PIMSY

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	**Q&A / Document & Renewal Notifications** 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. 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. 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. We have also added shading to the Q&A Assessment Note forms list. See below for more information and our latest guide.

All			Provider Portal	Enhancement	**New Provider Portal 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. We have made improvements/ additions such as: Note Q&A and Q&A Forms Print Report and Documents Docs to Sign Tile Comments and Date for Documents See below for more in depth information and our latest guide.
Platinum	Admin / Set Up	Reports	Desktop	New	**Tag Report** 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.
All	SAL / Calendar	Scheduler / Calendar	Desktop Provider Portal	Enhancement	**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 more flexibility and more customized statuses for your site.
All	SAL / Calendar	Dashboard / Scheduler / Calendar	Desktop Provider Portal	Enhancement	**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.

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Professional Platinum	Admin / Set Up	Reports	Desktop	New	**Grid Report for Client Q&A Assignments** 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	**Setting -806** 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	**New colors** 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	**Filter for Tags** 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	**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). 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	**Client Portal Payments** 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

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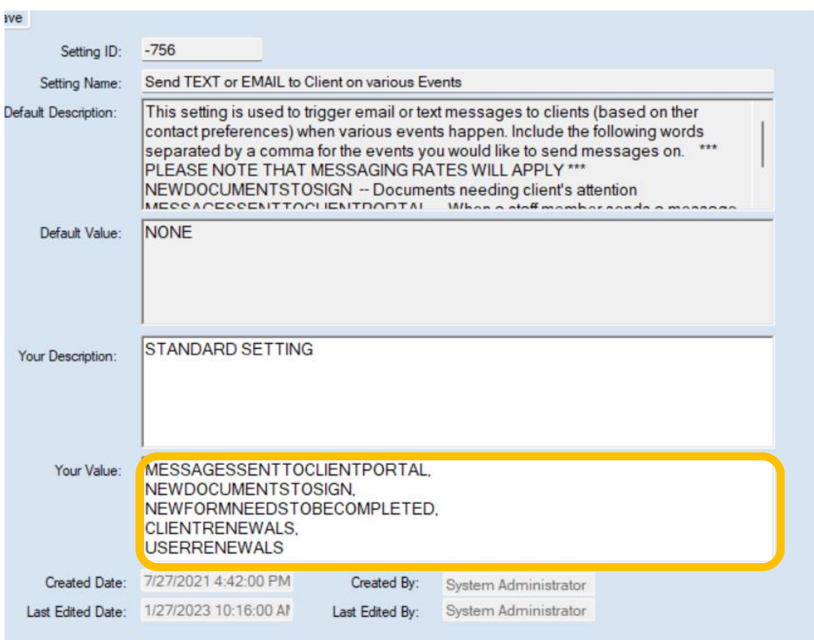
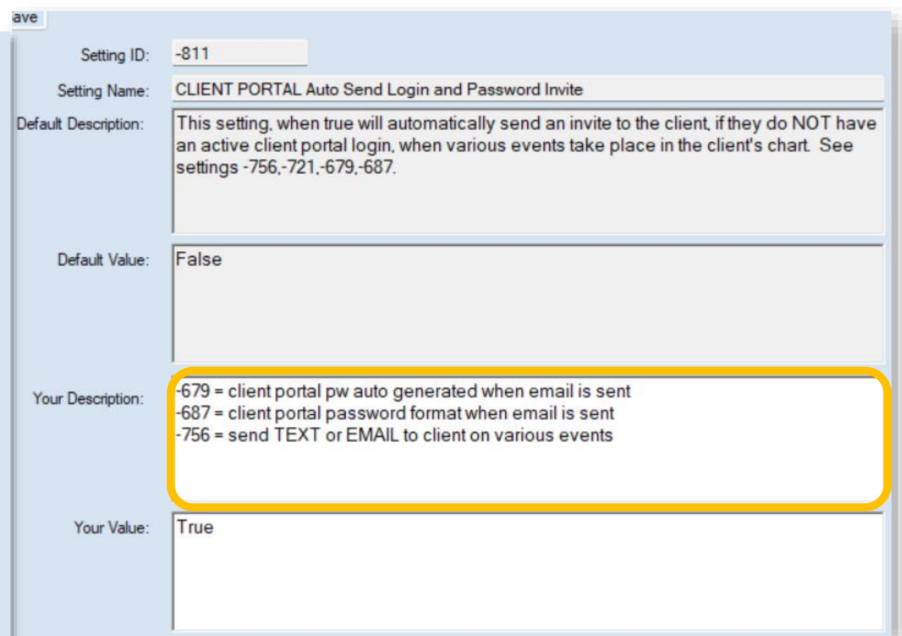
Desktop & Provider Portal

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.





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

o 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
    - o 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.
    - o 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.
    - o After completing a Q&A, the system will automatically generate a renewal based on the *Renewal Frequency* in Picklist Management.
    - o Q&A questions flagged as the *Form Complete Question*, when answered yes, will update the renewal on the client for that Q&A.

Save | No Records: | Export

Picklist: Renewal Sub Types
Can not Edit or Update Rows in Yellow

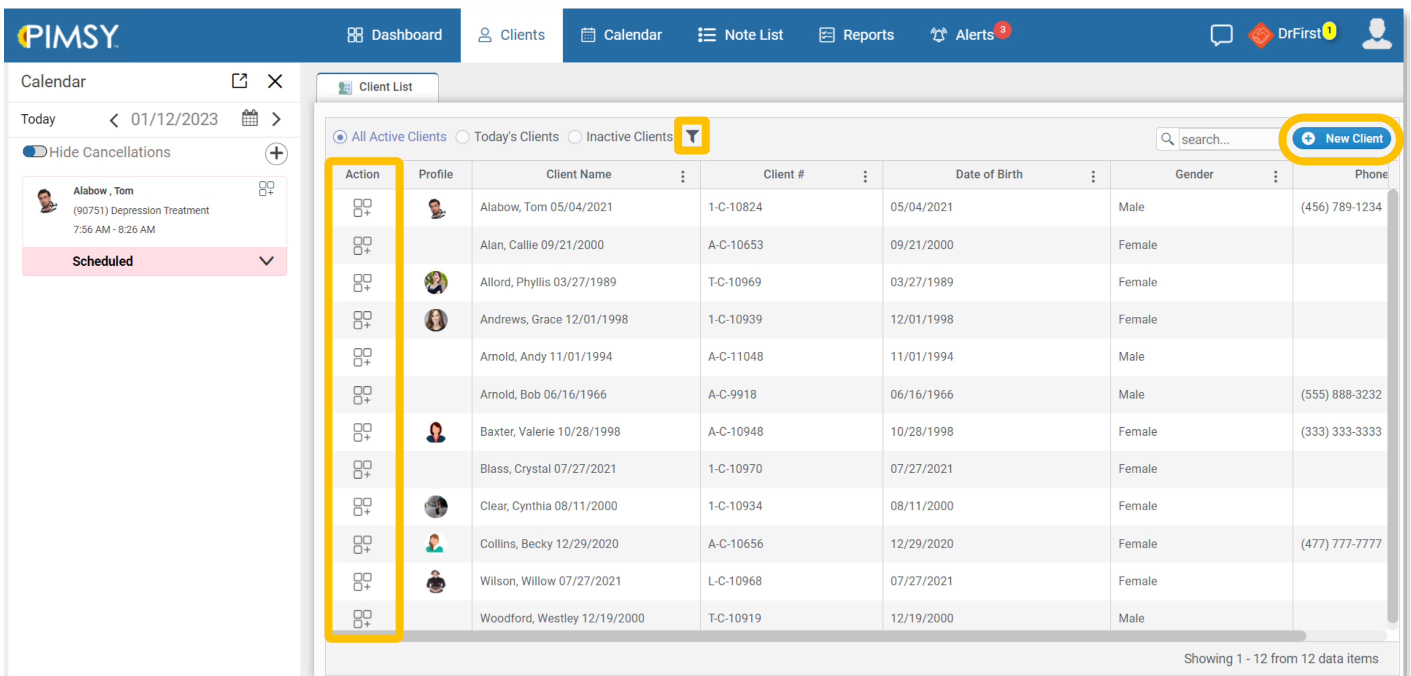
Audit-RenewalSubTypeID	Renewal Type	Name	Description	Renewal Frequency	Active	Default	Suspend Note Releasing By User on Expiration	Suspend Note Releasing on Client on Expiration	Days To Add To DOA or DOH For Expiration	Auto Add to New Clients or Users	Expiration Alert Lead Time In Days
20	CPR	2 Year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

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
    - Access a client's dashboard select the dashboard action icon on the Client List page.
    - Create a new client by clicling 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.
    - Utilize the search function to search for a specific client or use search filters for more advanced search controls.



