

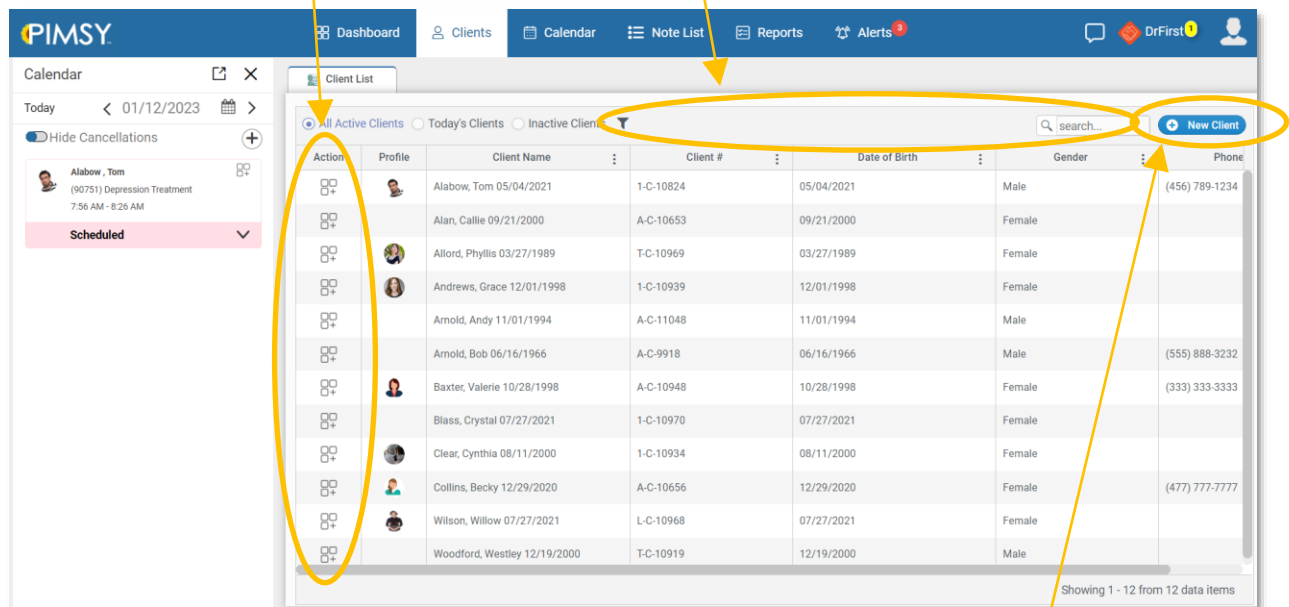


Provider Portal
New Client Dashboard

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.



