



# RELEASE REPORT – 02.13.2023

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
All	Admin / Set Up	Medical Records	Desktop Provider Portal	Enhancement	<p><b>Q&amp;A / Document &amp; Renewal Notifications</b></p> <p>Under System Settings, we have added options to setting -756 Send TEXT or EMAIL to clients based on various events. This setting is used to trigger email or text messages to clients (based on their contact preferences) when various events happen.</p> <p>We have also added setting -811, when set to true will automatically send an invite to the client if they do not have an active portal login.</p> <p>In conjunction with this, we have made enhancements to Renewals. Under Picklist Management, we have added Renewal Subtypes under Renewal Types. Renewals will need to have Allow Auto Reminder Messages to be checked under Renewal Type. Once checked, any renewals with the renewal type, when due will alert the client or user. For clients and users, the message will be sent out based on the Expiration Alert Lead Time. If there is no value, it will default to 7 days from the expiration. They will also receive a message one day before the expiration date. Renewals Frequency controls how often the renewal takes place.</p> <p>We have also added shading to the Q&amp;A Assessment Note forms list.</p> <p>See below for more information and our latest guide.</p>

All			Provider Portal	Enhancement	<p><b>New Provider Portal Client Dashboard</b></p> <p>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. We have made improvements/ additions such as:</p> <ul style="list-style-type: none"> <li>Note Q&amp;A and Q&amp;A Forms</li> <li>Print Report and Documents</li> <li>Docs to Sign Tile</li> <li>Comments and Date for Documents</li> </ul> <p>See below for more in depth information and our latest guide.</p>
Platinum	Admin / Set Up	Reports	Desktop	New	<p><b>Tag Report</b></p> <p>We have added a new report under Stats by Date to track Tags. This report shows all Tags for every item across the system (excluding Schedule Preference Tags). It is filtered by the last edited date of the Tag.</p>
All	SAL / Calendar	Scheduler / Calendar	Desktop Provider Portal	Enhancement	<p><b>Late Cancel</b></p> <p>We have changed the way the system exposes certain appointments based on status type. If <i>Hide Cancellations</i> is selected on the calendar, it will now use the status type that is assigned to the status to determine whether to expose it or not. This allows more flexibility and more customized statuses for your site.</p>
All	SAL / Calendar	Dashboard / Scheduler / Calendar	Desktop Provider Portal	Enhancement	<p><b>Add Non-Billable Codes to Note to Start Dashboard</b></p> <p>We have added the question "Include appointments with this billing code to Dashboard view: Notes to Start" to the Billing Code Detail Q&amp;A.</p> <p>When answered yes this will show the appointments with these billing codes (non-billable) to the Notes to Start tile on the user's dashboard.</p>

Professional Platinum	Admin / Set Up	Reports	Desktop	New	<b>Grid Report for Client Q&amp;A Assignments</b> We have added a new report in desktop to track when Q&A forms are assigned to clients to complete on the Client Portal.
Platinum	Admin / Set Up	Medical Records	Desktop Client Portal	New	<b>Setting -806</b> We have added a new setting -806 that if set to true, exposes client lab results under the client document tab on the Client Portal.
All	Admin / Set Up	Medical Records	Desktop	Enhancement	<b>New colors</b> We have added 15 additional colors to our library of color options that show in various areas within PIMSY. These colors are used for Appointment Status, Billing code(s), User(s), Location(s) and Room(s) based on the setting -287 and along with Waitlist Status and Task Status.
All	SAL / Calendar	Scheduling	Desktop	New	<b>Filter for Tags</b> We have added the ability to filter for tags on the service Activity Log Multiple user report
All	Admin / Set Up	All	Provider Portal	New	<b>Setting -810 Session Timeout Popup Warning</b> We have added setting -810, which will generate a warning on the Provider Portal prior to being timed out (in seconds). The warning message appears before the Provider Portal session times out due to inactivity. Default time is 120s (2 min). We have also included a warning popup for when users lose connection to the portal due to internet or network issues.
Professional Platinum	Billing / Invoicing	Take a payment	Client Portal	Enhancement	<b>Client Portal Payments</b> We've streamlined the client portal payments, and are posting payments to existing unpaid invoices, if applicable before creating a new invoice