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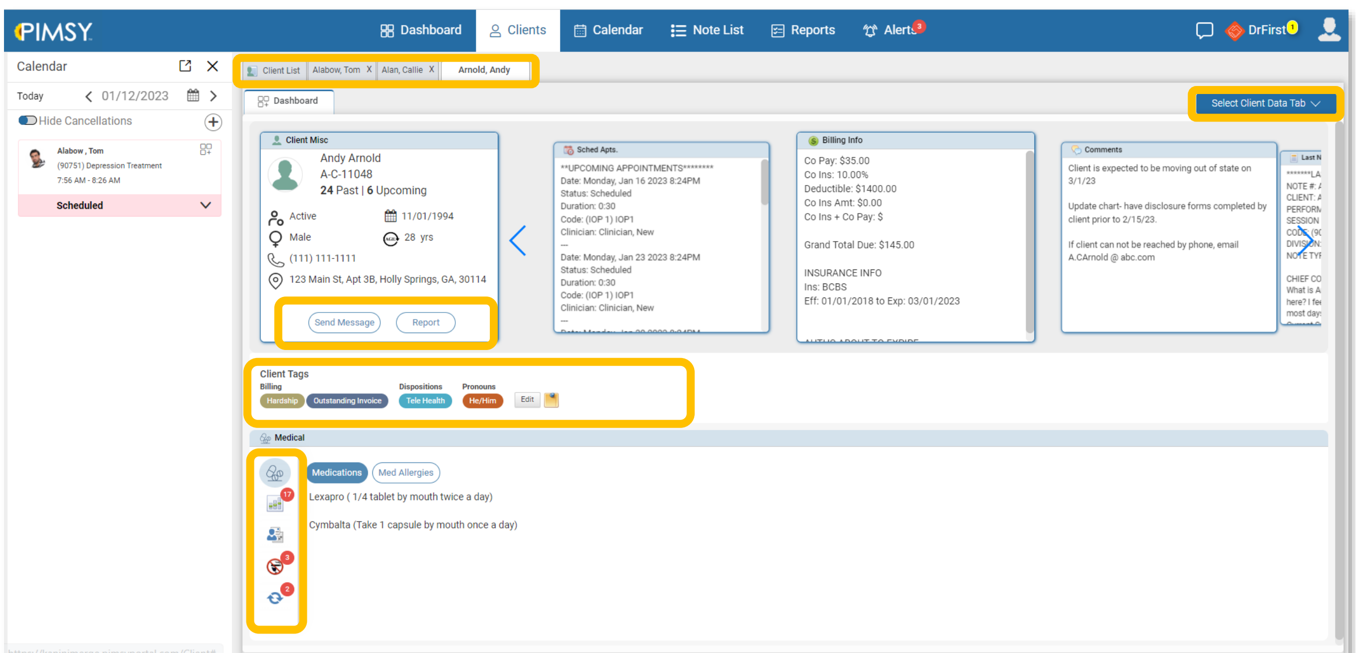
Client Dashboard

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

Top section:	Bottom:
- Client Misc.	- Medication/Allergies
- Sch Appt	- Lab Results
- Billing Info	- Diagnosis
- Comments	- Substances
- Last Note	- Client Requests
- Checklists	- Client Renewals

  - 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.



