PIMSY 08.28.2024 • Release Report

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Prime Professional Platinum	Billing / Invoicing	Eligibility	Provider Portal	New	*Real Time Eligibility for ClaimMD Users* We are excited to announce that Real Time Eligibility is exclusively available to ClaimMD users. The Real Time Eligibility feature will allow you to obtain immediate results for a client's active coverage and patient responsibility due on primary, secondary or tertiary plans. For any questions or further details, please email support@pimsyehr.com for assistance.
Prime Professional Platinum	Medical Records	Client Groups	Provider Portal	Enhancement	*Client Group Management - Provider Portal* We are excited to announce the addition of Client Group Management to the Provider Portal. This new feature empowers users to create and manage client groups directly from the Client List screen. *Create and Manage Groups*: Users can now effortlessly create and manage client groups, streamlining the organization of clients. *Group Overview*: The Client List screen has been enhanced to display group members directly from the grid, allowing users to view group details without needing to open each group individually.

Prime Professional Platinum	Medical Records	My Clients	Provider Portal	New	*My Clients filter option in the Client List* We are pleased to introduce a new filter option in the Client List called "My Clients". This feature allows users to quickly view and access clients that are specifically assigned to them. *My Clients filter*: Users can now easily filter the Client List to show only the clients assigned to them. *Assignment Criteria:* Clients will appear under "My Clients" if you are assigned to one of the clinical fields or designated as an additional user in the client's user assignment. This enhancement simplifies the process of managing your assigned clients, ensuring quick and focused access within the Provider Portal.
Prime Professional Platinum	Medical Records	Client Details	Provider Portal	Enhancement	*Gender Field added to Client Details* We have enhanced the Client Details screen on the Provider Portal by adding a field for gender. This update is designed to streamline client data management. *Gender Field Addition*: The Client Detail screen now includes a Gender field, allowing users to enter or update this information directly from the screen. *System Requirements*: If the Gender field is a required field within your system setup, you will be prompted to add or select a gender when saving a client's details. *Streamlined Workflow*: This addition eliminates the need to navigate to the Demographic screen, simplifying the setup and management of client information. This enhancement is aimed at improving the efficiency and ease of use within the Provider Portal, ensuring that all necessary client data is captured promptly.

Prime Professional Platinum	Medical Records	Medical /Medications	Provider Portal	Enhancement	We have made improvements to the Client Medications area in the Provider Portal to enhance usability and clarity. *Simplified Slide-Out*: Unnecessary fields have been removed from the medication slide-out, creating a cleaner and more focused interface. *Reorganized Medication Grid*: The Medication grid has been reorganized to provide a more intuitive layout, improving the overall clarity and ease of use. These changes are designed to streamline the medication management process, making it easier for users to view and update client medications efficiently.
Prime Professional Platinum	Medical Records	Diagnosis	Provider Portal	Enhancement	*Client Diagnosis Enhancements* We have introduced several enhancements to the Client Diagnosis feature in the Provider Portal, aimed at improving usability and clarity. *Reordered Slide-Out Fields:* Some fields on the diagnosis slide-out have been reordered to provide a more logical flow and easier navigation. *Accordion Sections*: Less frequently used fields have been moved under the Diagnosis Detail section, resulting in a cleaner and more organized interface. *Reorganized Diagnosis Grid*: The diagnosis grid has been reordered to enhance the overall layout and make it easier for users to find relevant information.

Prime Professional Platinum	ALL	ALL	Provider Portal	Enhancement	*Provider Portal UI Improvements* We have implemented several UI improvements across the Provider Portal, focusing on updating button designs and grids to achieve a consistent look and feel. *Button Updates*: All buttons across the Provider Portal have been updated to a unified design, enhancing visual consistency and improving the overall user experience. *Grid Enhancements*: Grids throughout the portal have been refined to match the updated design, ensuring a more cohesive and visually appealing interface.
Prime Professional Platinum	Medical Records	Disclosure	Provider Portal	Enhancement	*Disclosures* We are pleased to announce the addition of the Client Disclosure feature to the Provider Portal. *Client Disclosure*: Users can now track when client information is disclosed, providing greater transparency and accountability in managing client data. The following profile rules apply to client disclosures are: *Client disclosure Create* *Client disclosure Modify* *Client disclosure Delete* *Client disclosure View*: This feature enhances the ability to monitor and manage client information disclosures, supporting better compliance and record-keeping within the Provider Portal.