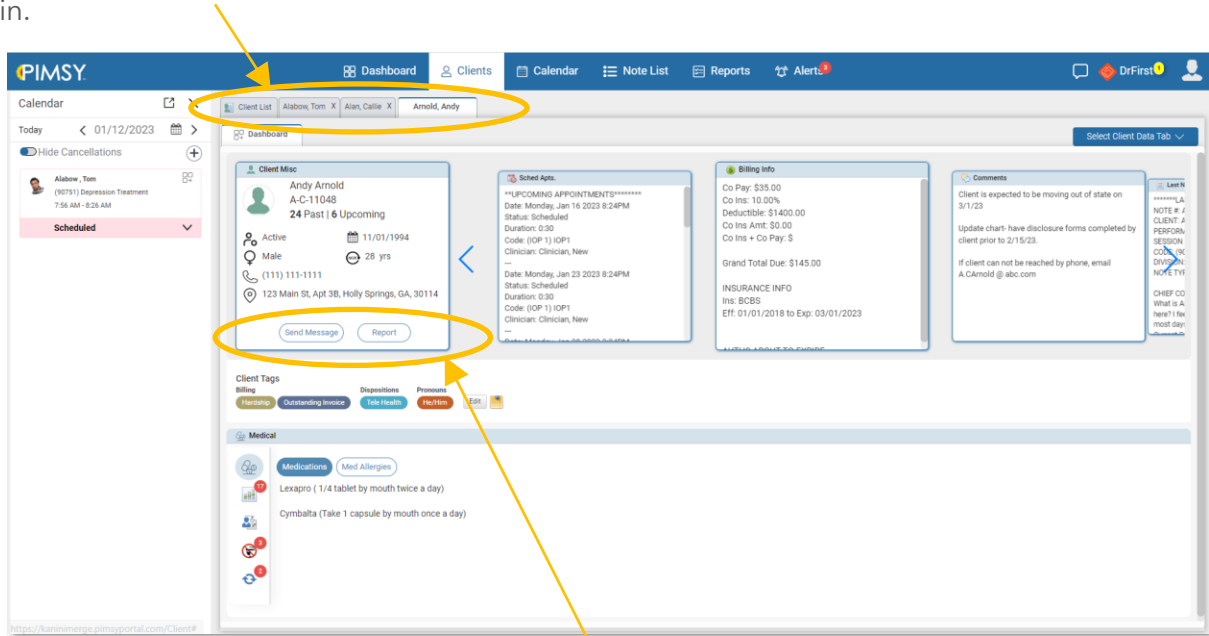
The screenshot shows the PIMSY Client List interface. The top navigation bar includes 'Dashboard', 'Clients', 'Calendar', 'Note List', 'Reports', and 'Alerts'. The main content area features a 'Client List' tab with filters for 'All Active Clients', 'Today's Clients', and 'Inactive Clients'. A search bar and a 'New Client' button are located in the top right corner of the list. The list itself has columns for 'Action', 'Profile', 'Client Name', 'Client #', 'Date of Birth', 'Gender', and 'Phone'. Annotations with yellow arrows point to the 'Action' column icons, the search bar, and the 'New Client' button.

| Action | Profile | Client Name | Client # | Date of Birth | Gender | Phone |
|--------|---------|------------------------------|-----------|---------------|--------|----------------|
| | | Alabow, Tom 05/04/2021 | 1-C-10824 | 05/04/2021 | Male | (456) 789-1234 |
| | | Alan, Callie 09/21/2000 | A-C-10653 | 09/21/2000 | Female | |
| | | Allord, Phyllis 03/27/1989 | T-C-10969 | 03/27/1989 | Female | |
| | | Andrews, Grace 12/01/1998 | 1-C-10939 | 12/01/1998 | Female | |
| | | Arnold, Andy 11/01/1994 | A-C-11048 | 11/01/1994 | Male | |
| | | Arnold, Bob 06/16/1966 | A-C-9918 | 06/16/1966 | Male | (555) 888-3232 |
| | | Baxter, Valerie 10/28/1998 | A-C-10948 | 10/28/1998 | Female | (333) 333-3333 |
| | | Blass, Crystal 07/27/2021 | 1-C-10970 | 07/27/2021 | Female | |
| | | Clear, Cynthia 08/11/2000 | 1-C-10934 | 08/11/2000 | Female | |
| | | Collins, Becky 12/29/2020 | A-C-10656 | 12/29/2020 | Female | (477) 777-7777 |
| | | Wilson, Willow 07/27/2021 | L-C-10968 | 07/27/2021 | Female | |
| | | Woodford, Westley 12/19/2000 | T-C-10919 | 12/19/2000 | Male | |

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.