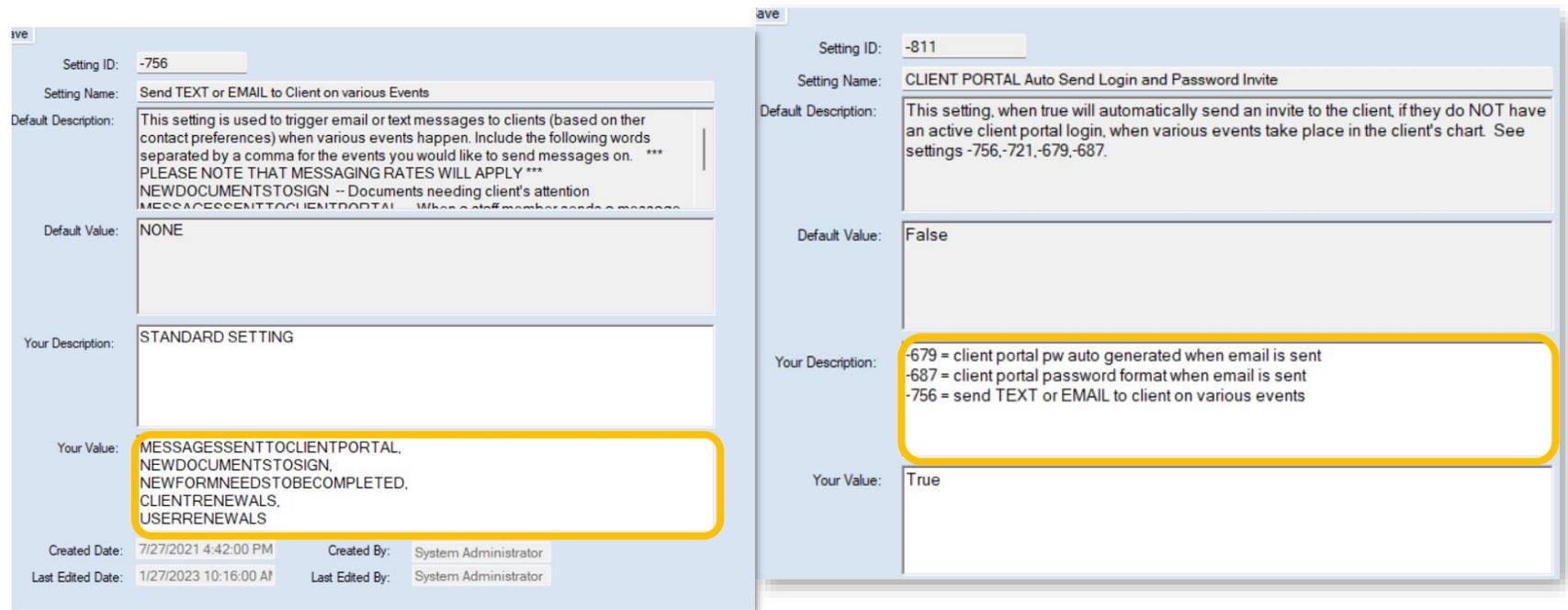
See next page for more detail



## Desktop & Provider Portal

### Q&A and Document Notifications and Renewals

- Under System Settings, we have added options to setting -756 Send TEXT or EMAIL to Client based on various events. This setting is used to trigger email or text messages to clients (based on their contact preferences) when various events happen. When any of the 5 values are in the setting the system will attempt to send out text or email messages to the client or user when there are new docs to sign, new forms to fill out, a new message, or upcoming renewals.
- If the client doesn't have an active portal login (login, password that is active OR the rep doesn't have a login or password that is active), then the system will try based on setting -811. If the setting is True, it will send an invite. If False, it will skip sending anything to the client.



**Setting -756**

Setting ID: -756  
 Setting Name: Send TEXT or EMAIL to Client on various Events  
 Default Description: This setting is used to trigger email or text messages to clients (based on their contact preferences) when various events happen. Include the following words separated by a comma for the events you would like to send messages on. \*\*\* PLEASE NOTE THAT MESSAGING RATES WILL APPLY \*\*\* NEWDOCUMENTSTOSIGN -- Documents needing client's attention MESSAGESENTTOCLIENTPORTAL -- When a staff member sends a message  
 Default Value: NONE  
 Your Description: STANDARD SETTING  
 Your Value: MESSAGESENTTOCLIENTPORTAL, NEWDOCUMENTSTOSIGN, NEWFORMNEEDSTOBECOMPLETED, CLIENTRENEWALS, USERRENEWALS  
 Created Date: 7/27/2021 4:42:00 PM Created By: System Administrator  
 Last Edited Date: 1/27/2023 10:16:00 AM Last Edited By: System Administrator

**Setting -811**

Setting ID: -811  
 Setting Name: CLIENT PORTAL Auto Send Login and Password Invite  
 Default Description: This setting, when true will automatically send an invite to the client, if they do NOT have an active client portal login, when various events take place in the client's chart. See settings -756,-721,-679,-687.  
 Default Value: False  
 Your Description: -679 = client portal pw auto generated when email is sent  
 -687 = client portal password format when email is sent  
 -756 = send TEXT or EMAIL to client on various events  
 Your Value: True

- The system will now send notifications for:
  - o A notification will be sent to the client if the user sends a message from the client chart.

