Ticket ID	PIMSY Department	PIMSY Screen	Type	Release Notes	Version
3046	Medical Records	Treatment Plans	New	We have added the option to the Treatment Plan to include the insurance information on the header of the Treatment Plan when it is printed.	5.0.45.0
3166	Medical Records	treatment plan	New	We have included the Need/Observation Type Name onto the Treatment Plan Report along with the Need Number field.	5.0.45.0
3267	Medical Records	Reports	New	We have added 6 new printable reports to the system. (Informed Consent to Release Information, Informed Consent to Transport, Informed Consent to Treat, Informed Consent to Video Tape, Permission to Communicate, HIPAA / Patient Health Information (PHI)) Along with each of these reports there 6 new Q&A modules for the signatures and 6 new system settings -380,-381,-382,-384,-385,-386 that will allow you to control the text on each report. You can pull up any of these reports by hitting the Brown Leaf button either on the client's chart or from the appointment dialog box. Select the report and hit preview. Once the report has been generated you can have the client hit the sign menu on the report viewer to have them fill up the Q&A for that report. Then once the client has signed the document you can then hit the save menu item to save the pdf back to the client's chart.	5.0.47.0
3209	Medical Records	reports	New	We have added a new Stats by Client Report that will show all the different Divisions clients are assigned to in PIMSY. The report is called Client Division Report.	5.0.45.0
3010	Medical Records	Reports	New	We have added the Target Population field to the Main Client Report. We have also added a new setting (-389) that will allow you to change the label for this field on the Demographics tab in Client Management. We have also added the Misc Client Q&A area to the Main Client Report.	5.0.45.0
3210	Medical Records	report	New	We have added the Document Thread Name to the "Document Counts on Clients by Document Created Date" report under the Stats by Date Reporting menu.	5.0.45.0
3193	Medical Records	renewals	New	We have added a new 270 day renewal time interval option to the renewals pick list area.	5.0.44.0
3085	Medical Records	Renewals	New	We have added a couple new options under the Renewal Sub Types to allow for the system to auto add renewals to new Clients and Users. You can now choose whether to auto add different renewals to clients and users when they are added to the system and also select how far out from the DOA or DOH the first initial renewal will expire. To set this up up enter in the days out you want for the first renewal and after that it will go with what you have set up in the renewal types. We have also modified the Bulk Adding of Renewals to Clients and Users to make them show as Active.	5.0.45.0
3124	Medical Records	receipts	Changed	We have changed the system so if at the time the payment is taken there is no note the system will put the current active primary diagnosis on the receipt.	5.0.47.0

3037	Medical Records	Profiles	New	We have added a new Profile Rule called "Note Copy". You can now control who can copy a note and who can't with the profiles. Please make sure if you use this feature to add it to the appropriate profiles.	5.0.45.0
3188	Medical Records	notes	New	We have added Tool Tips on the Check Boxes on the Note Dialog box to help users know what each one means.	5.0.45.0
3092	Medical Records	MU - Automated Measures	New	When the Upcoming Appointments report is generated in any fashion the client's Automated Measures "Client Reminders Sent" box will automatically be updated to Yes with a Remark stating that the upcoming appointments report was printed.	5.0.45.0
3030	Medical Records	Group Notes/Client List	Changed	We have made a change to the system that will prevent inactive clients from showing on the Unassigned Client List when making group notes. We have also modified the system so only active clients show on the New Note Dialog box in the Client Drop Down list. If you need to make an on the fly note for an inactive client you will have to go to the clients chart.	5.0.44.0
2613	Medical Records	Global Note List	New	We have added the ability to search/filter the notes in the Global Note List by the Note Text. I new column called Note Text has been added to the grid and it now also included in the filter. We have also added a new Find menu item to the right click on the main Note Boxes. The find option will search the entire note for specific text and highlight that text in yellow and blue.	5.0.44.0
2625	Medical Records	Educational Resources / Meds, Labs, Diagnosis	New	A new Educational Resources button has been added to the following screens: Lab Result Details, Diagnosis and Medications. You can select a row of and get specific educational material about that specific item.	5.0.46.0
2623	Medical Records	Diagnosis screen	New	We have added the ability to track diagnosis on client's relatives. There is a New Show Family check box on the client diagnosis list. When checked the list will show diagnosis from relatives. You can now also assign a diagnosis to a relative for reference. The Relationship Drop down box has been added to the Dialog box.	5.0.45.0
3181	Medical Records	Content Central	Changed	Modified how the client number gets passed to Content Central. It will now pass both the client number and the client alternate number with an OR between them if they are both there and New setting (-387) it turned on.	5.0.44.0
2621	Medical Records	Clients Demographics	New	We have added two new Smoking Statuses based on the MU2 Requirements. (Light Smoker and Heavy Smoker)	5.0.44.0
3064	Medical Records	Client Detail page	Changed	We have modified the system and added a new setting (-390) "CLIENT - Require 9 digit Zip Code on Clients." This setting, when True, will require a 9 digit zip code on the client's physical address. This is useful when services are provided in the home because electronic billing requires a full zip code.	5.0.45.0

