



06.26.2024 • RELEASE REPORT

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Prime Professional Platinum	Medical Records	Messaging Consent	Provider Portal Desktop	Enhancement	<p><i>Client Messaging Consent - UI Changes</i></p> <p>We have made improvements to the client chart messaging section which include repositioning buttons and implementing a new 3-state radio button for messaging consent status.</p>
Prime Professional Platinum	Administration	Organization	Desktop	New	<p><i>Organization Management</i></p> <p>New fields have been added in Organization Management to store the Client Portal URL and the unique link for the Intake Assistant (coming soon).</p>
Prime Professional Platinum	Administration	User Details	Desktop	New	<p><i>User Credentials Management</i></p> <p>We have added a new feature that allows administrators to email user credentials directly from the PIMSY application. Located in the User Personnel record on the User Detail screen, this feature streamlines credential distribution. Ensure users have a valid email address saved in their User Detail record. When the user is ready to log into their account, administrators can simply click the "Send Credentials" button to send the credentials. This enhancement improves efficiency, accuracy, and convenience in managing user accounts.</p>
Prime Professional Platinum	Administration	Documents	Desktop	Fix	<p><i>Document Management</i></p> <p>We have fixed an issue where the document name was not auto-populating with the latest changes to the document saving dialogue window.</p>

Prime Professional Platinum	Administration	Homepage	Client Portal	Enhancement	<p><i>Client Portal Home Screen</i></p> <p>We are excited to present the newly updated the Client portal homepage, which entails a new clean and contemporary layout, making it easier for clients to find the information and services they need quickly and efficiently. With streamlined menus and a simplified structure, clients can effortlessly navigate and access key features on any device.</p>
Prime Professional Platinum	Medical Records	Messaging	Client Portal	New	<p><i>Messaging Preference and Consent</i></p> <p>We have added a new screen for clients to add or update their messaging preferences. Clients can now update their messaging preferences, confirm their contact information, add or change another person to receive messages, or opt out of messaging entirely.</p> <p>*Opting out of messaging will be reflected as "No" under consent given, necessitating the switch to a three-state radio button.</p> <p>If a client has not given messaging consent, they will be prompted to update this on the client portal upon logging in, which will direct them to the messaging preference screen.</p>
				Coming soon!	<p>PIMSY's Intake Assistant is coming soon!</p> <p>Alleviate administrative burdens during appointment scheduling for prospective clients. This feature allows new clients to book appointments based on criteria like modalities, location, and provider availability.</p>
				Coming soon!	<p>PIMSY's Self Scheduler is coming soon!</p> <p>Enhance client satisfaction and reduce administrative workload. This tool allows clients to book appointments with their assigned primary therapist and internal physician through the client portal, eliminating the need to contact the office directly.</p>

See next page for more details

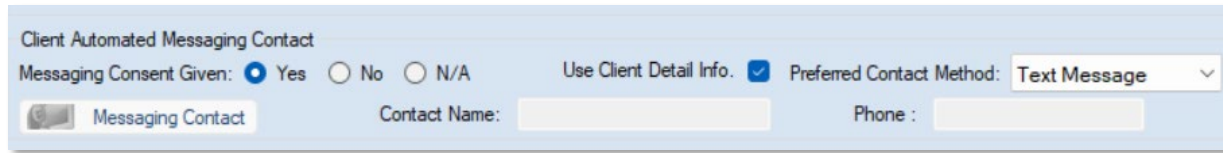


Desktop / Provider Portal

Client Messaging Consent - UI Changes


- We have made improvements to the client chart messaging section which include repositioning buttons and implementing a new 3-state radio button for messaging consent status.

Desktop

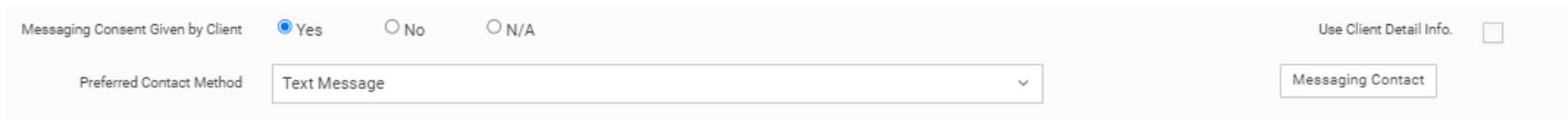


Client Automated Messaging Contact

Messaging Consent Given: Yes No N/A Use Client Detail Info. Preferred Contact Method: Text Message


