SmartCare™ October 2025 MSP Release Notes (Defects)

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Audience

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

Applicable Releases

The functionality documented these release notes supports <mark>SC.CORE.6.0_1.39.000.2510.009 and</mark> later.

Permissions

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

Global Codes, Recodes, and Configuration Keys

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

TASKS LIST-'DEFECT FIXES' (90)

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

Sl. No	Task No	Summary	Module Name
84	Core Bugs # 132711	Authorizations: The system does not show an error when the 'PM authorization units' used exceed the authorized limit.	Authorizations
85	Core Bugs # 133267	An empty document is created with status 'In Progress' when the Reviewer declines a diagnosis document in the 'Batch Signature' screen.	Batch Signature
86	Core Bugs # 133433	Batch Signature: The Staff Name is not displayed correctly in the 'SignaturePage' pop-up	Batch Signature
87	Core Bugs # 132994	When a Bed Attendance record is deleted, the corresponding service is also automatically deleted.	Bed Board
88	Core Bugs # 133263	Care Coordination Referral List Page – data were not correctly displaying	Care Co-ordination
89	Core Bugs # 132844	The 'Do Not Mark Charges Ready to Bill' checkbox should prevent component services from being marked as ready to bill.	Case Rate
90	Core Bugs # 133158	Case Rate Duration for Procedure Codes entered as hour/day is Multiplying.	Case Rate
91	Core Bugs # 133259	ISERV1 Initial Evaluation Name and Date Changes	CCBHC
92	Core Bugs # 133268	The 'CCBHC Data Collection form' will not allow for entry of a "0" in the 'PHQ9 score' field.	CCBHC Data Collection form
93	Core Bugs # 132298	The 'Degree Code Name' data Truncate Issue for 'Box-31'.	Charges/Claims
94	Core Bugs # 132892	To JOIN Taxonomy Code from Sites table to GlobalCodes and to pull externalcode1.	Charges/Claims
95	Core Bugs # 133112	An error occurs while creating Paper Claims for the Services across episode dates.	Charges/Claims
96	Core Bugs # 133066	CLM did not send the frequency code as '7' Claimed the primary and bundled charges together after marking the primary charge as to be replaced and adding 'PCCN number'.	Charges/Claims
97	Core Bugs # 133082	Plan Name override not working in Primary billing 837P and 837I	Charges/Claims

98	Core Bugs # 133129	The 'Billing Provider Address' field is added to the 'Claim Bundling Criteria Details' page as a bundling criterion.	Claim Bundling Criteria
99	Core Bugs # 133211	The Billing Provider Address field has been added to the Claim Bundling Criteria Details page as a bundling criterion.	Claim Bundling Criteria
100	Core Bugs # 133045	Red error displayed for Non-integer value in PatientAccountNumber.	Claims
101	Core Bugs # 133278	MICR Check Print Issue - MICR #'s are being cut off.	Claims
102	Core Bugs # 133287	Claim Adjudicated and Paid when "Data Entry Incomplete".	Claims
103	Core Bugs # 133300	Client Address Space Issues.	Client Information (c)
104	Core Bugs # 133224	Client Inquiries' screen: Inquiry records are not displaying correctly based on the From and To date filters.	Client Inquiries
105	Core Bugs # 133391	Object reference error when creating an inquiry	Client Inquiries
106	Core Bugs # 133324	'Inquiry Detail' screen: Validation is not displayed when no value is selected in 'Program' dropdown	Client Inquiries
107	Core Bugs # 133205	Lab result PDF details displayed for the wrong client	Client Orders
108	Core Bugs # 133292	Order List Not Displaying in Modify Client Orders Screen	Client Orders
109	Core Bugs # 133353	When a client has a suffix and when client is selected from the 'Client Typeable search', the client's name is missing the suffix.	Client Tool tip
110	Core Bugs # 133368	Client Suffix is not displaying in Client Header	CM Client Summary
111	Core Bugs # 133125	Error message is displayed when the reviewer tries to open and sign enrollment form event document from the message screen.	CM Events
112	Core Bugs # 133322	Contact Note changes to the current date when saved.	Contacts
113	Core Bugs # 133241	Client Name, Client ID, Date of Birth, and Effective Date not displayed in the Assessment (C) document PDF	Core Assessment
114	Core Bugs # 133284	In the Assessments (C), Fagerstrom Test for Nicotine Dependence (FTND) document under the 'Smoking Check-In tab',	Core Assessment

		checkboxes displayed a red fill color when selected.	
115	Core Bugs # 133273	Numerator for CMS-2 (depression screening) Changes	CQM
116	Core Bugs # 133366	FUH-AD/FUH-CH Encounter Diagnosis not pulling for Denominator	CQM
117	Core Bugs # 133349	Issues with exporting a DFA to an SQL script file.	DFA (Dynamic Form Architecture)
118	Core Bugs # 133163	Selecting 'View by Staff' or 'View by Client' options not updating first column in Team Scheduling Grid.	DFA (Dynamic Form Architecture)
119	Core Bugs # 133199	Forms: Formatting Conflict with Text in DFA Editor screen.	DFA (Dynamic Form Architecture)
120	Core Bugs # 133257	Duplicate observations are displayed in the observation dropdown in the 'Client Order Details' screen.	DFA (Dynamic Form Architecture)
121	Core Bugs #133269	The red error message is shown in 'DFA Documents' and 'Service Notes' when the user uses the 'DFA Grid/Table feature' for the 'Documents' and 'Service Notes'.	DFA (Dynamic Form Architecture)
122	Core Bugs # 133017	Existing Goals and Objectives are not displaying in Domain Details screen	Documents
~~123~~	~~Core Bugs # 133048~~	~~DLA -20 Adult document: Average DLA was calculated by Sum of Scores / 20~~	~~Documents~~
124	Core Bugs # 133196	Agency/Program Discharge allows discharging from Primary Program without selecting a new one.	Documents
125	Core Bugs # 133219	Validation Fix for 'Step 1 – Identify Risk Factors' section	Documents
126	Core Bugs # 133289	System fails to refresh PDF after cosign.	Documents
127	Core Bugs # 133291	Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.	Documents
128	Core Bugs # 133305	Document Validations table is not working for 'Revoke Release of Information' document.	Documents
129	Core Bugs # 133402	When a patient signed the PHQ-9 document in the Patient Portal, the Depression Severity information was not displayed in the SmartCare application under the signed PHQ-9 document.	Documents

130	Core Bugs # 133398	Release of Information: Client contact information is not being initialized.	Documents
131	Core Bugs # 133339	Summary of Care document' - 'Client Information' section displayed 'No Information Available' in the document PDF.	Documents
132	Core Bugs # 132904	Payments are not updated while processing ER files.	Electronic Remittance
133	Core Bugs # 133063	Client MAR: Administration Events not functioning as expected for MAT Take home medications.	eMAR
134	Core Bugs # 133380	Flow Sheet Time Out issue	Flow Sheet
135	Core Bugs # 133443	The Weight column in the Vital Signs Report does not display any results.	Flow Sheet
136	Core Bugs # 132155	"Violation of PRIMARY KEY constraint" error when saving Group Note.	Group Service Detail
137	Core Bugs # 133157	Unable to access Show Services Report for Group Services	Group Service Detail
138	Core Bugs # 133369	Group Details Screen does not default to chronological order unless date header is clicked.	Group Service Detail
139	Core Bugs # 133253	Immunization Transmission Details: The 'VXU HL7 Message' not generated on clicking 'Send' Button.	Immunization Transmission Log
140	Core Bugs # 133277	Inquiry (My Office) not updating unless you log out of SmartCare and login back	Inquiry (my office)
141	Core Bugs # 133183	Client Verify Eligibility Process is not working	Interfaces
142	Core Bugs # 133350	Order Question Pick Code length change for Compendium SP	Interfaces
143	Core Bugs # 133364	The system is not transferring all the selected charges to Internal Collections.	Internal Collections
144	Core Bugs # 133340	No Validation Check when users enter an End Date less than Start Date.	Life Event
145	Core Bugs # 133251	Client MAR: unable to administer the Additional Orders	MAR
146	Core Bugs # 133307	Discrepancies in Client MAR when order Template Frequency has "Use Start Time of Order as First Dispense Time" selected	MAR
147	Core Bugs # 133375	Client MAR: Changing the dispense time creates duplicate entries in the Dispense pop up.	MAR

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148	Core Bugs # 133422	Showing Client Not Found error If FirstName or LastName having Special Character in Inbound Results XML.	Messages Interface
149	Core Bugs # 133149	MAT Management Details: For Suboxone Active Orders the scheduled dose is appearing as 0mg in the Dispense grid.	Methadone
150	Core Bugs # 133258	MAT: Show Complete History Report: Start/End date label changes	Methadone
151	Core Bugs # 133345	The Complete label address is not displayed on MAT Medication Label.	Methadone
152	Core Bugs # 133396	MAT: Infinite loop issue persists when saying No to Prime prompt.	Methadone
153	Core Bugs # 133415	The 'Quantity' field value is defaulted to specific value when 'Inventory spill' Reason is selected.	Methadone
154	Core Bugs # 133288	MAT: Hard stop when dispensing a Medication will not be dispensed if the remaining amount after dispensing is at or below the 'Very Low' indicator.	Methadone
155	Core Bugs # 133188	Erclaimlines details and Erclaimlines denied reports showing deleted Erfiles.	My Reports
156	Core Bugs # 133295	Error Message displayed when trying discontinue lab orders	Orders
157	Core Bugs # 132983	Services: Editing an appointment results in duplicate appointments in Outlook.	OutLook
158	Core Bugs # 133406	The duplicate entries for the globalcode category 'SCAPIMessagePRState' are inserted during the upgrade.	Patient Portal
159	Core Bugs # 133271	The system relocates charges to '90 Days' in the prior period instead of '360 Days' when the configuration key value was set to Null.	Reallocation
160	Core Bugs # 133233	Reception/Front Desk Export Excel is not working.	Reception/Front Desk
161	Core Bugs # 133107	Reception/Front Desk List Page Custom View Not Exporting	Reception/Front Desk
162	Core Bugs # 133299	While running the 'RWQM' job, the error message is displayed.	RWQM
163	Core Bugs # 132463	Medication discontinues prompt switches default selection randomly.	Rx Application
164	Core Bugs # 133318	The edited Sig is not saved in the 'SigTextEdited' column in the 'ClientMedicationScriptDrugs' table. Causing	Rx Application

		ambiguity between system-generated and manually edited	
165	Core Bugs # 133091	Recurrence Services did not inherit recurring services from the main service.	Services
166	Core Bugs # 133430	When navigating specific existing service, the 'Service Details' screen appears blank, and the Service ID is shown as '-1'.	Services
167	Core Bugs # 133444	Services Error Log message - JS Error in OnSuccessInitializeCrisiService Method	Services/Notes
168	Core Bugs # 133228	Increased the size of the text fields for "Other Person(s) Present"	Services/Notes
169	Core Bugs # 133326	Unable to hide the Custom Fields in the Service Note & display of red error when deleting In-Progress service notes.	Services/Notes
170	Core Bugs # 133401	Spelling mistake in the validation message of 'Peer Support Service Note'	Services/Notes
171	Core Bugs # 133382	Incorrect ModifiedDate Update for All StaffLicenseDegrees Records	Staff/Users
172	Core Bugs # 132777	Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.	Team Scheduling
173	Core Bugs # 133194	Supervision Report Date Filter is not Working	Widget

Functionality Task Details
Authorizations

Reference No	Task No	Description
84	Core Bugs #132711	Authorizations: The system does not show an error when the 'PM authorization units' used exceed the authorized limit.

