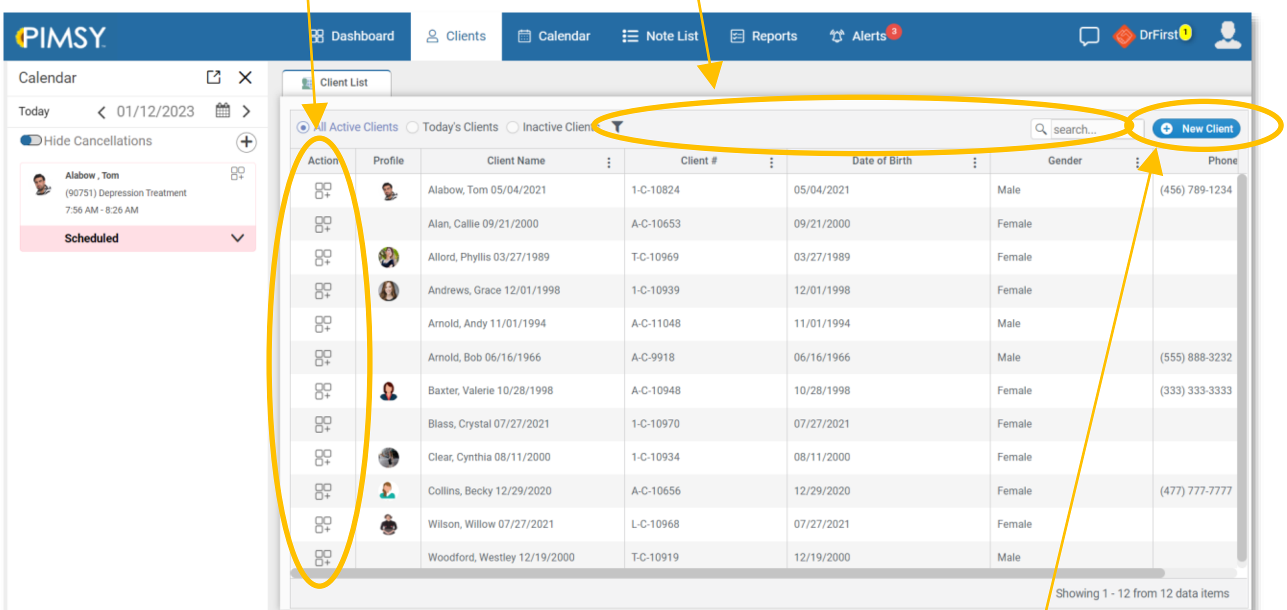
Provider Portal
New Client Dashboard

PIMSY

Provider Portal - New Client Dashboard

The client dashboard within the Provider Portal has been given a significant overhaul. This new setup allows for improved functionality, with the purpose of adding convenience and value to user workflow.