3204	Medical Records	Client Comments	New	We have added a new "Private" check box to the Client Comments area in the Client's Chart. This box, when checked, will prevent anyone but the user that originally created the comment from seeing it.	5.0.45.0
3184	Medical Records	Client authorizations	Changed	We have made an adjustment to the system so that when Released Notes are Deleted the Units will be automatically added back to the authorizations.	5.0.45.0
2640	Medical Records	Automated Measures	New	We have added a new set of Questions on the Automated Measures Tab in the clients Chart. This new set of questions handles how Amendments to the client's chart should be tracked.	5.0.44.0
3197	Medical Records	authorizations	Changed	We have made adjustments to the system that should correct some issues where units were not calculated correctly when Add on Codes were added to the Notes.	5.0.45.0
3132	Medical Records	authorizations	Changed	We have modified the system so the Last Edited By column on an Authorization is always the last person to modify an Authorization and not include the last person to sign off on a Note.	5.0.44.0
3112	Medical Records	Authorizations	Changed	We have modified the Bulk Authorization Update so when Auths are updated the Active flag will be updated if the Date Range is current. If the Date Range on this Auth is not current then the Active flag will be marked inactive.	5.0.45.0
3020	Medical Records	Assessment note	Corrected	We have corrected an issue where inactive Section Headers still appeared in the Q&A Reports when they were printed.	5.0.45.0
2117	Human Resouces	users	New	We have added 2 more user surveys to the Professional Plan and an additional 5 more user surveys to the Platinum Plan.	5.0.46.0
2915	Human Resouces	user survey report	Changed	We have made changes to the system to prevent long signature questions from being lost under the signature image on the reports.	5.0.44.0
3203	Human Resouces	user Signatures	Changed	We have modified the system to pull signature images onto the note reports based on the date the note was done and the date the signature was done. This will allow for a user to have different signatures over time.	5.0.45.0
3059	Calendar/Scheduling	Reports - sal - multi user	New	We have added the Last Edited Date and Last Edited By Columns to the Service Activity Log (Multi User) report.	5.0.45.0
3136	Calendar/Scheduling	messaging service	Changed	We have improved the status checking in the Client Reminders and Messaging area. The system will also post the status from the vendor on the end of the Status Message in the Message history grid.	5.0.44.0
3217	Calendar/Scheduling	Calendar / appointment	Corrected	We have corrected an issue on the calendar where brand new clients created from the calendar didn't appear automatically in the Client Drop Down box on the appointment screen.	5.0.45.0
3254	Calendar/Scheduling	calendar	Changed	We have changed to OK button to a Save button when you make appointments. This allows you to just go to take a payment or start your note without having to close the box save and open it back up.	5.0.45.0

3249	Calendar/Scheduling	Calendar	New	We have added a new feature that will allow you to email clinicians (or yourself) appointment detail to be added to a 3rd party calendar like Outlook. The adding, updating and cancelling these appointments works just like any other calendar event. That appointment should be automatically added to the calendar when the person accepts the meeting. An email will then go back to the person that scheduled the appointment letting them know it was acknowledged. This feature will also work on group appointments. It currently does not work on recurring appointments. You will need to register for a free account with sendgrid.com. They will make sure you are not a spammer then give you a login and password that we can place on your PIMSY Site.	5.0.47.0
2914	Calendar/Scheduling	appointment dialog	New	We have added a new $ icon on the Calendar Appointment dialog box that will show up if the client has a copay.	5.0.45.0
3114	Billing / Invoicing	Take a Payment	New	We have added the ability take credit cards in PIMSY. You can now store credit card information in the secure vault and process those credit cards from the take a payment screen.	5.0.47.0
2193	Billing / Invoicing	take a payment	Changed	We have modified the system so if Expected Amounts are filled out it will use those on the Take a Payment Screen when estimating what the client should pay for the visit. If Expected amounts are not their the system will then use the Allowed Amount to Bill as normal.	5.0.49.0
3201	Billing / Invoicing	Stats By Date	New	We have added a new report to the Stats by Date Menu Item. It's called "Client Visit Report." This report shows a listing of all the notes performed in a date range with bill codes, units, amount invoiced and paid, division and location.	5.0.45.0
3115	Billing / Invoicing	statement / system setting	New	We have added a new setting (-388) BILLING - Statement Include Individual Applied Payments. This setting allows you to control whether or not to include the individual transactions on the line on the statement that sum up the Payment Splits. This setting works in conjunction with setting -331.	5.0.45.0
3232	Billing / Invoicing	notes/invoice	New	We have added a new setting to the system (-383) so we can identify what the Telemedicine Modifier is for each practice. If there is modifier filled out in this setting the system will look to see if the modifier is already on the billing code on the note. If the modifier is on the billing code on the note it will make the Location Modifier Blank for the session.	5.0.45.0
3173	Billing / Invoicing	Multi-user screen	Changed	We have removed the PQRS/"G Codes" from the non billable drop down list on the Service Activity Log (Multi User Screen).	5.0.45.0
3127	Billing / Invoicing	Invoicing / Take a payment	Corrected	We have corrected an issue on the statements when notes were attached to existing payments.	5.0.45.0