- The system will also send a notification to the client if the user submits a comment from within a TASK that is public to the client. This can be done on both desktop and the portal.
- Client Renewals and User Renewals
  - Under Picklist Management, we have added Renewal Subtypes under Renewal Types. Renewals will need to have Allow Auto Reminder Messages to be checked under Renewal Type. Once checked, any renewals with the renewal type, when due will alert the client or user. For clients and users, the message will be sent out based on the Expiration Alert Lead Time. They will also receive a message one day before the expiration date. Renewals Frequency controls how often the renewal takes place.
  - In Desktop, under *Administration*, go to *Q&A Setup* and select the Q&A from the list that you would like to link to a renewal. Located on the top right of the Q&A is a drop-down called **Renewal Subtype**. Select the renewal subtype that you would like linked to the Q&A.
  - After completing a Q&A, the system will automatically generate a renewal based on the *Renewal Frequency* in Picklist Management.
  - Q&A questions flagged as the *Form Complete Question*, when answered yes, will update the renewal on the client for that Q&A.

Picklist: Renewal Sub Types											
Audit-RenewalSubTypeID	Renewal Type	Name	Description	Renewal Frequency	Active	Default	Suspend Note Releasing By User on Expiration	Suspend Note Releasing on Client on Expiration	Days To Add To DOA or DOH For Expiration	Auto Add to New Clients or Users	Expiration Alert Lead Time in Days
20	CPR	2 Year check up ra		Every 2 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
18	Check Insurance	Check Teeth		Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	<input checked="" type="checkbox"/>	3
29	Client Forms	Consent Form		Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
11	CPR	CPR	CRP	Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	365	<input checked="" type="checkbox"/>	30
13	Driver License	DL	dldldg	Every 5 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	900	<input checked="" type="checkbox"/>	
25	Import_05-23-18	Driver's Ed			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
27	Client Forms	GAD7 Form		Every 30 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	7
21	Stop Notes on Clients	Hault Notes	rah	Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	45
22	Stop Notes on Users	Hault Notes		Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
23	Import05-16-18	Health Plan			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
12	Check Insurance	Insurance		Every 2 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
28	Client Forms	Misc Client Reminder		Weekly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
30	Client Forms	Need a Physical		Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
19	Medical Results	Order Lab Results		Every 30 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15	<input checked="" type="checkbox"/>	60
17	Reset Goals	PCP		Every 90 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	60	<input checked="" type="checkbox"/>	

## 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.

#### Client List

- o Access a client's dashboard select the dashboard action icon on the Client List page.
- o Create a new client by clicking the *New Client* button on the top right of the Client List.
  - When the *Add to New Clients* is checked on the renewal sub type and there are Q&A's attached to the renewal, the system will auto add the Q&A to new clients to complete on the client portal.
- o Utilize the search function to search for a specific client or use search filters for more advanced search controls.

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	

Showing 1 - 12 from 12 data items

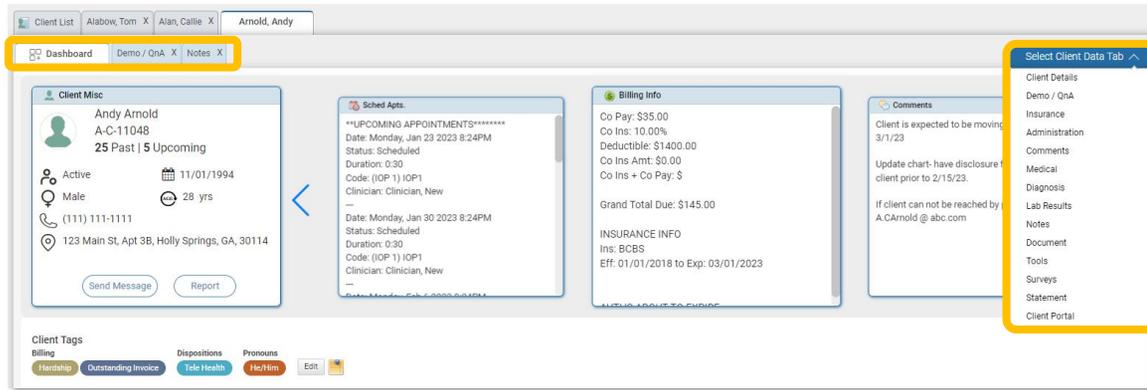
## Client Dashboard

- After selecting a client, you will be taken to the client's dashboard where you can:
  - Switch between dashboard cards, such as:
 