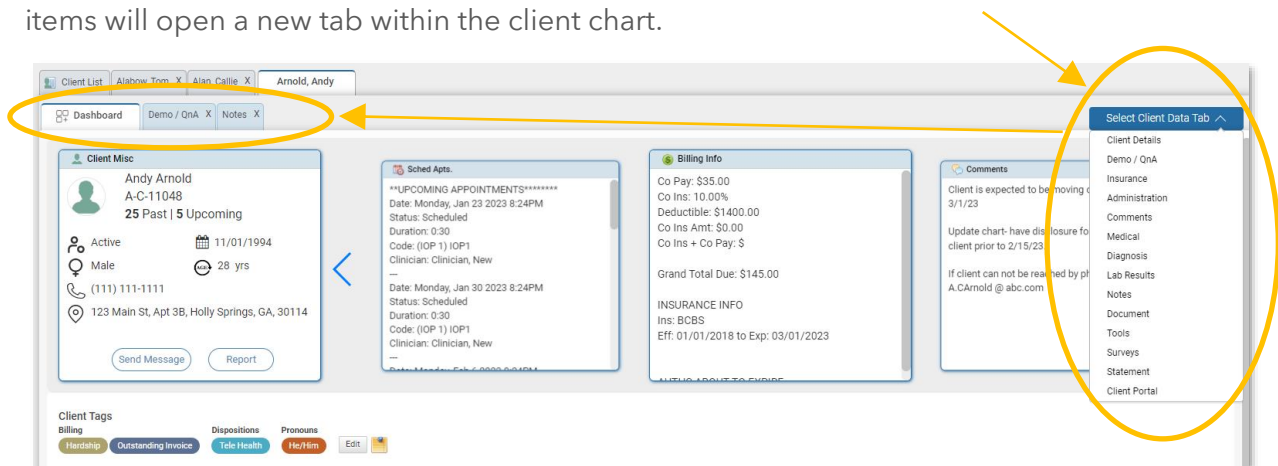
One of the most requested changes we've received is to add the ability to have multiple client charts open at the same time. Users will now notice that once they select a client from the list, a tab will appear at the top for that client. New tabs will be added as different clients are selected.

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.



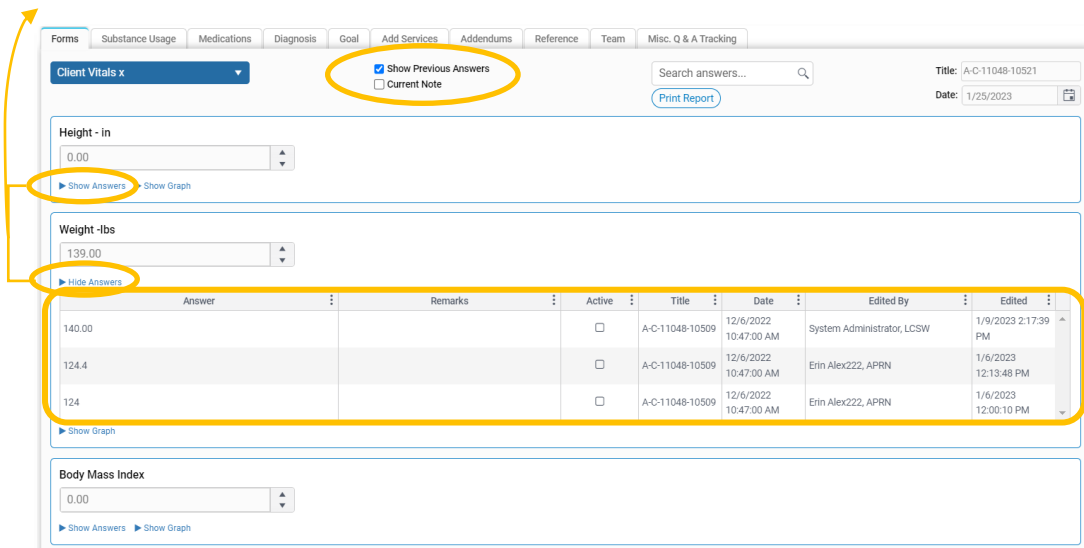
Users can flip between the client dashboard cards, such as: Client misc., Schedule Appt, Billing Info, Comments, Last Note, to name a few.

