PIMSY 08.31.2023 • RELEASE REPORT

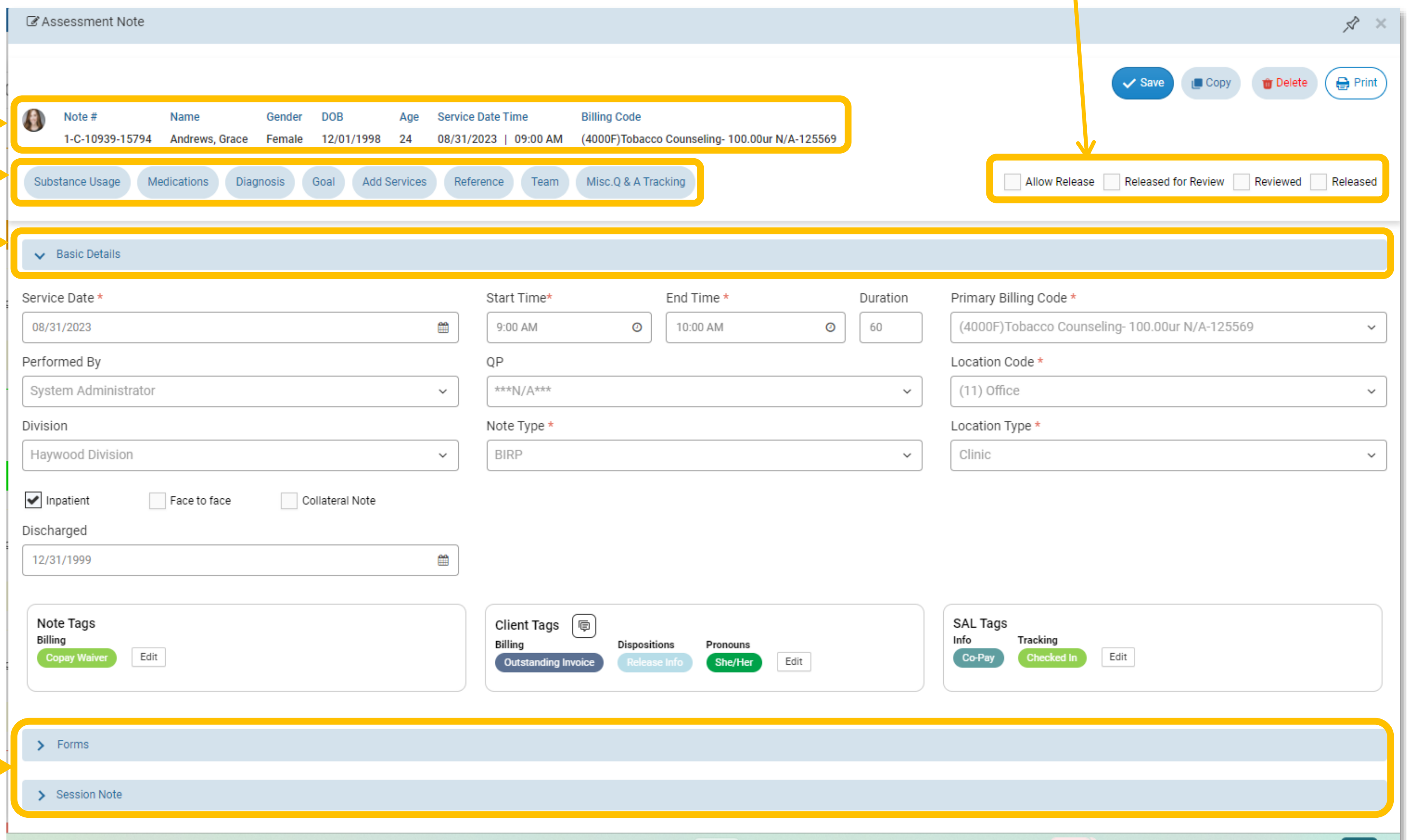
PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Prime Professional Platinum	Medical Records	Notes	Provider Portal	Enhancement	We have updated the note interface for Progress and Assessment notes in the Provider Portal. Please see below to read more on these exciting changes.