<p>Top section:</p> <ul style="list-style-type: none"> <li>- Client Misc.</li> <li>- Sch Appt</li> <li>- Billing Info</li> <li>- Comments</li> <li>- Last Note</li> <li>- Checklists</li> </ul>	<p>Bottom:</p> <ul style="list-style-type: none"> <li>- Medication/Allergies</li> <li>- Lab Results</li> <li>- Diagnosis</li> <li>- Substances</li> <li>- Client Requests</li> <li>- Client Renewals</li> </ul>
---	---
  - Select Portal messaging and Reports
  - Select Client Data Tab
  - View and edit Client Tags
  - View the medical section where you can view substances, labs, renewals, etc....
- Users now can have multiple client charts open at once. You can switch between charts by selecting a client tab at the top of the dashboard.
- To access the different areas of the client chart, click the Select Client Data Tab at the top right. Selecting any of these items will open a new tab within the client chart.

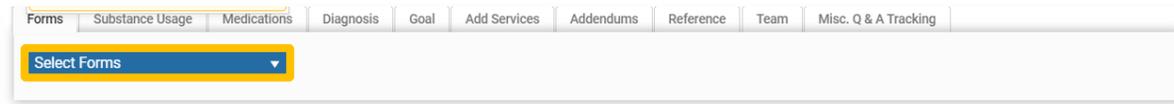
The screenshot displays the PIMSY Client Dashboard for Andy Arnold. The interface includes a top navigation bar with 'Dashboard', 'Clients', 'Calendar', 'Note List', 'Reports', and 'Alerts'. Below this is a client list with tabs for 'Alabow, Tom', 'Alan, Callie', and 'Arnold, Andy'. The main dashboard area contains several cards: 'Client Misc' (personal info, active status, address), 'Sched Apts' (upcoming appointments), 'Billing Info' (payment details), 'Comments' (client notes), and 'Client Tags' (relationship, insurance, etc.). A 'Medical' section at the bottom shows 'Medications' and 'Med Allergies' with a list of drugs like Lexapro and Cymbalta. A 'Select Client Data Tab' dropdown is visible in the top right of the dashboard area.

- Users can also access different areas of the client dashboard by selecting any of the tabs just above the client dashboard cards.
- The Select Client Data Tab can take you to various areas of the client chart, such as Client Details, Demo/Q&A, Insurance, Administration, and more.

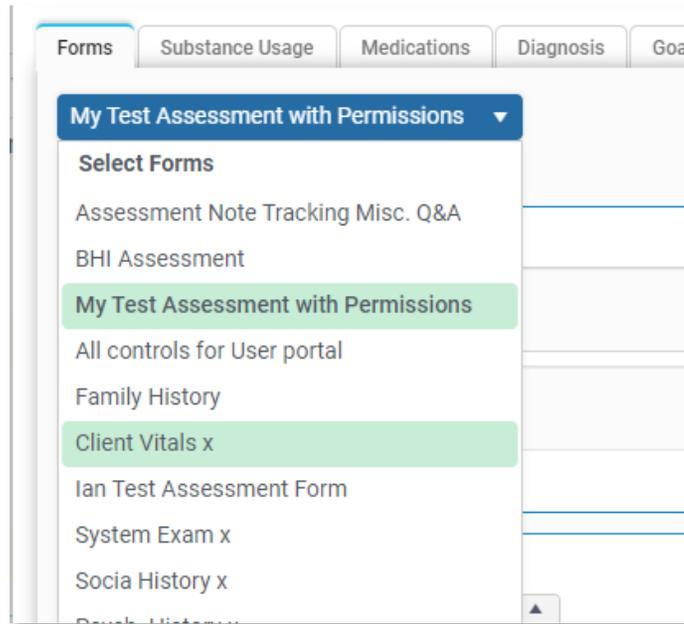


## New Q&A Changes

- In addition to the Client Dashboard changes, we have made improvements to the way Q&A's are displayed.
- When under the forms tab of a note, Users can select a Q&A form from the blue *Select Forms* button.



- Any Q&A answers attached to the note that is open will be highlighted in green. This will also apply to Desktop assessment notes.



- See our newest guide on the Provider Portal - New Client Dashboard to learn more.

## Print Report and Documents

- When saving a document from public docs, users will now have the option to check *Client Action Required*, save, and then assign to a user to add to their document queue.

## Docs to Sign Tile

- On the Provider Portal dashboard, we have added a tile for Docs to Sign, which provides users a place to check for documents that need their attention.
  - o Users can also add dates and comments, to improve information sharing and record keeping.