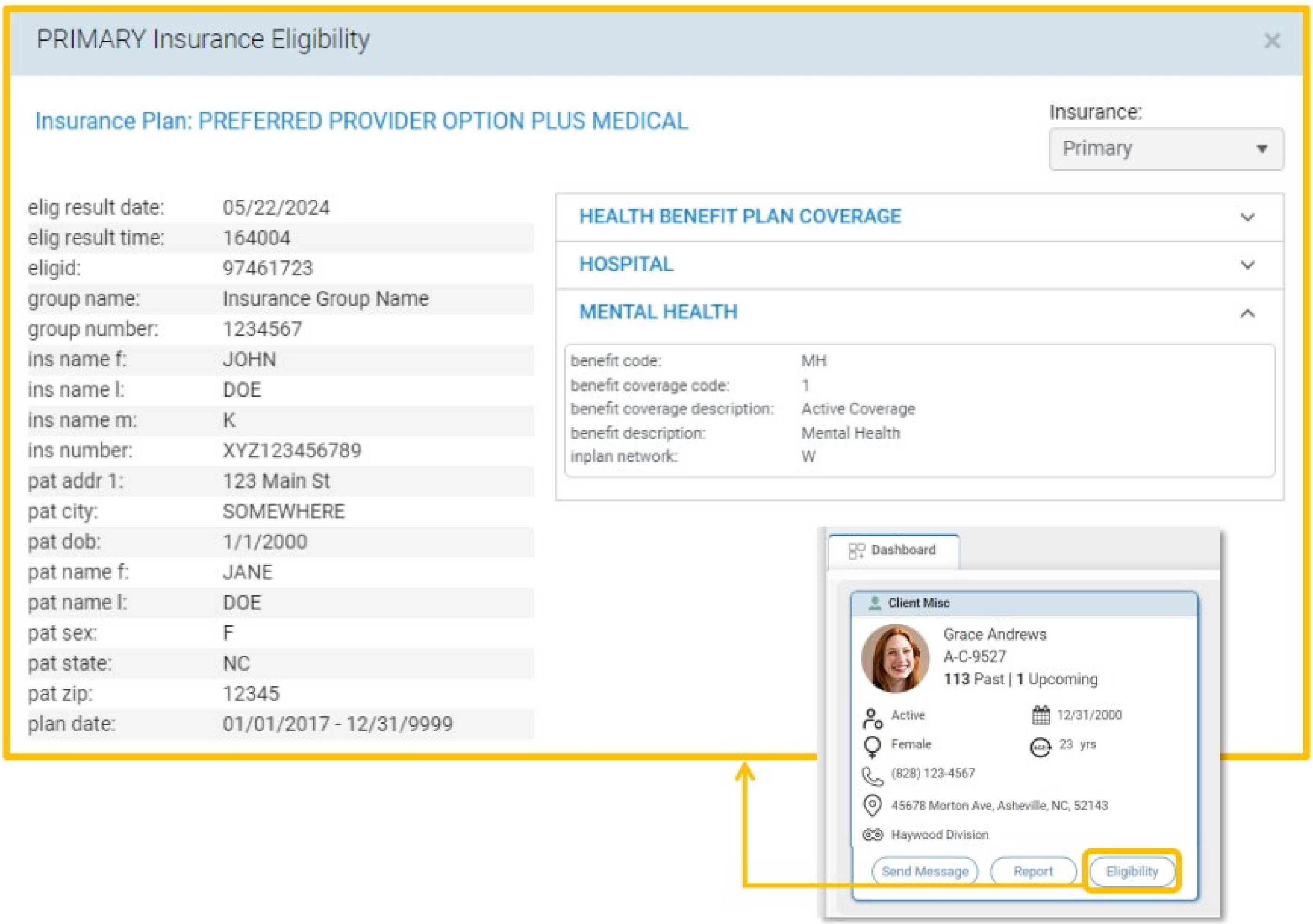
Prime Professional Platinum	Medical Records	Status Log	Provider Portal	Enhancement	*Status Log* We are excited to introduce the Client Status Log feature to the Provider Portal. *Client Status Tracking*: Users can now view detailed logs of client activation and deactivation events. *Client Division Assignment:* The status log also includes information on client division assignments, providing a comprehensive view of client status changes. The following profile rules apply to client status log are: *Client Status Log View* *Client Status Log Create* *Client Status Log Modify* *Client Status Log Delete* This new feature enhances the ability to track and manage client status and assignments, offering greater visibility and control within the Provider Portal.
Prime Professional Platinum	Medical Records	Client Notes	Provider Portal	New	*Note Report Queuing* We are pleased to announce the introduction of advanced note report functionalities in the Provider Portal. *Note Report Queuing*: Users can now queue multiple note reports for batch processing and download. This feature leverages the filtering of the note grid on the client's chart, allowing for the generation and retrieval of several reports at once and streamlining report management. *Download Alerts*: Notifications will be sent to users when the queued note reports are ready for download, ensuring timely access to the reports. These enhancements are designed to improve the efficiency and convenience of managing note reports within the Provider Portal.
Prime Professional Platinum	Medical Records	Client Administration	Provider Portal	Enhancement	*Additional User Assignment* We are excited to announce the addition of the Additional User Assignment feature in the Provider Portal. *Additional User Assignment*: A new section has been added to the Client Administration screen, allowing for the assignment of multiple additional users to a client.

Prime Professional Platinum	Billing / Invoicing	Client Insurance	Provider Portal	Enhancement	*Insurance Notes Field Templates* We are pleased to announce the addition of templates to the Insurance notes field in the Provider Portal. *Template Integration*: Users with the appropriate profile rules for template usage can now add and modify templates within the Insurance notes field. *Enhanced Free Text Area*: Templates can be utilized in the free text area, providing a standardized and efficient way to manage and enter insurance notes. This update enhances the functionality of the Insurance notes field, allowing for more efficient and consistent notetaking.
Prime Professional Platinum	Client Portal	Payment History	Client Portal	New	*New Statement Report* We have added a new "Statement" report to the Payment History screen on the Client Portal. This enhancement allows clients access to open the Statement report directly within the Client Portal, providing quick and easy access to their statements.