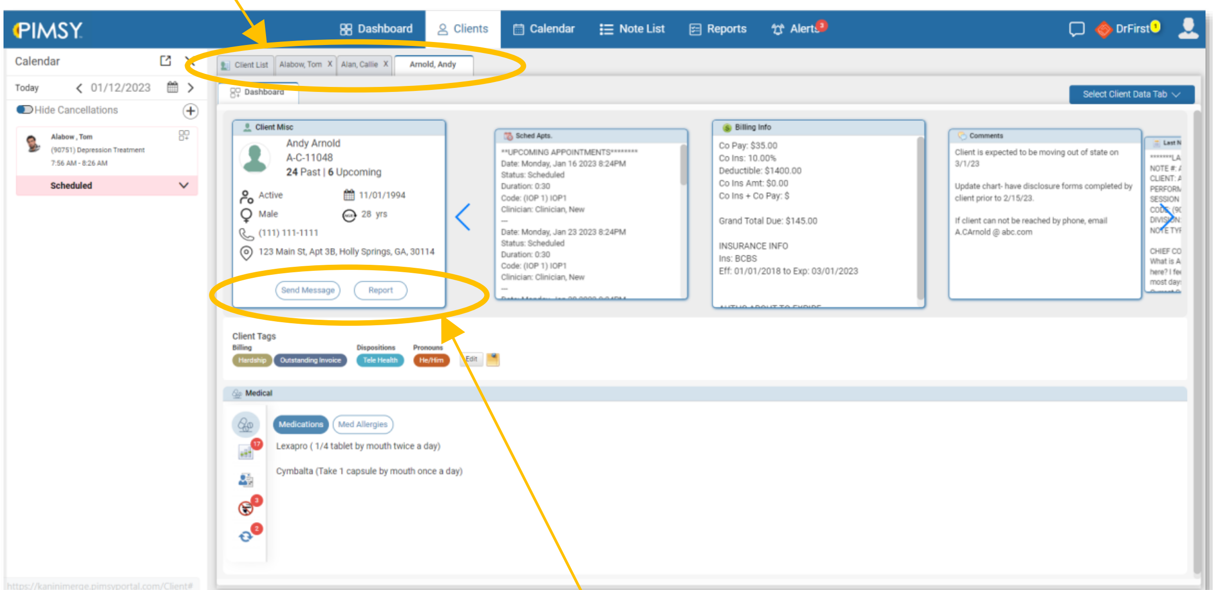
To select a specific client, click the Client Dashboard icon to the left of their name under the Action column to access the client's dashboard. Users can also search for specific clients via the search bar or press the filter icon to use search filters with more advanced search controls.



Users may notice that we have added a *New Client* button on the top right corner of the Client list. This simplified way to create new clients is not only easy to find, but also saves clicks.

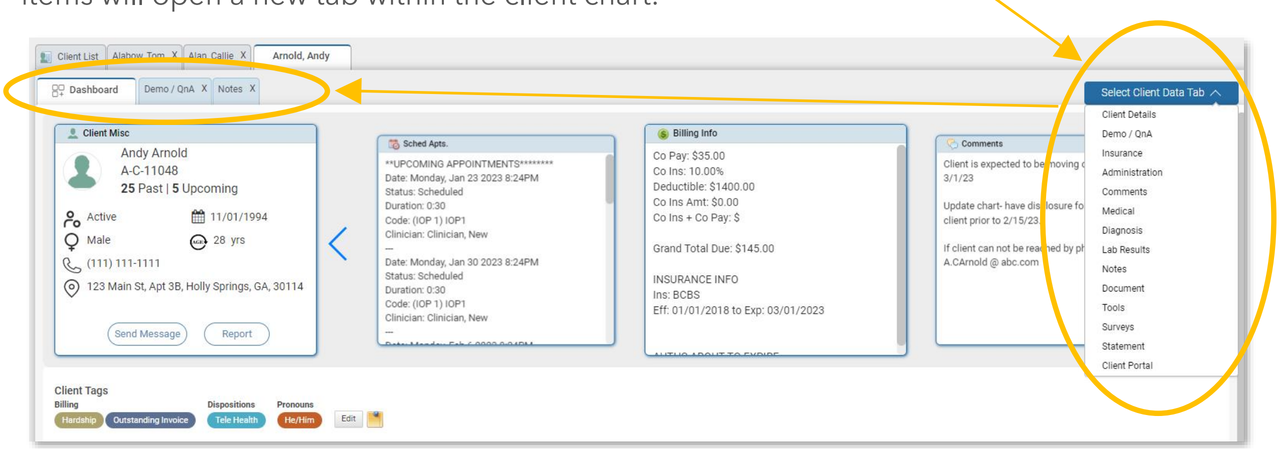
One of the most requested changes we've received is to add the ability to have multiple client charts open at the same time. Users will now notice that once they select a client from the list, a tab will appear at the top for that client. New tabs will be added as different clients are selected.

To remove a tab, simply click the "x" on the tab. If you happen to close the portal without closing any tabs, your browser will recall the tabs that were open the next time you log back in.



The blue buttons that resided at top right of the client chart (dashboard, Portal Messaging, and Client Report) are now located on the client card on the dashboard.

To the right of the client chart is a blue *Select Client Data Tab* button, which when clicking will give you access to a list of the different Q&A areas of the client chart. Selecting any of these items will open a new tab within the client chart.