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 that 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*.



| Answer | Remarks | Active | Title | Date | Edited By | Edited |
|--------|---------|--------------------------|-----------------|-----------------------|----------------------------|----------------------|
| 140.00 | | <input type="checkbox"/> | A-C-11048-10509 | 12/6/2022 10:47:00 AM | System Administrator, LCSW | 1/9/2023 2:17:39 PM |
| 124.4 | | <input type="checkbox"/> | A-C-11048-10509 | 12/6/2022 10:47:00 AM | Erin Alex222, APRN | 1/6/2023 12:13:48 PM |
| 124 | | <input type="checkbox"/> | A-C-11048-10509 | 12/6/2022 10:47:00 AM | Erin Alex222, APRN | 1/6/2023 12:00:10 PM |

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.

The screenshot displays the PIMSY interface for a patient named Andy Arnold. The patient's service date is 01/09/2023, and the location is (12) Home. The note type is BIRP, and it is marked as Released for Review and Released. A yellow arrow points to the 'Forms' tab, which is highlighted with a yellow circle. The 'Forms' dropdown menu is open, showing a list of forms. 'My Test Assessment with Permissions' is highlighted in green, indicating it has been completed. Other forms listed include 'Assessment Note Tracking Misc. Q&A', 'BHI Assessment', 'All controls for User portal', 'Family History', 'Client Vitals x', 'Ian Test Assessment Form', 'System Exam x', and 'Socia History x'. The background shows various form fields for patient information, location, and status.

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.

The first screenshot shows a report viewer for 'Parker House II' with a toolbar containing a 'Save to Client' button circled in yellow. The report content includes the address '1234 Day Treat Lane', website 'www.mysites.com', and phone/fax numbers.

The second screenshot shows a 'Save to Folder' dialog box with 'Client Action Required' checked. The 'Save' button is circled in yellow. Client information for Andy Arnold is visible at the bottom.

The third screenshot shows another 'Save to Folder' dialog box with 'Client Action Required' checked. The 'Assign' button is circled in yellow. Client information for Valerie Baxter is visible at the bottom.

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.

The screenshot displays the PIMSY Provider Portal dashboard. The top navigation bar includes 'Dashboard', 'Clients', 'Calendar', 'Note List', 'Reports', and 'Alerts'. The main content area is divided into a left sidebar and a central 'Docs to Sign' section. The sidebar contains several tiles: 'Latest Alerts' (1), 'Notes to Start' (64), 'Unrel. Notes' (63), 'Grips to Finish' (2), 'Unrel Grp Notes' (5), 'All Renewals' (4), 'Payroll', and 'Docs to Sign' (5). The 'Docs to Sign' tile is highlighted with a yellow circle and a yellow arrow pointing to it from the text above. The 'Docs to Sign' section features a table with columns for Action, Assign, Document, Client, Description, Folder Name, Primary Therapist, and Qualified Professional. The table contains five rows of document entries.

| Action | Assign | Document | Client | Description | Folder Name | Primary Therap... | Qualified Prof... |
|----------------------|------------------------|----------------------------------|----------------|---------------------------|------------------------------|-------------------|-------------------|
| View | Assign | PIMSY Face Sheet | Andy Arnold | PIMSY Face Sheet | FSTEST | New Clinician | |
| View | Assign | PIMSY Face Sheet | Grace Andrews | PIMSY Face Sheet | Public Portal doc | New Clinician | |
| View | Assign | SAL Misc Notes 1 - Jenny Address | Jenny Address | Uploaded File from Client | Documents Updated via Portal | Ron Copy | Ron Copy |
| View | Assign | PIMSY Face Sheet | Valerie Baxter | PIMSY Face Sheet | Documents to Complete | New Clinician | |
| View | Assign | PIMSY Face Sheet | Willow Wilson | PIMSY Face Sheet | Documents to Complete | | |

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:

