour transactions are handled and displayed within the MAT workflow to improve transparency, efficiency, and traceability across the MAT Management, MAT Medication Adjustments, and Medication Inventory Transaction screens.

The update ensures:

- All Pre-Pour, Dispense, Adjustment, and Return to Inventory activities are automatically reflected in the Medication Inventory Transaction list.
- Users can return multiple pre-pour bottles at once.
- Each action (Dispense, Re-dispense, Spill, Lost, Destroy, Remove/Void, etc.) generates a corresponding system in Medication Inventory Transaction screens for complete audit tracking.

Data Model Changes:

1. MedicationInventories table - Added column: InventoryType

2. MedicationTransactions table - Added columns:

- **LinkedMedicationInventoryTransactionId**
- **DispensedUnitCount**
- **StaffId**
- **ReDispensedReason**
- **ReDispensedBy**
- **ReDispensedDateTime**

3. MATManagementPrePourDetails table - Added column:

- **DispensedMedicationInventoryTransactionId**

My Documents List Page

Reference No	Task No	Description
61	EII # 131702	Implementation of the "To Do" logic in the 'My Documents' list page and 'Service Note'.

61. EII # 131702 (Feature # 554256): Implementation of the "To Do" logic in the 'My Documents' list page and 'Service Note'.

ACTIVE CHANGE

What's Changed:

SmartCare now supports improved status handling for Service Notes to ensure consistent visibility across status filters.

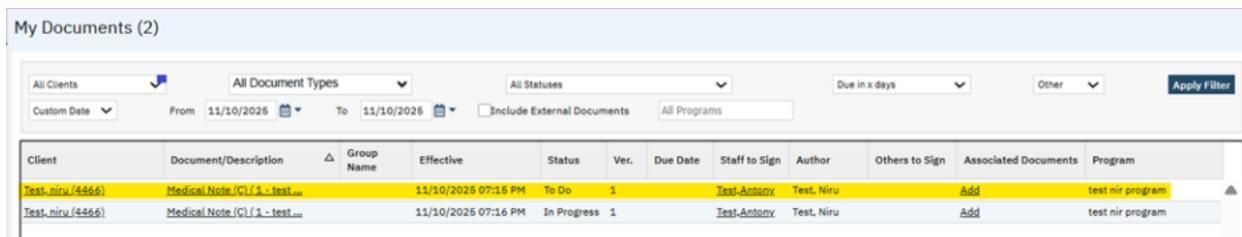
This Active change enhances when a document exists with both "To Do" and "In Progress" statuses, it will now appear as "To Do" in the Grid section when the user filters by "To Do" status by selecting "All Statuses."

Additionally, when the service note is opened, the status is consistently displayed as "To Do," regardless of whether CDAG is ON or OFF.

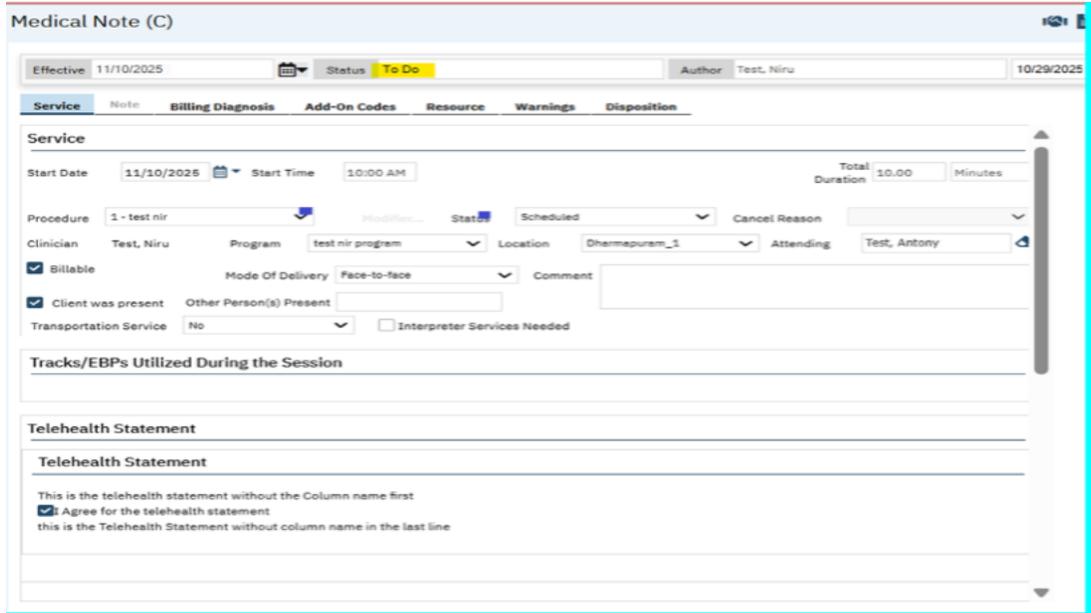
With this update:

When the user selects "All Statuses" on the 'My Document List' page, records display with a "To Do" status, and opening a 'Service Note' record with this status retains the "To Do" status. This behavior applies regardless of whether CDAG is ON or OFF.

Screenshot 1: Shows 'To Do' record



Screenshot 2: Shows opening 'To Do' record



Where to Find It:

Path 1: 'Client' - 'Services/Notes' - 'Services/Notes' list page - Click on 'New' icon - 'Service Note' page - Select the required data and select status as 'Scheduled' and click on 'Save' icon.

Path 2: Select the above selected client - 'Services/Notes' - 'Services/Notes' list page - Click on 'New' icon - 'Service Note' page - Select the required data and select same Client ID, same date, and same note with status as 'Show' and click on 'Save' icon.

Path 3: 'My Office' - 'My Documents' - 'My Documents' list page - Click on the above created 'To Do' status 'Document/Description' hyperlink - 'Service Note' page.

How It Helps:

Resolves conflicting logic in the Status column on the 'My Documents list' page for Service Note records to ensure consistent behavior and reduce user confusion.

My Reports

Reference No	Task No	Description
62	EII # 132127	Changes in the filter logic for 'Revenue Report'.

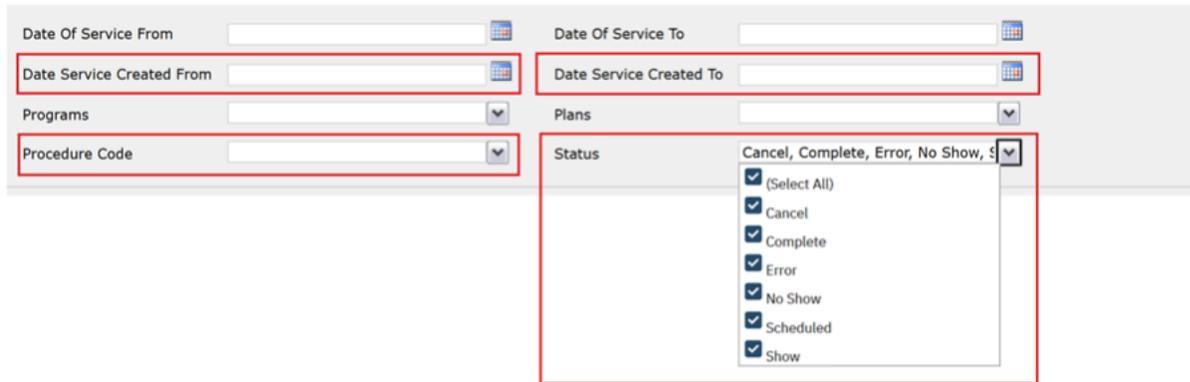
62. EII # 132127 (Feature # 576368): Changes in the filter logic for 'Revenue Report'.

Note: This is a passive change.

What's Changed:

SmartCare now supports enhanced filter usability by aligning the "All" status functionality and ensuring consistency across reports. This passive change makes the report more user-friendly, reduces confusion, and enables more accurate data analysis.

Filter logic update in the 'Revenue Report':



1. **Date Service Created From:** This field will now be defaulted to blank, allowing users to enter custom date ranges in this field without any pre-set values.
2. **Date Service Created To:** This field will now be defaulted to blank, allowing users to enter custom date ranges in this field without any pre-set values.
3. **Procedure Code:** This field will now default to blank, allowing users to manually select only the codes relevant to their needs.
4. **Status:** The 'Service Status' filter has been converted to a multi-select dropdown, with the default selection set to "All Status". This enhancement now accurately represents all service statuses (e.g., 'Complete', 'Error', 'No Show', 'Cancel', 'Show', 'Scheduled' etc).

Note: For all Status to work, i.e., to show Services with 'No Show', 'Cancel', 'Show' and 'Scheduled' statuses, all the Plans must be selected in the 'Plans' criteria filter.

Screenshot of the whole Revenue Report:

Service Id	Charge ID	Program Name	Client Name	Client ID	DOB	Procedure Name	Billing Diagnosis 1	Billing Diagnosis 2	Billing Diagnosis 3	CPT Code	Date Of Service	Units	Original Charge	Current Charge	Amount Paid	Amount Adjusted	Amount Transferred	Balance
119401860		Inpatient	Brett Bennett	3	1/8/1954	Residential Day					07/14/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
119401945		Inpatient	Brett Bennett	3	1/8/1954	Residential Day					07/15/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
119402032		Inpatient	Brett Bennett	3	1/8/1954	Residential Day					07/16/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
119402117		Inpatient	Brett Bennett	3	1/8/1954	Residential Day					07/17/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
119402207		Inpatient	Brett Bennett	3	1/8/1954	Residential Day					07/18/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
119402292		Inpatient	Brett	3	1/8/1954	Residential					07/19/2025		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Where to Find It:

Path: 'My Office' -- 'My Reports' -- Search for 'Revenue Report' -- Enter all the parameters and click on 'View Report' button.

How It Helps:

- This filter logic is updated to improve accuracy and usability in the *Revenue Report*. Also to deliver a more comprehensive and flexible reporting experience.

Orders

Reference No	Task No	Description
63	EII # 128408	To disable/enable the auto-completion functionality for a lab order based on the SetDualReviewForLabOrderCompletion configuration key setup.
64	EII # 132627	Implementation of New System Configuration Key to enable/disable the Med-Sig hyperlink in Client Orders Screen
65	EII # 131698	Changes are implemented to capture and record specimen details for all lab orders

63. EII # 128408 (Feature # 403080): To disable/enable the auto-completion functionality for a lab order based on the SetDualReviewForLabOrderCompletion configuration key setup.

Note: This is a passive change.

What's Changed:

With this release, a new configuration key '**SetDualReviewForLabOrderCompletion**' is implemented and when the key value is 'Yes', system will disable the auto-completion functionality and when the key value is 'No', system will enable the auto-completion functionality (existing functionality) for all the lab orders.

System Configuration Key Details:

Configuration Key: SetDualReviewForLabOrderCompletion

Read Key as: Set Dual Review For Lab Order Completion.

Allowed Values: Yes, No.

Default Value: No

Modules: SCM Order Entry

Description:

This system configuration key is to be used to control the auto-completion behavior set in the lab orders. The value of this key will determine whether the system should automatically complete lab orders after clinician review or not.

1.) When the key value is set to "Yes", the system will disable the auto-completion functionality for all the lab orders. All the lab orders must be reviewed by both the nurse and the clinician staff before the system automatically updates the status of the order as "Complete". Alternatively, either the nurse or the doctor may manually mark the order as completed.

2.) When the key value is set to "No", the system will maintain the current workflow: once a Nurse reviews the lab orders, the Order Status will automatically update to 'Nurse Reviewed'. After the Doctor completes their review of the same lab order, the Order Status will then update to 'Complete'. **This is the Default setting.**

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". The below changes are implemented in the 'Client Order Details' and 'Lab Results Review' screens for the Lab Orders.

When the **Configuration Key 'SetDualReviewForLabOrderCompletion' = 'Yes'**

Changes in Client Order Details screen

When the Nurse reviews the lab order, the status will automatically update to '**Nurse Reviewed**' upon clicking on 'Nurse Reviewed' button in the 'Review' tab in Client Order Details screen.

After the Nurse reviews the order, the Provider reviews it, and then the order will automatically update to '**Complete**' on click of 'Reviewed' button in the 'Review' tab in Client Order Details screen.

When the Provider reviews the lab order first, the status of the order will automatically update to '**Reviewed**' upon clicking the 'Reviewed' button in the 'Review' tab in Client Order Details screen.

After the Provider reviews the order, and the Nurse reviews it, the order will automatically updates to '**Complete**' button in the 'Review' tab in Client Order Details screen.

If either the Nurse or the Provider reviews the lab order and manually sets the status to '**Complete**' selecting it from the '**Status**' dropdown in the 'Client Order Details' screen or from the 'Client Orders screen', the order status automatically updates to '**Complete**' upon saving/signing.

The functionality of the other statuses for the lab order will not be affected by these changes.

Changes in Lab Results Review screen

When the Nurse reviews the lab order, the status will automatically update to 'Nurse Reviewed' upon clicking on 'Nurse Reviewed' button in the 'Review' section in Lab Results Review screen.

After the Nurse reviews the order, the Provider reviews it, and then the order will automatically update to 'Complete' on click of 'Reviewed' button in the Lab Results Review screen.

When the Provider reviews the lab order first, the status of the order will automatically update to 'Reviewed' upon clicking the 'Reviewed' button in the Lab Results Review screen.

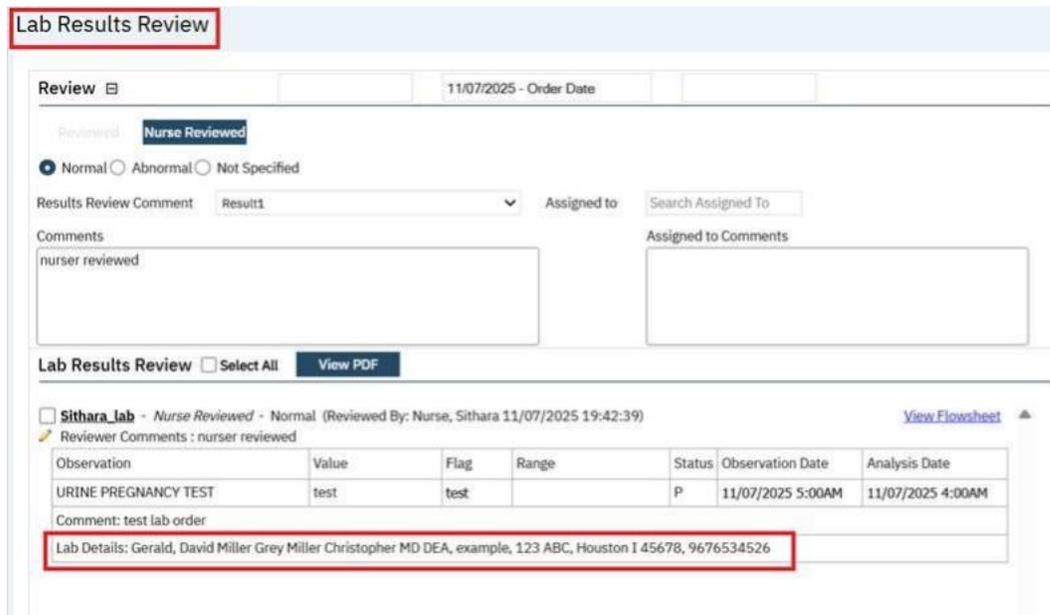
After the Provider reviews the order, and the Nurse reviews it, the order will automatically update to 'Complete' button in the 'Review' tab in Lab Results Review screen.