See next page for more details

Real Time Eligibility (ClaimMD)

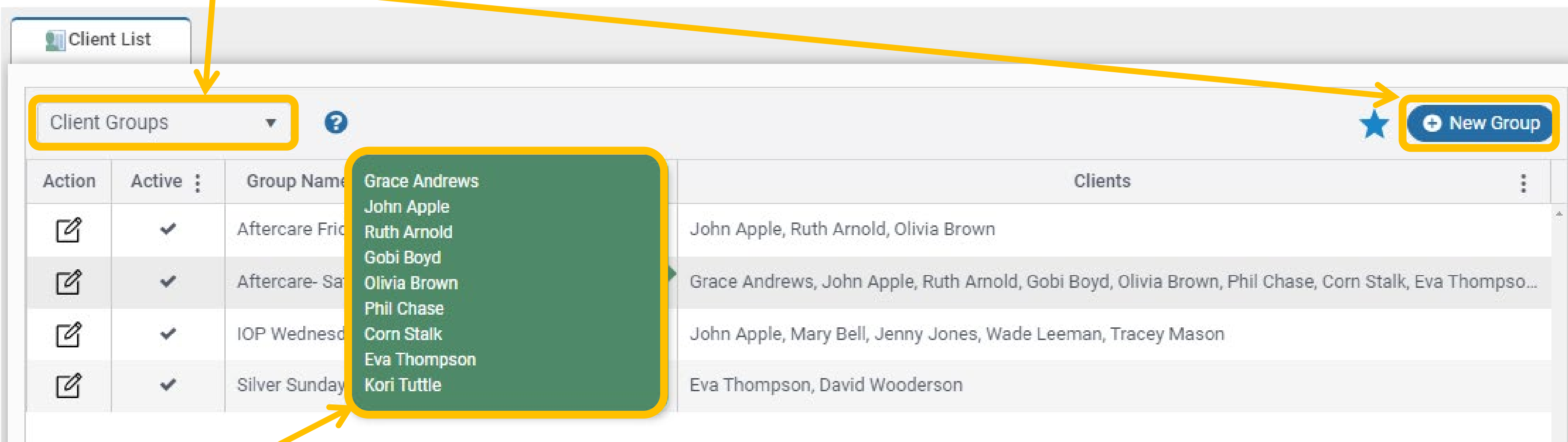
- **We are excited to announce that Real Time Eligibility is exclusively available to ClaimMD users. The Real Time Eligibility feature will allow you to obtain immediate results for clients active coverage and patient responsibility due on primary, secondary or tertiary plans. For any questions or further details, please email support@pimsyehr.com for assistance.**



Client Group Management

- **We are excited to announce the addition of Client Group Management to the Provider Portal. This new feature empowers users to create and manage client groups directly from the Client List screen.**

- **Create and Manage Groups: Users can now effortlessly create and manage client groups, streamlining the organization of clients.**

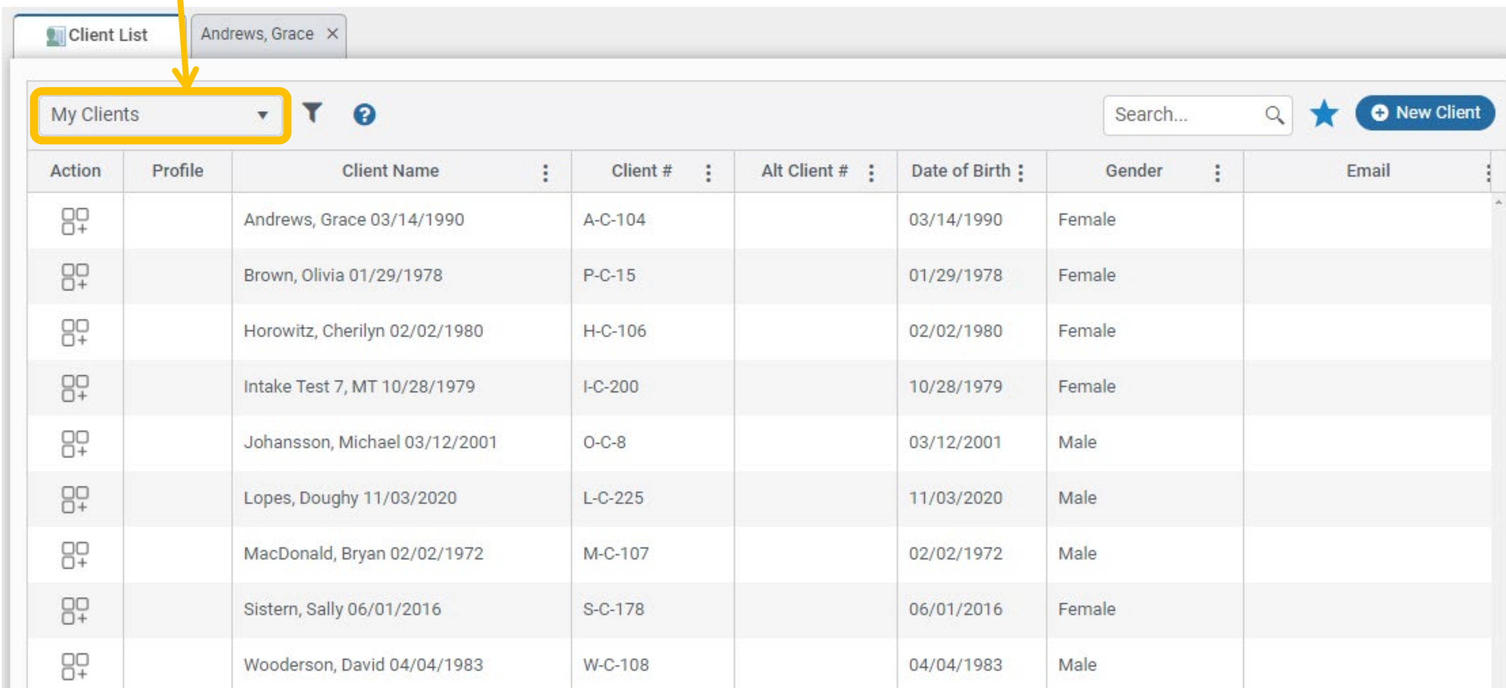


- **Group Overview: The Client List screen has been enhanced to display group members directly from the grid, allowing users to view group details without needing to open each group individually.**

My Clients List

- We are pleased to introduce a new filter option in the Client List called “My Clients”. This feature allows users to quickly view and access clients that are specifically assigned to them.