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

What's Fixed:

The system displays the appropriate validation messages as described below:

1. In the 'Authorization Details' Screen, under the Services sub-tab, when the user clicks the 'Associate Auth with Other Services...' button and attempts to attach services, the system displays the following validation message in the 'Associate Authorization Services' pop-up screen if the available authorization units are insufficient to cover the service units.

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

2. In the 'Service Details' Page, under the 'Authorization(s)' sub-tab, when the user clicks the 'Attach' button in the 'Available/Potential Authorization(s)' section, the system displays the following validation message if the service units exceed the available authorization units.

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

Additionally, authorization units are now automatically reduced or rolled back when an authorization is detached from a service, or when the service status is changed to anything other than Scheduled, Show, or Completed, ensuring accurate unit balances.

Pre-requisite: Valid service and authorization records with defined unit values exist in the system.

Where To Find It:

Path 1: 'Client' search **--** Select any client – 'Services' – 'Services' list page – Click on 'New' or select any 'DOS' hyperlink text – 'Service Detail' page.

Path 2: 'My Office' -- 'Authorizations' screen – 'Authorizations' list page – click on 'ID' hyperlink.

Path 3: 'Client' search -- – Select a client -- 'Authorizations' screen – Click on 'New' or click on 'ID' hyperlink – 'Authorization Detail' page.

Batch Signature

Reference No	Task No	Description
85	Core Bugs # 133267	An empty document is created with status 'In Progress' when the Reviewer declines a diagnosis document in the 'Batch Signature' screen.
86	Core Bugs # 133433	Batch Signature: The Staff Name is not displayed correctly in the 'SignaturePage' pop-up

85. Core Bugs # 133267: An empty document is created with status 'In Progress' when the Reviewer declines a diagnosis document in the 'Batch Signature' screen.

What's Fixed:

The system displays all details from the declined version in the second version of the document with the status 'In Progress' when the Reviewer declines the diagnosis document in the 'Batch Signature' screen.

Where To Find It:

Path 1: 'Client' – 'Diagnosis Document' - 'Diagnosis Document' page – Select required data and click on 'Sign' icon – 'Signature Page' popup – Select the Reviewer and click on 'Add Reviewer' button.

Path 2: Login as a reviewer – 'My Office' menu – 'Batch Signature' - 'Batch Signature' page -- Select 'To Be Reviewed' from the dropdown and click on 'Apply Filter' button – Select above document(Path 1) and click on 'Decline' button – 'Decline to Sign' popup – Select required reason and click on 'Ok' button.

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86. Core Bugs # 133433: Batch Signature: The Staff Name is not displayed correctly in the 'SignaturePage' pop-up

What's Fixed:

The system now correctly displays the Staff Name in the format of Last Name, First Name in the 'SignaturePage' pop-up on the 'Batch Signature' screen.

 Where To Find It:

Path: My Office -- 'Batch Signature' -- Select any document status -- Click on 'Apply Filter' -- Select document and click on 'Sign Approved Documents' button

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Bed Board

Reference No	Task No	Description
87	Core Bugs # 132994	When a Bed Attendance record is deleted, the corresponding service is also automatically deleted.

87. Core Bugs # 132994: When a Bed Attendance record is deleted, the corresponding service is also automatically deleted.

What's Fixed:

When a user deletes a Bed Attendance record, the corresponding service is no longer deleted or results in an error if the service has already been billed. This ensures data integrity and prevents the removal of billed service records.

Where To Find It:

Path 1: Client Search -- Create a new client/or select an existing client.

Path2: 'Administration' -- 'Units/Rooms/Beds' -- 'Units/Rooms/Beds' list page --

Create 'Unit/Room/Bed'

Path 3: My office -- 'Bedboard' -- 'Bedboard' list page -- 'Status' column -- Search 'Open' and click on

'Admit' hyperlink -- Admit the client.

Path 4: Execute 'create Bed Services' job

Path 5: Client **--** services -- 'Services' list page -- Click on 'DOS' hyperlink -- 'Service Detail' screen --

Hover the 'I' icon -- check the details.

Care Co-ordination

Reference No	Task No	Description
88	Core Bugs # 133263	Care Coordination Referral List Page – data were not correctly displaying

88. Core Bugs # 133263: Care Coordination Referral List Page – data were not correctly displaying.

What's Fixed:

The CDAG logic has been fixed, and the data is now displaying correctly on the Care Coordination Referral List page.

Where To Find It:

Path: Go search – 'Care Coordination Referral List page (My Office)

Case Rate

Reference No	Task No	Description
89	Core Bugs # 132844	The 'Do Not Mark Charges Ready to Bill' checkbox should prevent component services from being marked as ready to bill.
90	Core Bugs # 133158	Case Rate Duration for Procedure Codes entered as hour/day is Multiplying.

89. Core Bugs # 132844: The 'Do Not Mark Charges Ready to Bill' checkbox should prevent component services from being marked as ready to bill.

What's Fixed:

- The system now correctly holds both Case Rate and completed component service charges from being marked as Ready to Bill if any component service remains incomplete.
- Charges receive the billing error 'Hold For Case Rate Service Creation' until all component services are marked Complete.

- The system no longer blocks Case Rate creation due to incomplete services—it now creates Case Rate services and holds them from billing until all criteria are met.

Prerequisites:

1. Case Rate Setup has the checkbox "Do Not Mark Charges Ready to Bill Until All Component Case Rate Services Are Complete" enabled.

2. Case Rate Period can be set to: Day, Week, Month, Encounter, or Year.
3. Valid configuration for Plan, Procedure, Program, and Location exists for the Case Rate Setup.

Where To Find It:

Nightly Billing Job:

Create Case Rate Services – Executes as scheduled

Set Charges Ready to Bill – Executes as scheduled

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90. Core Bugs # 133158: Case Rate Duration for Procedure Codes entered as hour/day is multiplying.

What's Fixed:

The logic is corrected, now, if a 'Case Rate service' with procedure code entered as '112 (Days)', then it will divide the "CaseRateDuration" by 1440 instead of multiplying.

Prerequisites:

1: The Configuration key 'CalculateCaseRateMonthlyDateOfService' to be updated as 'FLDM'

2: A case rate service with procedure code entered as 'Days' needs to be created.

Where To Find It:

Path: 'Client' search -- 'Services'.

CCBHC

Reference No	Task No	Description
91	Core Bugs # 133259	ISERV1 Initial Evaluation Name and Date Changes

91. Core Bugs # 133259: ISERV1 Initial Evaluation Name and Date Changes

What's Fixed:

The following changes have been made:

1. If the Client has both 'Service' and 'Document' related to ISERV1, the system will now consider the document and if multiple documents are available, the earliest document and its effective date will be used for the '*ISERV1 Initial Evaluation Name'* and '*ISERV1 Initial Evaluation Date'*.

2. If the Client has only Service related to ISERV1, then the system will consider 'Service' and if multiple services are available, the earliest service and its service date will be used for the '*ISERV1 Initial Evaluation Name'* and '*ISERV1 Initial Evaluation Date'*.

Prerequisites:

Create a batch by selecting measure to create a batch as 'ISERV' **through the Path:**

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

Where To Find It:

Path: 'My Office' – 'Clinical Quality Measure Batch Results' screen – Click on 'Total Clients' hyperlink of 'ISERV1' and click on 'Client Name' hyperlink.

CCBHC Data Collection form

Reference No	Task No	Description
92	Core Bugs # 133268	The 'CCBHC Data Collection form' will not allow for entry of a "0" in the 'PHQ9 score' field.

92. Core Bugs # 133268: The 'CCBHC Data Collection form' will not allow for entry of a "0" in the 'PHQ9 score' field.

What's Fixed:

The system will no longer display the following validation message in the 'CCBHC Data Collection' Document if '0' is entered in the 'PHQ9 score' field.

Validation Message: PHQ9 score is required'

Where To Find It:

Path: Login to 'SmartCare' application -- 'Client' search -- Select a Client -- Documents' -- 'CCBHC Data Collection form' -- Enter the required fields -- Click on 'Validate' Button.

Charges/Claims

Reference No	Task No	Description
93	Core Bugs # 132298	The 'Degree Code Name' data Truncate Issue for 'Box-31'.
94	Core Bugs # 132892	To JOIN Taxonomy Code from Sites table to GlobalCodes and to pull externalcode1.
95	Core Bugs # 133112	An error occurs while creating Paper Claims for the Services across episode dates.
96	Core Bugs # 133066	CLM did not send the frequency code as '7' Claimed the primary and bundled charges together after marking the primary charge as to be replaced and adding 'PCCN number'.
97	Core Bugs # 133082	Plan Name override not working in Primary billing 837P and 837I

93. Core Bugs # 132298: The 'Degree Code Name' data Truncate Issue for 'Box-31'.

What's Fixed:

The length of the field *'Box-31' Signed column* has increased from 30 characters' to '250 characters'. As a result, the *'Degree Code Name'* is no longer truncated, and the 'Box-31' field can now accommodate up to '250 characters'.

Prerequisites:

1. Set Billing degree as the key value for the following configuration key 'ShowSigningSuffixORBillingDegreeOnPaperClaims'.
2. Ensure that the 'CMS 1500' paper Claim-format is selected for the associated coverage plan.

Where To Find It:

Path 1: 'Client' search **--** 'Select a client' -- 'Services' -- 'Services' List page is opened--- Click on 'New' icon – 'Service Details' page is opened -- Enter all the 'Service Details' and set the 'Service' status to 'Complete' – Click on 'Save'.

Path 2: 'My Office' **--** 'Charges/Claims'– 'Charges/Claims List' page - select the required 'Charge ID' – Click on 'Paper-Claims' icon – 'Claims Processing' pop-up - Click on 'Process Now' – 'Print Claims'.

Data Model Changes: The field length for 'Field31Signed' column is increased to VARCHAR(250) in 'ClaimNPIHCFA1500s' Table.

94. Core Bugs # 132892: To JOIN Taxonomy Code from Sites table to GlobalCodes and to pull externalcode1.

What's Fixed:

The system correctly pulls the taxonomy from the site and processes the claims without red errors.

Prerequisites:

- Rendering provider id should not be present in the MCO claim line.
- DefaultClinicianFromClaimToServiceCreation key is configured with the clinician id used for service creation.

Where To Find It:

Path: Select 'Provider Contracts' under 'My office'---click on new ---create provider---select 'Claims' under 'My office'---Complete a Professional claim---select Services from claims ---select the claims ---create a service.