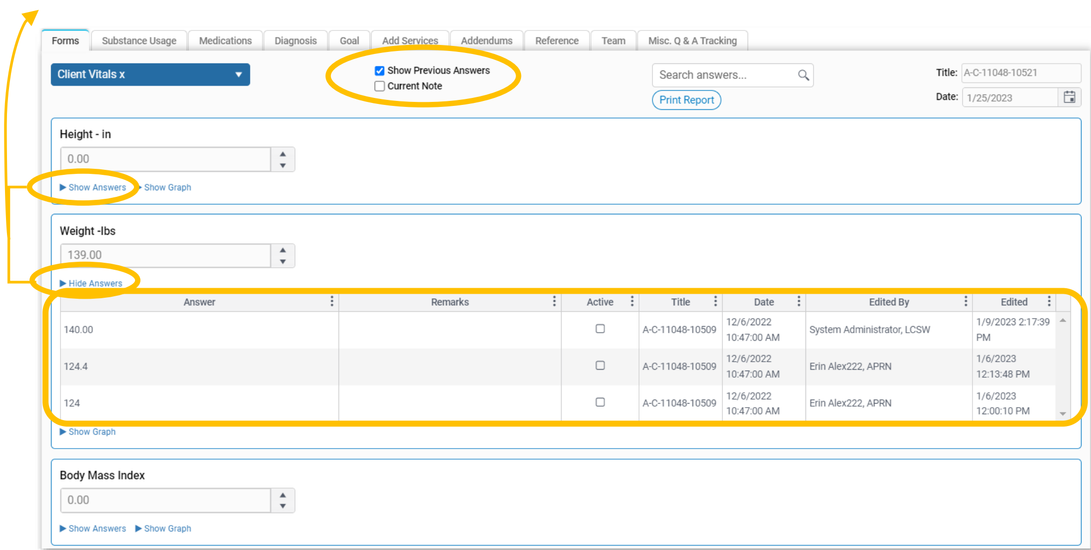
Users can flip between the client dashboard cards, such as:
Client misc., Schedule Appt, Billing Info, Comments, Last Note, to name a few.

Note Q&A

Now, you can toggle between previous and current answers on Q&A's by checking either *Show Previous Answers* or *Current Note*.

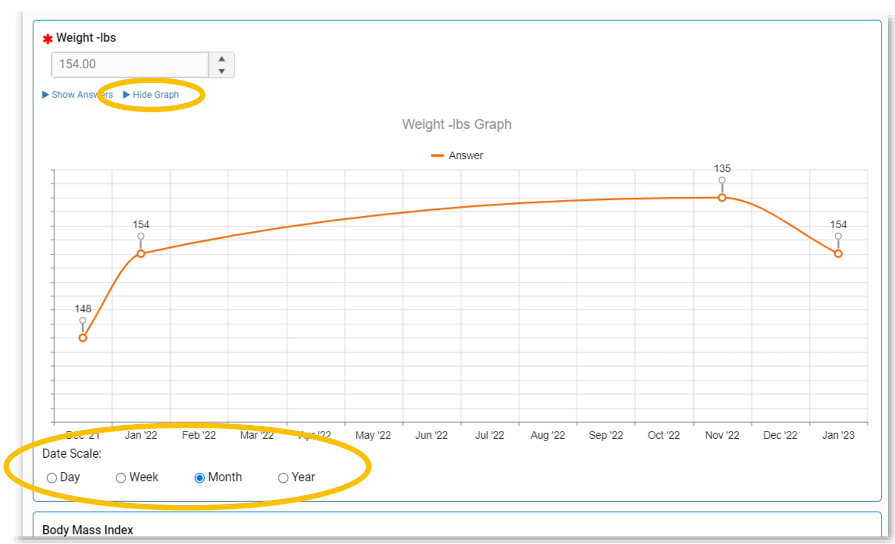
Show Previous Answers will only reveal answers the were made before the current answer. Checking *Current Note* will only show answers that were made on that specific note.