- My Clients filter: Users can now easily filter the Client List to show only the clients assigned to them.

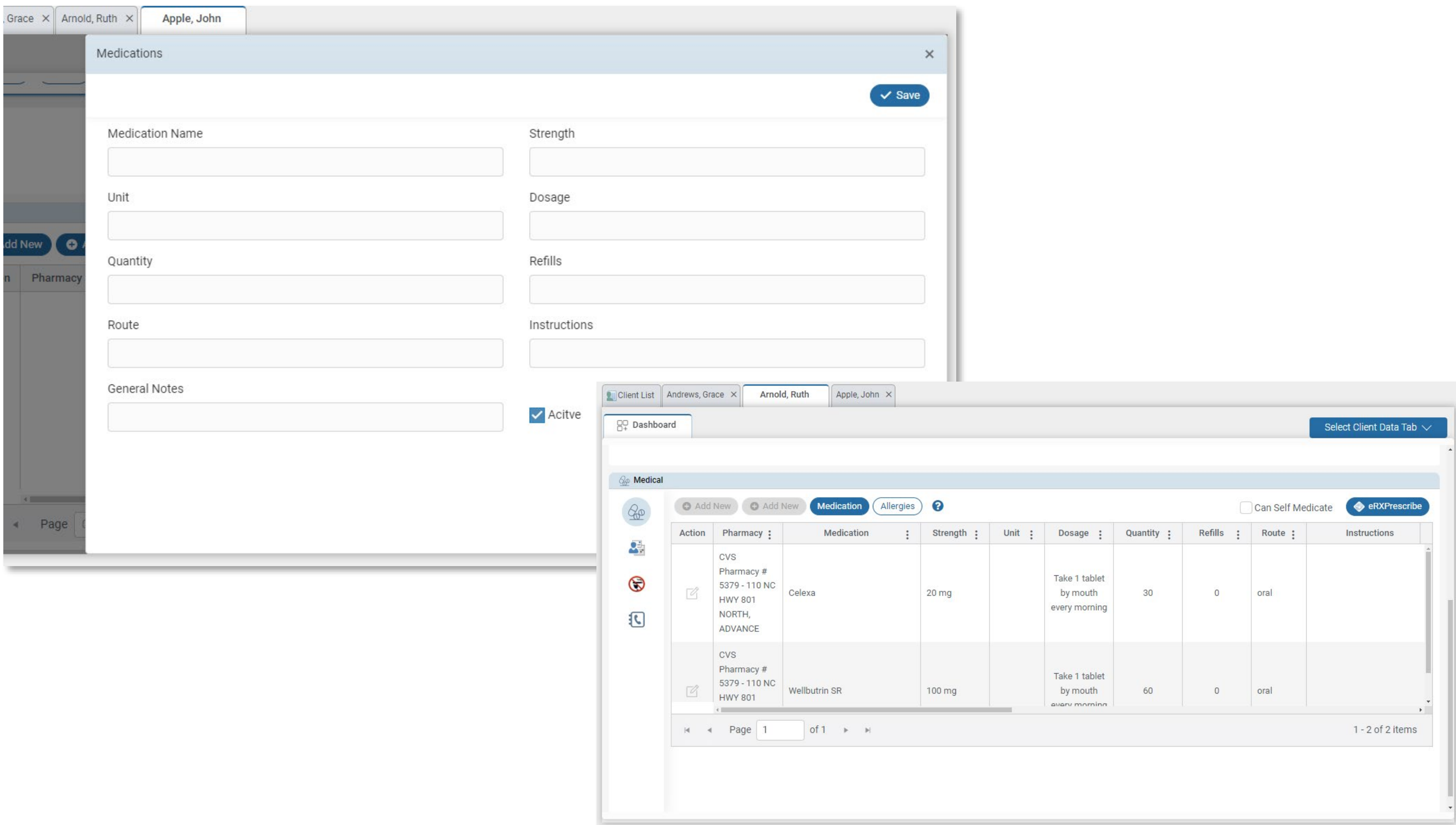


- Assignment Criteria: Clients will appear under "My Clients" if you are assigned to one of the clinical fields or designated as an additional user in the client's user assignment.

- This enhancement simplifies the process of managing your assigned clients, ensuring quick and focused access within the Provider Portal.