95. Core Bugs # 133112: An error occurs while creating Paper Claims for the Services across episode dates.

What's Fixed:

The 'Professional' paper claims can now be created successfully without errors for services that occur both within and beyond the registration and discharge dates of a client's episode.

Prerequisite:

- An active client episode is created for a client
- The Client is associated with a Professional coverage plan.
- The Service is created within the active episode date range and beyond the Episode date.

Where To Find It:

Path: My Office -- 'Charges/Claims' -- 'Charges/Claims' list page -- Select the Charges -- Click on the 'Paper Claims' icon – 'Claims Processing' popup -- Click on the 'Process Now' button.

96. Core Bugs # 133066: CLM did not send the frequency code as '7' Claimed the primary and bundled charges together after marking the primary charge as to be replaced and adding 'PCCN number'.

What's Fixed:

The 'CLM' segment is fetched only once with the frequency code set to '7', when users claim the primary and bundled charges together after marking the primary charge as *to be replaced* and adding the 'PCCN number'.

Prerequisite: Select 'HIPAA 837 Professional' Document from the 'Standard Electronic Claim Format' in the 'Plans'.

Where To Find It:

Path 1: 'Administration' —'Procedure' —Click on 'New' button—'Procedure Code Details' Page will be opened—Enter all the required details—Click on 'Bundle Codes' tab—Select required 'Procedure code'—Click on 'Save' button.

Path 2: 'Services' —'My office' —Click on 'New' button —'Service Detail' page will be opened—Enter all the required details—Click on 'Save' button.

Path 3: 'My Office' – 'Charges/Claims' –– Select the 'ChargeId' – Click on 'E-Claims' button-- Click on 'Process Now' –– Click on 'Create Claim File'—Navigate back to 'Charges/Claims '—Select the 'Primary charge'—Select the 'Mark to be replaced' from 'Actions' dropdown—Click on 'Charge Id' hyperlink—Click on 'Batch ID' –Click on 'Claims' – Add 'PCCN number'—Click on 'Save' button.

Job: ssp_SCJobToCreateBundledServices

Path 4: 'My Office' – 'Charges/Claims '–– Select the 'ChargeIds' (Primary and bundled)– Click on 'E-Claims' button-- Click on 'Process Now' –– Click on 'Create Claim File'.

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97. Core Bugs # 133082: Plan Name override not working in Primary billing 837P and 837I

What's Fixed:

When the user processes the charge, the plan name is now being overridden in the NM1*PR segment, and also when the 'Plan Name' on the 'ClientCoveragePlan' is blank or NULL, the system is now fetching the existing 'Plan Name' from the coverage plan even when the 'Override' checkbox is blank.

Where To Find It:

Path 1: Client -- Go Search -- Coverage — Client Plans Screen will be opened--Click on 'Plan Name' hyperlink—Click on 'Claim Information' tab—Check Override Claim Information from Coverage Plan checkbox.

Path 2: 'My Office' – 'Charges/Claims' –– Select the 'Charge Id' – Click on 'E-Claims' button-- Click on 'Process Now' –– Click on 'Create Claim File'.

Claim bundling Criteria

Reference No	Task No	Description
98	Core Bugs # 133129	The 'Billing Provider Address' field is added to the 'Claim Bundling Criteria Details' page as a bundling criterion.
99	Core Bugs # 133211	The Billing Provider Address field has been added to the Claim Bundling Criteria Details page as a bundling criterion.

98. Core Bugs # 133129: The 'Billing Provider Address' field is added to the 'Claim Bundling Criteria Details' page as a bundling criterion.

What's Fixed:

The 'Billing Provider Address' field with 'Yes' and 'No' radio buttons has been added to the 'Claim Bundling Criteria Detail' screen. This new field is now visible and can be utilized during the bundling criterion process.

Where To Find It:

Path: Administration' -- 'Claim Bundling Criteria List' -- 'Claim Bundling Criteria List' page -- click on new icon -- 'Claim Bundling Criteria Detail' screen.

Data model Changes:

A new column 'BillingProviderAddress' is added in the 'CoveragePlanClaimBundlingCriteria' Table.

99. Core Bugs # 133211: The Billing Provider Address field has been added to the Claim Bundling Criteria Details page as a bundling criterion.

What's Fixed:

The 'Billing Provider Address' field is now implemented and visible on the Claim Bundling Criteria Detail page, allowing it to be used during bundling criterion.

Functional Behavior:

- **When Billing Provider Address is set to 'Yes':** If a client receives multiple services on the same date from the same clinician, with different billing codes and programs that have different addresses, and the Claims Provider is configured to pull the Billing Provider from the Program (Address only), then each service will be placed on separate claims. Each claim will reflect a distinct Billing Provider Address.

- **When Billing Provider Address is set to 'No':** Under the same conditions, all services will be bundled into a single claim. The Billing Provider Address will be applied uniformly, without considering differences in program addresses.

  Note: When the Billing Provider Address is set to 'No', the Billing Provider NPI value should be the same across all services.

- Under the same condition, if the user tries to bundle on other Bundling criteria (Ex: by setting Billing Code as 'Yes') ensure Billing Provider NPI value should be the same.

Where To Find It:

Path 1. Go Search -- Claim Bundling Criteria List (Administration) → On the Claim Bundling Criteria List page, click the New icon → navigate to the Claim Bundling Criteria Detail page.

Path 2. Client Search ---Select a client associated with the coverage plan ---Navigate to '**Services**' under the client--- Create and complete the service--- navigate back to 'My Office' -- 'Charges and Claims' -- select the 'Charge' -- Click on 'Electronic Claim' button -- 'Claims Processing' popup screen--- click on 'Process Now' to create the claim file.

Prerequisites:

1. A client with an active coverage plan is to be selected.
2. The Claims Provider is configured to pull the Billing Provider from the Program (Address only).
3. A service is created using different programs and different procedures.

Claims

Reference No	Task No	Description
100	Core Bugs # 133045	Red error displayed for Non-integer value in PatientAccountNumber.
101	Core Bugs # 133278	MICR Check Print Issue - MICR #'s are being cut off.
102	Core Bugs # 133287	Claim Adjudicated and Paid when "Data Entry Incomplete".

100. Core Bugs # 133045: Red error displayed for Non-integer value in PatientAccountNumber.

What's Fixed:

When a user enters a non-integer value in the PatientAccountNumber field and clicks **Yes** on the *Duplicate Claim Line Confirmation* popup, the system navigates the user to the respective claim screen and does not display a red error.

Where To Find It:

Path: 'My Office' --- 'Claims' -- Select Client -- Select Claim type 'I'/'P'/'PI'/'PP' -- Claim entry Screen -- Save -- Adjudicate -- Select Claim type 'I'/'P'/'PI'/'PP' -- Claim entry Screen -- Add non integer value in Patient Account No. -- Select the same date range which is used in previous claim line -- Click on insert -- Click on yes from duplicate claim line popup.

101. Core Bugs # 133278: MICR Check Print Issue - MICR #'s are being cut off.

What's Fixed:

The system will display the 'Dollar amount' in a single line, and now the 'MICR number' is displaying properly in MICR Check.

Where To Find It:

Path: 'My Office' - 'Claims' - Select Approved Claim line - 'Select Action' - 'Pay'

102. Core Bugs # 133287: Claim Adjudicated and Paid when "Data Entry Incomplete".

What's Fixed:

The system now disables the 'Adjudication' option for claim lines with an 'Entry Incomplete' status

Where To Find It:
Path: 'My Office' -- 'Claims' – 'Claim Lines' list page -- Select 'Claim Line' id which has 'Entry Incomplete' status -- 'Claim Line Detail' screen – Select 'Adjudicate' from 'Select Action' dropdown

Client information (C)

Reference No	Task No	Description
103	Core Bugs # 133300	Client Address Space Issues.

103. Core Bugs # 133300: Client Address Space Issues.

What's Fixed:

When the user enters and saves an address in the '**Client Address'** section, the address now displays correctly with a space after the comma between city and state.

This fix applies to the following screens:

- Client Information (C)
- Client Information (Administration)
- Treatment Team Details
- Registration Document (C)
- Internal Consent Management (MH)

 Where To Find It:

Path 1: Client' search -- 'Client Information (C)'

Path 2: 'Client' search -- Client Information (Administration)

Path 3: Client' search -- 'Treatment Team Details'

Path 4: Client' search **-- '**Registration Document (C)'

Path 5: 'Client' search -- Internal Consent Management (MH)

Client Inquiries

Reference No	Task No	Description
104	Core Bugs # 133224	Client Inquiries' screen: Inquiry records are not displaying correctly based on the From and To date filters.
105	Core Bugs # 133391	Object reference error when creating an inquiry
106	Core Bugs # 133324	'Inquiry Detail' screen: Validation is not displayed when no value is selected in 'Program' dropdown

104. Core Bugs # 133224: Client Inquiries' screen : Inquiry records are not displaying correctly based on the From and To date filters.

What's Fixed:

The Client Inquiries list page will display records based on the following conditions:

1.If no dates are entered in the From Date and To Date fields, the system defaults the filter to the current date.
 2.if both the From and To dates are cleared and click Apply Filter, the system returns all inquiries for all dates.
 3.If the From and To date filters are set to a large date range, the system displays inquiry records based on the specified range.

Pre-requisite: Inquiry records exists for the selected client.

Where To Find It:

Path: 'Client' - 'Client Inquiries' list page.

105. Core Bugs #133391: Object reference error when creating an inquiry.

What's Fixed:

Users can now create or open a client through '**Client Inquiry**' without encountering the following error message:

"Object reference not set to an instance of an object."

Where To Find It:

Path: 'Client search' popup-- inquiry a New Client.

106. Core Bugs #133324: 'Inquiry Detail' screen: Validation is not displayed when no value is selected in 'Program' dropdown.

Note: This CDAG 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 Fixed:

The system now displays the following validation message on the 'Inquiry Detail' screen when the user is in the 'Demographics' or 'Insurance' tab and clicks the 'Save' button without selecting an option in the 'Program' dropdown under the 'Inquiry Handled By' section.

Validation Message: "Initial - Please choose the program."

Prerequisite: CDAG setup as follows:

- Set configuration key "DisplayCDAGSectionInStaffDetails" value to 'Yes'.
- Set configuration key 'EnableClinicalDataAccessGrouping' value to 'Yes'.

Where To Find It:

Path: Client' -- 'Client Inquiries' -- 'Inquiry Details' screen -- 'Inquiry Handled By' section.

Client Orders

Reference No	Task No	Description
107	Core Bugs # 133205	Lab result PDF details displayed for the wrong client
108	Core Bugs # 133292	Order List Not Displaying in Modify Client Orders Screen

107. Core Bugs # 133205: Lab result PDF details displayed for the wrong client.

What's Fixed:

When lab results are processed for Quest, the PDF details are correctly mapped to the appropriate client. As a result, the 'Lab Result Review' screen displays the results under the correct client.