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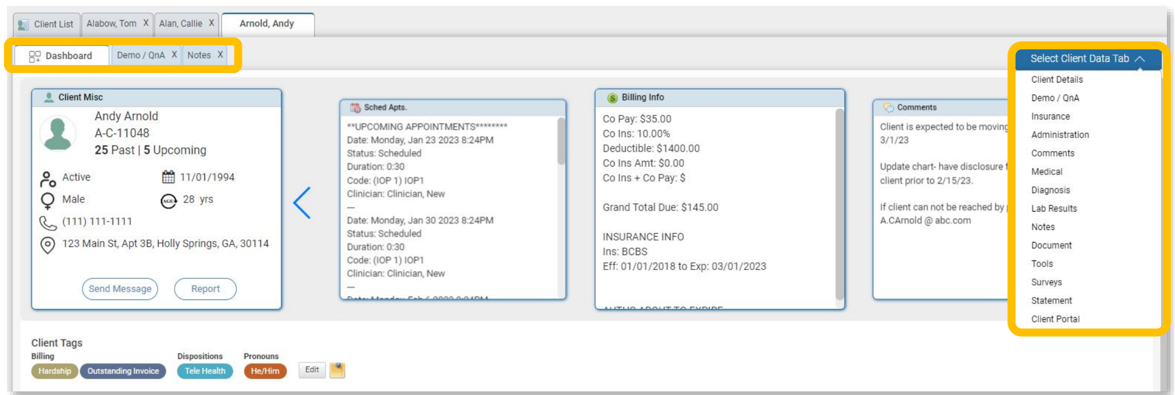
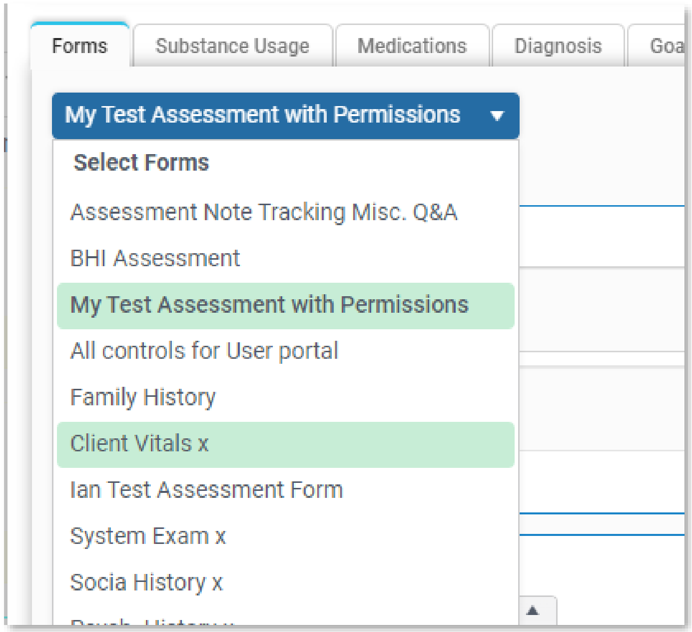
- Users can also access different areas of the client dashboard by selecting any of the tabs just above the client dashboard cards.
- The Select Client Data Tab can take you to various areas of the client chart, such as Client Details, Demo/Q&A, Insurance, Administration, and more.



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.



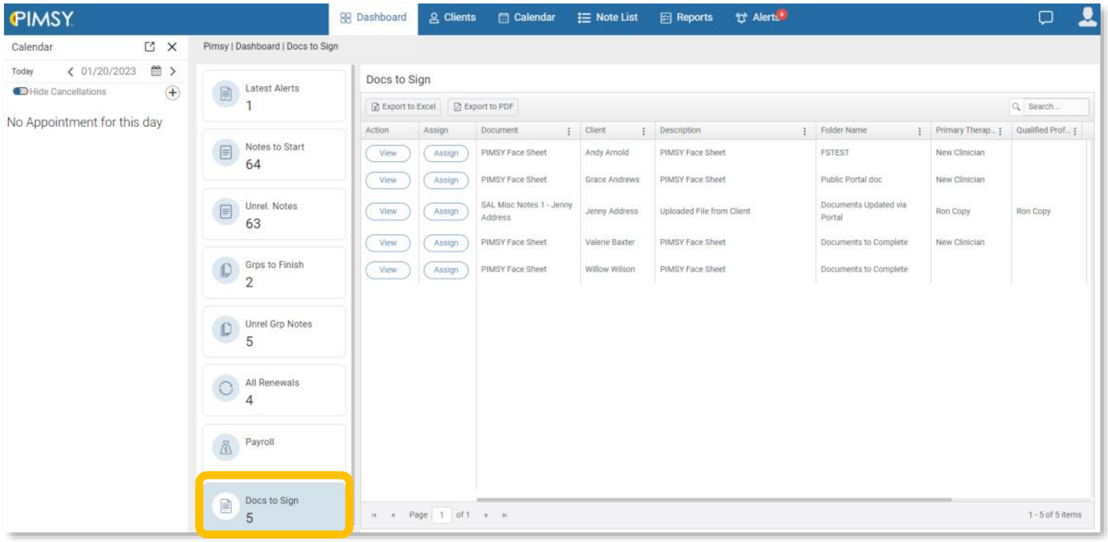
- See our newest guide on the Provider Portal – New Client Dashboard to learn more.