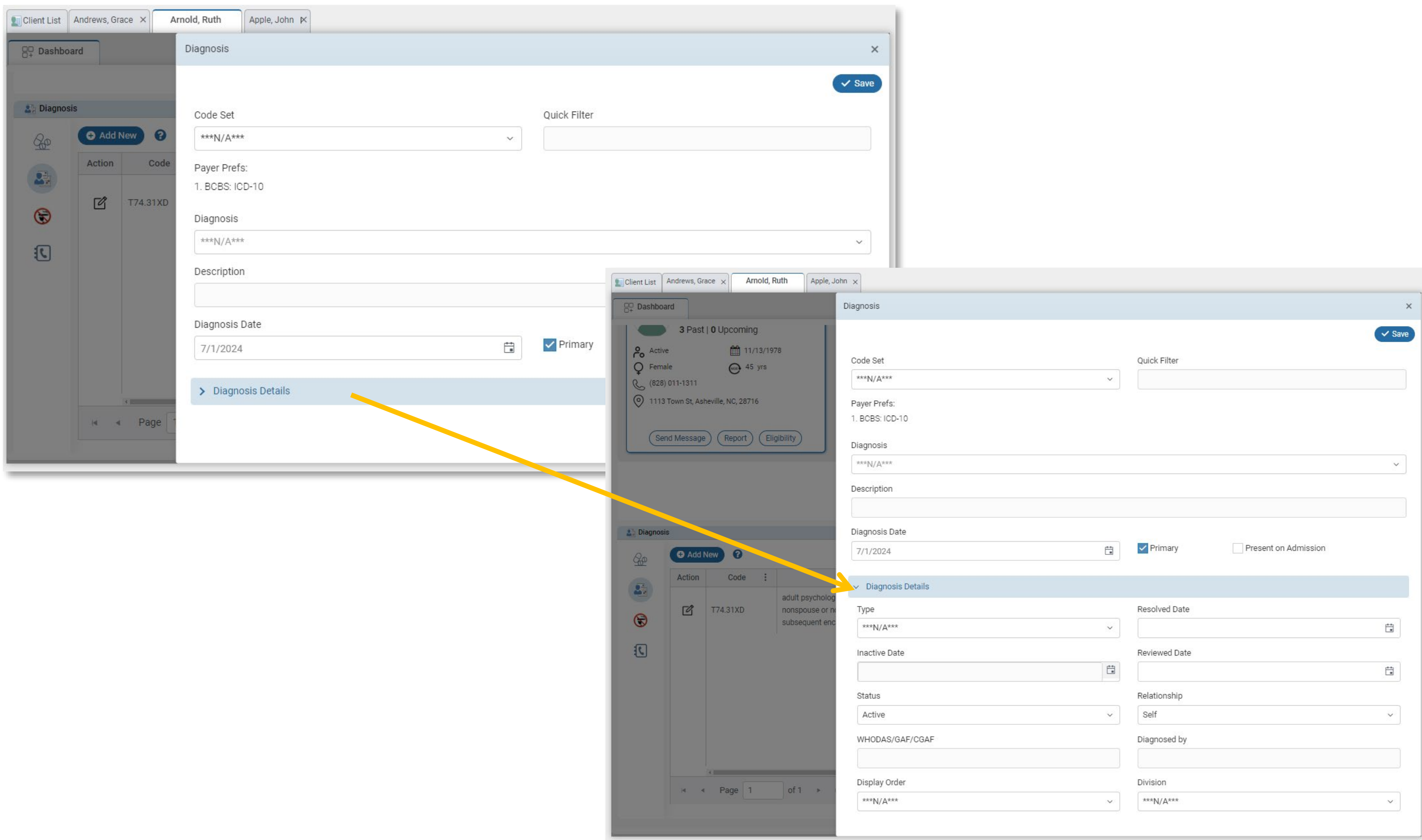
Client Medications Area Improvements

- **We have made improvements to the Client Medications area in the Provider Portal to enhance usability and clarity:**
- **Simplified Slide-Out: Unnecessary fields have been removed from the medication slide-out, creating a cleaner and more focused interface.**
- **Reorganized Medication Grid: The Medication grid has been reorganized to provide a more intuitive layout, improving the overall clarity and ease of use.**
- **These changes are designed to streamline the medication management process, making it easier for users to view and update client medications efficiently.**

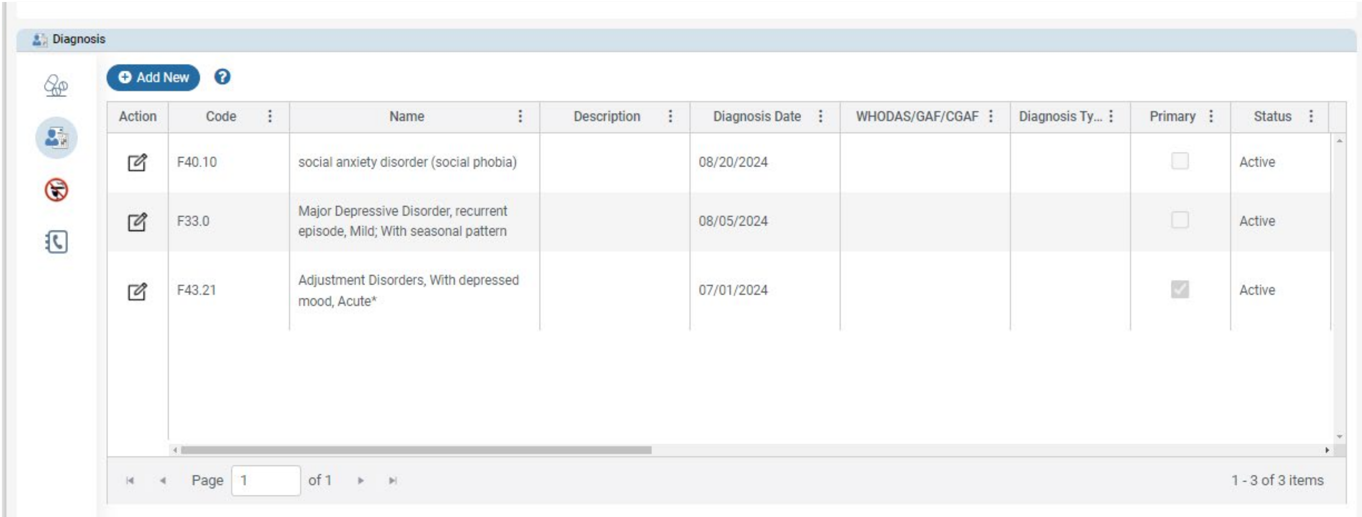


Client Diagnosis Area Improvements

- We have introduced several enhancements to the Client Diagnosis feature in the Provider Portal, aimed at improving usability and clarity.
- Reordered Slide-Out Fields: Some fields on the diagnosis slide-out have been reordered to provide a more logical flow and easier navigation.
- Accordion Sections: Less frequently used fields have been moved under the Diagnosis Detail section, resulting in a cleaner and more organized interface.