When the **Configuration Key 'SetDualReviewForLabOrderCompletion' = 'No'**

The system will work as per the existing functionality i.e., when a Nurse reviews the lab orders, the Order Status will automatically update to 'Nurse Reviewed'. After the Doctor completes their review of the same lab order, the Order Status will then update to 'Complete'.

New section Lab Details:

A new section **Lab Details** is added in the 'Review' section of 'Lab Results Review' screen at the end of each **"Reviewer Comments:"** grid for each lab result.



This new section will hold the Lab details, and these details will be pulled from Client Orders → Lab Results → Observation → Lab Name and Address, Lab Phone Number, and Lab Medical Director.

The details will be displayed in the following format:

Format: Lab Medical Director, Lab Name and Address, Lab Phone Number.

If there are no values present in any of the following fields — Client Orders → Lab Results → Observation → Lab Name and Address, Lab Phone Number, and Lab Medical Director — the section will display as blank.

Where To Find It:

Path 1: 'Client' --- 'Client Orders' screen --- Click on 'New' icon --- Search and select a 'Lab Order' --- Enter required data --- Click on 'Insert' button --- Click on 'Save/Sign' button --- Go to 'Client Orders List Page' --- Click and open the Lab Order --- 'Client Order Details' screen --- 'Lab Results' tab --- Add a result --- 'Review' tab --- Click on 'Nurse Reviewed' or 'Reviewed' button.

Path 2: 'Client' --- 'Lab Results Review' screen --- Select one order from the 'Lab Results Review' section – Go to 'Review' section --- Click on 'Nurse Reviewed' or 'Reviewed' button.

How it Helps:

Ability to disable/enable the auto-completion functionality for a lab order based on the configuration key setup.

Allows staff to view lab details—such as the lab name, address, phone number, and medical director—on the Lab Results Review screen along with the results.

64. EII # 132627 (Feature # 612498): Implementation of New System Configuration Key to enable/disable the Med-Sig hyperlink in Client Orders Screen.

Note: This is a Passive Change

What's Changed:

With this release, a new System Configuration Key called 'EnableFreeTextSigPopup' is implemented to enable or disable the Med-Sig text hyperlink in the Client Orders screen (Orders, Order Sets, Preferences tabs). Earlier the Med-Sig text hyperlink was always active, allowing users to access and edit the Free-Text Sig without restriction.

Configuration Key Details:

SystemConfigKey: EnableFreeTextSigPopup

Allowed Values: Both, Orders, Rx, None

Default Value: Both

Read Key as: Enable Free Text Sig Popup

Description:

This is a new feature being added to the core product by introducing a system configuration key for the system to enable/disable the Free-Text Sig functionality on Client Orders and/or Rx.

- 1.) If the key value is set to 'Both', then in the Client Order screen and Rx application, the Free-Text Sig is enabled. **This is the default behavior.**
- 2.) If the key value is set to 'Orders', then the Free-Text Sig is enabled in the Client Order screen and disabled in the Rx application.
- 3.) If the key value is set to 'Rx', then the Free-Text Sig is enabled in the Rx application and disabled in the Client Order screen.
- 4.) If the key value is set to 'None', then the Free-Text Sig is disabled in the Client Order screen and the Rx application.

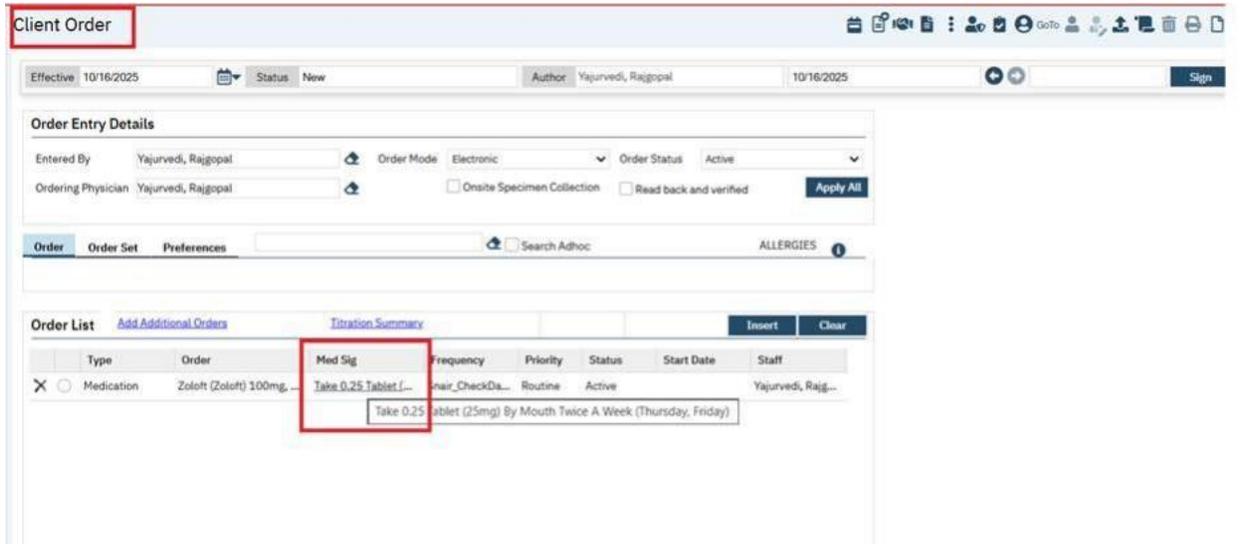
Note:

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 'Both'.

Scenario 1: When the Configuration Key value is 'Both', 'Orders' or Values other than allowed values.

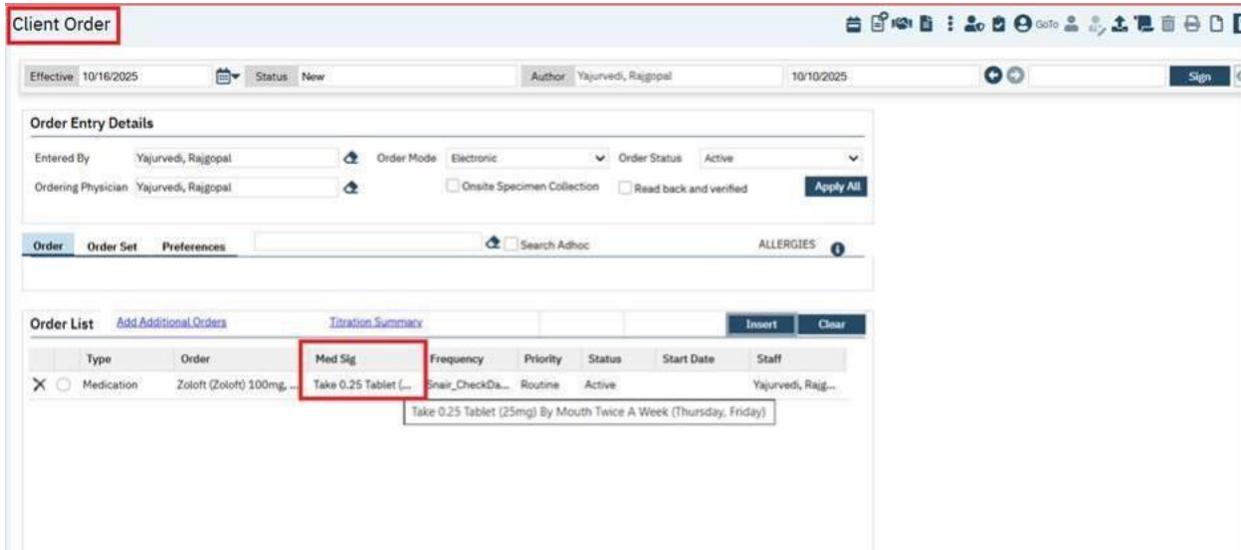
Med-Sig text hyperlink will be enabled, allowing the users to click and update the Free-Text Sig.

Screenshot:



Scenario 2: When the Configuration Key value is 'None or 'Rx'

Med-Sig text hyperlink will be disabled, users will not be able to click and update the Free-Text Sig.



Where to Find It:

Path 1: Administration - 'Configuration Keys' - 'Configuration Keys' list page - Click on 'EnableFreeTextSigPopup' key hyperlink - 'Configuration Key Details' page.

Path 2: Client - Search 'Client Orders' - Click 'New' - Search and select a Medication Type Order - Fill required details and Click on Insert/Modify.

How It Helps:

Provides the flexibility for the system to enable/disable the Free-Text Sig functionality on Client Orders.

65. EII # 131698 (Feature # 553458): Changes are implemented to capture and record specimen details for all lab orders.

Note: This is a [Passive Change](#).

What's Changed:

With this release, the following changes have been implemented to capture and record specimen details for all lab orders that involve onsite specimen collection in the 'Order Details' and 'Client Order Details' screens for the Lab Orders. Also, A new 'SpecimenAcceptable' global code has been newly added.

'Order Details' and 'Client Order Details' screens Enhancement:

- In the 'Order Details' screen, a new field 'Show Specimen Details' has been added in the 'Options' section and will be displayed only when the order type is selected as 'Lab' in the 'Order Setup' section. It is a radio button with 'Yes' and 'No' options, and 'No' is selected by default.
- When the user selects 'Yes', the 'Specimen Details' tab will be displayed for all lab orders in the 'Client Order Details' screen that has the 'Onsite Specimen Collection' field selected.
- When the user selects 'No', the 'Specimen Details' section will not be displayed for any lab orders that have the regardless of whether the 'Onsite Specimen Collection' field is selected or not. And its not a required field in the Order Setup screen.

Order Details

Order Details

Order Setup

Order Type Labs Procedure Code Procedure_Sithara_Days Active

Health Data Template PREGNANCY TEST Urine Order Name Sithara_lab Cannot Modify Order Name

Alternate Name1 Brand Name SUD

Order Details

Priorities

Priorities Add

Default	Priority
<input checked="" type="checkbox"/>	STAT

Schedules

Schedules Add

Default	Schedule
<input checked="" type="checkbox"/>	Tomorrow
<input type="checkbox"/>	Other

Medication Assisted Treatment

Medication Assisted Treatment (MAT) Yes No

Toxicology Screen Yes No

Laboratories

Laboratories Add

External Order Id

Default	Laboratories	External Order Id
<input checked="" type="checkbox"/>	LabCorp	

Order Details

The screenshot shows the 'Order Details' interface with several sections:

- Medication Assisted Treatment:** Radio buttons for 'Yes' and 'No' for both 'Medication Assisted Treatment (MAT)' and 'Toxicology Screen', with 'No' selected for both.
- Laboratories:** A dropdown menu for 'Laboratories' and an 'Add' button. Below is a table with columns 'Default', 'Laboratories', and 'External Order Id'. One entry is visible: 'LabCorp' with a selected radio button.
- Frequencies:** A dropdown menu for 'Frequencies' and an 'Add' button. Below is a table with columns 'Default', 'Display Name', 'Frequencies', and 'Dispense Times'. It shows 'No data to display'.
- Diagnoses:** A search box and an 'Add' button. Below is a table with columns 'Default', 'DSM 5/ ICD 10', and 'ICD/ DSM Description'. It shows 'No data to display'.
- Options:** A list of settings with radio buttons for 'Yes' and 'No':
 - Order can be completed: No
 - Order can be pended: No
 - Order Rationale: No
 - Order Comments: No
 - Whiteboard Observations: No
 - Diagnosis Required: No
 - Billable: Yes
 - Add Order to MAR: No
 - Add Ordering Physician Co-Sign: No
 - Permissioned?: No
 - Sensitive Order: No
 - Draw from Service Center: No
 - Quick Order: No
 - Display Program?: Yes
 - Public Health Reportable: No
 - Clinic/Location(default): 652 Feather Rd
 - Show Specimen Details: No

- 'Specimen Details' tab will not display in the 'Client Order Details' screen, when 'Show Specimen Details = No' and 'Onsite specimen collection = Yes/No'
- The 'Specimen Details' tab will be displayed in the 'Client Order Details' screen when 'Show Specimen Details' = 'Yes' in the 'Options' section of 'Order Details' screen and 'Onsite specimen collection' = 'Yes' in the Client Order.

The screenshot shows a web application interface for 'Client Order Details'. At the top, there's a header 'Client Order Details' with a red border. Below it is the 'Order Entry Details' section, which includes fields for 'Ordered By' (Smith, Tester), 'Ordering Physician' (Smith, Tester), 'Order Mode' (Electronic), 'Order Status' (Pending Specimen Collection), 'Onsite Specimen Collection' (checked), 'Read back and verified' (unchecked), 'Specimen Collected' (unchecked), and 'Collection Date'. Below this is a navigation bar with tabs: 'Order', 'Lab Results', 'Attachments', 'Review', and 'Specimen Details' (highlighted with a red border). The 'Specimen Details' section contains four fields: 'Specimen Source' (with a search icon), 'Specimen Identifier' (a text box), 'Specimen Type' (with a search icon), and 'Specimen Source Site' (a text box). At the bottom of this section is 'Specimen Condition Acceptability' with a dropdown menu set to 'Acceptable'. The entire 'Specimen Details' section is enclosed in a red border.

The 'Specimen Details' tab contains the below fields.

- **Specimen Source:**
 - o The user can enter any value in this field. When the user enters a value in this field, all possible matching values are displayed in a list below, and the search is not case-sensitive.
 - o The user must enter a minimum of five characters to list the possible values. The list displays exact matches first, followed by partial matches of the text entered by the user.
 - o This field is visible and editable only when the 'Onsite Specimen Collection' option is selected, and when the 'Show Specimen Details' option in the order set for the selected order is marked as 'Yes'.
 - o The values for this field are retrieved from the new database table 'SpecimenSources'.
 - o By default, this field is blank. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Source is required."

- **Specimen Identifier:** This is a comment box with a maximum limit on the number of allowed characters. The user manually enters the values. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Identifier is required."

- **Specimen Type:**
 - o The user can enter any value in this field. When the user enters a value in this field, all possible matching values are displayed in a list below, and the search is not case-sensitive.
 - o The user must enter a minimum of five characters before the list of possible values from the database is displayed. The field displays exact matches first, followed by partial matches of the text entered by the user.
 - o The field is visible and editable only when the 'Onsite Specimen Collection' option is selected, and when the 'Show Specimen Details' option in the order set for the selected order is marked as 'Yes'.