 Messaging Contact Contact Name: Phone :

Provider Portal



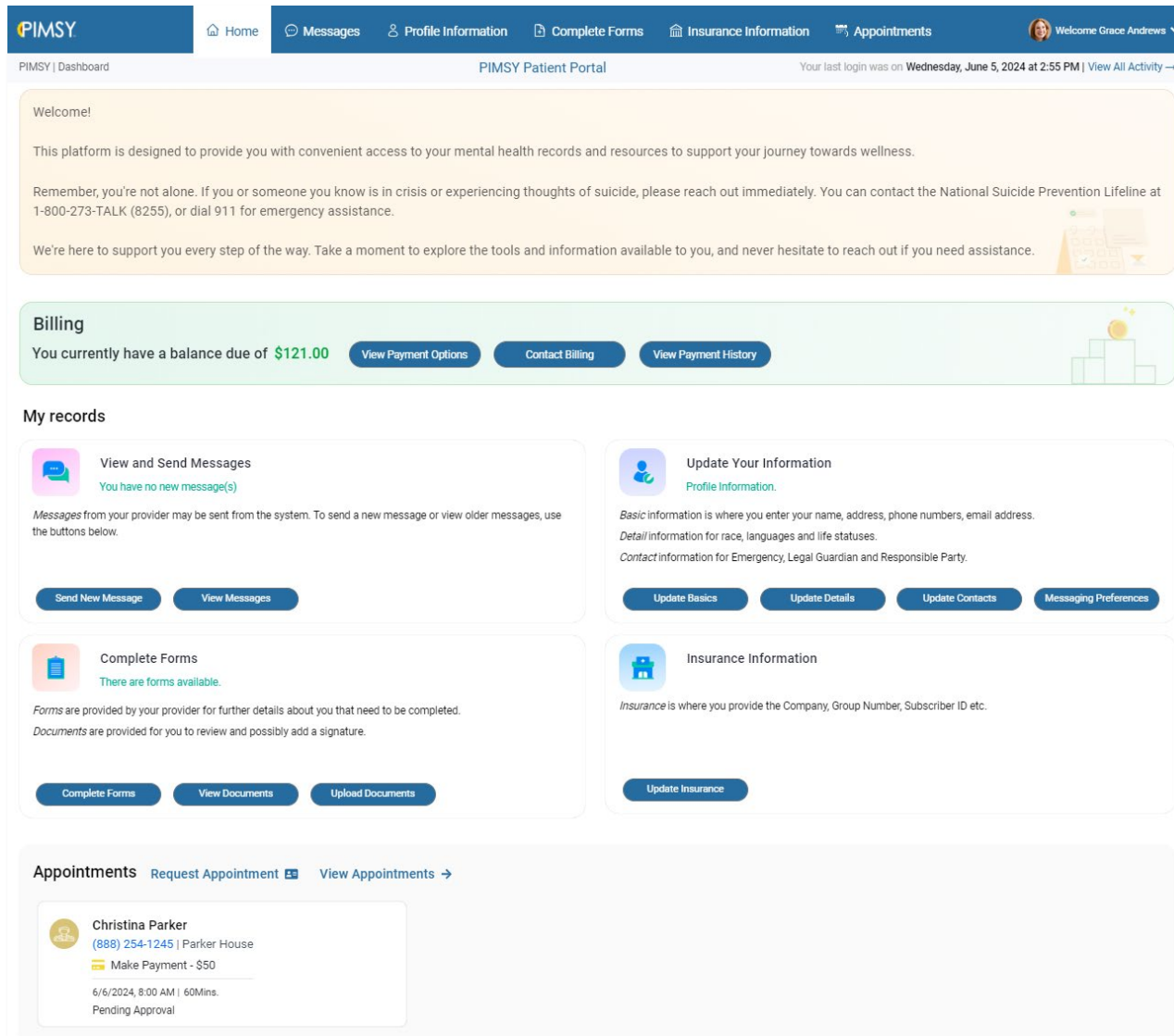
Messaging Consent Given by Client Yes No N/A Use Client Detail Info.