- **Reorganized Diagnosis Grid: The diagnosis grid has been reordered to enhance the overall layout and make it easier for users to find relevant information.**

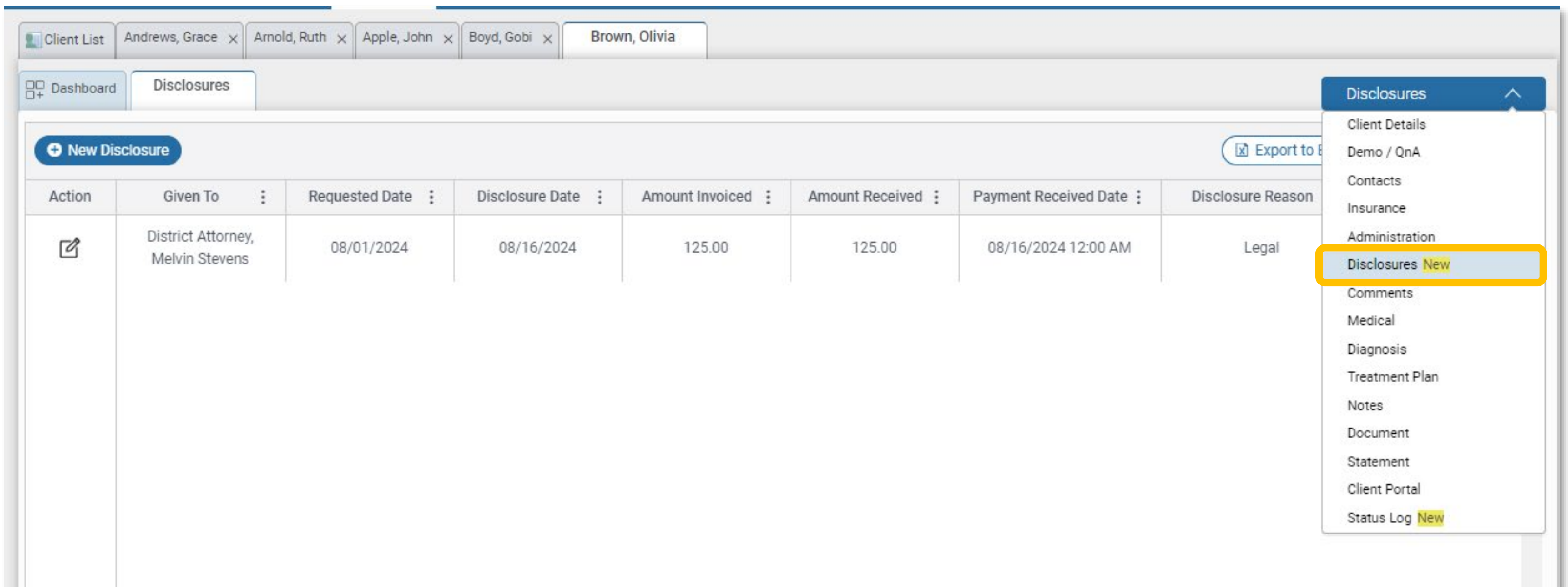


Disclosures

- We are pleased to announce the addition of the Client Disclosure feature to the Provider Portal.
- Client Disclosure: Users can now track when client information is disclosed, providing greater transparency and accountability in managing client data.

- The following profile rules apply to client disclosures are:
  - Client disclosure Create
  - Client disclosure Modify
  - Client disclosure Delete

Client disclosure View: This feature enhances the ability to monitor and manage client information disclosures, supporting better compliance and record-keeping within the Provider Portal