Where To Find It:

Path 1. Go Search -- Messages Interface (Administration) -- Message Interface Detail

Path 2. Client – Go Search -- -- Lab Results Review -- Lab Results Review screen

108. Core Bugs # 133292: Order List Not Displaying in Modify Client Orders Screen.

What's Fixed:

The orders selected from the Client Order Selection Pop-up are now accurately reflected in the Client Order Details grid

Where To Find It:

Path: 'Client' – 'Client Order' – Click 'New' – Select orders from the 'Client Order Selection Pop-up' - Click 'OK' button.

Client Tool tip

Reference No	Task No	Description
109	Core Bugs # 133353	When a client has a suffix and when client is selected from the 'Client Typeable search', the client's name is missing the suffix.

109. Core Bugs # 133353: When a client has a suffix and when client is selected from the 'Client Typeable search', the client's name is missing the suffix.

What's Fixed:

The client's name now correctly displays with the suffix in the following screens when the client has a suffix:

- Client Summary
- PMClient Summary
- Summary

Prerequisite: Select any Client having suffix through the **path:**

Path: 'Client Typeable search' –Enter 'Client ID' having suffix.

Where To Find It:

Path 1: 'Client' search -- Go Search -- 'Client Summary' -- Tool Tip

Path 2: 'Client' search -- Go Search -- 'PMClient Summary' -- Tool Tip

Path 3: 'Client' search -- Go Search - 'Summary' -- Tool Tip

CM Client Summary

Reference No	Task No	Description
110	Core Bugs # 133368	Client Suffix is not displaying in Client Header

110. Core Bugs # 133368: Client Suffix is not displaying in Client Header

What is Fixed:

When the user navigates to the 'CM Client Summary' screen, the Client name is now not overriding in the Client search tool bar, and the Client name is now displaying in the format 'Last Name, Suffix, First Name' if the Client name has a Suffix.

Prerequisite: Create/Select a 'Client' - Navigate to 'Client Information' screen – Add 'Suffix' – 'Save'

Where to Find:

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

CM Events

Reference No	Task No	Description
111	Core Bugs # 133125	Error message is displayed when the reviewer tries to open and sign enrollment form event document from the message screen.

111. Core Bugs # 133125: Error message is displayed when the reviewer tries to open and sign enrollment form event document from the message screen.

What's Fixed:

The reviewer staff can open the enrollment form event document from messages screen and sign it without any red error message.

Where To Find It:

Path 1: Select Client from client search popup - 'CM Events' - Select Enrollment Form Event - add required fields - Sign- Enter 'Password' and Select 'Reviewer' from dropdown- 'Add reviewer' Button - Save and close - Click on Three dots icon - 'Send' option -Choose staff(Reviewer staff which is added in the previous step) in "To" textbox - 'Message' icon - 'Log out'.

Path 2: 'Login to SmartCare with the reviewer staff -'My Office' -'Messages' - Select Enrollment from Event Message – Sign.

Contacts

Reference No	Task No	Description
112	Core Bugs # 133322	Contact Note changes to the current date when saved.

112. Core Bugs # 133322: Contact Note changes to the current date when saved.

What's Fixed:

The system now correctly displays the selected 'Contact Date/Time' after the 'Contact Note Detail' screen is saved.

Where To Find It:

Path: Client -- 'Contact Note' -- 'Contact Note' list page -- click on new -- 'Contact Note Detail' screen -- 'Contact Date/Time' field

Core Assessment

~~Reference No~~	~~Task No~~	~~Description~~
~~113~~	~~Core Bugs # 133241~~	~~Client Name, Client ID, Date of Birth, and Effective Date not displayed in the Assessment (C) document PDF~~
~~114~~	~~Core Bugs # 133284~~	~~In the Assessments (C), Fagerstrom Test for Nicotine Dependence (FTND) document under the 'Smoking Check-In tab', checkboxes displayed a red fill color when selected.~~

~~**113. Core Bugs # 133241: Client Name, Client ID, Date of Birth, and Effective Date not displayed in the Assessment (C) document PDF.**~~

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

~~The system now displays Client Name, Client ID, Date of Birth, and Effective Date at the top of the Assessment (C) document PDF.~~

~~Where To Find It:~~

~~**Path:** Select 'Client' – Select 'Assessment (C)' document – add required details – Save – Sign.~~

~~**114. Core Bugs # 133284: In the Assessments (C), Fagerstrom Test for Nicotine Dependence (FTND) document under the '*Smoking Check-In* tab', checkboxes displayed a red fill color when selected.**~~

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

~~The checkbox no longer displays a red fill color when selected in the 'Smoking Check-In' tab of the 'Fagerstrom Test for Nicotine Dependence document.~~

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

~~1. Set the 'Fagerstrom Test for Nicotine Dependence (FTND)' Assessment' tab as Active in the 'Document Mapping Details' screen through the below.~~

~~Path: 'Administration' -- 'Document Mapping' – click on the 'Assessment (C)' hyperlink for 'Fagerstrom Test for Nicotine Dependence (FTND)' -- Ensure the "Fagerstrom Test for Nicotine Dependence (FTND)' Document tab is 'Active' in the 'Document Mapping' screen.~~

~~2. Add 'Fagerstrom Test for Nicotine Dependence (FTND)' Document in the 'Document Code Details' screen as 'Active' through the below~~

~~Path: 'Administration' -- 'Document Codes' -- 'Assessment (C)' - 'Document Codes Details' -- 'Assessment' Tab -- 'Tab Triggers' Section -- Select "Fagerstrom Test for Nicotine Dependence (FTND) Document' from the 'Tab List' dropdown -- Select the Type -- Select 'Age Category' -- Select 'Population' -- Select 'Assessment Classification' -- Select 'Active' checkbox - Click on 'Insert' -- 'Save'.~~

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

~~**Path:** Go search – Assessment (C) -- Assessment (C) screen – Select the Type – Select Age Category – Select Population – Select Assessment Classification according to the setup done in Pre-requisite 2 – "*Smoking Check-In*' tab – Select the check boxes.~~

CQM

Reference No	Task No	Description
115	Core Bugs # 133273	Numerator for CMS-2 (depression screening) Changes
116	Core Bugs # 133366	FUH-AD/FUH-CH Encounter Diagnosis not pulling for Denominator

115. Core Bugs # 133273: Numerator for CMS-2 (depression screening) Changes

What's Fixed:

The following changes have been made.

1. For PHQ9 Document, if Other interventions or follow-up for the diagnosis or treatment of depression was set as 'Y' then it is reported as 410223002.
2. For PHQ9 Document, if Declined to Participate is set as 'Y' then it is reported as 720834000.
3. For PHQ9 and PHQA Document, if Referral For Depression Ordered is set as 'Y' then it is reported as 183524004.
4. For PHQ9 and PHQA Document if Suicide Risk Assessment Performed is set as 'Y' then it is not reporting any value.
5. For PHQ9 and PHQA Document, if Pharmacological Intervention is set as 'Y' then it is reported as 372067001
6. For PHQA Document, if Declined to Participate is set as 'Y' then it is reported as 720834000.

Prerequisite:

Client has a PHQ9 or PHQA document to be signed.

Where To Find It:

Path : 'My Office' – 'CQM Solutions' -- 'CQM Solutions' application -- Queued Report -- Click on 'Create Report' –' Enter Description with selection of Begin Date and End Date and CQM Update year as 'eCQM 2025' and select measure as 'CMS 2v14 / MIPS 134 - Preventive Care and Screening: Screening for Depression and Follow-Up Plan' then Click on 'Queue Report' button -- Click on 'View Results' and Click on 'View Detail' on the measure and select any of the checkbox of 'Client (IPP or Den or Excl or Num)'.

116. Core Bugs # 133366: FUH-AD/FUH-CH Encounter Diagnosis not pulling for Denominator

What's Fixed:

The 'Initial Patient Population' and 'Denominator' are now correctly populated when the conditions are satisfied.

Prerequisite:

Client has Hospitalization and active diagnosis of Major Depressive Disorder.

Where To Find It:

Path: 'My Office' – 'CQM Solutions' -- 'CQM Solutions' application -- Queued Report -- Click on 'Create Report' –' Enter Description with selection of 'Begin Date' and 'End Date' and CQM Update year as 'CCBHC 2024' and select measures as 'CCBHC FUH-AD (3319) - Follow-Up After Hospitalization for Mental Illness: Age 18 and Older and 'CCBHC FUH-CH (3320) - Follow-Up After Hospitalization for Mental Illness: Ages 6 to 17' -- Click on 'Queue Report' button -- Click on View Results and Click on 'View Detail' on the measure and select any of the checkbox of 'Client (IPP or Den or Excl or Num)'.

DFA (Dynamic Form Architecture)

Reference No	Task No	Description
117	Core Bugs # 133349	Issues with exporting a DFA to an SQL script file.
118	Core Bugs # 133163	Selecting 'View by Staff' or 'View by Client' options not updating first column in Team Scheduling Grid.
119	Core Bugs # 133199	Forms: Formatting Conflict with Text in DFA Editor screen.
120	Core Bugs # 133257	Duplicate observations are displayed in the observation dropdown in the 'Client Order Details' screen.
121	Core Bugs #133269	The red error message is shown in 'DFA Documents' and 'Service Notes' when the user uses the 'DFA Grid/Table feature' for the 'Documents' and 'Service Notes'.

117. Core Bugs #133349: Issues with exporting a DFA to an SQL script file.

What's Fixed:

1. Exporting a DFA to a SQL script now correctly exports the complete 'ViewDocumentRDL' field value without truncation.
2. The 'FormId' column in the 'Screens' table is now properly populated during the 'INSERT' statements.

Where To Find It:

Path: Login to 'SmartCare' application – 'Administration' – 'DFA Editor' Screen – Click on 'Export' icon – Select 'Export as SQL script' option and export Form.

118. Core Bugs # 133163: Selecting 'View by Staff' or 'View by Client' options not updating first column in Team Scheduling Grid.

What is Fixed:

In the Team Scheduling screen, when selecting either "View by Staff" or "View by Client" radio button and clicking on Apply Filter, the first column of the grid is now correctly updated according to the chosen filter.

Where To Find It:

Path: Login to SmartCare application – 'Team Scheduling' screen

119. Core Bugs # 133199: Forms: Formatting Conflict with Text in DFA Editor screen

What's Fixed:

When a user views text in the preview tab of the DFA Editor screen, the system preserves all formatting—such as bold, underline, and font color—when the user adds and highlights text for any item type.

Where To Find It:

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

120. Core Bugs # 133257: Duplicate observations are displayed in the observation dropdown in the 'Client Order Details' screen.

What's Fixed:

When the observation values are deleted from the 'Health Data Sub-Template' screen and same values are added again, now the duplicate values are not displayed in the 'Observation' dropdown of the 'Lab Results' tab in the 'Client Order Details' screen.