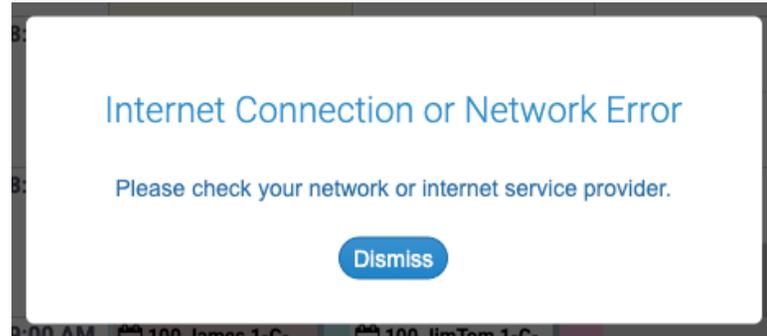
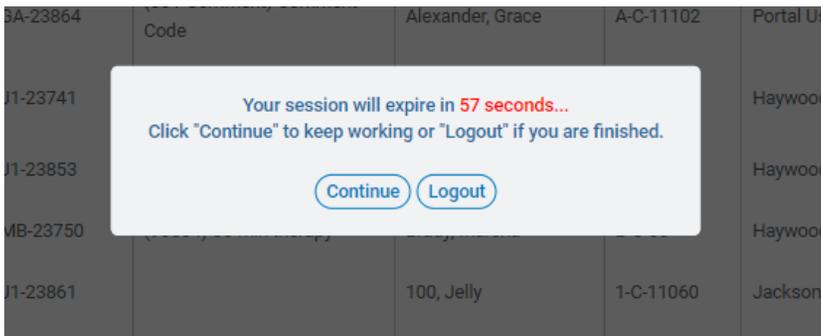
The screenshot shows the PIMSY dashboard with a navigation bar at the top containing 'Dashboard', 'Clients', 'Calendar', 'Note List', 'Reports', and 'Alerts'. On the left side, there is a sidebar with several tiles: 'Latest Alerts 1', 'Notes to Start 64', 'Unrel. Notes 63', 'Grps to Finish 2', 'Unrel Grp Notes 5', 'All Renewals 4', 'Payroll', and 'Docs to Sign 5'. The 'Docs to Sign' tile is highlighted with a yellow box. The main content area displays a table of documents to be signed.

Action	Assign	Document	Client	Description	Folder Name	Primary Thera...	Qualified Prof...
<a href="#">View</a>	<a href="#">Assign</a>	PIMSY Face Sheet	Andy Arnold	PIMSY Face Sheet	FBTEST	New Clinician	
<a href="#">View</a>	<a href="#">Assign</a>	PIMSY Face Sheet	Grace Andrews	PIMSY Face Sheet	Public Portal doc	New Clinician	
<a href="#">View</a>	<a href="#">Assign</a>	SAL Misc Notes 1 - Jenny Address	Jenny Address	Uploaded File from Client	Documents Updated via Portal	Ron Copy	Ron Copy
<a href="#">View</a>	<a href="#">Assign</a>	PIMSY Face Sheet	Valerie Barter	PIMSY Face Sheet	Documents to Complete	New Clinician	
<a href="#">View</a>	<a href="#">Assign</a>	PIMSY Face Sheet	Willow Wilson	PIMSY Face Sheet	Documents to Complete		

The screenshot shows the 'View Document' interface. At the top, there are tabs for 'Document View' and 'Document Details'. Below the tabs, there is a toolbar with buttons for 'Finalize Document', 'My Signature', 'Date', 'Add Comments', and 'Save Document'. The 'Date' button is highlighted with a yellow box. The main content area displays a document with a 'Special Note about Mental Health Benefits' section. Below the note, there are signature lines for the patient and staff, each with a date field. The date field for the staff signature is highlighted with a yellow box and contains the text 'Signed by witness 1/20/2023'.

## Setting -810 Session Timeout Popup Warning

- We have added setting -810, which will generate a warning on the Provider Portal prior to being timed out (in seconds). The warning message appears before the Provider Portal session times out due to inactivity. Default time is 120s (2 min)
- The Internet Connection or Network Error warning popup will alert users if they have lost connection to the portal due to connection issues.