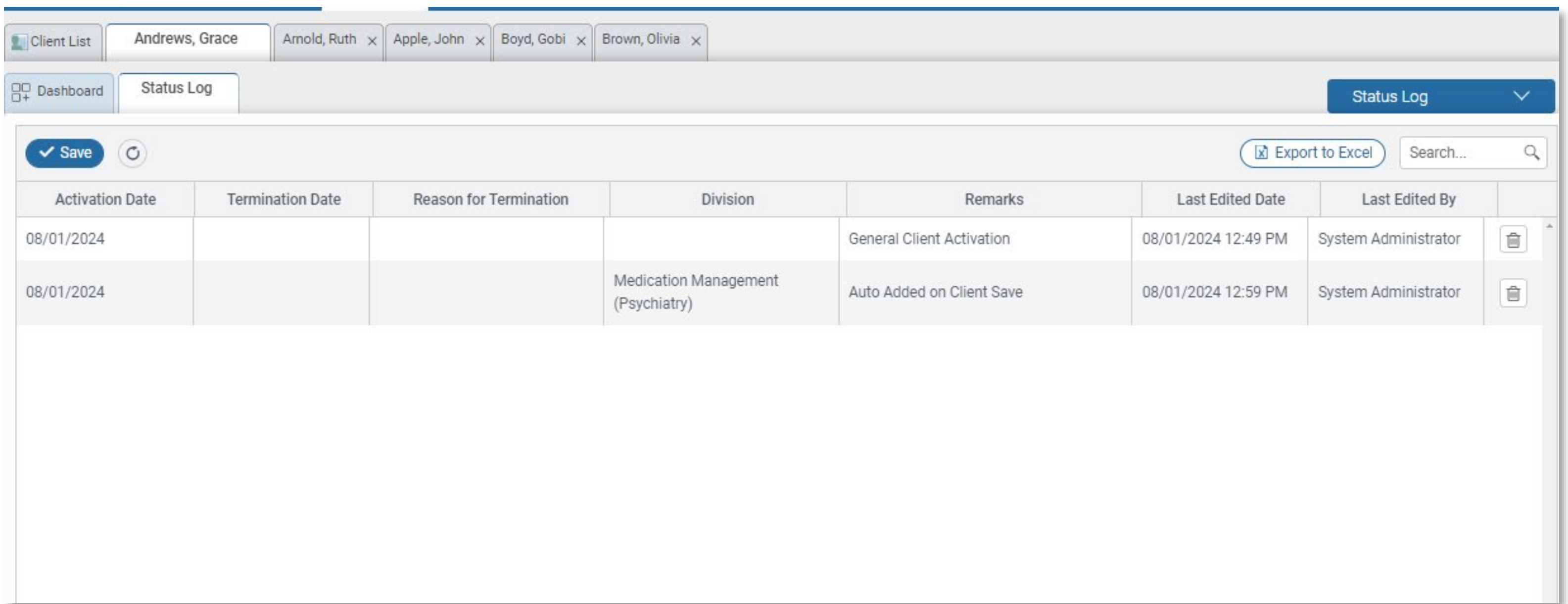
Status Log

- We are excited to introduce the Client Status Log feature to the Provider Portal.

- Client Status Tracking: Users can now view detailed logs of client activation and deactivation events.
- Client Division Assignment: The status log also includes information on client division assignments, providing a comprehensive view of client status changes.

- The following profile rules apply to client status log are:
  - Client Status Log View
  - Client Status Log Create
  - Client Status Log Modify
  - Client Status Log Delete

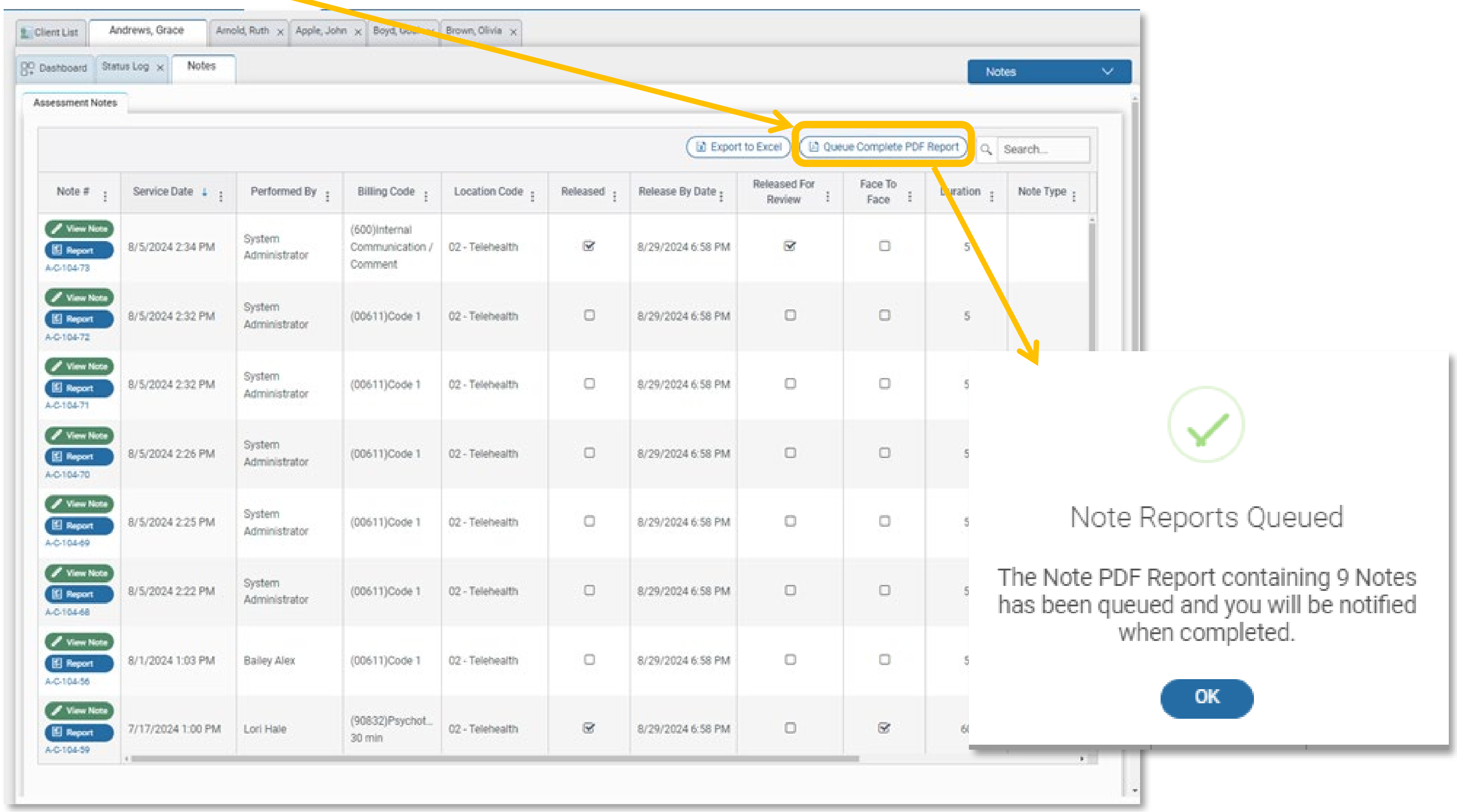
This new feature enhances the ability to track and manage client status and assignments, offering greater visibility and control within the Provider Portal.