Preferred Contact Method Text Message

 Messaging Contact

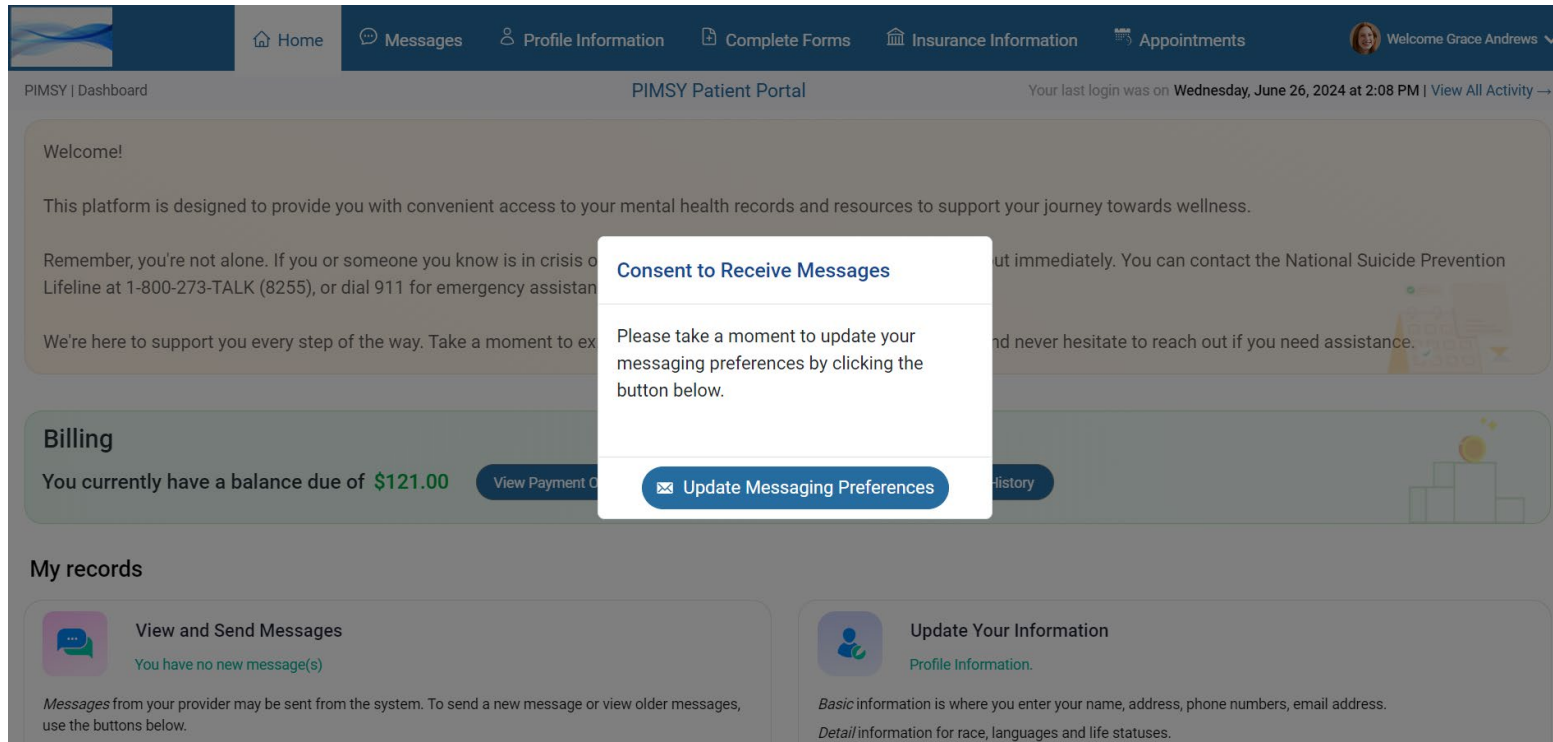
Client Portal Home Screen

- We are excited to present the newly updated the Client portal homepage, which entails a new clean and contemporary layout, making it easier for clients to find the information and services they need quickly and efficiently. With streamlined menus and a simplified structure, clients can effortlessly navigate and access key features on any device.



Messaging preference and consent

- We have added a new screen for clients to add or update their messaging preferences. Clients can now update their messaging preferences, confirm their contact information, add or change another person to receive messages, or opt out of messaging entirely.
- *Opting out of messaging will be reflected as "No" under consent given, necessitating the switch to a three-state radio button.
- If a client has not given messaging consent, they will be prompted to update this on the client portal upon logging in, which will direct them to the messaging preference screen.



MESSAGING PREFERENCES

Is the messaging contact someone other than yourself?

Yes No

First Name:

Last Name:

Email:

Phone Number: *(Optional)*

Cell Number: *(Optional)*

Preferred Contact Method:

No Contact ▼

Consent to Receive Messages:

Yes No

Save Preferences