See next page for more detail

Provider Portal

Progress / Assessment Note Updated UI

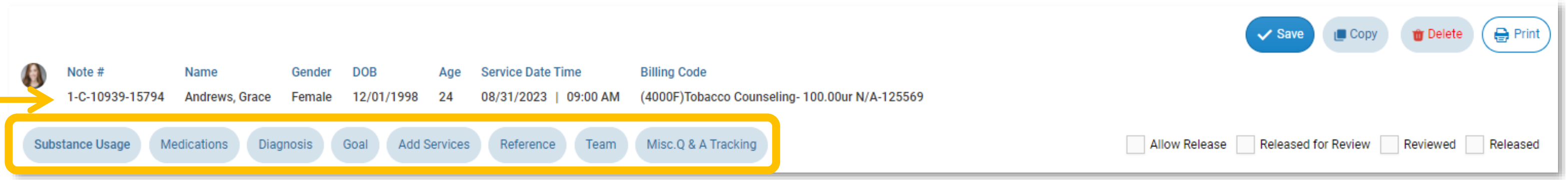
- We have updated the UI for Progress and Assessment Notes in the Provider Portal. Here, the Notes window features a clean layout that utilizes collapsible panels for the *Basic Details*, *Forms*, and *Session Notes* sections. Simply click on the blue panel to hide or reveal a section.
- At the top of the notes window, client and note information can be located, as well as options to review and/or release the note.

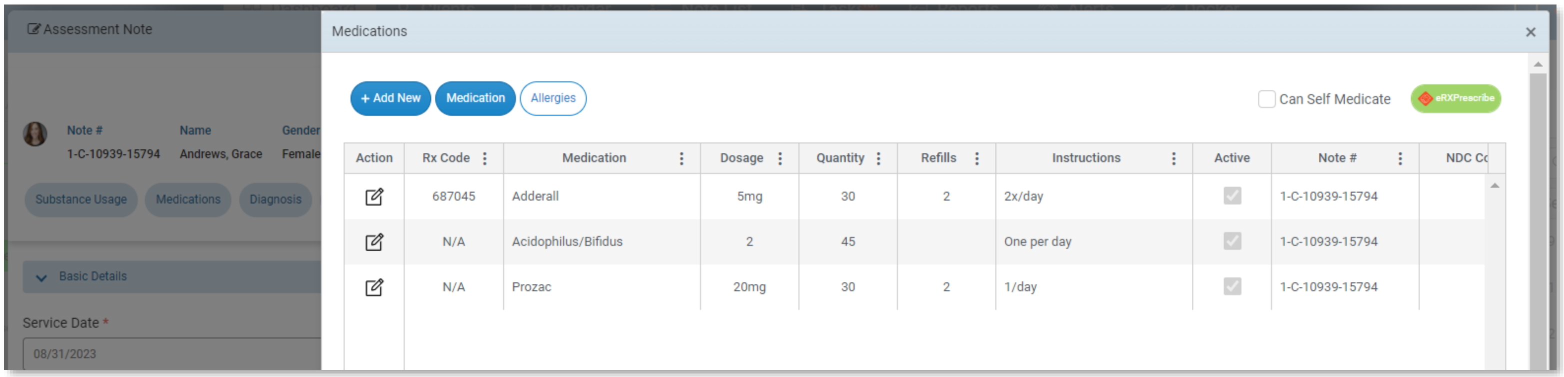


- To view areas such as Substance Usage, Medications, and Goals, select one of the bubbles below the client and note information to view a slide out of that section.