To hide answers, click *Show Answers* and conversely, to hide, simply click *Hide Answers*.



We have added graphing in the Q&A area as well.

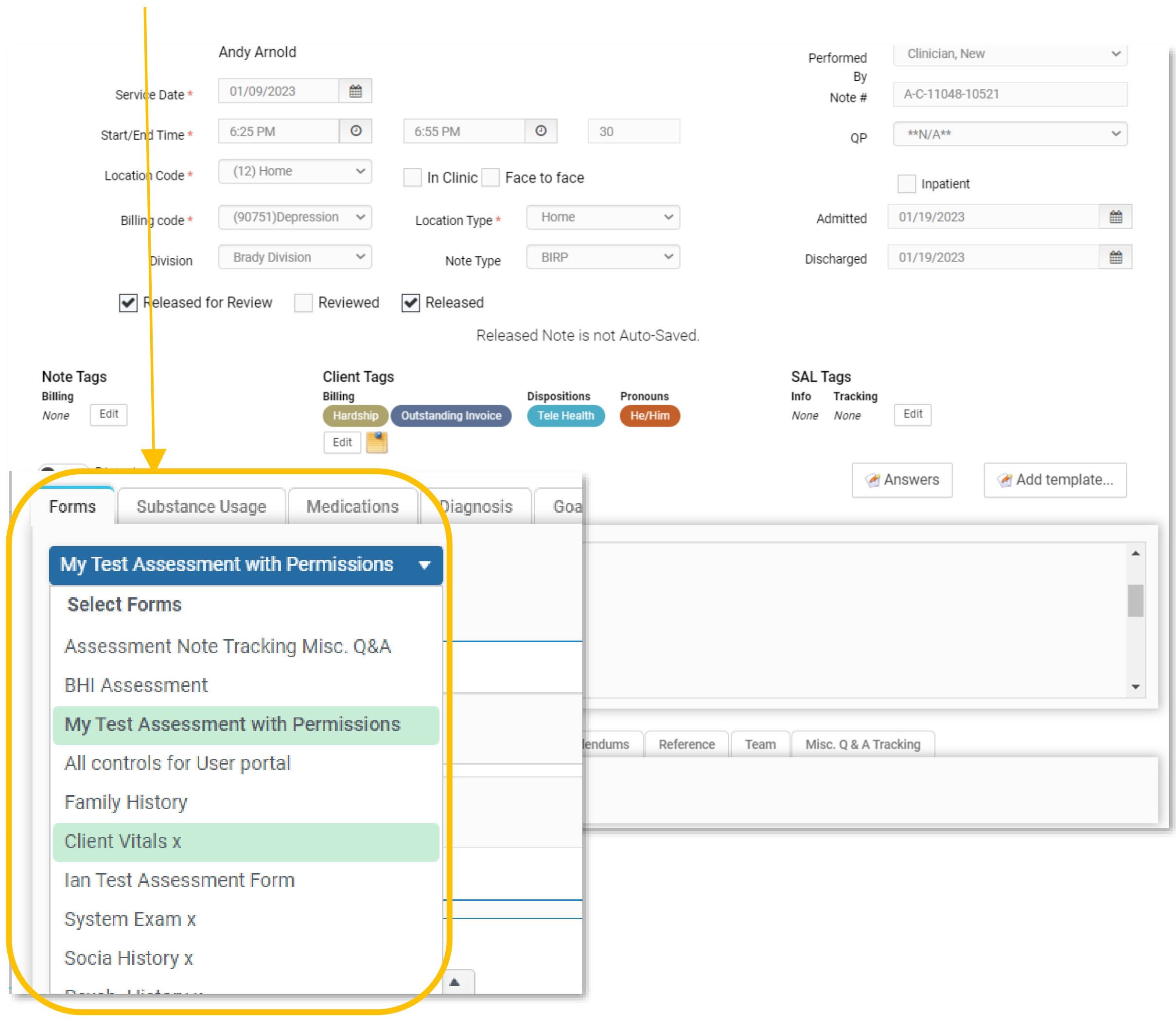
This addition helps provide a visual of changes that have occurred over time. Additionally, you can opt to view the results/answers by Day, Week, Month, or Year.



