

PIMSY 11.22.2023 • RELEASE REPORT

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Professional Platinum	Administration	Client Portal Main Page	Client Portal	Enhancement	Client Avatar When setting -831 is set to TRUE, the client's avatar will appear at the top right of the client portal. When this setting is set to FALSE, clients will not have the option to update or take a picture.
Professional Platinum	Administration	Q&A Forms Screen	Client Portal	Enhancement	We have added new columns on the Q&A Forms page for the <i>last completed date</i> and the <i>next due date</i> .
Professional Platinum	Administration	Q&A Forms Screen	Client Portal	Enhancement	When a client completes a Q&A form, the save button has been changed to say "submit" instead.
Professional Platinum	Client List	Client List Screen	Provider Portal	Enhancement	We have added a favorites icon so users can select which tabs they want automatically opened when selecting a client from the client list screen.

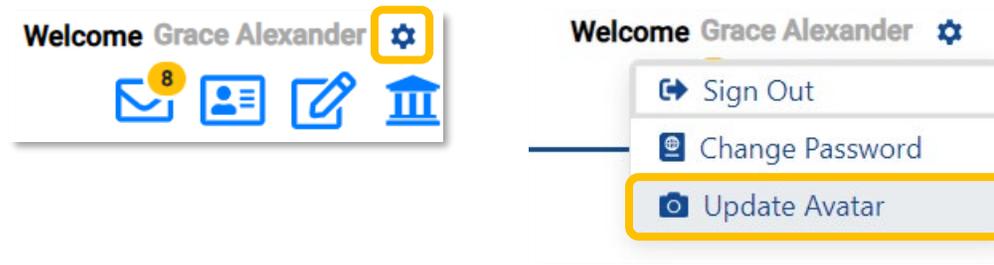
Go to the next page for more details 

Client Portal

Client Image

- When setting -831 is set to TRUE, the client's avatar will appear at the top right of the client portal. When there is not a client avatar available, a cog icon will appear in its place. Clicking the cog icon will open a menu with the option to *Update Avatar*. The *Update Avatar* option will also follow built-in AI parameters which will determine if the picture taken is good or needs to be retaken. When this setting is set to FALSE, clients will not have the option to update or take a picture.

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Q&A Forms Page Updates

- We have added new columns on the Q&A Forms page for the *Last Completed Date* and the *Next Due Date*. The *Next Due Date* column will be driven by your renewal setup.
- Please refer to the [Renewals guide](#) to learn more on how to set up renewals.

FORMS		Last Completed Date	Next Due Date
Family History *			
Medical History2 *			

- When a client completes a Q&A form, the save button has been changed to say "Submit" instead.

Form complete: Yes No
Answer Required

Narrative:

Cancel **Submit Family History ***

Provider Portal

Favorites

- We have added a favorites icon so users can select which tabs they want automatically opened when selecting a client.
- Please note that this will not update currently opened clients. These client tabs will need to be closed and reopened to update.

The screenshot shows the 'Client List' interface. A dropdown menu titled 'Select Favorite Data Tabs' is open, listing various data tabs with checkboxes. The 'Insurance' and 'Audit tab' are checked. A yellow box highlights the 'New Client' button and the star icon in the dropdown menu. Below the dropdown, a client profile for 'Alexander, Grace' is shown with tabs for 'Dashboard', 'Client Details', 'Audit tab', and 'Insurance'. The 'Insurance' tab is highlighted with a yellow box. The client profile shows 'Grace Alexander', 'A-C-4136', '270 Past | 0 Upcoming', and 'Active' status with a birth date of '06/24/1999'.

Action	Profile	Client Name	Client #	Alt Client #
		Alexander, Grace 06/24/1999	A-C-4136	

Client Name	Client #	Alt Client #	Email	Cell Ph
Grace Alexander	A-C-4136		n@pimsyehr.com	(678) 485

Client Name	Client #	Alt Client #	Email	Cell Ph
Grace Alexander	A-C-4136		n@pimsyehr.com	(678) 485