Where To Find It:

Path: 'Client' search --- 'Client Orders' screen --- Click on 'New' icon --- Select a 'Lab Order'--- Enter required data --- Click on 'Insert' button --- Click on 'Save/Sign' button --- 'Client Orders List Page' --- Click and Open the 'Lab Order' --- 'Client Order Details' screen --- Go to 'Lab Results' tab --- Click on 'Observation' dropdown.

121. Core Bugs #133269: The red error message is shown in 'DFA Documents' and 'Service Notes' when the user uses the 'DFA Grid/Table feature' for the 'Documents' and 'Service Notes'.

What's Fixed:

The system will no longer display the following red error in '*DFA Documents'* and '*Service Notes'* when users use the 'DFA Grid/Table feature' with a stored procedure for '*Documents'* and '*Service Notes'*.

Error Message: "Input String was not in correct format"

Where To Find It:

Path 1: 'Client' search - 'Service Note' Screen

Path 2: 'Client' search - 'Documents' Screen

Documents

Reference No	Task No	Description
122	Core Bugs # 133017	Existing Goals and Objectives are not displaying in Domain Details screen
~~123~~	~~Core Bugs # 133048~~	~~DLA -20 Adult document: Average DLA was calculated by Sum of Scores / 20~~
124	Core Bugs # 133196	Agency/Program Discharge allows discharging from Primary Program without selecting a new one.
125	Core Bugs # 133219	Validation Fix for 'Step 1 – Identify Risk Factors' section
126	Core Bugs # 133289	System fails to refresh PDF after cosign.
127	Core Bugs # 133291	Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.
128	Core Bugs # 133305	Document Validations table is not working for 'Revoke Release of Information' document.
129	Core Bugs # 133402	When a patient signed the PHQ-9 document in the Patient Portal, the Depression Severity information was not displayed in the SmartCare application under the signed PHQ-9 document.
130	Core Bugs # 133398	Release of Information: Client contact information is not being initialized.
131	Core Bugs # 133339	Summary of Care document' - 'Client Information' section displayed 'No Information Available' in the document PDF.

122. Core Bugs # 133017: Existing Goals and Objectives are not displaying in Domain Details screen

What's Fixed:

All existing and new Goals and Objectives associated with the Domain are now displayed correctly on the Domain Details screen under their respective Domains.

Where To Find It:

Path 1: 'Client Search' - 'Individualized Service Plan (Client)' – 'Needs tab' – 'Add some needs and associate Goals and Objectives to it'

Path 2: 'Documents Linked to Domain List (Administration) – 'Domain Details screen' – Verify the Goals and Objectives under respective Domain.

~~123. Core Bugs # 133048: DLA -20 Adult document: Average DLA was calculated by Sum of Scores / 20~~

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

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

~~In DLA -20 Adult document, now Average DLA is calculated by dividing the sum of scores by the number of questions answered.~~

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

~~**Path:** 'Client'– 'DLA -20 Adult (C)' Document – - Fill all the required Information -- Save/Sign~~

124. Core Bugs # 133196: Agency/Program Discharge allows discharging from Primary Program without selecting a new one.

Note : The CDAG 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 Fixed:

The following validation messages are implemented when discharging from a 'Primary Program' or unchecking the 'Primary' checkbox:

- If the user is discharged from a 'Primary Program' in the 'Discharge' document and When another Program is available, the following validation message is displayed:

  Validation Message: "Clients must always be enrolled in a primary program. Since you are discharging the client from their primary program, please select a new program for the client to be enrolled in."

- If the user is discharged from a 'Non-Primary Program', but unchecking the 'Primary' checkbox in the 'Discharge' document, and when another Program is available, the following validation message is displayed:

  Validation message: "Clients must always be enrolled in a primary program, please select a new program for the client to be enrolled in."

Note:
1. These above validation message will be released as inactivated state.

   When the configuration Keys - "DisplayCDAGSectionInStaffDetails"

   and 'EnableClinicalDataAccessGrouping' values are set to 'Yes' (CDAG);

If the user is discharging a 'Primary Program' or unchecking the 'Primary' checkbox in the 'Discharge' document, No validation messages will be shown. When discharging from a 'Primary Program', the system will automatically assign the enrolled program with the oldest enrolment date as the new Primary Program (similar to the workflow in Program Assignment Details).

Where To Find It:

Path 1: 'Client' search -- Open a client - 'Agency/Program Discharge' document – 'Discharge the Primary Program'.

Path 2: 'Client' search -- Open a client - 'Agency/Program Discharge' document – 'Discharge Non-Primary Program' by unchecking the 'Primary' checkbox.

125. Core Bugs # 133219: Validation Fix for 'Step 1 – Identify Risk Factors' section.

What's Fixed:

The system corrects the validation logic. When a user answers "No" to Question 2, the system excludes Questions 3, 4, and 5 from required field validation, allowing the user to proceed without filling them.

Where To Find It:

Path: Open client -- SAFE-T Protocol with C-SSRS (Columbia Risk and Protective Factors) - Recent(C) -- Enter all field – Sign.

126. Core Bugs # 133289: System fails to refresh PDF after cosign.

What's Fixed:

The system now refreshes the PDF to show the Co-signer's details after a Service Note is cosigned, when 'Regenerate RDL On CoSignature' is set to 'Yes' in the 'Document Codes Detail' screen.

Where To Find It:

Path 1: 'Client' -- 'Service Note' – Open any Service Note -- 'Co-Sign'

Path 2: 'Administration' -- 'Document Codes' – New -- 'Document Codes Detail' screen – Select 'Yes' radio button for 'Regenerate RDL On CoSignature'.

127. Core Bugs # 133291: Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.

What's Fixed:

Now the system allows the user to sign the National Outcome Measures (NOMs) Document without displaying a validation message for the G4 section.

Where To Find It:

Path: Login – Select Client — Documents — 'National Outcome Measures (NOMs)' Document — Enter the required field —Click on Validate Button – Sign.

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128. Core Bugs # 133305: DocumentValidations table is not working for 'Revoke Release of Information' document.

What's Fixed:

The system now pulls the document validations from the DocumentValidations table and can be seen in the 'Revoke Release of Information' document while signing.

Prerequisite:

1)The data needs to be present in the 'Release of Information Log' tab of 'Client Information(C)'

2)The validation added with the Hotkeys shortcut (Ctrl+Alt+v) is active.

Where To Find It:

Path: Client Search -- Select 'Client' -- 'Revoke Release of Information' – Click on 'Validate' icon -- The newly added validations are displayed -- select the data – Click on 'Sign' -- Pdf is displayed and entered data is matching with UI.

---

129. Core Bugs # 133402: When a patient signed the PHQ-9 document in the Patient Portal, the Depression Severity information was not displayed in the SmartCare application under the signed PHQ-9 document.

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

What's Fixed:

The 'PHQ-9 document' in the 'SmartCare application' now correctly displays all the information, including the 'Depression Severity' section, after the patient signs the document in the 'Patient Portal'.

Where To Find It:

Path: 'Client' search -- 'Documents' -- 'PHQ-9 document'.

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130. Core Bugs # 133398: Release of Information: Client contact information is not being initialized.

What's Fixed:

The system now correctly auto-populates all relevant fields (Name, Address, City, Phone, Email, State, and Fax Number), even if the contact does not have an organization value when the user selects a contact from the 'Release To/Obtain From' dropdown on the 'Release of Information' document.

Prerequisite:

- The configuration key 'DisplayOrganizationAndContactFieldAsDropDown' is set to "No"

Where To Find It:

Path 1: Client Search -- Select Client -- 'Client Information (C)' -- 'Contacts' tab -- Add a new contact without an organization -- Click on 'Save'.

Path 2: Client Search -- Select a Client -- 'Release of Information(C)' screen -- 'Release To/ Release From' section -- Select 'Contact' radio button -- Select contacts from 'Release To/Obtain From' dropdown.

131. Core Bugs # 133339: 'Summary of Care document' - 'Client Information' section displayed 'No Information Available' in the document PDF.

What's Fixed:

In the *Summary of Care* document, when the user enters the same value for the **Effective Date**, **From Date**, and **To Date** fields, the system now correctly displays the corresponding details in the *Client Information* section of the PDF instead of showing *No Information Available*.

Prerequisites: "SaveAndDisplayDocumentEffectiveDateWithTime" configuration key to be set to 'Yes'

Where To Find It:

Path: 'Client– 'Summary of Care' document.

Electronic Remittance

Reference No	Task No	Description
132	Core Bugs # 132904	Payments are not updated while processing ER files.

132. Core Bugs # 132904: Payments are not updated while processing ER files.

What's Fixed:

The system now increases the search range between SVC and REF*6R to 50 segments. It maps the correct REF*6R even when multiple LQ segments are present (X12 allows up to 99). It now properly populates the 'ClaimLineItemId,' ensuring successful payment posting.

Where To Find It:

Path: 'My Office' – 'Payments/Adjustments' – Click on the 'Electronic Remittance' Icon – click on the required 'Import file Id' hyperlink – 'Electronic Remittance File Details' pop-up – click on the 'Process File' button – click on 'Save' button and click on 'Close' button.

Flow Sheet

Reference No	Task No	Description
134	Core Bugs # 133380	Flow Sheet Time Out issue
135	Core Bugs # 133443	The Weight column in the Vital Signs Report does not display any results

134. Core Bugs # 133380: Flow Sheet Time Out issue

What's Fixed:

The validation stored procedure has been optimized, and the system now allows flow sheet data to be saved without any issues.

Where To Find It:

Path: 'Client' – 'Flow Sheet' – 'Flow Sheet' page – Select the required flow sheet template and click on 'New' icon – 'New Entry Flow Sheet' page – Select the required data and click on 'Save' icon.

135. Core Bugs # 133443: The Weight column in the Vital Signs Report does not display any results

What's Fixed:

The Weight column and all other fields from the Flow Sheet screen are retrieved and displayed in the Vital Signs Report.

Prerequisites:

The Flow Sheet entry for the selected client exists.

Where To Find It:

Path 1: Perform Client Search --- Select Client --- Navigate to Flow Sheet --- Client --- Flow Sheet List Page --- In Vital History tab --- Select Meaningful Use/ Vitals template --- From Add Flow Sheet dropdown filter --- Click on New Icon --- New Entry Flow Sheet Detail page --- Enter all required fields --- Click on Save Icon.

Path 2: Navigate to Vital Signs Report --- Client --- Vital Signs Report opens --- Enter the Vitals Taken from and Enter the Vitals Taken To dates ---- Click on Apply Filter --- Details display in the below grid.

Group Service

Reference No	Task No	Description
136	Core Bugs # 132155	"Violation of PRIMARY KEY constraint" error when saving Group Note.
137	Core Bugs # 133157	Unable to access Show Services Report for Group Services.
138	Core Bugs # 133369	Group Details Screen does not default to chronological order unless date header is clicked.

136. Core Bugs # 132155: "Violation of PRIMARY KEY constraint" error when saving Group Note.

What's Fixed:

When the user modifies the group note in the Group Details screen and saves the InProgress Group Service, the system updates the group note in the group service and does not display an error message.