Note Q&A Forms

When browsing under the *Select Forms* option, any forms that have already been completed will be highlighted. This can help quickly determine which forms still need to be filled out.

Under the forms tab of a note, any Q&A answers attached to that specific note will be highlighted in green.

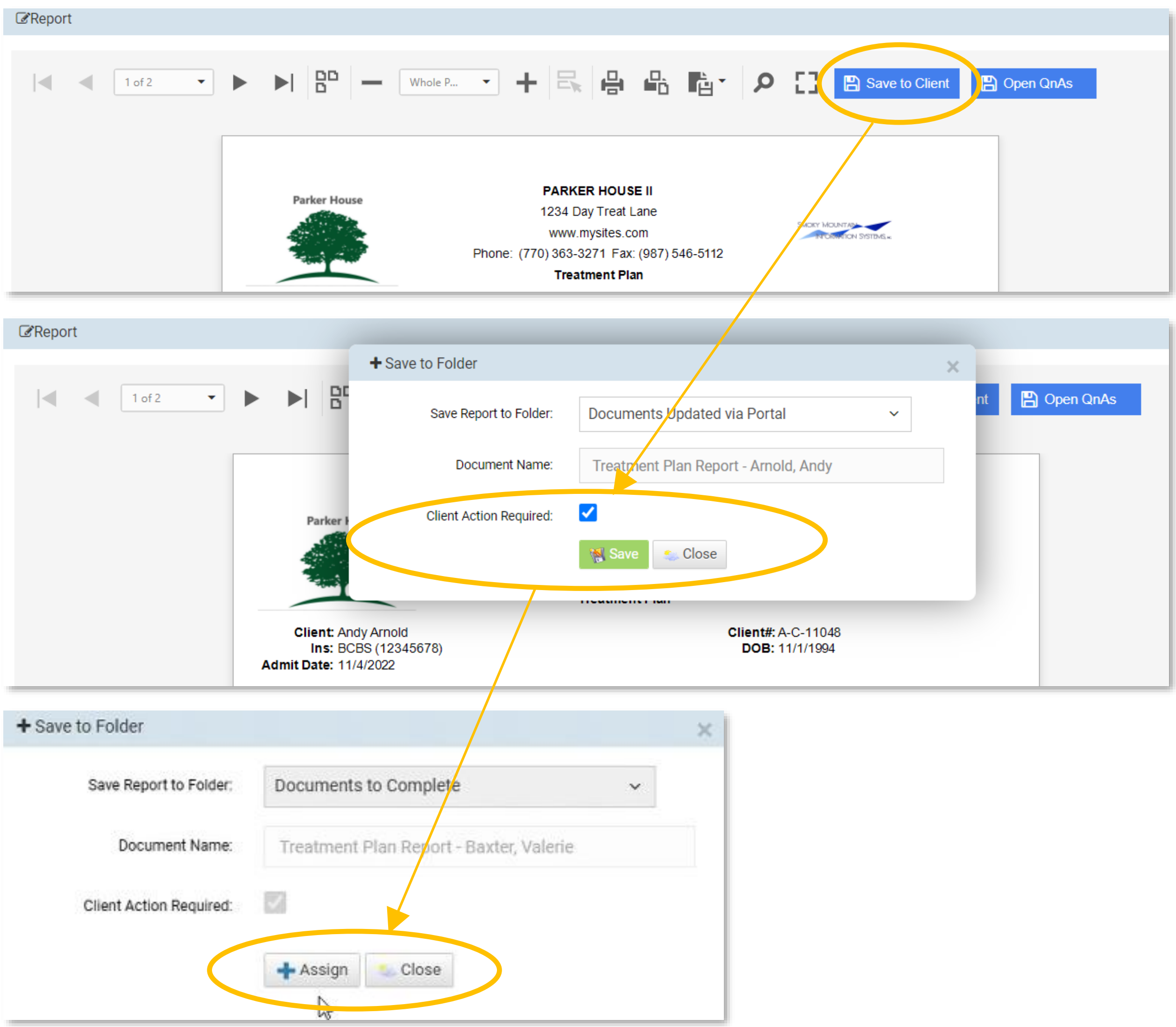


Print Report and Documents

When saving a document from public docs, you will get the option to check *Client Action Required*, save, and then assign to a user. To do this you:

- Select a document from under the *Documents* tab of a client chart and open it. Check the *Client Action Required* box before saving as this will send it to the documents for the client to fill out in the Client Portal. Be sure to save it to a folder that is exposed to the Client Portal.