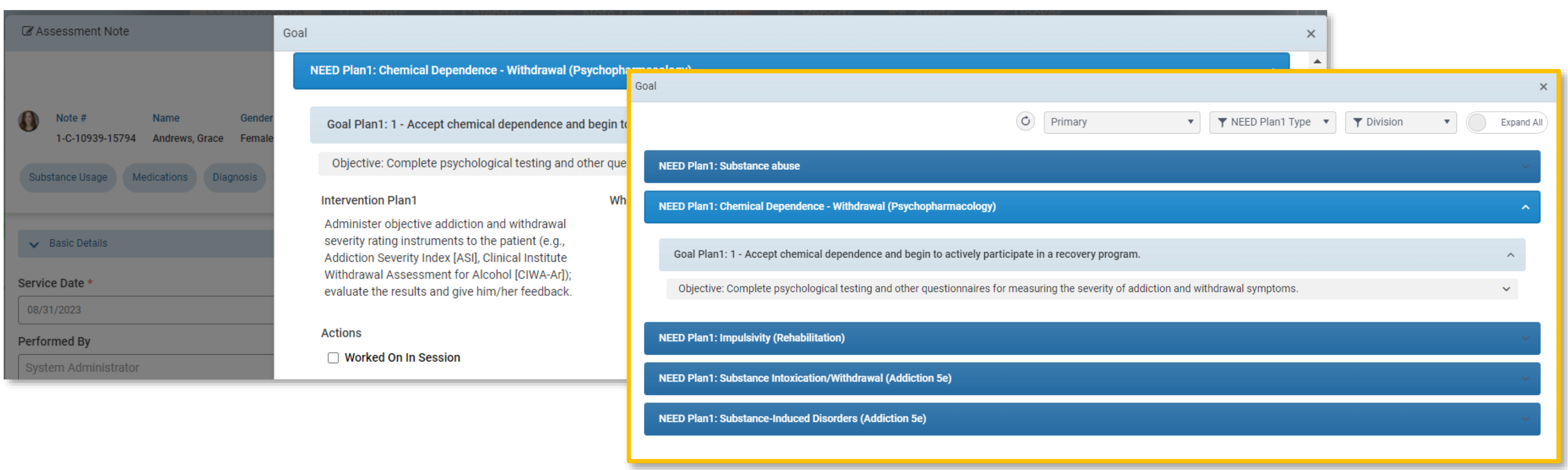
Top Panel and Slide Outs

- When creating a new note, please ensure to save the note so a note number is created. Once saved, and a note number is generated, you can proceed with making edits to the note.
- To access areas such as Substance Usage, Medications, diagnosis, etc., click one of the blue bubbles below the client and note information. A slide-out for that section will appear from the right side of the note window.