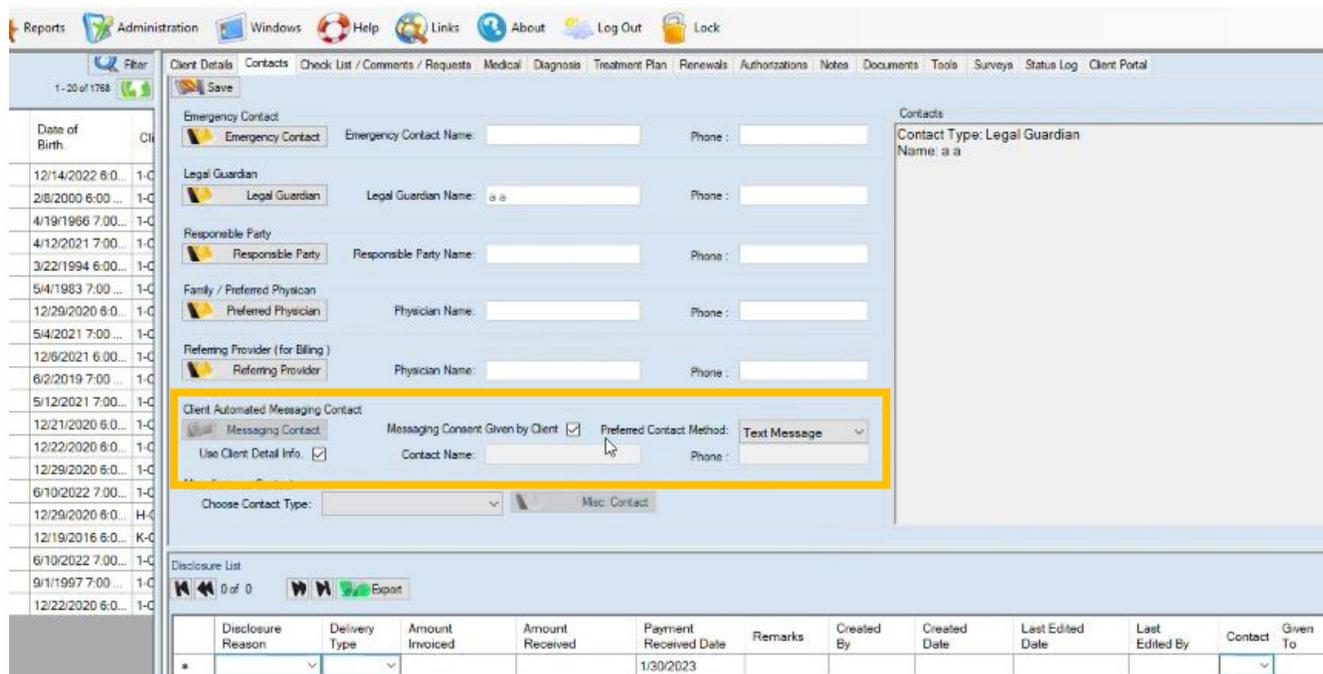


Q&A Renewals

- We have enhanced how renewals work in the system by adding auto messaging/alerts for clients and users. The messages are driven by setting -756 and how the *Renewal Type* and *Renewal Subtype* is setup in Picklist Management.
  - o Renewals will need to have *Allow Auto Reminder Messages* to be checked under Renewal Type. Once checked, any renewals with the renewal type, when due, will alert the client or user.
  - o For users, the message will be sent out based on the *Expiration Alert Lead Time*. If there is no value, it will default to 7 days from the expiration.
  - o *Renewals Frequency* controls how often the renewal takes place.

Picklist: Renewal Sub Types												
Audit RenewalSubTypeID	Renewal Type	Name	Description	Renewal Frequency	Active	Default	Suspend Note Releasing By User on Expiration	Suspend Note Releasing on Client on Expiration	Days To Add To DOA or DOH For Expiration	Auto Add to New Clients or Users	Expiration Alert Lead Time In Days	Division
20	CPR	2 Year check up ra		Every 2 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
18	Check Insurance	Check Teeth		Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	<input checked="" type="checkbox"/>	3	Buncombe Division
29	Client Forms	Consent Form		Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	1	
11	CPR	CPR	CRP	Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	365	<input checked="" type="checkbox"/>	30	
13	Driver License	DL	dgdg	Every 5 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	900	<input checked="" type="checkbox"/>		Macon Division
25	Import_05-23-18	Driver's Ed			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
27	Client Forms	GAD7 Form		Every 30 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	7	
21	Stop Notes on Clients	Hault Notes	rah	Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	45	Jackson Division
22	Stop Notes on Users	Hault Notes		Every 10 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
23	Import05-16-18	Health Plan			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
12	Check Insurance	Insurance		Every 2 Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
28	Client Forms	Misc Client Reminder		Weekly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
30	Client Forms	Need a Physical		Annually	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
19	Medical Results	Order Lab Results		Every 30 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15	<input checked="" type="checkbox"/>	60	Brady Division
17	Reset Goals	PCP		Every 90 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	60	<input checked="" type="checkbox"/>		Haywood Division