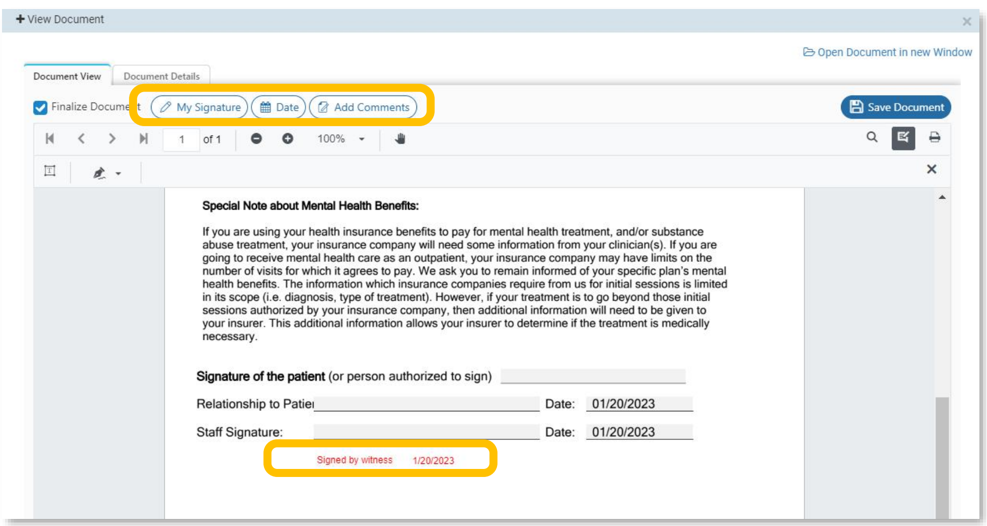
Print Report and Documents

- 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.
    - Users can also add dates and comments, to improve information sharing and record keeping.





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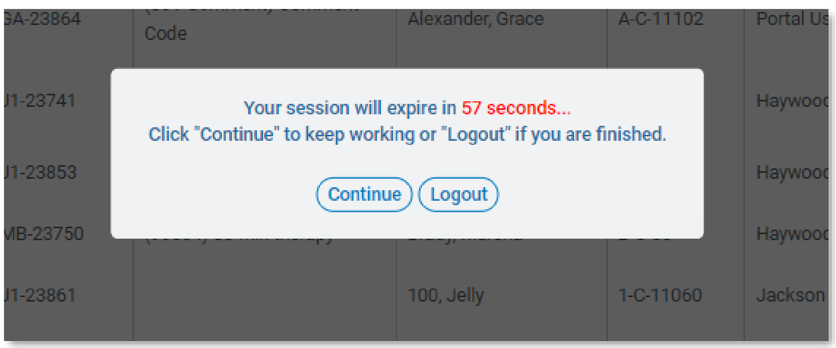
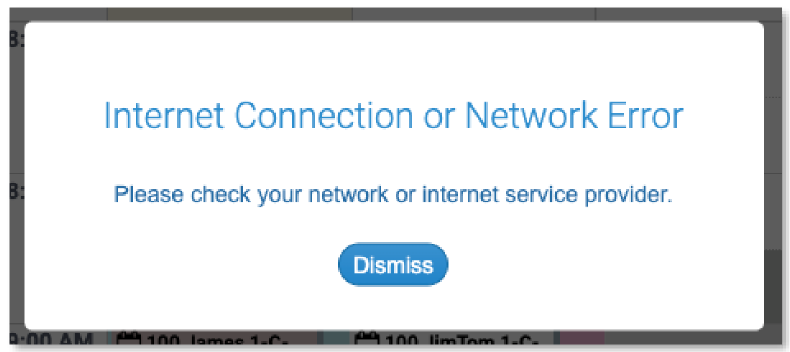
Setting -810 Session Timeout Popup Warning

- 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.