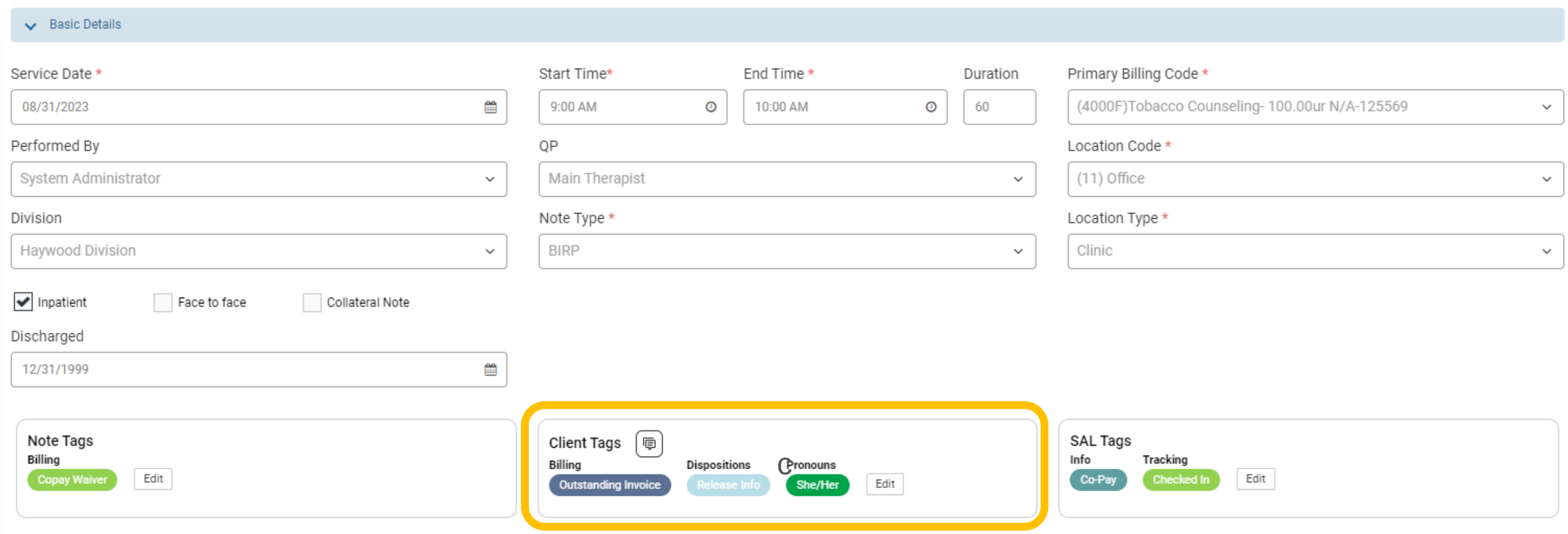


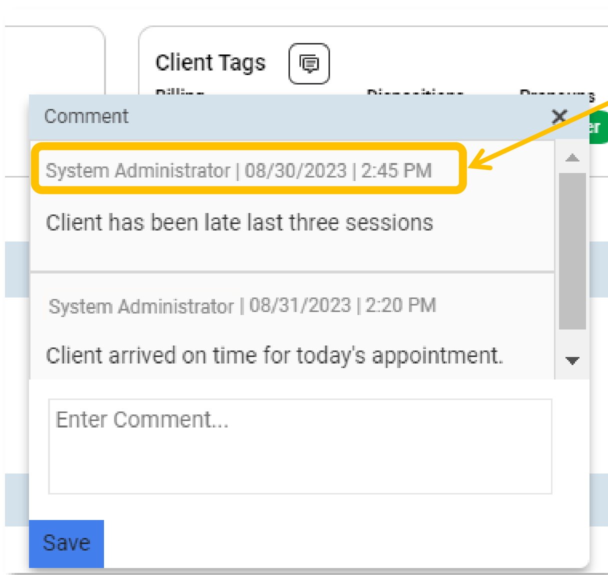
- The Goals/Treatment Plan area can be accessed from this area as well. The Treatment Plans and Goals area utilizes the collapsible accordion section just like on the main note page. Click to view or hide the goal and need panels. Like the PIMSY desktop application, Primary, Secondary, and Tertiary plans can be selected, as well as Plan Types, and Divisions.



Basic Details Panel

- The Basic Details panel for Notes has been improved by being structured into a more comprehensive layout. Here, items such as *Performed By*, *Division*, *Start / End Time*, and *Note Type* can be viewed and/or edited. Additionally, commentary for Client tags has been updated.