Where To Find It:

Path: My Office - Groups – New – Enter the required values save – Navigate to Schedule tab – Click on New Group Services button – Select the Date and client – Click on Ok – In Group Services Detail screen enter the required values – Save.

137. Core Bugs # 133157: Unable to access Show Services Report for Group Services.

What's Fixed:

When user clicks **Show Services Report** in the Group Services Detail screen, the system loads the Service report in a pop-up window without errors and does not log any entry in the **ErrorLog** table.

Where To Find It:

Path: My Office - Groups – New – Enter the required values save – Navigate to Schedule tab – Click on New Group Services button – Select the Date and client – Click on Ok – In Group Services Detail Screen Click on Services tab – Click on Show Services Report under List of Clients grid.

138. Core Bugs # 133369: Group Details Screen does not default to chronological order unless date header is clicked.

What's Fixed:

The **Schedule** tab now sorts the data list based on the column users select. If users do not select a column (for example, on first access), the system sorts the list by the **Date** column in descending order.

Where To Find It:

Commented [RK1]: @Savitha Basavaiah please update what's fixed for active voice.

Commented [SB2R1]: resolved

Path: My Office' – 'Groups' - 'Groups' list page – Click on required group name hyperlink – 'Group Details' page – Click on 'Schedule' tab.

Immunization Transmission Log

Reference No	Task No	Description
139	Core Bugs # 133253	Immunization Transmission Details: The 'VXU HL7 Message' not generated on clicking 'Send' Button.

139. Core Bugs # 133253: Immunization Transmission Details: The 'VXU HL7 Message' not generated on clicking 'Send' Button.

What's Fixed:

The 'VXU HL7 messages' are successfully generated and displayed on the 'Immunization Transmission Log' screen.

Where To Find It:

Path: 'Client' search -- 'Immunization Transmission Log' screen -- Click on 'Click to Send Client Immunizations' -- Select 'Record' and click on 'Send' button.

Inquiry (my office)

Reference No	Task No	Description
140	Core Bugs # 133277	Inquiry (My Office) not updating unless you log out of SmartCare and login back

140. Core Bugs # 133277: Inquiry (My Office) not updating unless you log out of SmartCare and login back.

What's Fixed:

The staff members can view newly created inquiries by clicking the **"Apply Filter"** action on the Inquiry (My office) List screen.

Prerequisite: Set configuration key 'ClientAccessRuleIncludeAllInactiveClients' to 'N'.

Where To Find It:

Path 1: Login as staff 1 in Chrome browser- Select inactive client - Client Inquiry – Enter all the mandatory field and click on 'Save'

Path 2: Login as staff 2 in Edge browser - Inquiry (My office) -- Filter for Active Clients -- Apply Filter

Interfaces

Reference No	Task No	Description
141	Core Bugs # 133183	Client Verify Eligibility Process is not working
142	Core Bugs # 133350	Order Question Pick Code length change for Compendium SP.
148	Core Bugs # 133422	Showing Client Not Found Error If FirstName or LastName having Special Character in Inbound Results XML.

141. Core Bugs # 133183: Client Verify Eligibility Process is not working

What's Fixed:

When a user clicks the Verify Eligibility button on the Coverage screen, the system loads the correct data on the Insurance Eligibility Verification popup instead of showing a blank screen.

Where To Find It:

Path: Client – Go Search -- Coverage -- Click on Verify Eligibility... icon

142. Core Bugs # 133350: Order Question Pick Code length change for Compendium SP.

What's Fixed:

The 'Order Pick Code' and 'Pick Code Description' field lengths have been increased in the 'Core Compendium stored procedure' to configure the order details in 'SmartCare' from 'LabHub'.

Where To Find It:

Path: 'Administration' -- 'Orders' -- 'Order Details' screen.

148. Core Bugs # 133422: Showing Client Not Found Error If FirstName or LastName having Special Character in Inbound Results XML.

What's Fixed:

Able to process the Inbound Lab Results XML when the client's name contains quotes in the first name or last name, without causing any errors.

Where To Find It:

Path 1: Administration - 'Messages Interface'- 'Messages Interface' screen.

Path 2:'Client' - 'Client Orders' screen.

Internal Collections

Reference No	Task No	Description
143	Core Bugs # 133364	The system is not transferring all the selected charges to Internal Collections.

143. Core Bugs # 133364: The system is not transferring all the selected charges to Internal Collections.

What's Fixed:

The system now correctly transfers all the selected charges to Internal Collections, ensuring that bulk actions function as intended.

Where To Find It:

Path: 'My Office' -- 'Charges/Claims' -- 'Charges/Claims' list page -- Select charges -- select the 'Add to Internal collections' from 'Select Action' drop down.

Life Event

Reference No	Task No	Description
144	Core Bugs # 133340	No Validation Check when users enter an End Date Before a Start Date.

144. Core Bugs # 133340: No Validation Check when users enter an End Date less than Start Date.

What's Fixed:

The system now displays the following validation messages to prevent users from entering an End Date less than Start Date.

Validation: Life Event Details - Summary - Start Date must be prior to End Date.

Where To Find It:

Path: 'Client' -- 'Life Events' -- 'Life Events' list page -- Click on 'New' icon -- Enter required values -- Select End Date less than Start Date -- Click on 'Save' icon.

Commented [RK3]: @Savitha Basavaiah this is a good example of where active voice is used.

MAR

Reference No	Task No	Description
133	Core Bugs # 133063	Client MAR: Administration Events not functioning as expected for MAT Take home medications.
145	Core Bugs # 133251	Client MAR: unable to administer the Additional Orders
146	Core Bugs # 133307	Discrepancies in Client MAR when order Template Frequency has "Use Start Time of Order as First Dispense Time" selected
147	Core Bugs # 133375	Client MAR: Changing the dispense time creates duplicate entries in the Dispense pop up.

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

What's Fixed:

Now the below-mentioned changes have been done for the Take Home Medications in the Client MAR. The newly added validation messages will display for the Take Home doses:

1.Below Validation message will be displayed when signing the order if the Order has a question at the administration and/or has 'Standing Administered Once' schedule.

Validation Message: 'Ordername - MAT orders are not allowed to have questions that need to be answered during the administration. Please modify the Order Setup or choose a different order.

2.Below Validation message will be displayed when signing the MAT Order if the Order has a 'Standing Administered Once' schedule.

 Validation Message: 'Ordername - Standing Administered Once is not allowed for MAT Orders.

3.Below Validation message will be displayed when DualSignRequired option is enabled for MAT Order.

 Validation Message: 'Ordername - MAT orders are not allowed to have DualSignRequired option enabled. Please modify the Order Setup Or choose a different order.'

4.The capsule icon will appear for the MAT medications within/outside the administration window.

5.The "Received Take Home" status will be displayed in Administration popup dropdown only for MAT Medications on the Client MAR screen.

Where To Find It:

Path 1: Administration - 'Orders' - 'Orders' list page - New - 'Order Details' screen - Select 'Medication' Order Type - Enter the required fields - Select Standing Administered Once under Schedule selection, Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) =

Yes- under Option section Select DualSignRequired = Y-Select Administration radio button under Questions section - Save.

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

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

Path 4: Go Search – MAT Management (My office)– Click on the dispense icon for required medication – MAT Management Details screen – Dispense the Face to Face and Take-Home doses.

Path 5: 'Client'- 'Client MAR'.

145. Core Bugs # 133251: Client MAR: unable to administer the Additional Orders

What's Fixed:

The users can administer the Additional Orders created through Quick Order in Client MAR.

Where To Find It:

Path 1: Go search – Orders - New - Order Details screen - Select Additional Order Type - Enter the required fields - Set Quick Order and Add Order to MAR as Yes in Order Setup section - Save.

Path 2: 'Client'- 'Quick Orders' – Select Order created in Navigation Path 1 – Click on Add Order – Click on 'Sign'.

Path 3: 'Client'- 'Client MAR' – Click on the administrator icon for Order created in Navigation Path 2.

146. Core Bugs # 133307: Discrepancies in Client MAR   when order Template Frequency has "Use Start Time of Order as First Dispense Time" selected.

What's Fixed:

The system has been updated to preserve existing overridden frequency records maintaining accuracy in the 'Client MAR'.

Where To Find It:

Path 1: 'Client' search – 'Client Order' – Create an order with 'Use Start Time of Order as First Dispense Time' checkbox is de-selected in the 'Order Template frequencies' screen -- Navigate to 'Client MAR' and change the scheduled time.

Path 2: 'Client' search – 'Client Order' – Create an order with 'Use Start Time of Order as First Dispense Time' checkbox selected in the 'Order Template frequencies' screen -- Navigate to 'Client MAR' and change the scheduled time.

147. Core Bugs # 133375: Client MAR: Changing the dispense time creates duplicate entries in the Dispense pop up.

What's Fixed:

When a user changes the dispense time using the clock icon in the dispense time popup on the Client MAR screen, duplicate entries are no longer created.

Where To Find It:

Path 1: Go search – Order Template Frequency - New – Enter the required details and select Use Start Time of Order as First Dispense Time - Save.

Path 2: Go search – Orders - New - Order Details screen - Select Medication Order Type - Enter the required fields - Set Add Order to MAR as Yes in Order Setup section and Select frequency created in Navigation Path 1- Save.

Path 3: 'Client'- 'Client Orders' – Click on New icon - Select Order created in Navigation Path 1 – Click on Insert and Sign.

Methadone

Reference No	Task No	Description
149	Core Bugs # 133149	MAT Management Details: For Suboxone Active Orders the scheduled dose is appearing as 0mg in the Dispense grid.
150	Core Bugs # 133258	MAT: Show Complete History Report: Start/End date label changes
151	Core Bugs # 133345	The Complete label address is not displayed on MAT Medication Label.
152	Core Bugs # 133396	MAT: Infinite loop issue persists when saying No to Prime prompt.
152	Core Bugs # 133415	The 'Quantity' field value is defaulted to specific value when 'Inventory spill' Reason is selected.
154	Core Bugs # 133288	MAT: Hard stop when dispensing a Medication will not be dispensed if the remaining amount after dispensing is at or below the 'Very Low' indicator.

149. Core Bugs # 133149: MAT Management Details: For Suboxone Active Orders the scheduled dose is appearing as 0mg in the Dispense grid.

What's Fixed:

The Scheduled Dose is now correctly displayed in the Dispensed grid on the MAT Management Details screen for Suboxone active orders.