- o The values for this field are retrieved from the new database table 'SpecimenTypes'.
- o By default, the field is blank. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Type is required."

- **Specimen Source Site:** This is a comment box with a maximum limit on the number of allowed characters. The user manually enters the values. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Source Site is required."

- **Specimen Condition Acceptability:** The user can select any one of the values from the dropdown. By default, the value 'Acceptable' is selected when this section loads. This field displays the values from the custom global code 'SpecimenAcceptable'. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Condition Acceptability is required."

- **Specimen Condition Acceptability Text Area:** When the user selects the 'Other' option in the 'Specimen Condition Acceptability' field, this field becomes visible; otherwise, it remains hidden. This is a required field, and a validation message will be displayed on 'Save' if left blank.

Validation Message: "Client Order Details - Specimen Details - Specimen Condition Acceptability Other Text is required."

Global Code details:

Category Code: SpecimenAcceptable

Category Name: Specimen Acceptable.

Active: Yes

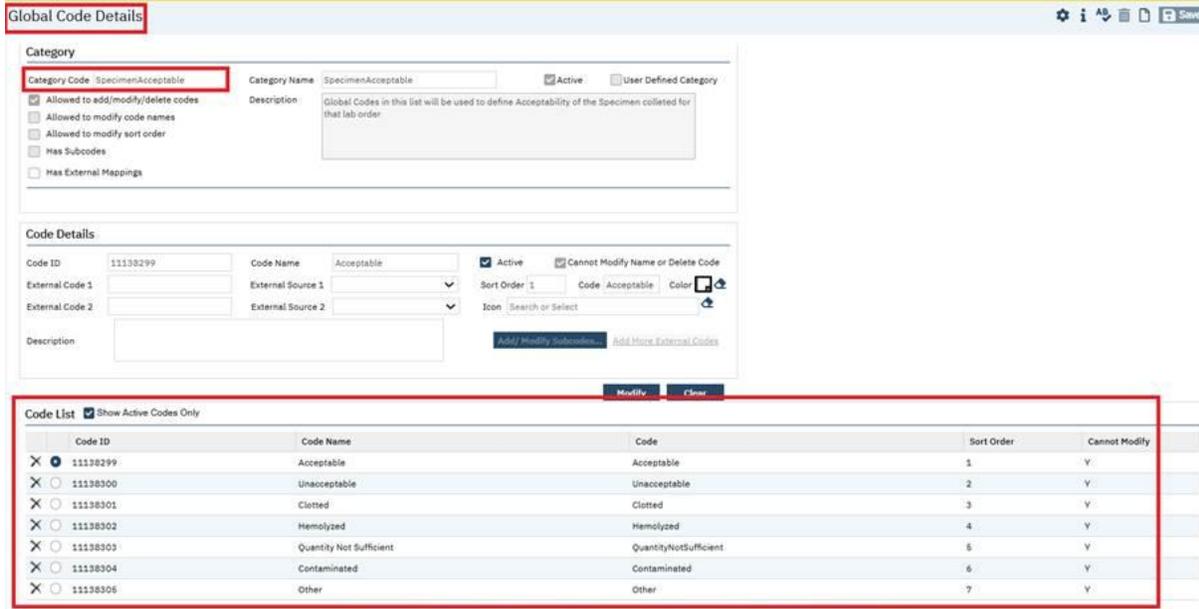
Allowed to Add/Modify/Delete codes: Yes

Allowed to modify code names: No

Allowed to modify sort order: No

Has Subcodes: No

Description: Global Codes in this list will be used to define Acceptability of the Specimen collected for that lab order.



Where To Find It:

Navigation Path 1: 'Administration' -- 'Orders/Order Setup' screen -- Click on 'New' icon -- Search and select a 'Lab Order' or open an existing 'Lab Order' -- 'Options' section -- 'Show Specimen Details' field.

Navigation Path 2: 'Client' -- 'Client Orders' screen -- Click on 'New' icon -- Search and select a 'Lab Order' -- Enter required data -- Select 'Onsite Specimen' checkbox -- Click on 'Insert' button -- Click on 'Save/Sign' button -- 'Client Orders' list page -- Click on the 'Lab Order' name -- 'Client Order Details' screen.

Navigation Path 3: Administration -- 'Global Codes' -- 'Global Codes' list page -- Search and select 'SpecimenAcceptable' -- 'Global Code Details' screen

How It Helps:

- This provides the ability to record specimen collection date/time, type, and site at the time of order entry.

Data Model Changes:

- New Column: ShowSpecimen in **Orders table**.
- **New Table:** ClientOrderSpecimenDetails

Patient Portal

Reference No	Task No	Description
66	EII # 132435	Intelichart: Implementation to Synchronize the patient signed version of document pdf to SmartCare via API.
67	EII # 132629	Implementation of synchronization for client appointment data with the Intelichart Portal.

~~66. EII # 132435 (Feature # 599416): Intelichart: Implementation to Synchronize the patient signed version of document pdf to SmartCare via API.~~

~~Note: This is Passive Change.~~

~~What's Changed:~~

~~This release introduces enhanced document signing functionality that enables client co-signatures through the Patient Portal. The new integration ensures a seamless and secure signing process for both users and clients.~~

~~Once the client signs the document in the Patient Portal, the signed version is automatically transmitted back to SmartCare via API.~~

~~The client's signature will be displayed on the document's PDF version within SmartCare.~~

~~Where to Find It:~~

~~Path: Documents (Client) — Open the Signed document — Add Client as Co-Signer.~~

~~How It Helps:~~

- ~~• Enables users to see the client's signed documents for electronic signatures through an API integration.~~
- ~~• Streamlines the document co-signing workflow between SmartCare and the Patient Portal.~~
- ~~• Enhances client engagement and reduces manual signature handling.~~
- ~~• Ensures real time synchronization of signed documents for improved accuracy and compliance.~~

~~67. EII # 132629 (Feature # 612482): Implementation of synchronization for client appointment data with the Intelichart Portal.~~

~~-~~

~~Note: This is Passive Change.~~

~~-~~

~~What's Changed:~~

~~With this release, enhanced integration between the application and the Intelichart Portal is done. The system will now automatically send API calls to the Intelichart Portal whenever service scheduling or key appointment details are updated for clients whose records are mapped in the SmartPortalAppointmentMappings table.~~

~~Automatic API Trigger on Service Scheduling~~

When a service is scheduled for a client, and the associated Program, Procedure, Location, and Clinician are mapped in the SmartPortalAppointmentMappings table, an API call will be sent to the Intelichart Portal.

API Trigger on Appointment Modifications

The system will also send an API update to the Intelichart Portal when any of the following appointment attributes are changed for mapped records:-

- Date of Service (DOS)
- Clinician
- Program
- Procedure
- Location
- Mapping Validation

The API calls will only be triggered if all required mappings exist in the SmartPortalAppointmentMappings table to ensure accurate synchronization with Intelichart Portal.

Where to Find It:

Path 1: Services (Client) Services New Enter details to schedule a service Save.

Path 2: Services (Client) Services Click on DOS for Schedule Service → Change clinician or program or location or procedure Save.

Path 3: Services/Notes (Clients) Services/Notes Enter details to schedule a service Save.

Path 4: Services/Notes (Clients) Services/Notes Click on DOS for Schedule Service → Change clinician or program or location or procedure Save.

How It Helps:

This enhancement is to ensure seamless and automated synchronization of client appointment data with the Intelichart Portal. The system will send API calls for all scheduled services and when any key appointment details such as Date of Service (DOS), Clinician, Program, Procedure, or Location are changed, provided that these entities are mapped in the SmartPortalAppointmentMappings table. This ensures that updates are accurately reflected in Intelichart for all mapped configurations, improving data consistency and reducing manual intervention.

Provider Client

Reference No	Task No	Description
68	EII # 131670	Changes are implemented to populate 'ProviderClients' Table Automatically.

68. EII # 131670 (Feature # 552339): Changes are implemented to populate 'ProviderClients' Table Automatically.

Note: This is [Passive Change](#).

What's Changed:

A new 'EnableAutoUpdateProviderClient' configuration key has been introduced to create provider client records automatically in the 'ProviderClients' table.

Configuration Key details:

Key: EnableAutoUpdateProviderClient

Read Key as: Enable Automatic Update To ProviderClients Table.

Allowed Values: Yes, No.

Default Value: No

Modules: SCM MCO Core

Description: This configuration key controls whether client and provider data are automatically updated in the ProviderClients table upon clicking Save on the Claims screens (My Office and Client) or after a successful import via the 837 Import screen. When enabled, the system automatically maintains provider-client relationships, eliminating the need for manual updates.

A) If the key is set to "No", the automatic update functionality is disabled, and no updates to the ProviderClients table will occur. **This will be the default value of the key, as it drives the existing behavior.**

B) If the key is set to "Yes", the system will automatically update the corresponding client and provider data in the ProviderClients table upon clicking Save on the Claims screens (My Office and Client) or after a successful claim import via the 837 Import screen. [Note that this happens only if the client-provider combination does not already exist.](#)

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. the same as the key value being "No."

Where To Find It:

Path1: 'Administration' -- 'Configuration Key' -- 'EnableAutoUpdateProviderClient'

Path2: 'Client Search' -- Select 'Client' -- 'My office' -- 'Claims' -- Create any Claim type 'I'/'P'/'PI'/'PP' -- 'Claim Entry' Screen -- Enter required details -- Selecting 'Provider' and 'Insurer' -- Click on 'Insert' and 'Save'

Path 3: 'My Office' -- '837 Import' -- 'Import New File' -- Select provider from 'Select 837 File Sender' -- Upload 837 file using Choose File option -- 'Import File'

How It Helps:

- Reduces manual effort and ensures consistent data integrity.
- Provides a system-driven solution to automatically update the 'ProviderClients' table.

Quicklink

Reference No	Task No	Description
69	EII # 132165	The 'Quicklink Detail' screen is updated to eliminate the possibility of incorrect setup.

69. EII # 132165 (Feature # 577607): The 'Quicklink Detail' screen is updated to eliminate the possibility of incorrect setup.

Note: This is Passive Change.

What's Changed:

With this update, the following changes have been implemented in the 'Quicklink Detail' screen:

1. The 'Screen' dropdown has been repositioned to appear below the 'Display As' dropdown field.
2. The 'Navigation Context' field is now disabled and will be automatically populated based on the selected Screen.
3. Existing required field validation for 'Navigation Context' has been removed.
4. Required field validation has been added for the 'Screen' dropdown.

Where To Find It:

Path: 'Administration' -- 'QuickLinks' -- 'QuickLinks' list page – click on new icon – 'QuickLink Detail' screen.

How It Helps:

- Prevents misconfiguration by auto populating the 'Navigation Context' field based on the Screen selection.
- Reduces manual effort in selecting workflows.

Reports

Reference No	Task No	Description
70	EII # 132237	Implementation of 'Staff Safety Checks' Report.
71	EII # 132112	Changes made in the 'Service Note Reviewer' report filter dropdown field values.

70. EII # 132237 (Feature # 557430): Implementation of 'Staff Safety Checks' Report.

Note: This is Passive Change.

What's Changed:

'Staff Safety Checks' Report Enhancement:

Start Date <input type="text" value="8/6/2025"/> End Date <input type="text" value="10/28/2025"/> Staff List <input type="text" value="Kumar, Vinay, Kumar, Vinod, Kumar"/>				
Staff Safety Checks 8/6/2025 - 10/28/2025 Report Executed: 10/28/2025 10:13 AM				
	Client ID	Safety Check Time	Status	Comment
Jois, Navya	11446	10/10/2025 8:29:00 AM	Sleeping	https://blrqashs2.smartcarenet.com/GoldSmartcareQA/BasePages/Application.aspx?
	11446	10/10/2025 8:31:00 AM	Sleeping	Update the existing
	# of Safety Checks	2		
Kumar, Lakshmi	4038	9/24/2025 10:58:00 AM	Eating	test
	4038	9/24/2025 11:00:00 AM	Eating	
	3874	9/25/2025 1:30:00 PM	Sleeping	test
	3874	9/25/2025 2:18:00 PM	Watching TV	test comments
	3874	9/25/2025 2:20:00 PM	Eating	test ascending
	3874	10/6/2025 10:07:00 PM	Watching TV	testtk
	3874	10/14/2025 10:27:00 AM	Watching TV	If your paragraphs run consistently to 200 or 300 words, they are probably too long and need to be shortened or divided. This gives you five or so paragraphs to develop your points. A good topic sentence is concise and emphatic. It is no longer than the idea requires, and it stresses the important word or phrase. If your paragraphs run consistently to 200 or 300 words, they are probably too long and need to be shortened or divided. This gives you five or so paragraphs to develop your points. A good topic sentence is concise and emphatic. It is no longer than the idea requires, and it stresses the important word or phrase.
	# of Safety Checks	7		

A "Staff Safety Check" report has the following fields:

1. Filter section
2. Report Header
3. Grid section

1. Filter Section: The filter section contains the following fields:

Start Date: This is a calendar control with default value as Current Date – 7 days. Also, this is a required field.

End Date: This is a calendar control with default value as Current Date. Also, this is a required field.

Staff List: This is a multi-select dropdown. All the active staffs' names will be listed in the dropdown.

View Report: On click of View Report button, report will be generated based on the filter selected.

2. Report Header:

Report header displays the 'Report Name', 'Filtered Date Range' and 'Time of Execution' of Report.

3. Grid: This section contains with following columns:

Staff Name: Displays the name of the staff member who completed the Safety Check, formatted as Last Name, First Name. The list of staff names is sorted alphabetically.

Client ID: Displays the 'Client ID' associated with Safety Check.

Safety Check Time: Displays the 'Date' and 'Time' when the Safety Check is completed.

Status: Displays the **status** selected during the Safety Check.

Comment: Displays of any comments entered by the staff during the Safety Check.

of Safety Checks: Displays the **count of distinct Safety Checks** completed by a staff member.

Prerequisites:

1. Sign a 'Safety Check' type of Client Order.
2. Search 'Whiteboards' and click on the "Next Check" time hyperlink – Update the flowsheet details.

Where To Find It:

Path: 'My Office' – 'Staff Safety Checks' Report.

How this helps:

SmartCare now allows staff to generate a list of all safety checks completed within a specified time period by a selected staff member. This change improves usability by allowing users to easily view the core 'Staff Safety Checks' Report and monitor safety check completion activity.

71. EII # 132112 (Feature # 572841): Changes made in the 'Service Note Reviewer' report filter dropdown field values.

Note: This is [Passive Change](#).

What's Changed:

'Service Note Reviewer' filter Enhancement:

1. The 'Programs', 'Procedures' and 'Status' dropdowns are displayed as 'All Programs', 'All Procedures', and 'All Statuses' when the 'Select All' checkbox is checked in the 'All Statuses' dropdown.
2. The 'Programs' and 'Procedures' dropdown values are now sorted alphabetically, making it easier for users to locate and select desired options.
3. The 'No Show' and 'Cancel' statuses are Added in the 'Service Status(s)' filter drop-down list.