3152	Billing / Invoicing	Invoicing	New	We have added many new options to Auto Button Dialog Box on the Invoicing Screen.	5.0.45.0
3108	Billing / Invoicing	Invoicing	Corrected	We have corrected an issue where the Billable Flag did not always change when Addendums for Non Billable Codes were added to the note.	5.0.45.0
3237	Billing / Invoicing	Insurance Setup/ Invoicing	New	We have added a new Q&A option in the Payer Management area that will allow you to replace the Rendering Line on the 837 file for individual Payers. The question is called Rendering Provider Line - 2310A Loop. It needs the actual line from the 837 file in it.	5.0.45.0
3137	Billing / Invoicing	Client detail for DOB and demo for contact	Corrected	We have corrected an issue where the Date of First Contact on the Main Client Report showed up in a Time format when the report is generated. It now shows as a date.	5.0.45.0
3128	Billing / Invoicing	billing code decrement	New	We have added a new Unit Decrement Category: 1 Unit / Hour rounds up after 31 minutes.	5.0.44.0
3120	Billing / Invoicing	837 / user modifier	Changed	We have modified the system to send out a 0 amount on PQRS codes instead of .01. We have also made changes that will send out 1 unit for these codes instead of 0. We have also added a NONE option on user Modifiers. You can now add a NONE modifier to the system and reference that is the Billing Matrix. If the NONE modifier ends up on a note then the system will then delete that modifier when electronic billing takes place. This is useful because it allows you to set up global rules then bypass those rules when you don't need a modifier.	5.0.45.0
3161	Administration/Set Up	System Settings	Corrected	We have corrected a spelling error in the Setting -1 description.	5.0.45.0
3069	Administration/Set Up	saved searches	Changed	We have modified the Filtering capabilities to allow you to use saved searches along with the normal searches. This will allow you to set your saved searches then still filter for different date ranges.	5.0.45.0
2886	Administration/Set Up	Profiles	New	We have added a new Profile Rule called, "Note Can See All Notes by All Users." This will allow someone with this profile setting to see all the notes for all the clients they have access to even if setting -80 is set to False. This way Client administrators can be allowed to see everyone's notes while setting -80 still limits everyone else to only seeing their own notes.	5.0.45.0

3236	Administration/Set Up	PIMSY	Important HIPAA Info	Microsoft will stop supporting Windows XP in April of 2014. Because of security and HIPAA issues that arise from using an unsupported operating system we at PIMSY are recommending everyone still using XP or Vista upgrade to Windows 7 or Windows 8. In conjunction with this move from Microsoft, PIMSY will be getting a framework upgrade of it's own in the July 2014 update to .net 4.0. This framework is not included in either the XP or Vista operating systems by default. Anyone using Windows XP or Vista prior to the July update will need to download and install the .net 4.0 framework from the following link. http://www.microsoft.com/en-us/download/details.aspx?id=17851 This framework will only work on Windows XP if service pack 3 (SP3) is installed so please check with your IT department if you plan on remaining on Windows XP after the July update.	5.0.45.0
3248	Administration/Set Up	Links	New	We have added a way for our clients to add new / custom links to PIMSY and have them show on the Links Dialog box. There is now a new pick list tab called Links. Here you can add your own custom links. They will show in the new custom links drop down box on the Links Dialog box. 4 New Profile Rules have been added to the system for controlling who can View, Add, Modify and Delete the Links in the Pick List area.	5.0.46.0
2622	Administration/Set Up	Documents	Changed	Have made some mods to the documents area that will allow for a more robust document description.	5.0.44.0
2826	Administration/Set Up	Calendar	Changed	If there is a note number on the SAL then when you hit the MU button it will bring up the MISC Q&A on the note to be filled out. If there is No Note Number then you just get the standard Automated Measures tab.	5.0.44.0
2638	Administration/Set Up	audit	New	We have permanently turned on the Audit Log for the Audit Log. Going forward you will always be able to see if someone has turned on or off Auditing on different areas of PIMSY.	5.0.45.0