Where To Find It:

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

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

~~**Path 3**: 'Client'- 'Client Orders' - 'Client Orders' list page - New - 'Client Order details' screen – Select the Order created in Navigation Path 1 - Enter the required fields – enter the dose as 12mg - Select the Take home days - select Program - Insert –click on 'save' and 'Sign'.~~

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

~~**Path 5**: 'My Office' - 'MAT Management 'list page – Select the Order (Navigation path 3) and click on 'Dispense icon' – MAT Management – and verify the scheduled dose in the dispense grid.~~

~~150. Core Bugs # 133258: MAT: Show Complete History Report: Start/End date label changes.~~

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

~~The date filters are now renamed to Dispensed from and Dispensed To.~~

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

~~**Path:** Go Search – MAT Management – MAT Management Details – Dispense medication – See Complete History – MAT Dispense & No-Show History report.~~

~~151. Core Bugs # 133345: The Complete label address is not displayed on MAT Medication Label.~~

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

~~The system now displays the complete label address including 'Street', 'City', 'State', 'Zip Code', and 'Phone Number' for the 3'' X 1'' template, Buprenorphine Label Template, and Standard MAT medication label when Take Home doses are dispensed or when the 'Print Label' button is clicked on the 'MAT Management Details' screen.~~

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

~~**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.~~

~~**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 -- Select any label from 'Label Template' dropdown (2.25" x 1.00, 3" x 1" with warning, Buprenorphine, or Standard) - 'Options' section -- Select 'Display Program?'= Yes for MAT Orders -- Enter all the required fields -- Click on 'Save'.~~

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'.

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'

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'.

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 -- on Dispensed Label will get print -- verify the address -- Click on the Redispensed icon to Redispensed the medication -- label gets print -- verify the address.

Path 7: 'My Office' -- 'MAT Management 'list page -- Select the 'Order' (Navigation path 4) and click on 'Dispense icon' -- 'MAT Management Details' screen -- 'Scheduled' section -- click on the 'Print Labels' Button -- label gets print before dispensing -- verify the address.

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152. Core Bugs # 133396: MAT: Infinite loop issue persists when saying No to Prime prompt.

What's Fixed:

When selecting **"No"** on the "Do you want to prime?" pop-up (triggered by the **Calibrate** button), the system advances to the next step without repeating the previous pop-up.

Where To Find It:

Path: My Office' – 'MAT Management' – Click 'Calibrate'.

---

153. Core Bugs # 133415: The 'Quantity' field value is defaulted to specific value when 'Inventory spill' Reason is selected.

What's Fixed:

The system no longer defaults the 'Quantity' field to a specific value when the 'Reason' is set to 'Inventory Spill'; instead, it displays the field as blank.

Where To Find It:

Path: 'My Office' -- 'Medication Inventory Transaction' -- 'Medication Inventory Transaction' list page -- Click on 'New' icon -- 'Medication Inventory Transaction Detail' screen -- Enter 'Location', 'Medication/Strength' and 'Bottle/Box ID' -- Select the 'Transaction Type' as 'Adjustment' -- Select the 'Reason' as 'Inventory Spill' -- Observe 'Quantity' field.

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154. Core Bugs # 133288: MAT: Hard stop when dispensing a Medication will not be dispensed if the remaining amount after dispensing is at or below the 'Very Low' indicator.

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

~~1: The system now triggers validation only when the remaining quantity falls below the Very Low indicator, not when it is equal to it.~~

~~2: Also, the validation message has been updated as below:~~

~~**Validation message:** The remaining amount in the bottle amount after dispensing will fall below the "Very Low" indicator. Please replace the bottle before proceeding.~~

~~**Pre-requisite:**~~
~~**1.** To display the Hard Stop validation for Very Low Indicator, through~~

~~**Navigation Path:** Administration – MAT Configuration - Enable hard stop dispensing when inventory hits the 'Very Low' Indicator field – check the check box – save.~~

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

~~**Path 1**: My office - MAT Dispenser – Select the Machine – Machine details – set the indicator value for 'Low'(Yellow) and 'Very Low'(Red) – save.~~

~~**Path 2:** Administration - Orders' - Orders' list page - New - Order Details' screen -Select 'Medication' Order Type - Enter the required fields - Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes, - under 'Medication Assisted Treatment' section and display program? Must be 'Yes' for MAT Orders – Save~~

~~**Path 3:** My Office – 'Medication/Lot/Bottle' list page – New 'Medication/Lot/Bottle Details' screen - Enter the required fields – Enter Location - Insert – Save.~~

~~**Path 4:** 'Client'- 'Client Orders' - 'Client Orders' list page - New - 'Client Order details' screen - Select the Order created in Navigation Path2 - Enter the required fields –Select the Take home days - select Program –Insert –click on 'save' and 'Sign'.~~

~~**Path 5:** 'My Office' - 'MAT Management 'list page – click on 'Connect User' icon – Connection Details pop up will be displayed – select the Machine (Navigation path 1) and other required fields – Click on 'Verified' check box – and click on connect – Machine get connected.~~

~~**Path 6:** 'My Office' - 'MAT Management 'list page – Select the Order (Navigation path 4) – MAT Details screen -Dispensed dose – on click on dispensed, the system now triggers validation only when the remaining quantity falls below the Very Low indicator.~~

My Reports

Reference No	Task No	Description
155	Core Bugs # 133188	Erclaimlines details and Erclaimlines denied reports showing deleted Erfiles.

155. Core Bugs # 133188: Erclaimlines details and Erclaimlines denied reports showing deleted Erfiles.

What is Fixed:

The system adds a record-deleted condition to the ER Claim Line Details and ER Claim Line Denial reports, and when it rolls back an ER File, it hides the details from the ER Claim Line Details and ER Claim Line Denial reports.

Where To Find It:

Path:'My Reports' -- Search for 'ER Claim Line Detail's and 'ER Claim Line Denial' report.

Orders

Reference No	Task No	Description
156	Core Bugs # 133295	Error Message displayed when trying discontinuing lab orders

156. Core Bugs # 133295: Error Message displayed when trying to discontinue lab orders

What is Fixed:

In Client Orders, users can discontinue a lab order (created by RecLabOrdJob) by clicking the '**Modify'** button, without any red error message

Where To Find It

Path: Client' --- 'Client Orders' screen --- Click on 'New' icon --- Select a 'Lab Order' from the 'Order being Modified/Discontinued' pop-up --- Click on radio button --- Modify any data and select the Discontinue checkbox --- Click on Modify button.

~~Outlook~~

~~Reference No~~	~~Task No~~	~~Description~~
~~157~~	~~Core Bugs # 132983~~	~~Services: Editing an appointment results in duplicate appointments in Outlook.~~

~~157. Core Bugs # 132983: Services: Editing an appointment results in duplicate appointments in Outlook.~~

~~What's Fixed:~~

~~Duplicate entries in the Outlook calendar no longer occur when the created service appointments are modified.~~

~~Where To Find It:~~
~~Path:~~

~~Perform Client Search --- Select Client --- Go Search -- Services -- Click on New Icon --- Service Detail Page --- Select Prog/Proc/Loc values --- Enter all the required fields --- Click on Save icon.~~

~~Patient Portal~~

~~Reference No~~	~~Task No~~	~~Description~~
~~158~~	~~Core Bugs # 133406~~	~~The duplicate entries for the globalcode category 'SCAPIMessagePRState' are inserted during the upgrade.~~

~~158. Core Bugs # 133406: The duplicate entries for the globalcode category 'SCAPIMessagePRState' are inserted during the upgrade.~~

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

~~An update script has been provided to soft delete the duplicate entries created during upgrade process for the 'SCAPIMessagePRState' globalcode category~~

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

~~**Path:** N/A~~

Reallocation

Reference No	Task No	Description
159	Core Bugs # 133271	The system relocates charges to '90 Days' in the prior period instead of '360 Days' when the configuration key value was set to Null.

159. Core Bugs # 133271: The system relocates charges to '90 Days' in the prior period instead of '360 Days' when the configuration key value was set to Null.

What's Fixed:

When the reallocation job is executed and the configuration key value is set to *Null*, the system now correctly relocates charges to '360 Days' in the prior period.

Prerequisite: Save the 'SetReallocationDaysForNightlyBillingProcesses' configuration key without any value.

Where To Find It:

Path: N/A

Reception/Front Desk

Reference No	Task No	Description
160	Core Bugs # 133233	Reception/Front Desk Export Excel is not working.
161	Core Bugs # 133107	Reception/Front Desk List Page Custom View Not Exporting

160. Core Bugs # 133233: Reception/Front Desk Export Excel is not working.

What's Fixed:

The exported file from the 'Reception' list page now includes data based on the selected 'Reception' filter.

Where To Find It:

Path: 'My Office' – 'Reception' – 'Reception' list page – Select the required filter value and click on 'Apply Filter' button – Click on the 'Export' button.

---

161. Core Bugs # 133107: Reception/Front Desk List Page Custom View Not Exporting

What's Fixed:

The user can export the custom column view of the Reception/Front Desk list page.

Where To Find It:

Path: Reception/Front Desk – Column Configuration icon – Select the Custom view – Click on Export icon

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RWQM

Reference No	Task No	Description
162	Core Bugs # 133299	While running the 'RWQM' job, the error message is displayed.

162. Core Bugs # 133299: While running the 'RWQM' job, the error message is displayed.

What's Fixed:

Users can now run the 'RWQM' job without encountering any errors.

Where To Find It:

Path 1: 'Administration' -- 'RWQM Rules' -- Click on 'New' icon -- Enter the required details -- Click on 'Save' button.

Path 2: 'My Office' -- 'RWQM Work Queue' -- 'RWQM Work Queue' list page.

JOB: exec ssp_SCCreateRWQMWorkQueueItems

Rx Application

Reference No	Task No	Description
163	Core Bugs # 132463	Medication discontinues prompt switches default selection randomly.
164	Core Bugs # 133318	The edited Sig is not saved in the 'SigTextEdited' column in the 'ClientMedicationScriptDrugs' table. Causing ambiguity between system-generated and manually edited sig.

163. Core Bugs # 132463: Medication discontinues prompt switches default selection randomly.

What's Fixed:

When the user discontinues a medication, the system automatically selects the correct order method by default in the 'Discontinuation Letter' section of the 'Enter Discontinue Reason' popup.

Where To Find It:

Path: 'Client' -- 'Medication Management (RX)' -- 'Patient Summary' screen -- Navigate to 'Medication List' section -- Click on 'X' icon -- Click on 'Yes' in the 'Confirmation Message' pop up -- 'Enter Discontinue Reason' pop up.

164. Core Bugs # 133318: The edited Sig is not saved in the 'SigTextEdited' column in the 'ClientMedicationScriptDrugs' table. Causing ambiguity between system-generated and manually edited sign

What's Fixed:

The 'SigText' column continues to store the original system-generated sig when no changes are made in the 'Free-Text Sig' pop-up. When a user edits the medication instruction via the 'Free-Text Sig' pop-up in the 'Order' screen under 'Rx application', the modified value is now correctly saved in the existing 'SigTextEdited' column of the 'ClientMedicationScriptDrugs' table.

This ensures accurate traceability and a clear distinction between system-generated and user-edited instructions, thereby improving data integrity and auditability.

Where To Find It:

Path: Login to 'SmartCare' Application – 'Client' search – Select a Client -- Search for 'Medication Management (Client)' – 'Patient Summary screen (Rx Application)'— Click on 'New Order' Button – search and select a 'Medication' – Enter all the required fields – Click on 'Insert' button – 'Free-Text Sig' popup -- Update the system generated sig (medication instructions) – Click on 'Update' & 'Close' button.