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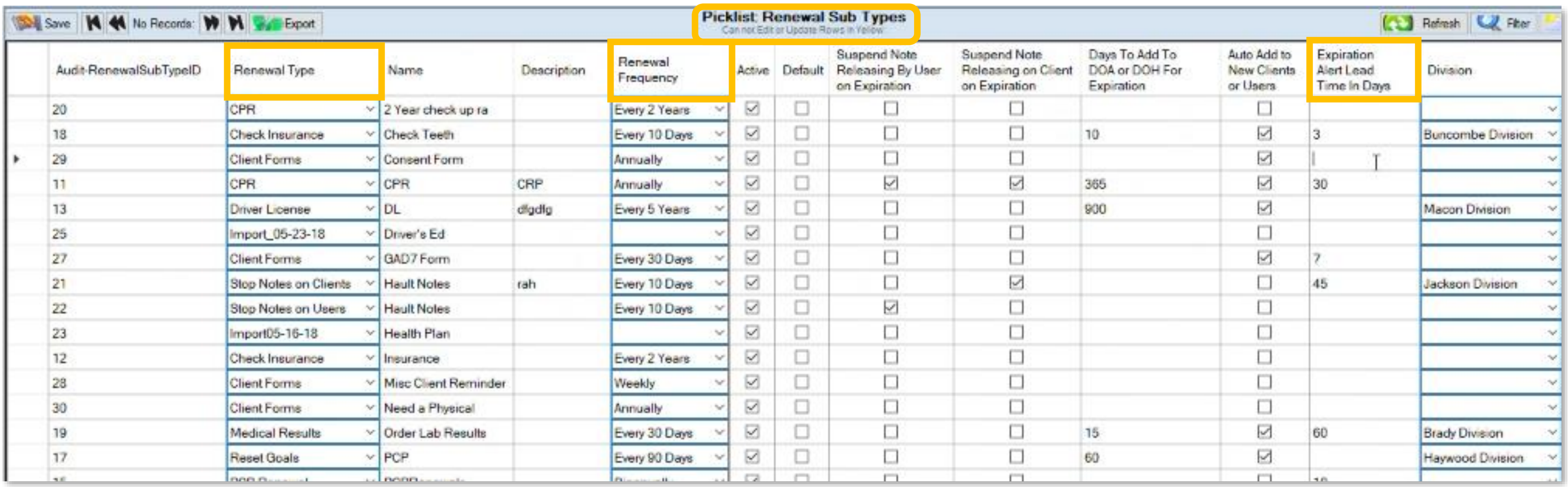
Desktop