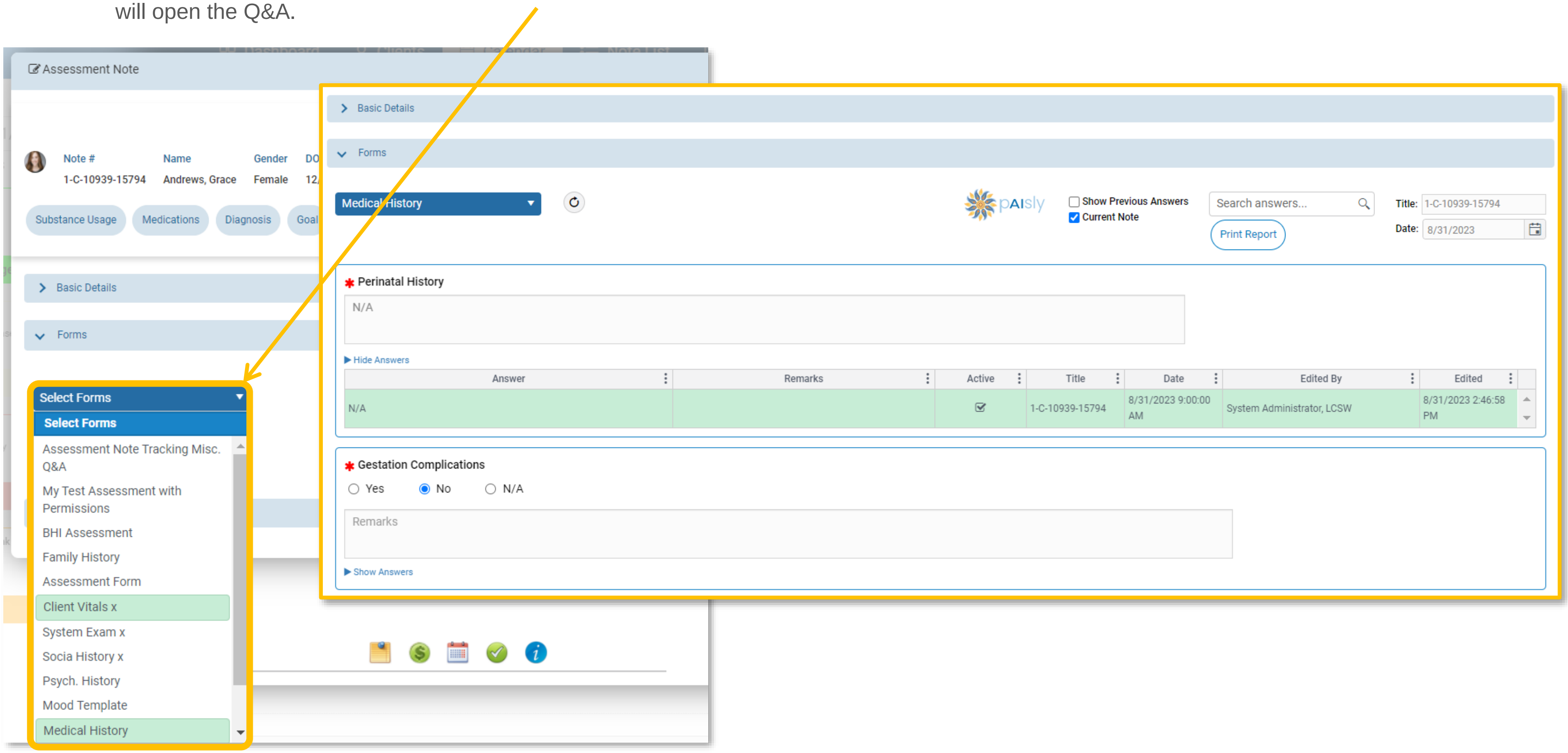


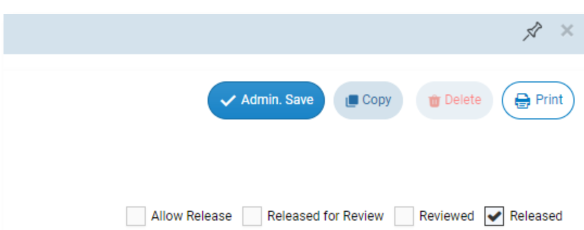


- When creating comments for Client tags, a timestamp will be applied for when the comment was created and by whom. To create a comment, type in the blank text field and then click Save.

Forms Panel

- Q&A’s can be accessed by revealing the Forms Panel. Here, any Q&A’s that have current active answers will be highlighted in green. Selecting a Q&A will open the Q&A.





- For users with the profile rule *Note Modify Admin Save Button*, an *Admin Save* button will appear in place of the Save button if the note is released.

Session Note Panel

- The Session Note Panel houses the narrative field. This was previously the top narrative field of the note form. Please note that the header labels may appear differently for each site.

Additional Changes

- We have included the option to convert Progress Notes to Assessment Notes. This can be found by going to the Reference tab under the client and note details. A slide-out will appear on the right with various options that can be saved. Click the blue *Change to Assessment Note* button to initiate the conversion.