- After attaching a renewal to a Q&A and assigning it to a client from the client chart, the renewal will be automatically generated based on the subtype setup. If the Q&A option for *Form Complete Question* is checked, a final question will be added to the form asking if the form is completed. When the client selects yes, it will create/update the renewal.
  - o Based on the notification settings, the client will receive a message that the form will need to be completed via the client portal. This will also be driven by the *Expiration Date* and *Renewal Date*.
  - o Renewal messages go out at noon EST.
  - o In Desktop, under the Contacts tab of the client chart, Client Automated Messaging Contact will determine where the message will be sent or how the client prefers to be contacted. This applies to all client messaging.



The screenshot shows the PIMSY client chart interface. The 'Contacts' tab is active, displaying various contact information fields. The 'Client Automated Messaging Contact' section is highlighted with a yellow box, showing the following details:

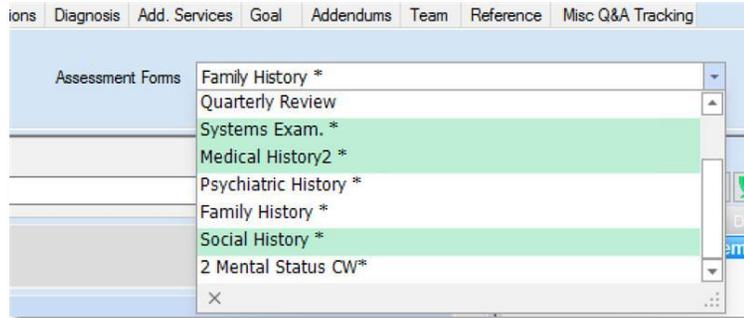
- Client Automated Messaging Contact**
- Messaging Consent Given by Client
- Use Client Detail Info
- Preferred Contact Method: **Text Message** (dropdown menu)
- Contact Name:
- Phone:

Below the contact information, there is a 'Disclosure List' table with the following columns: Disclosure Reason, Delivery Type, Amount Invoiced, Amount Received, Payment Received Date, Remarks, Created By, Created Date, Last Edited Date, Last Edited By, Contact, and Given To. The table shows one entry with a payment received date of 1/30/2023.

Disclosure Reason	Delivery Type	Amount Invoiced	Amount Received	Payment Received Date	Remarks	Created By	Created Date	Last Edited Date	Last Edited By	Contact	Given To
*				1/30/2023							

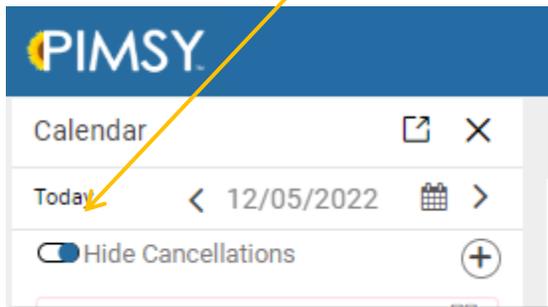
## Q&A Assessment Note Forms Shading

- Just like in the Provider Portal, any Q&A answers attached to the note that is open will be highlighted in green.