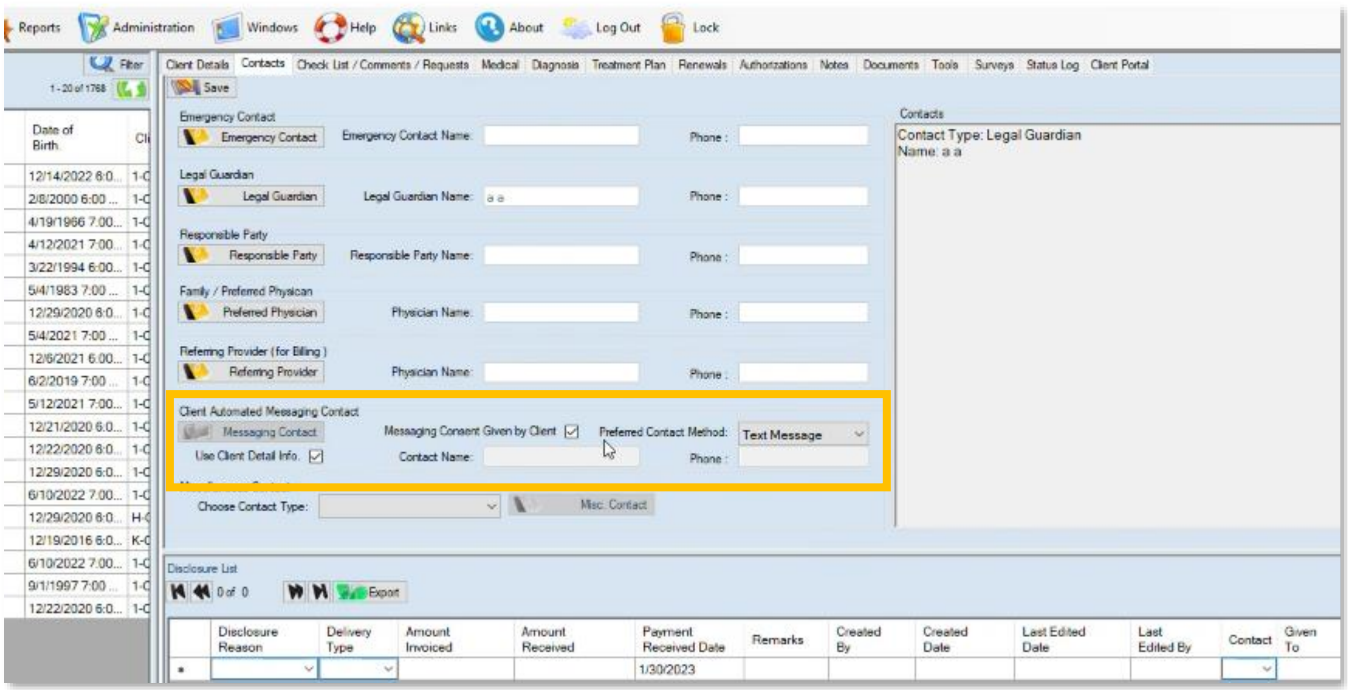
Q&A Renewals

- 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.
    - 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 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.
    - *Renewals Frequency* controls how often the renewal takes place.



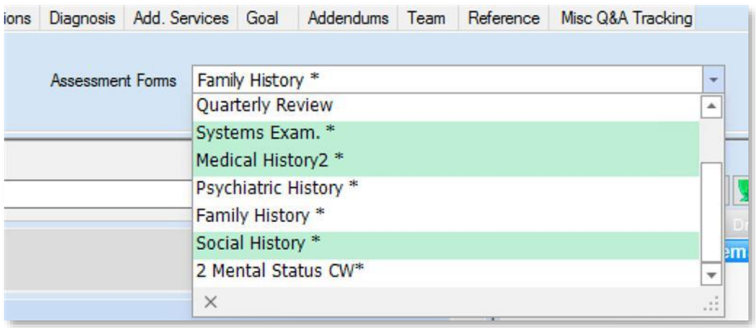
Audit-RenewalSubTypeID	Renewal Type	Name	Description	Renewal Frequency	Active	Default	Suspend Note Releasing By User on Expiration	Suspend Note Releasing on Client on Expiration	Days To Add To DOA or DOH For Expiration	Auto Add to New Clients or Users	Expiration Alert Lead Time In Days	Division
20	CPR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



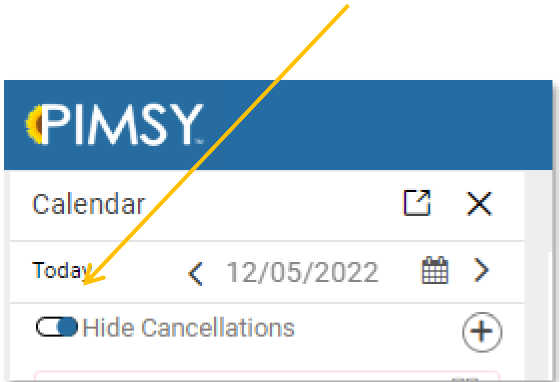
Q&A Assessment Note Forms Shading

- 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 | No Records: | Export

Picklist: Status Type

Can not Edit or Update Rows in Yellow:

Audit-	StatusTypeName	StatusTypeDescription	Active	Default
-7	Hold	Hold	☑	
-6	Cancelled	Cancelled	☑	
-5	Rescheduled	Rescheduled	☑	
-4	Late Cancel	Late Cancel	☑	
-3	No Show	No Show	☑	
-2	Checked In	Checked In	☑	
-1	Scheduled	Scheduled	☑	

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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.