PIMSY Release Report v5.0.29.0

Ticket	PIMSY Area	Version	Notes
#2246	Billing	5.0.28.4	We have made a change to the NPI number on the Invoicing grid. Now the NPI number will contain the NPI Number that goes out on claims not just the NPI number saved in the user details. This way, if the billing matrix or the user rates tab have alternate NPI numbers for specific situations, those NPI numbers will show instead of just the standard one saved in the users personnel folder.
#2178	Billing / authorizations on clients	5.0.28.2	We have added the ability to update the auths across multiple clients at once. We have added a new button to the Global Client Auth list that will allow you to add new codes to all the clients listed or update all the codes listed in the grid. We have also added additional ways of filtering this grid by client groups and billing code groups. Finally we have added the client DOB column to this grid.
#2207	Billing / Notes / All over	5.0.28.0	We have added the ability for each note to contain multiple billing codes. New billing code types have been added to the system and will allow you to categorize your billing codes based on whether they are CPT Add On codes, UB04 Add On codes or standard CPT / E&M codes. Any Codes with the Add On type (or no type at all) can be added onto a note using the new Add Services tab on the Note Dialog boxes. All Non Add On Codes will appear in the top part of the note as normal. CPT Add On codes will create new claim lines in Invoicing. UB04 Add on Codes will be rolled into the primary claim on the note. For UB04 Billing a new Revenue code column has been added to the system in Billing Code Management. The Revenue codes that are associated with each CPT code can be added here. Each Note should be continuous over one day and only done by one person. Make a new note if someone else is doing it or if there is a gap in time with the client. There is a long list of rules on how to use the new codes so please see our forum for more details. Please Contact your PIMSY Support Person for additional details on this new feature.

#2028	Billing 837p Invoicing	5.0.28.1	We have made more changes to the 837p form. Now if the service location NPI matches the Billing Location NPI we will no longer include the service location information.
#2111	Billing Client Insurance tab	5.0.28.1	We have made the first round of changes to the Client Insurance tab in the clients chart. You will see we have added a non editable Insurance History tab. This tab will show all the insurance information for the client over time. As new insurance information is added or changed the history will be recorded in this window. If the insurance company and Individual number remain the same then the data will be updated in the history. If the Insurance or Individual Number change then it will record a new line in the history.
#2217	Billing Code Units	5.0.28.4	We have added the ability for SMIS to provide you with Billing Code Decrement Categories that contain duration ranges. Please contact us if you need a billing code where the units vary based on the duration of the session.
#2010	Calendar	5.0.28.1	We have made a change in this update that will allow users to see other users' appointments on the calendar even when the client is not assigned to the user. The client's name will be replaced with the client number. This change will allow people to more accurately check the availability of users and rooms by allowing them to see the appointments on the calendar even if they don't have access to the client. When you open the appointment you will not see the client names or the user name on the appointment.
#2253	Calendar	5.0.28.4	We have modified the SAL Calendar Button on the Home page to open the calendar independently from the rest of the application. This way the calendar can be put on its own Monitor, Updated and Saved while you continue to work in the rest of the PIMSY application. If you choose to open the calendar from the utilities menu it will work as it always has and be loaded as a child window inside the PIMSY application.
#2214	Calendar Client	5.0.28.4	We have adjusted the way the system works when you press the "Clients Calendar" button from the clients chart. It will now show you all appointments for that client not just the ones for the Primary Therapist.
#2189	Calendar, Appointment Report	5.0.28.0	We have added the client's phone number to the hover over tool tip on the calendar. This phone number will contain the client's cell phone number. If that is empty then it will have the client's phone number. We have added the same column to the Stats by Date Appointment Log report.
#2157	Client Diagnosis decision support	5.0.28.1	We have corrected an exception that occurred when diagnosis with Decision Support Recommendations were saved.

#2015	client insurance tab	5.0.28.3	We have modified the Insurance Note boxes to take unlimited text and moved them over to the side of the screen. We have also added an Insurance History Grid so you can view the previous Insurances a client may have used throughout their history.
#2119	contacts	5.0.28.0	We have modified the Contact Names in the client charts to show the relationship. You no longer need to go into the contact to see the relationship.
#2190	Export	5.0.28.0	We have added a new Profile Rule that will Allow users to Export Data From the different list screens in the system. This is a global profile rule called "Export Allow", which needs to be given to all the existing profiles in the system to continue to allow users to export.
#2014	Invoicing	5.0.28.0	We have made a slight change to how the primary flag is set on new claims. The primary flag will automatically be flagged if the insurance on the claim is not the secondary on the client.
#2030	Note Assessment	5.0.28.0	We have corrected an issue on the Assessment note where the Decision Support Dialog box didn't show and an error occurred when saving a diagnosis.
#2106	Note reports / SSN	5.0.28.1	We have changed the default setting so the Client's SSN is no longer on the Note Reports by default.
#2150	Notes	5.0.28.0	We have added a new client automated measures button to the Assessment Note. This button will now pull up the automated measures questions from inside the client's chart under the audits tab, allowing the users easy access to this area. This area really only needs to be used for companies seeking Meaningful Use Certification.
#2251	Notes	5.0.28.4	We have modified the Assessment Note screen. The top 4 boxes on the Note appear in tabs. This allows us to make the boxes bigger and more usable. We have added 3 fields to both the Progress and Assessment note screens, Inpatient, Admission Date and Discharge Date. These fields are used for Inpatient UB04 Billing.
#2080	Notes Group Notes from Calendar	5.0.28.1	We have modified the system so the user from the Appointment shows up automatically in the Group Notes Performed By box when the user from the appointment doesn't match the user who is logged in.

#2181	Profile Clients	5.0.29.0	We have added the ability to set up the client so they can log into PIMSY at a terminal in the office. There is a pre existing profile called "Client Login" that can be changed but gives the client access only to the client details page in the clients chart. Here they can fill out their demographic information and survey information for their initial set up. You also have a new user in the system called Client Login. Login as username: patient / password: patient. You are not charged for this user and it is attached to the Client Login Profile. This is the user Clients should log in as when filling out their chart. This new feature can only be used to create new clients. They will not be able to edit their chart once they have been logged out. Finally, only one client should be logged in at a time under the same user. If you need multiple clients to log in at the same time you will need to create multiple users with that profile. See your PIMSY Support person for details.
#2220	Q&A on Reports	5.0.28.4	We have corrected an issue on printed reports that contained digital signatures from the Q&A areas. When signatures were present the question text was shortened causing the text to wrap.
#2239	Receipt	5.0.28.3	We have added the Tax ID from Organization Management to the Receipt Full report on the Take a payment screen. There is a new setting (-303) that will determine if that value shows on the report. The default setting is not to show.
#2036	Sal / payroll	-	We have resolved an issue where the billing code did not always populate on the appointment when notes were created.
#2007	SAL Grids	5.0.28.1	We have corrected a Time Zone issue when saving dates on the SAL grids.
#2236	Stats By Date / Hours worked Report	5.0.28.2	We have made a slight change to the Stats by Date / Hours worked report. The report was previously counting the Notes done in groups as individual notes with all the individual hours adding to the total hours worked. Going forward the group note only counts as one note which will prevent total hours worked by the therapist from being counted multiple times for each note in the group.
#2229	User Documents	5.0.28.1	We have added a new button to the user documents tab that will allow you to store private documents on that user. This area has its own set of profile rules and can be used to store sensitive documents relating to your staff members that only those with the User Private Documents profile rules can see. To use it, click on Private Documents Button and go from there.