Where To Find It:

Path: 'Client' Search -- 'Service Note Reviewer' Report – 'Select Filter' dropdowns.

How this helps:

SmartCare now supports displaying the filter dropdowns fields in plural i.e. 'All Programs', 'All Procedures', 'All Statuses' when the 'Select All' checkbox is selected from the multiselect dropdowns. This change improves usability by allowing users to sort the 'Programs' and 'Procedures' filter options in alphabetical order. And also, it will allow users to select the 'No Show' and 'Cancel' statuses in the 'Service Statuses' filter dropdown list.

RWMQ Rule

Reference No	Task No	Description
72	EII # 132461	RWQM Rule Detail: A new 'Copy' icon has been added.

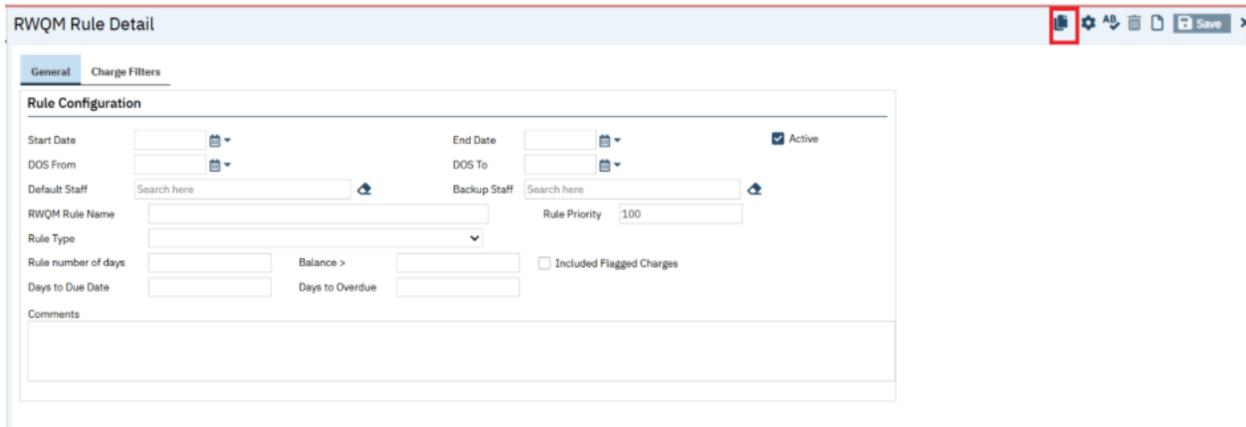
72. EII # 132461 (Feature # 601354): RWQM Rule Detail: A new 'Copy' icon has been added.

Note: This is Passive Change.

What's Changed:

With this release, a new 'Copy' icon has been added to the toolbar section of the RWQM Rule Detail screen. This enhancement enables users to copy an existing RWQM Rule quickly, the fields and filters already configured will be available without having to enter each item again. It will minimize manual configuration efforts and maintains consistency across similar rules.

- A **Copy icon** is now added on the **RWQM Rule Detail** screen.



- When the icon is clicked, the system creates a new RWQM Rule using the configuration from the selected rule.
- All configurations from the **General** tab are copied, except the following:
 - **RWQM Rule Name** → left blank (the user must provide a new name).
 - **Charge Filters** → copied from the source rule; users may review and modify as needed.
- After the copy process, users are automatically redirected to the new rule screen to complete or update any necessary fields.
- The Validation will be displayed for the RWQM Rule Name on the copied rule. If it is left blank before saving.

Prerequisite:

The user has access to the **RWQM Rule Configuration** screen with edit permissions.

Where To Find It:

Path: Login to SmartCare → Administration → RWQM Rule Configuration → Select an existing rule → Click **Copy** icon.

How this helps:

- Simplifies the rule creation process by allowing rule duplication instead of manual setup.
- Reduces configuration time and minimizes potential errors.
- Ensures uniformity and consistency across similar RWQM rules.

Rx Application

Reference No	Task No	Description
73	EII # 124626	Implementation to display Controlled Substance Certification Number (CSC#) into electronic prescriptions for Controlled substance medications within SmartCare Rx.
74	EII # 131627	Windows service ensures that CSC# number is added in the request message XML to the SureScripts in the place of 'StateLicenseNumber'
75	EII # 132327	Dispense Qty is Not Calculating for Patches, Implants, Films and Lozenges.
76	EII # 132495	Implementation to display full Strength formulation instead of abbreviated formulation across all medication-related screens and reports.
77	EII # 132699	Implementation to enable/disable the Med-Sig hyperlink in Rx screen of SmartCare application through EnableFreeTextSigPopup Configuration Key.
78	EII # 132641	Free-Text Sig (instructions for medication) is being incorrectly overwritten during medication reorder or modification—even when no Sig-related fields are changed.
79	EII # 132474	To triggered Prescriber popup uniformly for all user regardless of their role whenever the required PMP criteria are not satisfied.

73. EII # 124626 (Feature # 259835): Implementation to display Controlled Substance Certification Number (CSC#) into electronic prescriptions for Controlled substance medications within SmartCareRx.

Note: This is a Passive change.

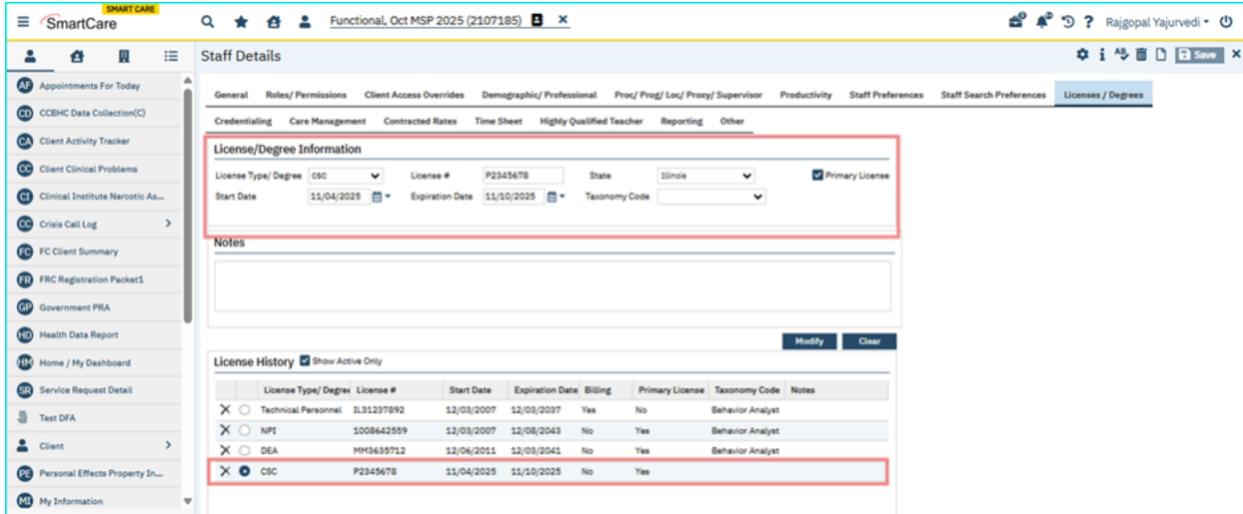
What's Changed:

With this update, Controlled Substance Certification Number (CSC#) will be displayed into electronic prescriptions for controlled medications within SmartCareRx.

A New Global Code Value 'CSC#' is added under the 'DEGREE' category in Global Code.

A New Recode 'StatesToSendCSCOnPrescriptions' is added under Recode category is to determines eligible states.

A new dropdown value 'CSC' is added under License/Degree Information section under the Licenses/Degrees tab in the Staff Details screen.

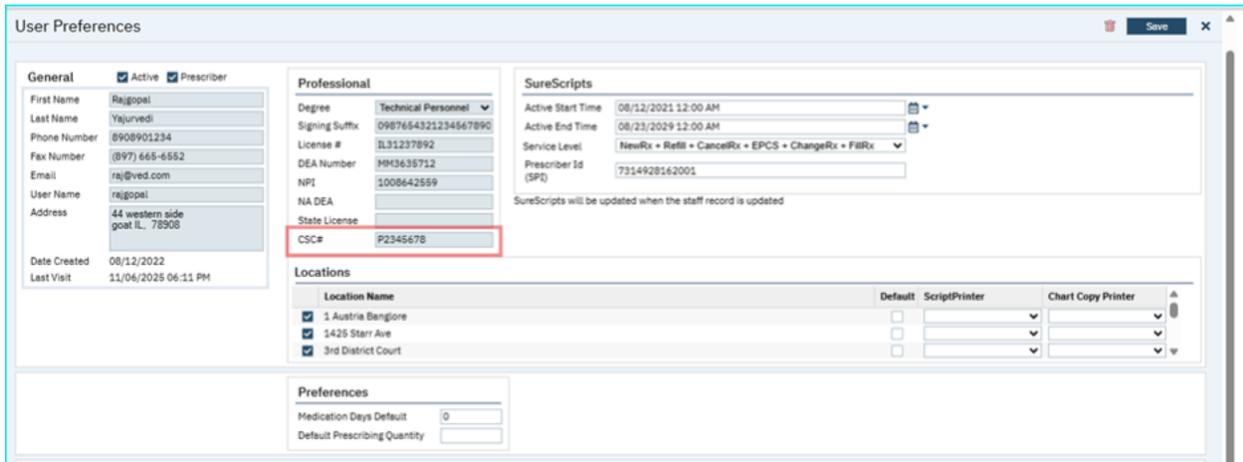


For CSC degree, the License# field accepts alphanumeric input and pushes data to SmartCareRx.

- o For CSC# is sent through electronic prescription only if:
 - § Medication is a controlled substance.
 - § Prescriber/Staff has an active CSC#.
 - § Prescribing location state matches CSC# state
 - § State is listed in the Recode and is Active.

SmartCareRx Updates:

- o User Preferences: A new read-only textbox CSC # is added in the User Preferences screen and CSC# is populated from Staff Details.

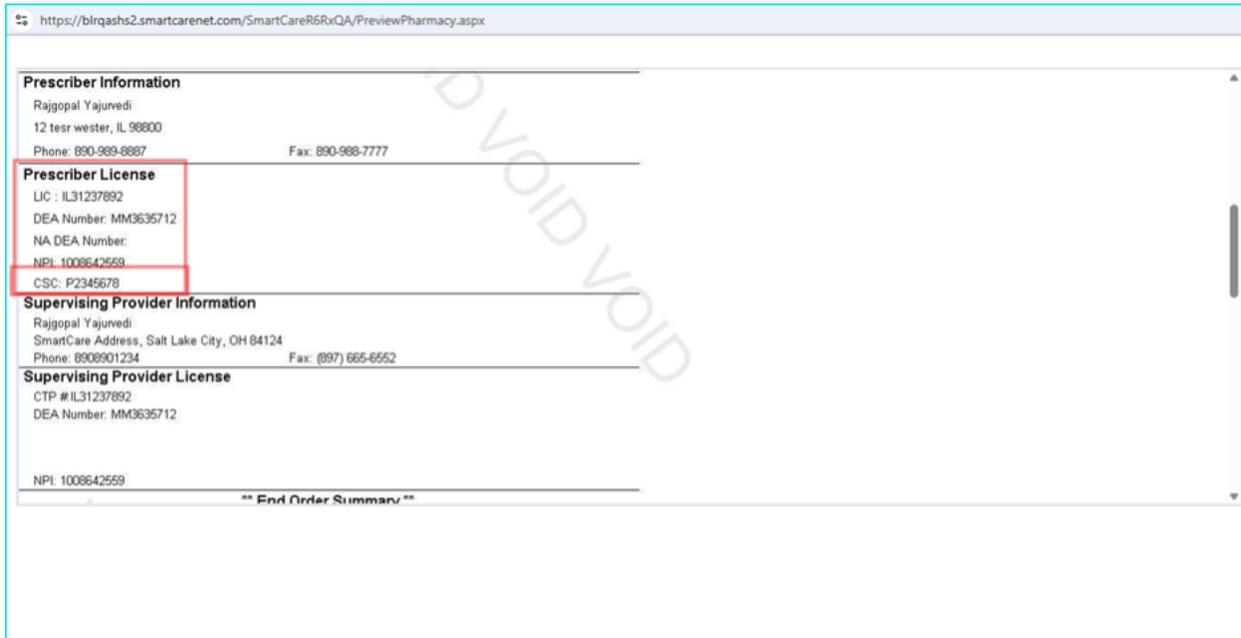


- o Prescriber Screen: CSC# label is displayed conditionally based on validation rules
 - § Medication is a controlled substance.
 - § Prescriber/Staff has an active CSC#.
 - § Prescribing location state matches CSC# state
 - § State is listed in the Recode and is Active

2. PDF Prescription Output:

- o CSC# will be included in the 'Prescriber Signature' field if all above conditions are met.

- o Most recent CSC# is used if multiple exist.
- o Field is hidden if conditions are not met.



In Fax also, CSC is displayed.

Prerequisite:

- The Global Code 'CSC#' is added under the 'DEGREE' category in Global Code though the **Path:** Login to SmartCare Application - Administration - Global Codes - 'DEGREE' category - CSC.
- Add the state and state ID in the 'StatesToSendCSCOnPrescriptions' recode through the **Path:** Administration - Recodes - 'StatesToSendCSCOnPrescriptions' category - Apply Filter - Click on 'StatesToSendCSCOnPrescriptions' link - Recode Detail - Enter the required value - Click Insert button - Click 'Save' button.
- Add the CSC degree for the Staff through the **Path:** Administration - Staff/Users - Staff Details - 'Licenses/Degrees' tab - 'License/Degree Information' section - 'License Type/Degree' dropdown - CSC degree - Enter the required values - Click Insert button - Click Save button.

Where To Find It

- **Path 1:** Login to SmartCare Application – My Office Tab – Medications – Rx application – Start Page - My Preferences - User Preference - 'Professional' section - CSC# number displayed.
- **Path 2:** Login to SmartCare Application – Client Search – My Office – Medication Management(Rx) – Rx application – Patient Summary – New Order button – New Medication Order Page - Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button - Fee-Text Sig popup - Update the Instruction(Sig) - Click 'Update and Close' button - Select the EPCS Pharmacy/Fax/Print Method – Click on 'Prescribe' button – Prescribe page - 'CSC#' degree displayed - Click 'Preview Pharmacy' button - 'Preview Pharmacy' script - 'CSC#' degree displayed - Close - 'Preview Pharmacy' script - Click 'Prescribe' button - 'Medication Script' - 'CSC#' degree displayed.

How It Helps:

Pharmacies in the multiple states require the CSC# on electronic prescriptions for controlled substances. The absence of this number delays prescription processing. This release automates the

inclusion of CSC# to streamline the PMP (Prescription Monitoring Program) process and ensure compliance.

74. EII # 131627 (Feature # 549418): Windows service ensures that CSC# number is added in the request message XML to the SureScripts in the place of 'StateLicenseNumber'.

Note: This is a [Passive change](#).

What's Changed:

With this update, logic is added to validate or conditionally include CSC# based on state requirements that CSC# number is added in the request message XML to the SureScripts in the place of 'StateLicenseNumber'. This ensures that prescriptions for controlled substances include the prescriber's CSC# on the electronic prescriptions.

- A New Global Code Value 'CSC' is added under the 'DEGREE' category in Global Code.
- A New Recode 'StatesToSendCSCOnPrescriptions' is added under Recode category is to determines eligible states.
- CSC# is sent through electronic prescription only if:
 - Medication is a controlled substance.
 - Prescriber/Staff has an active CSC#.
 - State is listed in the Recode and Active
 - Prescribing location matches CSC# state .

2. Windows Service Update

When the user prescribes controlled medication via electronically, and above conditions are met then the Windows service ensures that CSC# number is added in the request message XML to the SureScripts in the place of 'StateLicenseNumber'

Prerequisite:

- The Global Code 'CSC#' is added under the 'DEGREE' category in Global Code through the **Path:** Administration - Global Codes - 'DEGREE' category - CSC.
- Add the state and state ID in the 'StatesToSendCSCOnPrescriptions' recode through the **Path:** Administration - Recodes - 'StatesToSendCSCOnPrescriptions' category - Apply Filter - Click on 'StatesToSendCSCOnPrescriptions' link - Recode Detail - Enter the required value - Click Insert button - Click 'Save' button .
- Add the CSC degree for the Staff through the **Path:** Staff/Users - Staff Details - 'Licenses/Degrees' tab - 'License/Degree Information' section - 'License Type/Degree' dropdown - CSC degree - Enter the required values - Click Insert button - Click Save button.

Where To Find It:

Path: Client Search – My Office – Medication Management(Rx) – Rx application – Patient Summary – New Order button – New Medication Order Page - Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button - Fee-Text Sig popup - Update the Instruction(Sig) - Click 'Update and Close' button - Select the EPCS Pharmacy/Fax/Print Method – Click on 'Prescribe' button – Prescribe page - 'CSC#' degree displayed - Click 'Preview Pharmacy' button - 'Preview Pharmacy' script - 'CSC#' degree displayed - Close - 'Preview Pharmacy' script - Click 'Prescribe' button - 'Medication Script' - 'CSC#' degree displayed.

How It Helps:

Pharmacies in the multiple states require the CSC# on electronic prescriptions for controlled substances. The absence of this number delays prescription processing. This release automates the inclusion of CSC# to streamline the PMP (Prescription Monitoring Program) process and ensure compliance.

75. EII # 132327 (Feature # 586518): Dispense Qty is Not Calculating for Patches, Implants, Films and Lozenges.

ACTIVE CHANGE

What's Changed:

SmartCare now automatically calculates the Dispense Quantity (Dispense Qty) for specific medication types having potency units as patches, implants, films, and lozenges—within the Rx module of the system. Currently, the system does not perform this calculation for Patches, Implants, Films and Lozenges which affects accurate medication dispensing.

With this update the **Dispense Quantity** is now correctly calculated for medications with the above potency units using the formula:

$$\text{Dispense Qty} = (\text{Dose+Unit}) / (\text{Strength}) * (\text{Frequency}) * (\# \text{ of Days})$$

Example:

Strength: Nicotine 7mg/24 hr daily transdermal patch

Dose+Unit: 7 mg

Frequency: Daily

Days: 30

Potency Unit: Patch

Dispense Qty: 30

$$(7\text{mg}) / (7\text{mg}) \times (1) \times (30) = \mathbf{30 \text{ Patches}}$$

Where to Find It:

Path 1: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application)—Click on New Order button – In New Medication Order screen select a medication which has any one of the potency unit (Patch, Implant, Film and Lozenge)—Enter all the required fields – Check the Dispense Quantity is calculated -- Click on Insert button – Click on prescribe button – IN Prescribe screen click on prescribe button.

Path 2: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) – Select a medication and click on Re order Button – In Re-Order Medication order screen select a medication which has any one of the potency unit (Patch, Implant, Film and Lozenge)—Enter all the required fields – Check the Dispense Quantity is calculated -- Click on Insert button – Click on prescribe button – IN Prescribe screen click on prescribe button.

Path 3: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) – Select a non-controlled medication and click on Change order Button – In Change Medication order screen select a medication which has

any one of the potency unit (Patch, Implant, Film and Lozenge)—Enter all the required fields – Check the Dispense Quantity is calculated -- Click on Insert button – Click on prescribe button – IN Prescribe screen click on prescribe button.

Path 4: Login to SmartCare Application – search for medication management (My Office) – Start page (Rx Application) – Click on Queue order button – In order approval screen select a medication – Click on Adjust Dosage/Schedule button -In Adjust Dosage / Schedule screen select a medication which has any one of the potency unit (Patch, Implant, Film and Lozenge)—Enter all the required fields – Check the Dispense Quantity is calculated -- Click on Save Adjustment button—in Prescribe screen click on update order button.

How it Helps:

This will help the user to automatically calculates the Dispense Quantity (Dispense Qty) for specific medication types with potency units such as *Patches, Implants, Films, and Lozenges* within the Rx module.

76. EII # 132495 (Feature # 586525): Implementation to display full Strength formulation instead of abbreviated formulation across all medication-related screens and reports.

ACTIVE CHANGE

What's Changed:

SmartCare will now display the full-Strength formulation instead of abbreviated formulation across all medication-related screens and reports. This ensures clear, accurate, and user-friendly dosage information for better readability and reduced confusion.

With this update, the medication strength is displayed in full forms making Strength details clear and easy to understand in the below screens:

New Medication Order screen:

New Medication Order

Margaret Adelia, Devereaux (1115), DOB/AGE: 11/1/1997 (28), Sex: M, Height: 140 In, Weight: 34 lb

Order

Pharmacy: [Search] | PrintScript | Print Drug Information | Print Chart Copy

Prescriber: Testing, Rx InternStudent | DEA #: MM3635455 | Order Date: 11/13/2025 | Prescribing Location: [Select Location] | Verbal Order Read Back

Medication | Permit Changes By Other Users

Drug: Nexplanon | Dx/Purpose: [] | Active Coverage: [] | Dispense as Written: []

Instruction Text: test | Desired Outcome: test | Comment: test | Include On Prescription: []

Titrate: [] | Recommended Adult Min/Max Units: 1 EA - 1 EA

Strength	Dose	Unit	Frequency	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
68mg, Implant, Subdermal	68	mg	24 times per day	11/13/2025	2	48	Implant	0	0	0	11/14/2025

Medication List | Formulary

Medication Description	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
Nexplanon 68 mg Subdermal Implant	11/13/2025	Administer 1 Implant (68mg) Under The Dermis Of The Skin 24 Times Per...	11/13/2025	11/14/2025	0	N	

Medication strength is displayed in the same way in Prescribe screen, Re-Order medication Order screen, Change Medication Order screens, Patient Summary screen -- Medication list, Order Details Screen, View Medication History screen and Patient Consent Screens.

Print list of medications and Discontinue Medication Letter are also display the Medication strength as shown below:

	morphine 8 mg/mL intravenous solution	4/5/2025	8mg/mL, soln, IV 1 ml Now	4/5/2025	4/6/2025	Yajurvedi, Rajgopal Limited License Bachelor's Social Worker
	morphine 8 mg/mL intravenous syringe	4/5/2025	8mg/mL, syrg, IV 1 mg Bedtime	4/5/2025	4/5/2025	Yajurvedi, Rajgopal Limited License Bachelor's Social Worker
	morphine ER 10 mg capsule, extended release pellets	4/5/2025	10mg, CERP, Oral 1 each As Needed	4/5/2025	4/6/2025	Yajurvedi, Rajgopal Limited License Bachelor's Social Worker
	Nexplanon 68 mg Subdermal Implant test	11/13/2025	Administer 1 Implant (68mg) Under The Dermis Of The Skin 24 Times Per Day	11/13/2025	11/14/2025	Testing, Rx InternStudent
	nicotine 7 mg/24 hr daily transdermal patch vs	10/23/2025	Place 3 Patches (21mg) Onto The Skin 9 Times Per Day	10/23/2025	11/11/2025	Testing, Rx InternStudent

Printed On 11/13/2025 Page6 of 10

Discontinue Medication Letter:

60DailyHFJulyMSP2025 | 08/29/2025 Medication Discontinuation Notice

testDecMSP
Address
Phone: (123) 213-2131 Ext 123123

To Whom It May Concern,

Please be advised the following medication(s) / dosage(s) have been discontinued. Please cancel any outstanding refills. This medication should not be dispensed until a new order is received from this prescriber.

Patient Information
Name: Manjunatheshwar, Smoke Dec 2024 DOB: 1/21/2000
Allergies: Atopiclair (Allergy), Bal in Oil (Allergy), Cafergot (Allergy), Castor Oil (Allergy), Clindesse (Allergy), Liquadd (Allergy), Prefest (Intolerance), Quit 2 (Allergy)

Medication	Dosage(s)	Prescriber	Discontinue Date
Nexplanon 68 mg Subdermal Implant	Administer 1 Implant (68mg) Under The Dermis Of The Skin 4 Times Per Day	Malipatil, Manjunath NP Nurse Practitioner	11/4/2025

Discontinued Reason:
Patient Revoked Consent **test**

Notice Initiated By: Manjunath Malipatil, NP Nurse Practitioner

Where to Find It:

Path 1: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application)—Click on New Order button – In New Medication Order screen select a medication – check the strength is displayed in full forms—Enter all the required fields -- Click on Insert button—check the strength of the inserted medication is displayed in full form – Click on prescribe button – In Prescribe screen check that medication strength is displayed in full form -- click on prescribe button.

Path 2: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) – Select a medication and click on Re order Button – In Re-Order Medication order screen select a medication – check the strength is displayed in full forms—Enter all the required fields -- Click on Insert button—check the strength of the inserted medication is displayed in full form – Click on prescribe button – In Prescribe screen check that medication strength is displayed in full form -- click on prescribe button.

Path 3: Login to SmartCare Application – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) – Select a non-controlled medication and click on Change order Button – In Change Medication order screen select a medication – check the strength is displayed in full forms—Enter all the required fields -- Click on Insert button—check the strength of the inserted medication is displayed in full form – Click on prescribe button – In Prescribe screen check that medication strength is displayed in full form -- click on prescribe button.

Path 4: Login to SmartCare Application -- Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) -- Navigate to Medication list and verify that the medication strength is displayed in full form.

Path 5: Login to SmartCare Application -- Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) -- Navigate to Medication list and select a medication – In order details screen check the medication strength is displayed in full form.

Path 6: Login to SmartCare Application -- Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) -- Navigate to Medication list and click on X next to medication -- click on yes button in confirmation message pop up – In Enter discontinue reason pop up enter all the required fields click on discontinue button – IN discontinue letter check the medication strength is displayed in full form

How it Helps:

The full wording ensures accurate and readable information.

77. EII # 132699 (Feature # 617349): Implementation to enable/disable the Med-Sig hyperlink in Rx screen of SmartCare application through EnableFreeTextSigPopup Configuration Key.

Note: This is Passive Change.

What's Changed:

With this release, following changes have been implemented:

A new **System Configuration Key** 'EnableFreeTextSigPopup' is added with the following allowed values:

- **Both:** Enables Free-Text Sig popup and hyperlink are available in both Client Order and Rx (default behaviour).
- **Orders:** Enables Free-Text Sig only in Client Order. Disabled in Rx.
- **Rx:** Enables Free-Text Sig only in Rx, disabled in Client Order.
- **None:** Disables Free-Text Sig in both modules. (popup and hyperlink are disabled.)

Default Config key Behavior:

- If an invalid value is set in Config Key, the system defaults consider to the value Both, **which is a default behavior.**

Screen-Level Changes:

Rx:

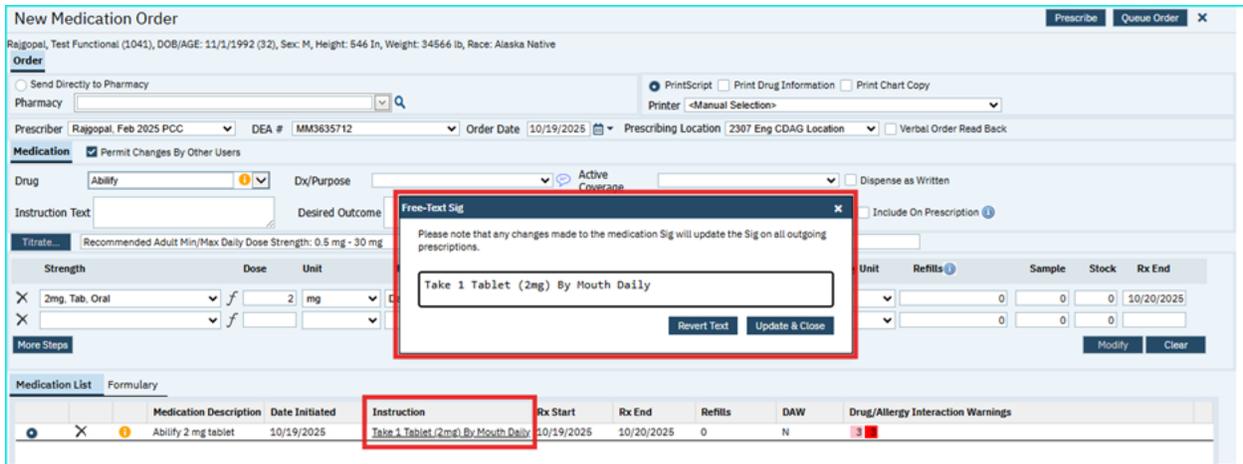
- Free-Text Sig popup and instruction hyperlink disabled when config-key is None or Orders.
- Free-Text Sig popup and instruction hyperlink enabled when config-key is Both or Rx.

- Applies to screens like New Medication Order, Change Order, Re-Order, Adjust Dosage/Schedule.

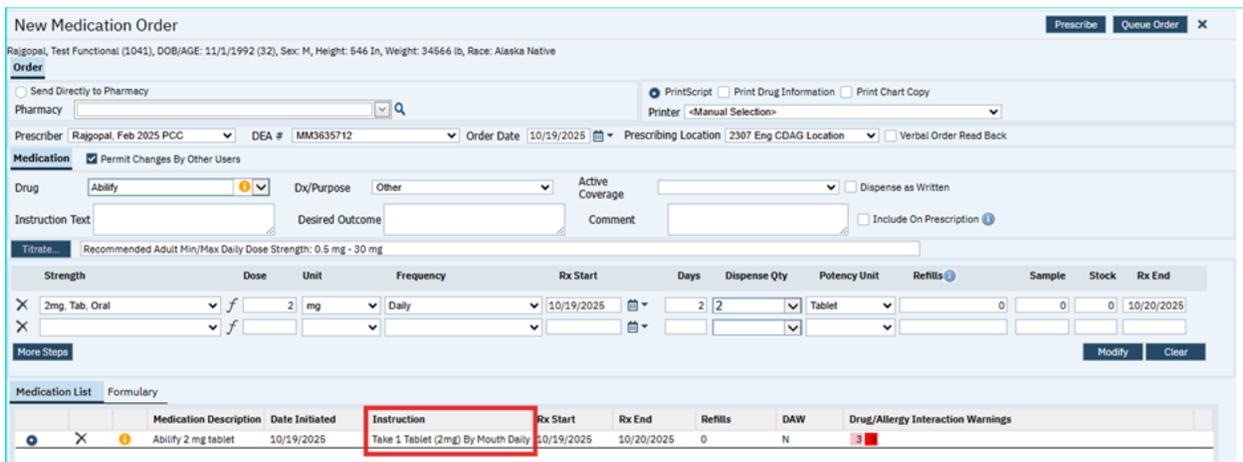
Additional Notes:

- **Layman's Terms Sig** will still be generated when applicable but will not be editable if Free-Text Sig is disabled.

Screenshot for Free-text Sig popup and Instruction hyperlink when Config Key set to the value of 'Both/Rx/ Invalid value' in Rx Application:



Screenshot for Free-text Sig popup when Config Key set to the value of 'Orders/None' and Invalid value in New Medication Order.



Where to Find It:

Path 1: Administration - 'Configuration Keys' - 'Configuration Keys' list page - Click on 'EnableFreeTextSigPopup' key hyperlink - 'Configuration Key Details' page.

Path 2: Client Search - My Office - Medications - Rx application - Start Page - Patient Summary - New Order button - New Medication Order Page - Select the Drug with starting three letters - Fill all required fields - click on 'Insert' button - Free-Text Sig pop - Calculated Instruction text - Click 'Update & Close'

button - Medication Inserted – Click on 'Prescribe' button – Prescribe page – Click on 'Prescribe' button - 'Patient Summary' page

How It Helps:

Customer will have the option to turn on/off the Free-Text Sig functionality in the Orders screen, Rx application, or both. This flexibility avoids possible discrepancies between Free-Text Sig and discreet field values by user entry error.

78. EII # 132641 (Feature # 586527): Free-Text Sig (instructions for medication) is being incorrectly overwritten during medication reorder or modification—even when no Sig-related fields are changed.

Note: This is a Passive Change.

What's Changed:

With this release, the logic and system functionality behaviours are updated as below:

- The system will retain the previously saved Free-Text Sig unless any of the following fields are changed:
 - o Strength
 - o Dose
 - o Unit
 - o Frequency
- Specific logic updates:
 - o Clicking Instructions hyperlink shows the last saved Sig.
 - o Changing only Pharmacy retains the Sig.
 - o Clicking Revert Text always shows the system-generated Sig.
 - o Editing Sig by changing the Strength/Dose/Unit/Frequency and then clicks Update & Close. This saves the new Sig.
 - o Clicking Close without saving will not update the Sig.

Prerequisite:

User prescribes the medication via below New Order **path:**

Login to SmartCare Application – Client Search – My Office – Medications – Rx application – Start Page – Patient Summary – New Order button – New Medication Order Page – Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button – Fee-Text Sig popup – Update the Instruction(Sig) – Click 'Update and Close' button – Select the EPCS Pharmacy – Click on 'Prescribe' button – Prescribe page – Click on 'Prescribe' button – 'Patient Summary' page.

User queues the medication via below New Order **path:**

Login to SmartCare Application – Client Search – My Office – Medications – Rx application – Start Page – Patient Summary – New Order button – New Medication Order Page – Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button – Fee-Text Sig popup – Update the Instruction(Sig) – Click 'Update and Close' button – Click on 'Queue Order' button – 'Patient Summary' page.

Where to Find It:

Path 1: Re-Order Path - Login to SmartCare Application - Client Search - My Office - Medications - Rx application - Start Page - Patient Summary - Select the medication in medication list - Click Re-Order button - Re-Order Medication Page - Select the radio button - Click on 'Modify' button - Free-Text Sig popup - Instructions are not re generated - Click 'Update and Close' button - Click on 'Prescribe' button - Prescribe page - Click on 'Prescribe' button - 'Patient Summary' page.

Path 2: Change Order Path - Login to SmartCare Application - Client Search - My Office - Medications - Rx application - Start Page - Patient Summary - Select the medication in medication list - Click Change Order button - Change Medication Page - Select the radio button - Click on 'Modify' button - Free-Text Sig popup - Instructions are not re generated - Click 'Update and Close' button - Click on 'Prescribe' button - Prescribe page - Click on 'Prescribe' button - 'Patient Summary' page.

Path 3 : Adjust Dosage/Schedule path: Login to SmartCare Application - My Office - Medications - Rx application - Start Page - Queued Order page - Select the medication radio button - Click Adjust Dosage/Schedule button - Adjust Dosage/Schedule page - Select the radio button - Click on 'Modify' button - Free-Text Sig popup - Instructions are not re generated - Click 'Update and Close' button - Click 'Save Adjustments' - Prescribe Page - Click 'Update Order' - Queued Order page.

Path 4: Refill Request Reorder : Login to SmartCare Application - My Office - Medications - Rx application - Start Page - 'Pharmacy Refill Request' tab - Click 'Approve with Changes' button - Re-Order Medication Page - Select the radio button - Click on 'Modify' button - Free-Text Sig popup - Instructions are not re generated - Click 'Update and Close' button - Click on 'Prescribe' button - Prescribe page - Click on 'Prescribe' button - Start Page.

Path 5: Rx Change : Login to SmartCare Application - My Office - Medications - Rx application - Start Page - 'Rx Change' tab - Click 'Approve with Changes' button - Change Medication Page - Select the radio button - Click on 'Modify' button - Free-Text Sig popup - Instructions are not re generated - Click 'Update and Close' button - Click on 'Prescribe' button - Prescribe page - Click on 'Prescribe' button - Start Page.

How it Helps:

Preserves the accuracy and avoid data loss, the Sig only reset when Sig-specific fields (Strength, Dose, Unit, Route, Frequency) are modified.

79. EII # 132474 (Feature # 603066): To triggered Prescriber popup uniformly for all user regardless of their role whenever the required PMP criteria are not satisfied.

Note: This is a Passive Change.

What’s Changed:

With this update, the RX module now evaluates PMP criteria independently of the user's role. If the criteria are not met, the system will prompt the user with the Prescriber popup, whether they are a Prescriber or non-Prescriber.

Where To Find It:

Path 1: Login to SmartCare Application as Prescriber – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application)— Click on PMP – if the staff criteria are not met – Warning Message pop up -- – search and select a prescriber – Click on Ok Button.

Path 2: Login to SmartCare Application as non-prescriber – Search and Select a client – Search for Medication Management (Client) – Patient Summary screen (Rx Application) – Click on PMP – if the staff criteria are not met – Warning message pop up – search and select a prescriber – Click on Ok Button.

How It Helps:

- **Role-agnostic PMP triggering:** All users are subject to the same validation logic.
- **Improved workflow consistency:** Eliminates dependency on user role for PMP checks.
- **Enhanced usability:** Supports seamless execution of PMP processes across clinical role.

Services

Reference No	Task No	Description
80	EII # 132281	Implementation of the new System Configuration Key 'SetDefaultDateFiltersForListPages'.

80. EII # 132281 (Feature # 586113): Implementation of the new System Configuration Key 'SetDefaultDateFiltersForListPages'.

Note: This is a [Passive Change](#).

What’s Changed:

A new system configuration key 'SetDefaultDateFiltersForListPages' has been implemented. This configuration key allows the user to filter the 'Services', 'Services/Notes' and 'Services (My Office)' list page data based on the value entered in the configuration key.

Configuration Key Details:

SystemConfigKey: SetDefaultDateFiltersForListPages

Read Key as: Set Default Date Filters For Certain List Pages.

Allowed Values: 1,2,3

Default Value: Respective existing filters of the screens listed below.

Modules/Functionality: SCM Admin2

Description: This is a new feature being added to the Core product by introducing a system configuration key. The value of this key will determine the date range for DOS filters that defaults in the following list pages:

- Service (Client)
- Service/Notes (Client)
- Services (My Office)

Previously, the DOS filters defaulted as follows:

- Service (Client): Past 6 months.
- Service/Notes (Client): Past 12 months.
- Services (My Office): Current date.

By using this key, customers can set the DOS default filters across these screens. This will significantly improve performance by reducing slowness while loading the screen.

A) If the key value is set to "1", the DOS field will default to past 1 month to the current date on the above indicated screens and data will be retrieved accordingly.

B) If the key value is set to "2", the DOS field will default to past 2 months to the current date on the above indicated screens and data will be retrieved accordingly.

C) If the key value is set to "3", the DOS field will default to past 3 month to the current date on the above indicated screens and data will be retrieved accordingly.

Where to Find It:

Path 1: 'Administration' – System Configuration Keys – Search 'SetDefaultDateFiltersForListPages' – Click on Key hyperlink – Configuration Key details – Enter the Value – Click on 'Save' icon.

Path 2: 'Client' – Services/Notes list page.

Path 3: 'Client' – Services list page.

Path 4: 'My Office' – Services list page.

How It Helps:

By implementing the new configuration key, Redis sessions will now store only lightweight data such as user identity and filter information. Service records will be retrieved directly from the database using pagination or lazy loading.

This improvement ensures stable session sizes, enhances performance, reduces server strain, and provides a more reliable and efficient user experience.

Services/Notes

Reference No	Task No	Description
81	EII # 132376	MCO ISP Goals/Objectives to initialize into Service Note(s) -ISN and Misc G/O.

81. EII # 132376 (Feature 590256): MCO ISP Goals/Objectives to initialize into Service Note(s) -ISN and Misc G/O.

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

What’s Changed:

SmartCare now allows clinicians to use CORE ISN (Individual Service Note) and Services/Notes, where Goals and Objectives (core) common control is used, for initialization of the Goals and Objectives. This ensures continuity and completion of the documentation for the client.

CORE ISN and notes with the client’s MCO goals and objectives automatically pre-populated. The system now allows initialization of Goals and Objectives from the MCO ISP, based on specific configuration settings.

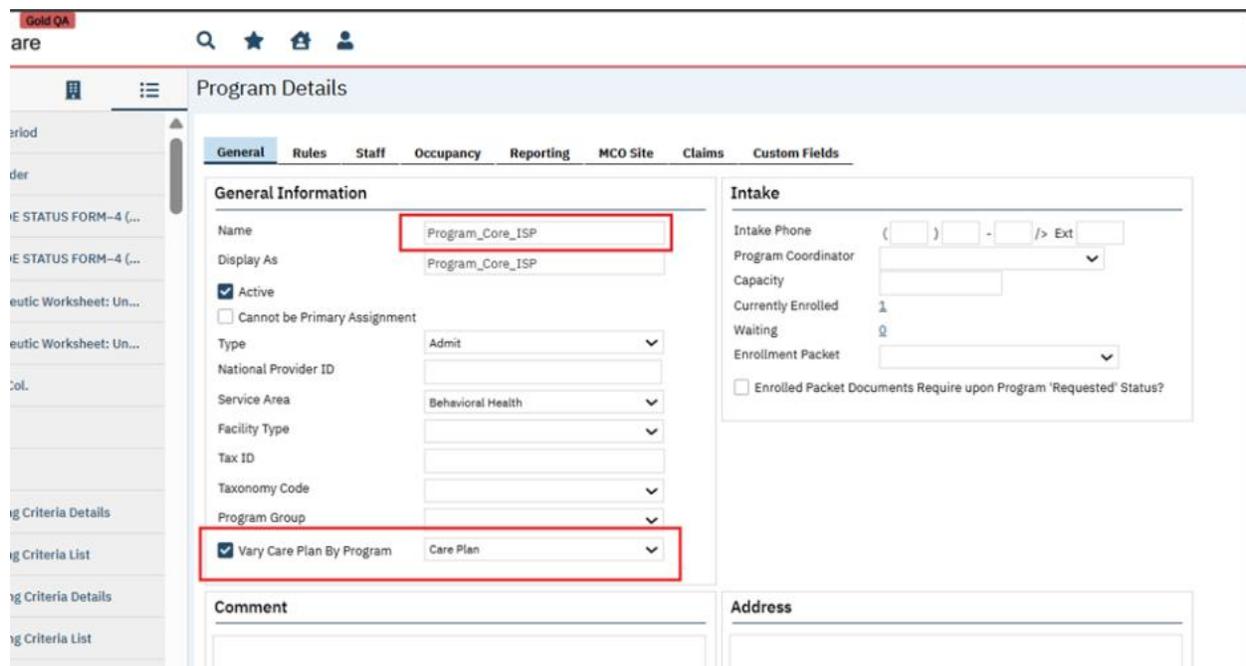
The following configurations have been done for MCO ISP-based initialization:

1. In the Document Codes Detail screen of the MCO ISP(Individualized Service Plan), under the Care Plan Details section, select the Care Plan checkbox.
2. In Program Details, enable the Vary Care Plan by Program checkbox and choose the required MCO ISP from the dropdown.

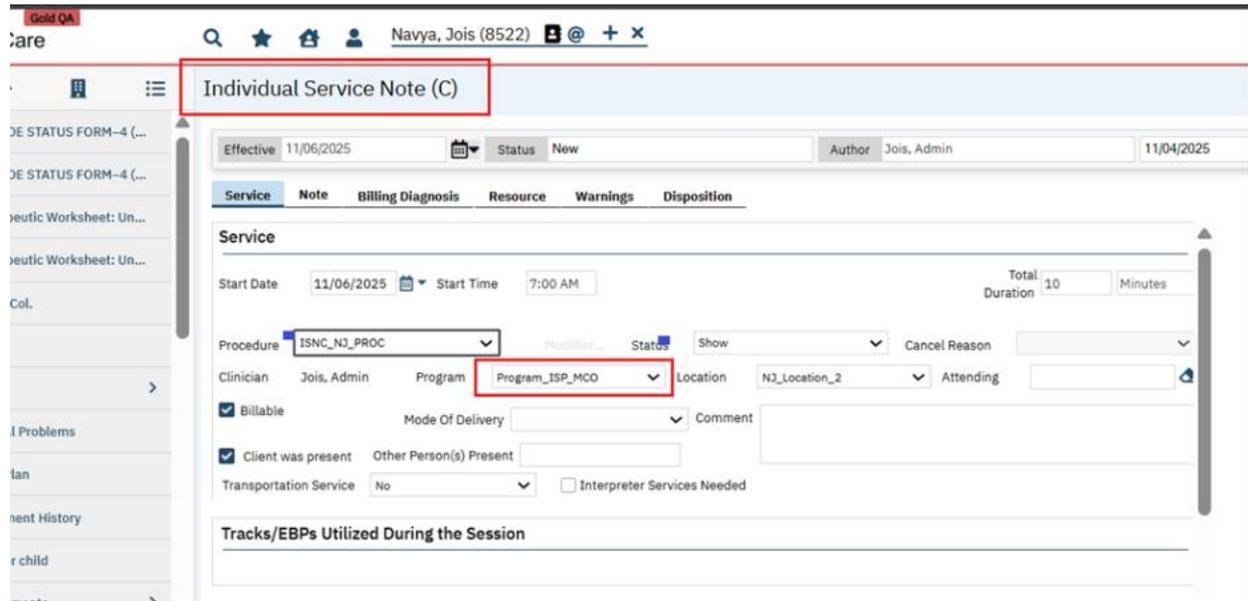
Note:

- I. When a program configured as described above is selected in the Service Note, the Goals and Objectives will be initialized from the latest signed MCO ISP specified in the “Vary Care Plan By Program” dropdown.
- II. In the Intervention tab of the MCO ISP, the Intervention dropdown dynamically populates the relevant Authorization Codes based on the selected Provider.
- III. Only those Goals and Objectives linked to the authorization codes associated with the Procedure selected in the Service Note will be initialized.

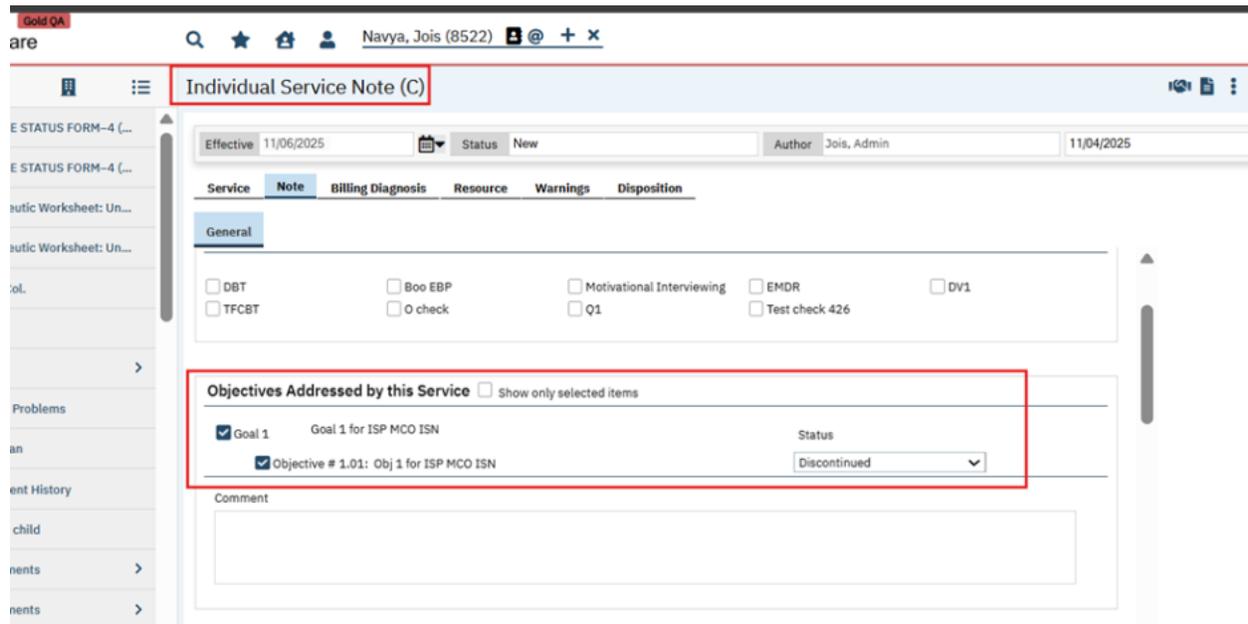
‘Vary Care Plan by Program’ checkbox checked for the program:



Initialization of 'Goals and Objectives' in the 'Services/Notes' based on the selected Program and value selected in the 'Vary Care Plan by Program' dropdown:



Note Tab-Objective Addressed by this Service:



In Misc G/O and PDF, the initialization of Goals and Objectives based on selected program, is displaying in the same manner.

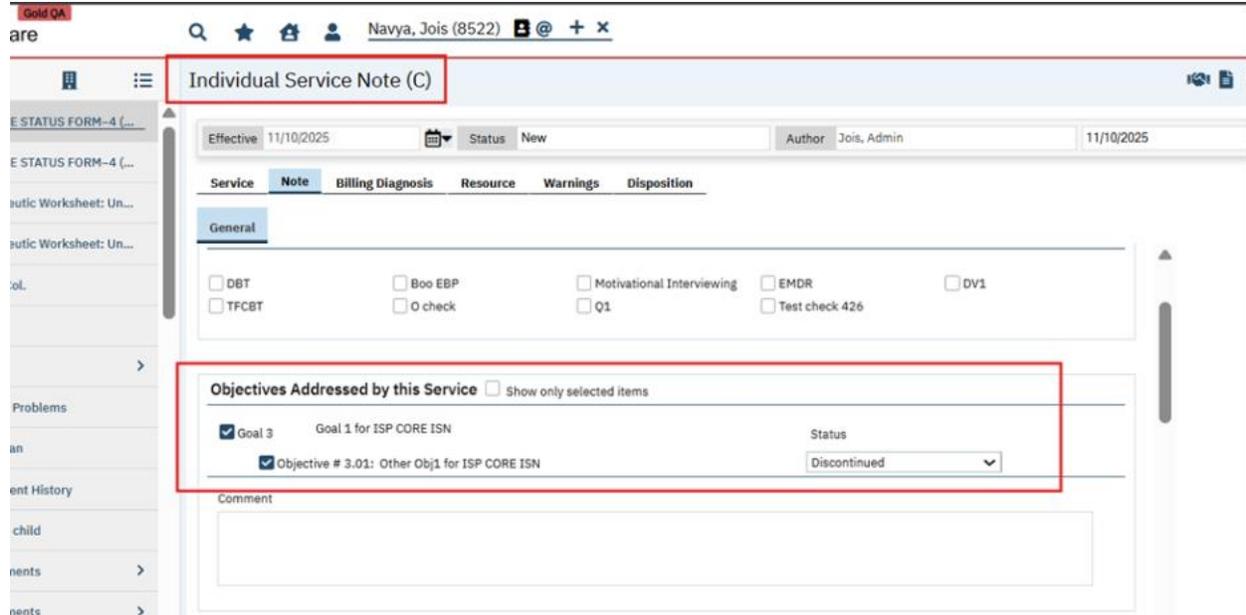
If 'Vary Care Plan by Program' is disabled in Individualized Service Plan – MCO', then it will be initialized from Core ISP:

The screenshot shows the 'Program Details' form in SmartCare. The 'General Information' section includes fields for Name, Display As, Active status, Type, National Provider ID, Service Area, Facility Type, Tax ID, Taxonomy Code, and Program Group. The 'Intake' section includes Intake Phone, Program Coordinator, Capacity, Currently Enrolled, Waiting, and Enrollment Packet. The 'Vary Care Plan By Program' checkbox is unchecked. The 'Comment' and 'Address' sections are also visible.

Initialization of Goals and Objectives by selecting the same Program where 'Vary Care Plan by Program' is unchecked for 'Individualized Service Plan – MCO':

The screenshot shows the 'Individual Service Note (C)' form in SmartCare. The 'Effective' date is 11/10/2025 and the 'Status' is 'New'. The 'Service' section includes fields for Start Date, Start Time, Total Duration, Procedure, Clinician, Program, Location, and Mode of Delivery. The 'Program' dropdown is set to 'Program_ISP_MCO'. The 'Billable' and 'Client was present' checkboxes are checked. The 'Transportation Service' is set to 'No' and 'Interpreter Services Needed' is unchecked. The 'Tracks/EBPs Utilized During the Session' section is also visible.

Note Tab-Goals and Objectives will be initialized from Core ISP now:



Prerequisites: An 'Individualized Service Plan (ISP)' and 'Individualized Service Plan(ISP) - MCO' to be signed with valid 'Goals and Objectives' for a selected Client.

Where to Find It:

Path 1: 'Client' search -- Open a client -- Search for 'Services/Notes' - Click on 'New' icon - select the procedure associated with 'Individual Service Note(C)' / 'Misc G/O' Note / 'Psychiatric Note' - Enter the required values -- Go to 'Note' tab -- Enter the required values -- Check if Goals and Objectives are initialized - Sign the Service Note.

Path 2: 'Administration' - 'Programs' - Click on 'New' icon - 'Check/Select 'Vary Care by Program' checkbox - select 'Care Plan/Individualized Service Plan'/ 'Individualized Service Plan - MCO' - Click on 'Save'.

How It Helps:

This functionality would allow clinicians to utilize the CORE ISN note with the client's MCO goals and objectives pre-populated. As a result, this would support and complete the golden thread of documentation for the client.

Telehealth

Reference No	Task No	Description
82	EII # 131754	Telehealth: Microsoft Graph API changes to allow creation of meetings on the behalf of other users.
83	EII # 128442	Telehealth: Configuration Improvements.

~~**82. EII # 131754 (Feature # 556052): Telehealth: Microsoft Graph API changes to allow creation of meetings on the behalf of other users.**~~

Note: This is a Passive Change.**What's Changed:**

The system now ensures that meetings are created directly on the assigned clinician's calendar, regardless of which user initiates the scheduling.

When a user selects Microsoft Teams and clicks "Schedule Meeting", the system retrieves the clinician's email from the staff details and uses the Microsoft Graph API to create the meeting. The generated meeting link and details are automatically added to the clinician's calendar, ensuring they are properly informed and prepared for the session.

Validation & UI Enhancements

- To support this change, the system now includes a validation step to ensure data accuracy.
- If the assigned clinician does not have a valid email address on file, the system prevents the meeting from being scheduled and displays a clear message instructing the user to update the clinician's profile.
- This validation ensures that meetings are created only when the required information is available, improving reliability and reducing scheduling errors.

If no valid email is found, the scheduling action is blocked, and the system displays the following message:

"Microsoft Teams requires the clinician to have a valid email address on file. Please update their profile with a valid email before scheduling a telehealth session."

- The Telehealth setup screen font color has been updated from red to the standard SmartCare black to maintain visual consistency across the application.

Where to Find It:

Path 1: login to 'SmartCare' application as 'Clinician' — Search and select a client — 'Services (Client)' — In 'Services list page' — Click On 'New' button — 'Service Details' screen — Enter all the required fields — Click on 'Save' button to schedule a service.

Path 2: Login to 'SmartCare' Application as (Receptionist/Support Staff) — 'Services (My Office)' — for a service navigate to the telehealth Column and click on 'Add Hyperlink' — 'Telehealth setup' pop up — schedule a telehealth meeting with Microsoft Teams.

Path 3: Open the Clinician Calendar — Check that Microsoft teams Meeting is listed in the calendar for the service.

How It Helps:

- This enhancement introduces the Telehealth — By Adding telehealth Meeting Link for Clinician.
- This update ensures that telehealth meetings — specifically Microsoft Teams links — are created directly on the **assigned clinician's calendar**, rather than the calendar of the support staff initiating the meeting.

83. EII # 128442 (Feature # 421730): Telehealth: Configuration Improvements:

Note: This is a Passive Change.

What's Changed:

With this release, users can now manage staff associations directly through the **Telehealth Credential Detail Page** using a dedicated Staff section.

The **Staff** Section is added on the Telehealth Credentials Detail Page which help users (typically admin staff) easily manage in which staff members are associated with a specific telehealth credential. This section replaces the previous manual process and introduces a dynamic, user friendly interface that supports both adding and removing staff with real time updates.

- The Staff section is **hidden until the credential is saved** for the first time.

If no staffs are associated, a warning message will be displayed as **"There is no staff associated with this Telehealth Credential."**

Note: This Warning message is dynamic and will disappear once the staff is associated with the telehealth credential.

The screenshot displays the 'Telehealth Credentials' form. The 'Provider Credentials' section includes fields for Life Size, User Name (API@tcbhc.org), Password, Time Zone, Tenant Id, Account Id, Require Password to Join (with a PIN checkbox), API Key, API Secret, Owner Extension (17701184), and Header Key (a58BSzq9nE4N47UPsTvPa2OzsbEIWeGE5yzUAXJ5). A red box highlights a warning message: 'There is no staff associated with this Telehealth Credential.' Below the provider credentials is the 'Staff' section, which has a table with a header 'StaffName' and a button 'Associate Staff'. The table is currently empty, with the text 'No data to display' at the bottom.

The **Staff** section is displayed with following fields:

~~**Associated Staff with Telehealth Credentials:** This is the sub header read only label.~~

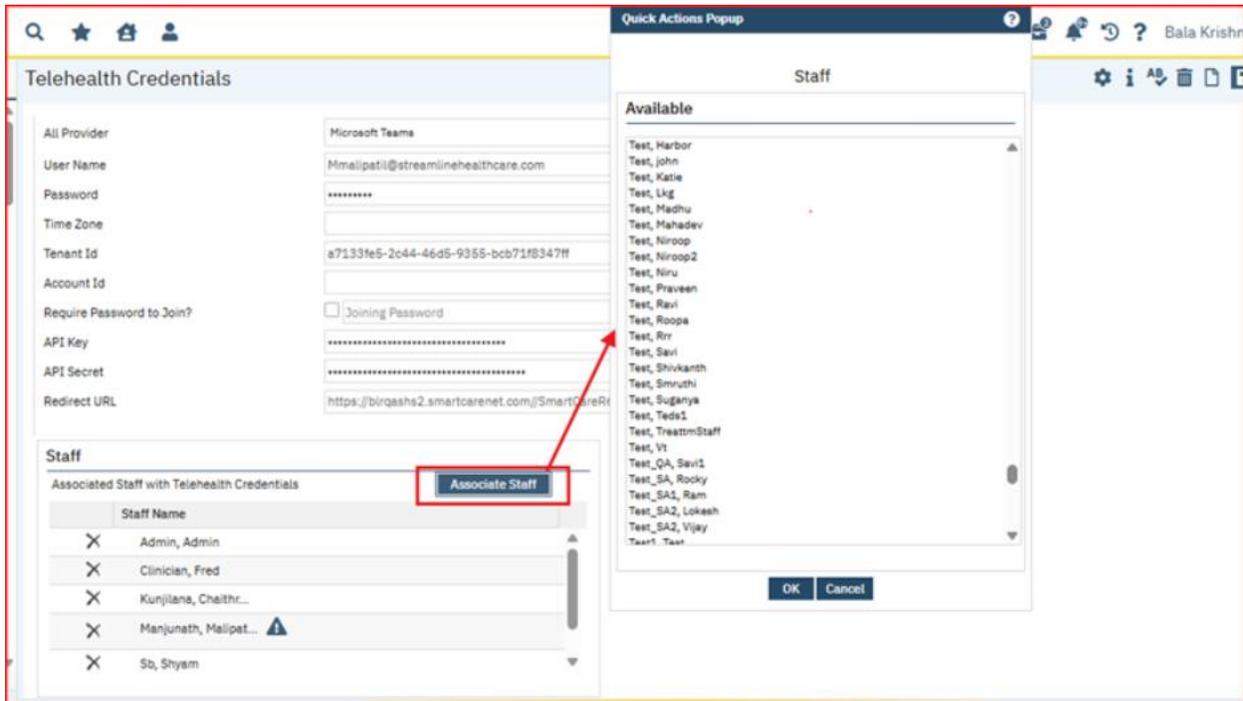
~~**Associate Staff:** This is a button. On click of this button, Quick Actions Popup will be displayed.~~

~~**To associate staff with a credential:**~~

~~on click of **"Associate Staff"** button. It will open **"Quick Actions Pop up"** showing all eligible staffs which are not already linked to the credential.~~

~~**Quick Actions Pop up is displayed with below details:**~~

- ~~1.—Staffs are listed in the format: **LastName, FirstName** and sorted in alphabetical order.~~
- ~~2.—Users can be able to select one or more staff members.~~
- ~~3.—The selected staffs are added to the credential and stored in the backend (TeleHealthStaffAccess table).~~
- ~~4.—**OK:** click on 'ok', it will add the selected staff member to credential.~~
- ~~5.—**Cancel:** Click on 'Cancel', it will close the pop up without selecting the staff member~~



~~**Grid section:**~~

~~**Staff Name:** This is a column header.~~

~~**Remove(X):** This is button, it will be displayed next to name on the staff list on click of this, it will remove the selected staff from the credential.~~

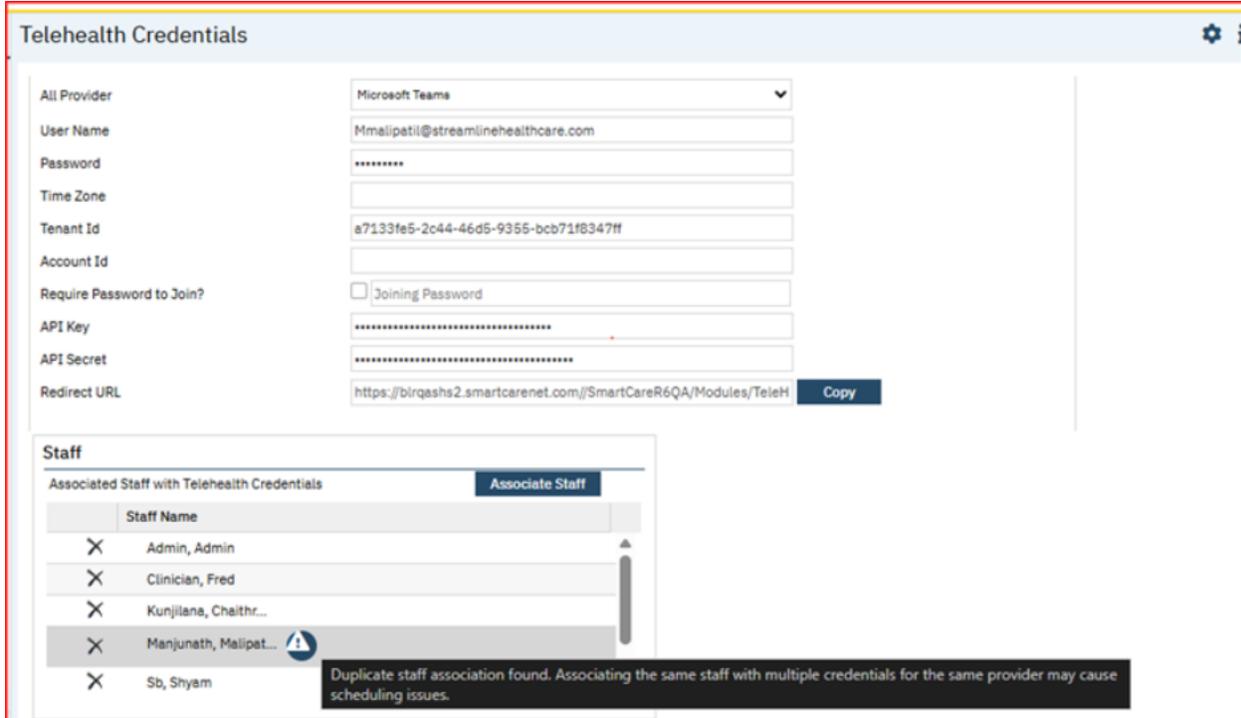
- ~~•—The staff section is **scrollable** to accommodate multiple entries.~~
- ~~•—The list is sorted alphabetically by LastName, FirstName~~

~~if a selected staff member is already associated with another credential for the same provider (e.g., multiple Teams credentials,  will appear next to the staff.~~

Hovering on it, the following message will be displayed.

“Duplicate staff association found. Associating the same staff with multiple credentials for the same provider may cause scheduling issues.”

User can still proceed, but it’s recommended to review such cases to avoid scheduling conflicts.



To remove a staff member associated with the Credential:

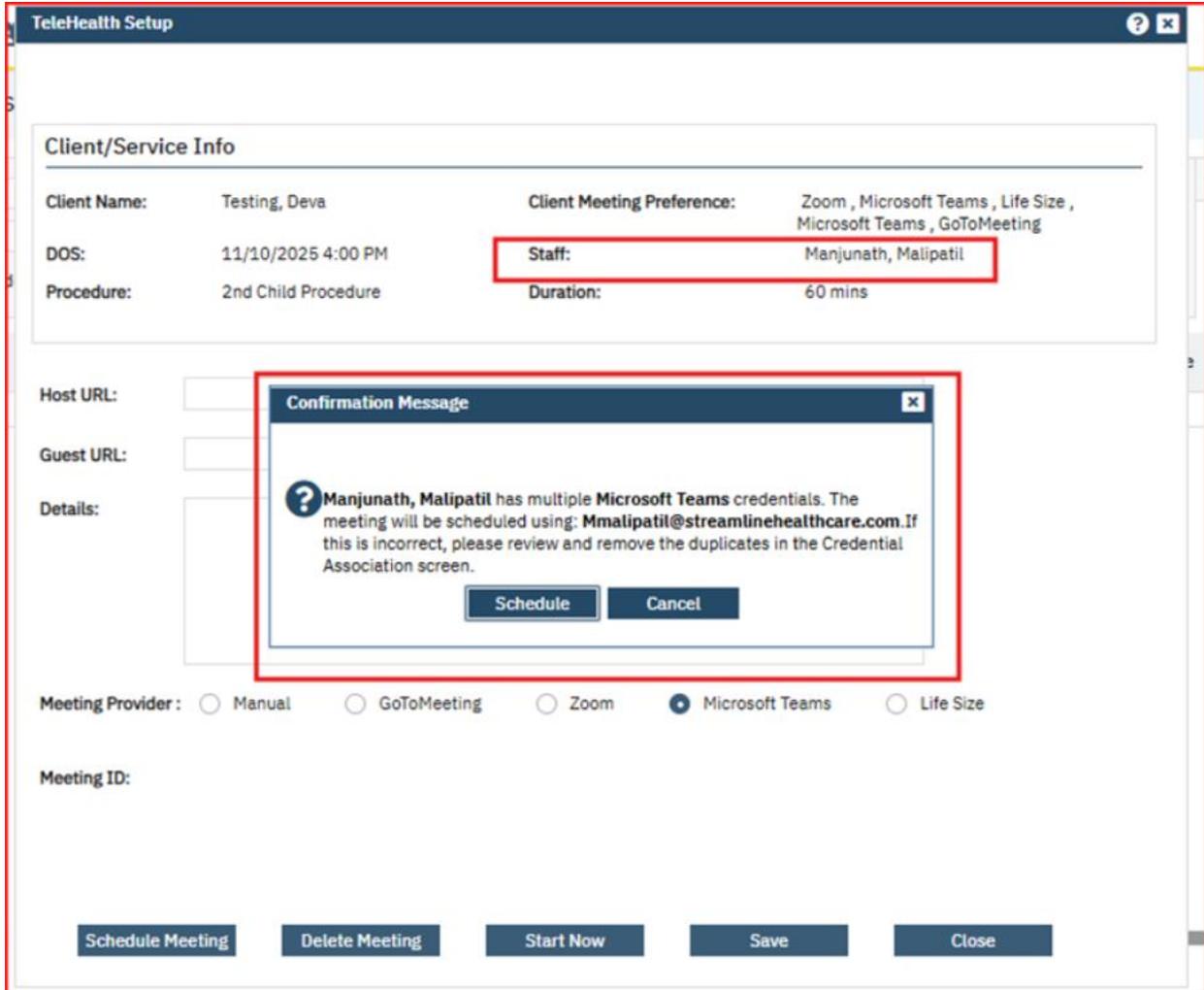
- 1.—Click the Remove(X) icon next to their name on the staff list.
- 2.—A confirmation Message pop up appears.
- 3.—Confirming the action removes the staff from the credential and updates the backend.
- 4.—If the list becomes empty, the warning message reappears.

Telehealth Provide Credential List page:

A new typeable search box field **Staff Name** is added in the filter section on the **Telehealth Provide Credential** List Page, which allows users to search credentials by associated staff. By default, it will display blank.

Scheduling Safeguards: When scheduling a telehealth meeting, if a clinician has multiple credentials for the same provider, a pop-up informs the user which credential will be used and allows them to cancel or proceed.

Pop-up Message Format: [Clinician LastName, FirstName] has multiple [Teams/Zoom] credentials. The meeting will be scheduled using: [credential email]. If this is incorrect, please review and remove duplicates in the Credential Association screen.



Where to Find It:

Path 1: Login to SmartCare Application — Telehealth Provider Credentials (Administration) — Verify the Staff Name type able search field:

Path 2: Login to SmartCare Application — Telehealth Provider Credentials (Administration) — Click on Any Provider credential hyperlink — Telehealth Credentials screen — Staff Section:

Path 3: Login to SmartCare Application — Select a client — Services (Client) — In service list screen click on New button — enter all the required fields — Click on save button to schedule a service — Click on Telehealth Icon — In telehealth Set up pop up if the staff is associated with multiple credentials a confirmation Message Pop up — Schedule button — Telehealth Meeting is created.

How It Helps:

This change improves the Telehealth Credential configuration workflow in SmartCare. This update enhances usability, reduces manual errors, and provides a more intuitive interface for managing staff associations with telehealth credentials. The most significant enhancement is the addition of a dedicated **Staff section** that allows users to associate and manage staff access to telehealth credentials directly from the Credential Detail Page.

Global Codes

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

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

Ref No.	Category Name
38	SEX
38	PHONETYPE
38	RELATIONSHIP
42	FamilyCostShareType
56	MARSTATUS
59	MATLocationType
65	SpecimenAcceptable
73	DEGREE
74	DEGREE

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
55	MatTransactionSpillReason
59	SetCodeForLocationType
73	StatesToSendCSCOnPrescriptions
74	StatesToSendCSCOnPrescriptions

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
39	EnableGuarantorDataSync
40	EnableGurantorDataSync
46	ShowCustomerLogoOnClientStatement
46	CLIENTSTATEMENTBALANCEDUEONDAYS
47	ShowGuarantorOnClientAccountScreen
50	BedBoardLimitDisplayOfProcAndLocBasedOnProgram
50	DisplayCDAGSectionInStaffDetails
50	EnableClinicalDataAccessGrouping
51	AllowBedServicesCreationToErrorBilledServices
51	ALLOWSERVICEERRORWITHPAYMENT
52	EnableLabHL7MessageGenerationOnSpecimenCollection
53	DisplayCDAGSectionInStaffDetails
53	EnableClinicalDataAccessGrouping
53	DisplaySUDCheckboxToTagDataAsSUD
63	SetDualReviewForLabOrderCompletion
64	EnableFreeTextSigPopup
68	EnableAutoUpdateProviderClient
77	EnableFreeTextSigPopup
80	SetDefaultDateFiltersForListPages

Data Model Changes

Ref No.	Data Model Change
38	Guarantors GuarantorPhones GuarantorClients GuarantorAddressHistory
42	FamilyCostShares FamilyCostSharePrograms FamilyCostShareServiceAreas FamilyCostShareProcedureCodes
43	ARLedgerFamilyCostShares
44	GuarantorId column is added in Payments Table.
46	GuarantorStatementBatches GuarantorStatements GuarantorStatementClients GuarantorStatementDetails
54	ParentHL7CpQueueMessageId, IsDerived columns are added in HL7CPQueueMessages table .
60	InventoryType column in MedicationInventories table.
60	Columns LinkedMedicationInventoryTransactionId,DispensedUnitCount,StaffId,ReDispensedReason,ReDispensedBy,ReDispensedDateTime in MedicationTransactions table.
60	Column DispensedMedicationInventoryTransactionId is added to MATManagementPrePourDetails table.
65	Column ShowSpecimen is added to Orders table.
65	ClientOrderSpecimenDetails

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.

Guarantor / Family Cost Share

Multiple EIIs implements a full guarantor account workflow (#126858, #130736, #132039).

Test:

- Validate sync between client and guarantor records.
- Confirm new "Guarantor" tab appears per permissions.

~~Patient Portal~~

- ~~• **EII #132435 / #132629** Intelichart sync for signed documents and appointment data.~~

~~**Test:** Validate sync accuracy and timing.~~

Provider Client

- **EII #131670** – Auto-populate ProviderClients table.
Test: Add/update client-provider relationships and verify auto-population.

Quicklink

- **EII #132165** – Improved Quicklink Detail to prevent incorrect setup.
Test: Attempt common setup flows and confirm validation.

Reports

- **Staff Safety Checks report (132237)**
- **Service Note Reviewer filter changes (#132112)**
Test:
 - Validate new fields, filters, and accurate report outputs.

RWQM Rule

- **EII #132461** – New Copy icon added.
Test: Confirm duplication behaves correctly.

Rx Application

Multiple EIIs include:

- **CSC# display in controlled substance prescriptions (124626, #131627)**
- **Correct dispense qty calculations (132327)**
- **Full strength formulation display (132495)**
- **Med-Sig hyperlink enable/disable (132699)**
- **Free-Text Sig overwrite fix (132641)**
- **Prescriber popup improvements (132474)**

Test:

- Validate prescription flows, Sig behaviors, pop-ups, and quantity calculations.

Services / Service Notes

- **EII #132281** – New System Configuration Key: SetDefaultDateFiltersForListPages
- **EII #132376** – MCO ISP Goals/Objectives initialization changes
Test:
 - Validate default date filters.
 - Confirm goal/objective initialization.

Telehealth-

- ~~EII #131754~~ Microsoft Graph API: create meetings for others.
 - ~~EII #128442~~ Various configuration improvements.
- ~~Test:~~
- Confirm delegated meeting creation works.
 - Validate configuration options.

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