## Late Cancel

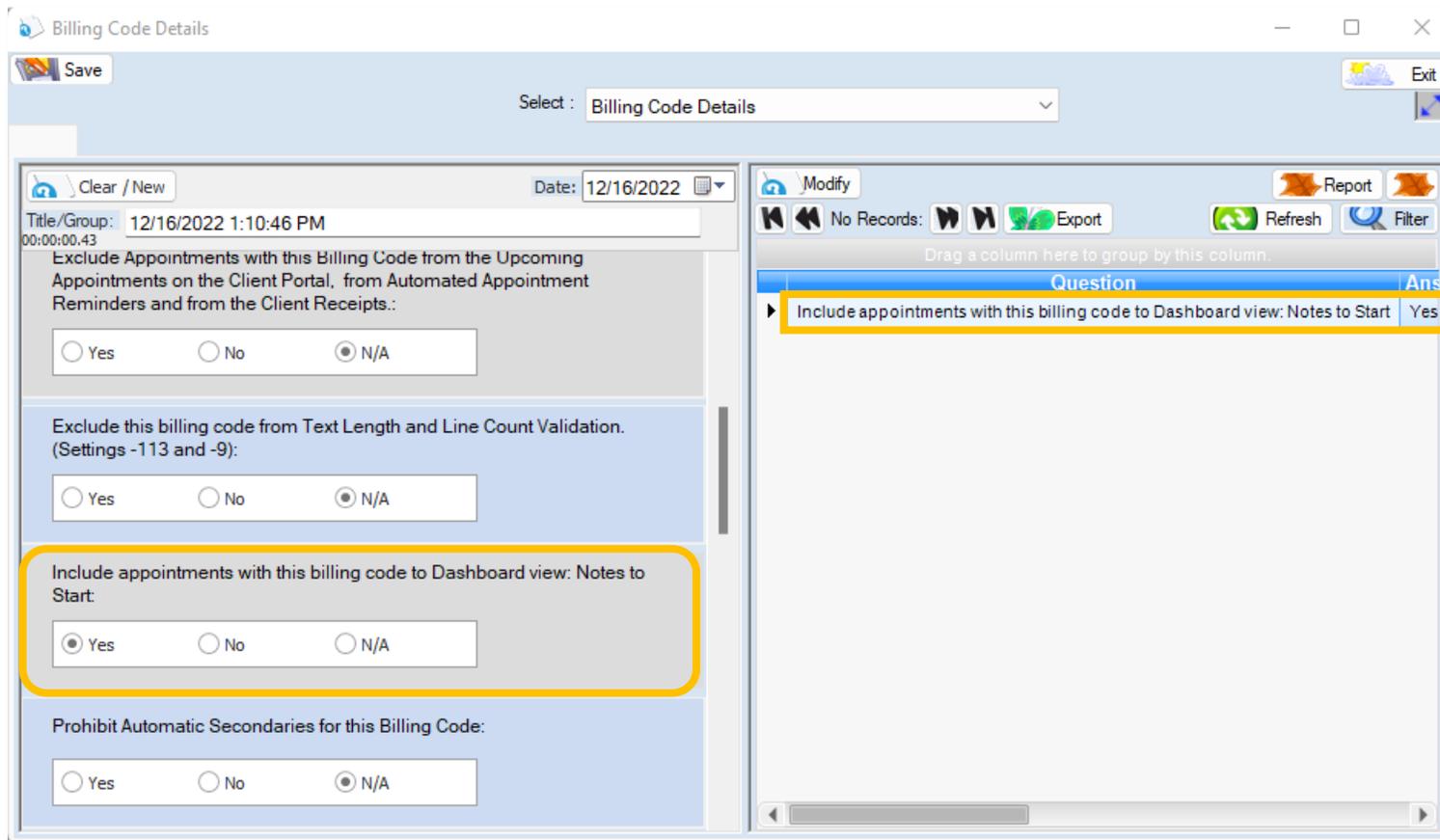
We have changed the way the system exposes certain appointments based on status type. If *Hide Cancellations* is selected on the calendar, it will now use the status type that is assigned to the status to determine whether to expose it or not. This allows for more flexibility and customized statuses for your site.



Save [Navigation Icons] No Records: [Navigation Icons] Export					
Picklist: Status Type Can not Edit or Update Rows in Yellow:					
	Audit-	StatusTypeName	StatusTypeDescription	Active	Default
▶	-7	Hold	Hold	<input checked="" type="checkbox"/>	
	-6	Cancelled	Cancelled	<input checked="" type="checkbox"/>	
	-5	Rescheduled	Rescheduled	<input checked="" type="checkbox"/>	
	-4	Late Cancel	Late Cancel	<input checked="" type="checkbox"/>	
	-3	No Show	No Show	<input checked="" type="checkbox"/>	
	-2	Checked In	Checked In	<input checked="" type="checkbox"/>	
	-1	Scheduled	Scheduled	<input checked="" type="checkbox"/>	

## Add Non-Billable Codes to Note to Start Dashboard

We have added the question "Include appointments with this billing code to Dashboard view: Notes to Start" to the Billing Code Detail Q&A. When answered yes this will show the appointments with these billing codes (non-billable) to the Notes to Start tile on the user's dashboard.



The screenshot shows the "Billing Code Details" application window. The left pane contains configuration options for a billing code, with the "Include appointments with this billing code to Dashboard view: Notes to Start" option highlighted by a yellow box. The right pane shows a table with one row, also highlighted by a yellow box.

**Configuration Options:**

- Exclude Appointments with this Billing Code from the Upcoming Appointments on the Client Portal, from Automated Appointment Reminders and from the Client Receipts.:  Yes  No  N/A
- Exclude this billing code from Text Length and Line Count Validation. (Settings -113 and -9):  Yes  No  N/A
- Include appointments with this billing code to Dashboard view: Notes to Start:**  Yes  No  N/A
- Prohibit Automatic Secondaries for this Billing Code:  Yes  No  N/A

**Q&A Table:**

Question	Ans
Include appointments with this billing code to Dashboard view: Notes to Start	Yes