Services

Reference No	Task No	Description
165	Core Bugs # 133091	Recurrence Services did not inherit recurring services from the main service
166	Core Bugs # 133430	When navigating specific existing service, the 'Service Details' screen appears blank, and the Service ID is shown as '-1'.

165. Core Bugs # 133091: Recurrence Services did not inherit recurring services from the main service.

What's Fixed:

When the user creates a recurring service, the system copies the following values from the main service into the recurring service: TravelTime, FaceToFaceTime, DocumentationTime, TotalDuration, EmergencyIndicator, and EvidenceBasedPractices.

Where To Find It:

Path 1: 'Client' - 'Services/Notes' – 'Services/Notes' list page – Click on 'New' icon – 'Service Note' page Select required data and select TravelTime, FaceToFaceTime, DocumentationTime, TotalDuration, EmergencyIndicator, and EvidenceBasedPractices data and click on 'Save' icon – Click on 'Select Action' icon and select 'Make Recurring' – 'Recurring Services' popup – Select required data and click on 'Ok' button.

Path 2: Select the above selected client - 'Services/Notes' – 'Services/Notes' list page – Click on above created Recurring Service 'DOS' hyperlink - TravelTime, FaceToFaceTime, DocumentationTime, TotalDuration, EmergencyIndicator, and EvidenceBasedPractices field values.

166. Core Bugs # 133430: When navigating specific existing service, the 'Service Details' screen appears blank, and the Service ID is shown as '-1'.

What's Fixed:

The code is added to update the Unit Type when it's updated as 'Null'. The system now automatically updates the Unit Type, preventing the blank screen and

incorrect Service ID display.

Where To Find It:

Path: Client -- 'Services' -- 'Services' list page -- Click on 'DOS' hyperlink

Services/Notes

Reference No	Task No	Description
167	Core Bugs # 133444	Services Error Log message - JS Error in OnSuccessInitializeCrisiService Method
168	Core Bugs # 133228	Increased the size of the text fields for "Other Person(s) Present"
169	Core Bugs # 133326	Unable to hide the Custom Fields in the Service Note & display of red error when deleting In-Progress service notes.
170	Core Bugs # 133401	Spelling mistake in the validation message of 'Peer Support Service Note'

167. Core Bugs # 133444: Services Error Log message - JS Error in OnSuccessInitializeCrisiService Method

What's Fixed:

When a user creates or modifies a service, the system executes the OnSuccessInitializeCrisisService method without logging any error message on the ErrorLog screen.

Where To Find It:

Path 1: Perform Client Search --- Select Client --- Navigate to Services --- Client --- Click on New Icon --- Service Detail Page --- Select Prog/Proc/Loc values --- Ensure Service has Charge --- Enter all the required fields --- Click on Save icon.

Path 2: Navigate to Services/Notes --- Client --- Service/Note List Page --- Select Services created from Navigation Path 1 --- Service Note detail page --- Enter all the required fields --- Click on Save icon --- Click on Sign Button --- Signature popup displays --- PDF generated.

Path 3: Navigate to Path 1 and complete the services.

Path 4: Navigate to ErrorLogViewer (Administration)--- ErrorLogViewer--- Filter for appropriate dates --- Click on Apply Filter button.

168. Core Bugs # 133228: Increased the size of the text fields for "Other Person(s) Present"

What's Fixed:

The size of the text field for 'Other Person(s) Present' has been increased

Where To Find It:

Path: Client – Services/Notes list page – Click on New icon

169. Core Bugs # 133326: Unable to hide the Custom Fields in the Service Note & display of red error when deleting In-Progress service notes.

What's Fixed:

- The system now disables custom fields in the 'Service Note' when admin staff deny permissions in Role Definition for non-admin staff.
- The user can now delete an In-Progress service note without displaying any red error message.
- The system now disables the ICD10 button in the 'Billing Diagnosis' tab of the 'Service Note' when admin staff deny permissions in 'Role Definition' for non-admin staff.

Where To Find It:

Path 1: 'Client' -- 'Service Note'

Path 2: 'Administration' -- 'Role Definition' screen

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170. Core Bugs # 133401: Spelling mistake in the validation message of 'Peer Support Service Note'

What's Fixed:

The system now displays correct spelling "Permission" in the below validation message for the 'Peer Support Service Note'.

Validation Message: "Permission required to Add/Edit Peer Support Service Note in Service Note screen, please grant permission in the Roles/Permission under Staff Details"

Pre-requisite: To display the validation message, the user must deny the 'Add/Edit Peer Support Service Note' permission item under the 'Staff List' permission type dropdown in the 'Role/Permission' tab of the 'Staff Details' screen.

Where To Find It:

Path: Client -- Services/Notes -- Click on New icon -- Select the Procedure code related to 'Peer Support Service Note' -- Enter the required values -- Click on 'Save' -- Navigate to 'Note' tab

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Staff/Users

Reference No	Task No	Description
171	Core Bugs # 133382	Incorrect ModifiedDate Update for All StaffLicenseDegrees Records

171. Core Bugs # 133382: Incorrect ModifiedDate Update for All StaffLicenseDegrees Records

What's Fixed:

When staff add or modify a license or degree for a staff member, the system updates the latest modified date only for the specific record that is changed and does not update the older entries in the *StaffLicenseDegrees* table.

Where To Find It:

Path: Staff/Users– Click on Staff name hyperlink – Click on Licenses/Degrees tab – Select a Degree from the License History grid – Modify something – Click on Modify – Click on Save icon.

Team Scheduling

Reference No	Task No	Description
172	Core Bugs # 132777	Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.

172. Core Bugs # 132777: Team Scheduling: Users unable to view Saturday and Sunday schedules alongside staff names simultaneously.

What's Fixed:

- The **Staff/Client column** is now fixed in position, while horizontal scrolling applies only to the **Monday–Sunday columns**.
- The **white blank space issue** in the **Sunday column header** has been resolved.
- When a **Program ID** is configured under the Recode and **'TEAMSCHEDULING7DAYS'** is selected from the **Program dropdown**, the data for **Monday–Sunday columns** will now be displayed alongside the **Staff Name**.

Prerequisites:

1. Respective Program ID to be mapped in Recodes **'TEAMSCHEDULING7DAYS'.**

Where To Find It:

Path: Administration -- Team Scheduling (My Office).

Widget

Reference No	Task No	Description
173	Core Bugs # 133194	Supervision Report Date Filter is not Working

173. Core Bugs # 133194: Supervision Report Date Filter is not Working

What's Fixed:

When a user navigates to the Supervision Reports via the Supervisee Documents or Supervision Documents widget from the Dashboard and applies a date filter, the Supervision report displays records within the specified date range.

 Where To Find It:

Path 1: Dashboard – Supervision Documents widget– Click on the hyper link – Select the From Date and To Date – Apply filter.

Path 2: Dashboard – Supervisee Documents widget– Click on the hyper link – Select the From Date and To Date – Apply filter.

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
158	SCAPIMessagePRState

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
172	TEAMSCHEDULING7DAYS

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
90	CalculateCaseRateMonthlyDateOfService
93	ShowSigningSuffixORBillingDegreeOnPaperClaims
94	DefaultClinicianFromClaimToServiceCreation
106	DisplayCDAGSectionInStaffDetails
106	EnableClinicalDataAccessGrouping
124	DisplayCDAGSectionInStaffDetails
124	EnableClinicalDataAccessGrouping
130	DisplayOrganizationAndContactFieldAsDropDown
131	SaveAndDisplayDocumentEffectiveDateWithTime
140	'ClientAccessRuleIncludeAllInactiveClients'
159	SetReallocationDaysForNightlyBillingProcesses

Data Model Changes

Ref No.	Data Model Change
93	The field length for 'Field31Signed' column is increased to VARCHAR(250) in 'ClaimNPIHCFA1500s' Table.
98	**CoveragePlanClaimBundlingCriteria' Table:** • New Column: BillingProviderAddress

SmartCare Testing Strategy – October 2025 MSP

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

How to Use This Strategy

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

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

Testing Workflow by Module – Core Bugs Only

Authorizations

Core Bug #132711 – Validation when PM authorization units exceed limit.

Test Steps:

- Navigate to Authorization Details and Service Details screens.

- Attempt to attach services exceeding available units.

- Confirm validation messages display correctly.

Batch Signature

Core Bug #133267 – Declined diagnosis document retains details in new version.

Core Bug #133433 – Staff name displays correctly in SignaturePage popup.

Test Steps:

- Decline a diagnosis document via Batch Signature.

- Verify details persist and staff name format is correct.

Bed Board

Core Bug #132994 – Deleting Bed Attendance no longer deletes billed services.

Test Steps:

- Admit client, create bed services, delete attendance.

- Confirm billed services remain intact.

Care Coordination

Core Bug #133263 – Referral List Page displays data correctly.

Test Steps:

- Navigate to Care Coordination Referral List.

- Validate data accuracy.

Case Rate

Core Bug #132844 – "Do Not Mark Charges Ready to Bill" checkbox works as expected.

Core Bug #133158 – Duration calculation corrected for hour/day codes.

Test Steps:

- Validate billing hold logic and duration calculation.

- Confirm configuration key CalculateCaseRateMonthlyDateOfService is set correctly.

CCBHC

Core Bug #133259 – ISERV1 Initial Evaluation logic corrected.

Core Bug #133268 – PHQ9 score accepts "0" without error.

Test Steps:

- Validate evaluation name/date logic.

- Enter PHQ9 score as "0" and confirm no validation error.

Charges/Claims

Multiple fixes (#132298, #132892, #133112, #133066, #133082)

Test Steps:

- Validate claim creation across episode dates.

- Confirm taxonomy joins, frequency code logic, and plan name override.

Claim Bundling Criteria

Core Bugs #133129, #133211 – Billing Provider Address added as bundling criterion.

Test Steps:

Configure bundling criteria.

Validate claim bundling behavior for Yes/No settings.

Client Information & Inquiries

Validate fixes for address formatting (#133300), inquiry filters (#133224), and validation messages (#133324).

~~Core Assessment~~

~~Confirm client details display in PDF (#133241).~~

~~Validate checkbox color fix in FTND tab (#133284).~~

DFA

Test export to SQL (133349), formatting (133199), and error handling in grid/table feature (#133269).

Documents

Multiple fixes (133017, 133048, #133196, #133219, #133289, #133402, #133398, #133339)

Test Steps:

Validate Goals/Objectives display, discharge validations, PDF refresh after cosign, and PHQ-9 depression severity display.

MAR & Methadone

Test MAT validations, dispense logic, and label printing (133063, 133251, 133375, #133149, #133258, #133345, #133396, #133415, #133288).

Rx Application

Validate discontinue prompt (132463) and SigTextEdited logic (133318).

Services / Service Notes

Confirm recurring service inheritance (133091), blank screen fix (#133430), and custom field permissions (#133326).

Reports

Validate ER Claim Line reports hide deleted files (#133188).

Other Modules

Reception/Front Desk export (#133233, #133107)

RWQM job execution (#133299)

Team Scheduling display (#132777)

Widget date filter (#133194)

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