- This is only when saving a new doc from public docs to a client.

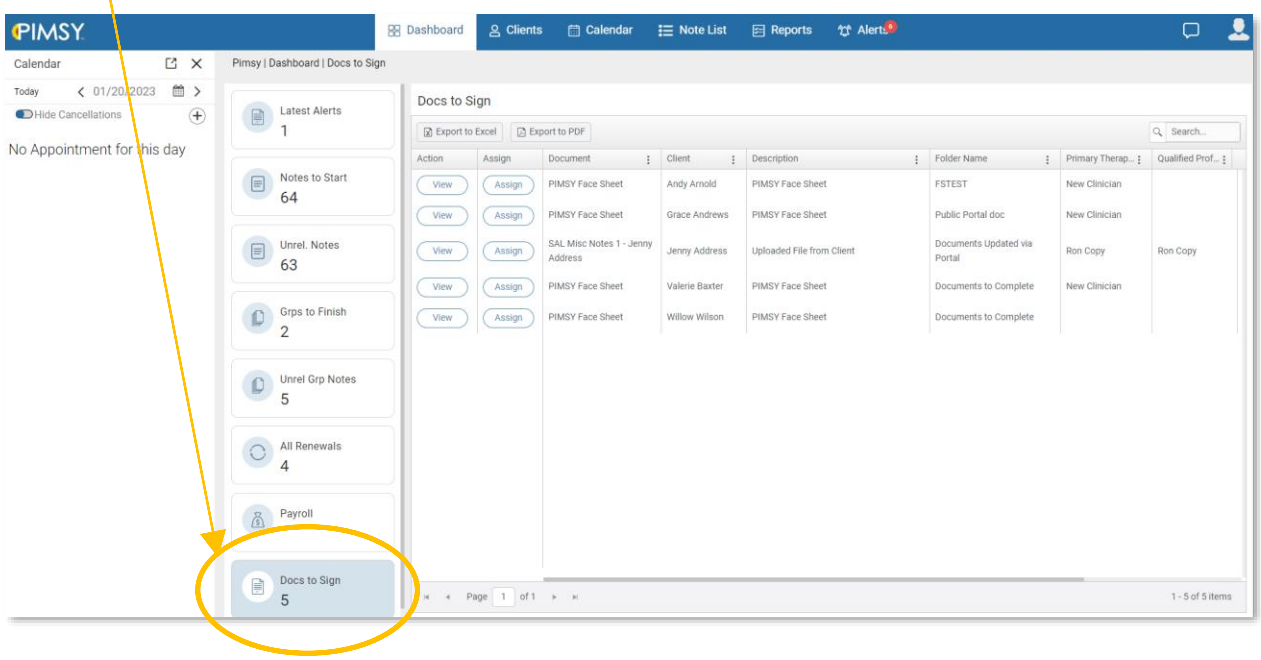


Other Provider Portal dashboard updates:

Docs to Sign Tile

- On the Provider Portal dashboard, we have added a tile for Docs to Sign. Just like in the Desktop application, this area houses the document queue, providing users a place to check for documents that need their attention.

- Here users can:
  - Sign documents and/or assign them to other users.
  - Pull in stored signatures to hasten the signing process.
  - Add dates and comments, to improve information sharing and record keeping.



Comments and Date for Documents

- In addition to adding signatures to documents, users can now opt to add comment and a date anywhere on the document.
- These buttons can be found at the top of the document viewer under the *Document View* tab.
- Saving the document will turn any date and comments that have been added from red to black. See images below: