Ticket ID	Lowest PIMSY Plan	PIMSY Department	PIMSY Screen	Release Notes	Version
5097	Professional	Administration / Set Up	Client detail tab	We have modified the system to automatically update the Suspend Notes flags on both the Users and Clients when a Renewal is Renewed that had that option checked.	6.0.6
5129	Professional	Administration / Set Up	Company Q&A	We have added a new report to the stats by date menu item called Company Q&A Report. This report pulls the company Q&A records filtered by the from date on the entries. It can be grouped by the different categories and filtered to bring back active or inactive results.	6.0.6
4304	Prime	Administration / Set Up	Electronic Signing	We have made modifications to the system that will allow you to sign directly on Windows Tablets when signing documents inside PIMSY. You will also be able to use various Topaz signature pads as well. The signatures will now count down and automatically finalize the signature when the signer picks up the pencil.	6.0.6
5118	Professional	Administration / Set Up	Exporting	We have made it so exporting from PIMSY allows you to do other things while a particular list is exporting. Once the export process starts you can close the export dialog and the system will continue to export while you work. You will be prompted when the export is complete. Once the export is running you can close the Export Dialog box and the export will continue to run. It will prompt you when it is complete.	6.0.6

Ticket ID	Lowest PIMSY Plan	PIMSY Department	PIMSY Screen	Release Notes	Version
4792	Prime	Administration / Set Up	Home	We have added a new Dashboard to the lower right hand portion of the PIMSY Main screen. You should be able to access from anywhere you are in the system with a click. It will show you the list of your appointments for the day and you can do the following; Click on the appointment and receive a list of blue tiles that when clicked on contain information about that particular client. You will also be able to Right Click on the appointment and get the same context menu you do when you are in the actual calendar. You should be able to hover over each appointment and see the same tool tip you do from the calendar. You can also highlight an appointment and open or start a note using the note button. You can go directly to that client's chart with the client button and open the calendar with the calendar button. Along with client tiles the user may also see tiles based on information about their particular login. The Provider tiles are green and show them information about global issues concerning them. (Renewals, Notes not released etc.) Finally, administrators will see white tiles that will give specific information about the status of operations. Many of these tiles will / can contain pie charts based on different revenue reports. Others will contain information about notes and appointment statuses. All tiles are profile driven. If they don't have the profile the user won't see the tile. Financial information will appear on these tiles so please make sure only appropriate users are power users. If you need information in a particular tile please let us know and we can create a tile just for you.	6.0.6
4829	Prime	Administration / Set Up	Q&A Pick List Setup	We have added the filter button back to the Q&A Pick list screen	6.0.6
5085	Professional	Administration / Set Up	Q&A Set up	We have added a new column to the Q&A Set up area that will allow you to change the category the Question is on.	6.0.6

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5239	Platinum	Administration / Set Up	Q&A Set up	For those with the PIMSY Platinum Plan you can now create as many Q&A Categories as you need in the Client Audits area and under the Company Q&A area. You will see a new "New" button in the Q&A Setup screen when you are working in those Q&A modules. Simply hit the new button and create your own Q&A module.	-
5198	Professional	Administration / Set Up	Reports	We have added Note Number, Released and Released for Review to the Service log Report under the Reports -> Stats by Date Menu. We have also Added a Units to Bill By Note column and changed the existing "Units to Bill Column" to be labeled "Units to Bill by Appt".	6.0.6
4914	Prime	Administration / Set Up	Scanning	We have improved the scanning features in PIMSY to be both more flexible, generic and compatible with various industry standards.	6.0.6
5190	Professional	Administration / Set Up	Templates	We have modified the system so if an individual has permissions to add or modify Templates (note templates, TX plan Templates etc.) they will be able to do so right from the screen where the templates are accessed.	6.0.6
5012	Professional	Billing / Invoicing	Billing	Consolidated Claims on an 837 file. When the new Consolidated 837 files is used the system will look for like claims and condense the figures into one claim line. The billed child and parent claims will be marked as such but only the consolidated parent claim will go out on 837 file. When the 835 file comes back in the revenue will be posted to that consolidated claim and billers will manually have to allocated the appropriate amounts to the individual child claims. There is a new column called "Consolidated Invoice Number". It will contain the Invoice number of the consolidated claim on all the child claims. You will be able to use this field to filter for your individual claim lines.	6.0.6

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5153	Professional	Billing / Invoicing	Denial Codes	We have added the Payer number to the denial code pick list. The system will try to match up the Payer number from the 835 file with the appropriate Payer number to get the appropriate denial code.	6.0.6
3359	Prime	Billing / Invoicing	invoice	In Invoicing, when you change the layout of the bottom grid the denial code column will retain the layout changes.	6.0.6
5164	Professional	Billing / Invoicing	Invoicing	We have added a new option in the Manual Batch Posting Screen. If you are posting a payment to a claim that has already been paid you will now be asked if you want to create a new claim for this adjustment. Choose yes or no. Yes will create a new claim line and no will update the existing claim.	6.0.6
5169	Professional	Billing / Invoicing	Invoicing/Location	We have added a new Pay To address type that is used in conjunction with specific insurance settings in Electronic billing. If the Payer Setting that states to include a Pay To address is marked yes the system will send the Pay To Address associated with the Default Location on the 837 file.	6.0.6
5026	Professional	Billing / Invoicing	Matrix	We have corrected an issue where the Billing Matrix wouldn't save the decimal places on specific charges.	6.0.6
5155	Professional	Billing / Invoicing	Reports	We have modified the AR reports under the Stats by Date menu to no longer use the "Include on Statement" flag in invoicing as a criteria when generating the numbers for the report. Going forward it will pull all claims regardless of the "Include on Statement" flag in invoicing.	6.0.6
4990	Professional	Billing / Invoicing	reports	We have added a new report called... Financial - Daily Reconciliation Report. This reports shows what was invoiced and received in a given day broken down by Billing code and Payment Method.	6.0.6
4930	Professional	Billing / Invoicing	Take a payment	We have made it so the Credit Card Signature line only appears on the Receipt Lite if the Credit Card Setting -396 is True and the client used a Card Payment Type.	6.0.6

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Ticket ID	Lowest PIMSY Plan	PIMSY Department	PIMSY Screen	Release Notes	Version
3114	Prime	Billing / Invoicing	Take a Payment	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. Please ask your PIMSY Support representative how to get started.	6.0.6
5187	Prime	Calendar / Scheduling	Appt	We have added the Remaining to the billing codes on the Appointment Dialog box. You will now see a "##ur" after each billing code that matches up with an authorization in the client's chart. That will tell you the number of the Current remaining units left on that authorization.	6.0.6
4613	Professional	Calendar / Scheduling	sal calendar entry	We have made it so if the note Copy Option is utilized it will copy the Division from the previous note.	6.0.6
5036	Professional	Human Resouces	Payroll / SAL	We have added a new setting -475.(PAYROLL - Only Include Appointments with Kept / Checkout Status) This setting when True will only include appointments with a status of Kept / Checked Out when calculating payroll for Hourly and Flat Rate sessions. (The top grid in payroll). When False it will not take the Kept status into account.	6.0.6
5213	Prime	Human Resouces	Profiles	We have modified the system to save profile rules individually instead of all at once. This should save time when modifying profiles.	6.0.6
4701	Professional	Medical Records	Client Detail Tab	We have added 3 new fields to the Client Details screen. There are two new user assignments (Clinician 3 and Clinician 4). Both of these can be renamed via settings -476 and -480. You could use these fields for assigning Case Coordinators or other staff to each client with a specific role. We have also added a Date of Referral to the client details screen. All three fields appear on the Client Report and can be filtered upon. We have also added the Client Assignments to the Stats by User -> Client Assignment Report	6.0.6

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5161	Professional	Medical Records	Documents	We can now pull up word and pdf files from within PIMSY without them opening in their native application. Word files can now be edited within the system if two things are true. The user must have permissions to modify that particular document category (Client Documents, User Documents etc.) and the document type must be flagged to allow editing if it is a word document. If the User only has Create Permissions then they will be able to copy the particular document and edit it.	6.0.6
3915	Professional	Medical Records	Insurance Tab Client Chart	We have added the ability to have Insurance Note Templates. These templates can be created and accessed from the large note boxes under the insurance tab in the client's chart. These templates are also available on the Co Pay screen.	6.0.6
5041	Prime	Medical Records	Note Report	We have added the Reviewer Signature to the note report and it will show if a Review was performed.	6.0.6
5014	Prime	Medical Records	note report	We have added a new option on the note reports that will allow you to hide the released by info when the note prints.	6.0.6
5207	Prime	Medical Records	Notes	We have modified the Note forms in the system to now us an End Time instead of using the hour and minute duration fields. Simply fill out the end time instead of the duration fields and the system will automatically calculate the note duration for you.	6.0.6
5058	Prime	Medical Records	Notes / Diagnosis	We have modified setting -67 NOTE - Prohibit users from Releasing a note on a client that is without a Primary Diagnosis. We have made it so the system will look for an "Active" Primary diagnosis, not just a primary diagnosis.	6.0.6
4834	Professional	Medical Records	Report Generation	Misspelled "Report" in the Header of Assessment report has been corrected.	6.0.6

Ticket ID	Lowest PIMSY Plan	PIMSY Department	PIMSY Screen	Release Notes	Version
5102	Professional	Medical Records	Treatment plan	We have added 2 new Q&A Categories that will allow for 2 more footers on the treatment plan report. These new Q&A categories will allow you to have different signatures on different types of treatment plans. You have the option of including or excluding questions when the report is printed.	6.0.6