Note Report Queuing

- **We are pleased to announce the introduction of advanced note report functionalities in the Provider Portal.**

- **Note Report Queuing: Users can now queue multiple note reports for batch processing and download. This feature leverages the filtering of the note grid on the client's chart, allowing for the generation and retrieval of several reports at once and streamlining report management.**

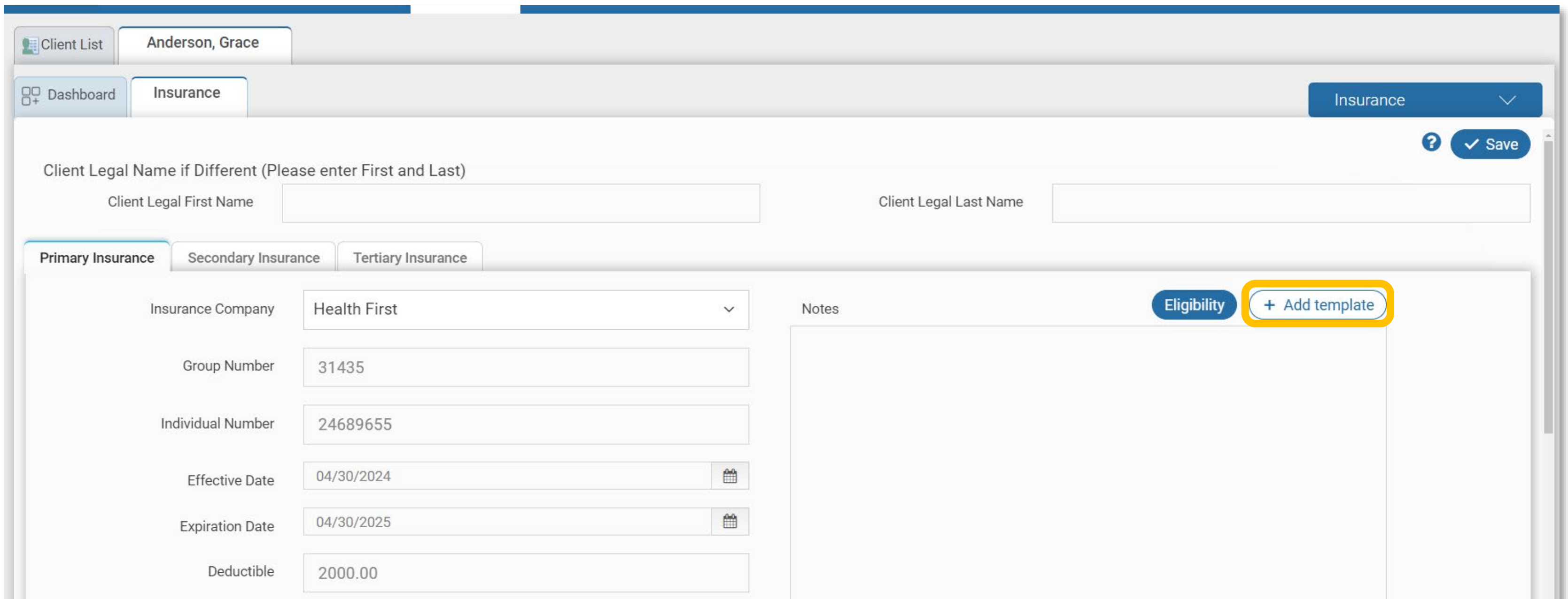


- **Download Alerts: Notifications will be sent to users when the queued note reports are ready for download, ensuring timely access to the reports.**

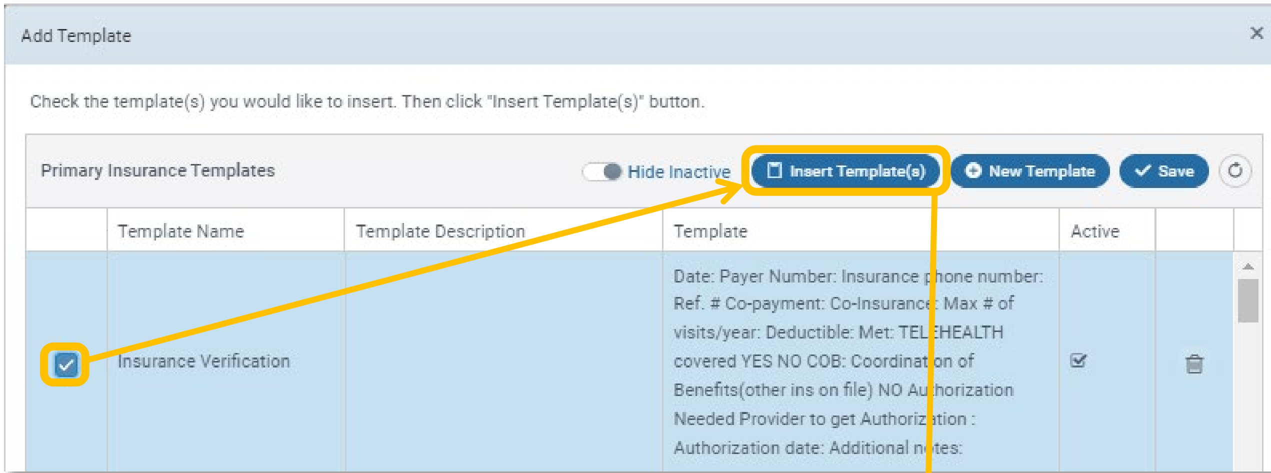
- **These enhancements are designed to improve the efficiency and convenience of managing note reports within the Provider Portal.**

Client Insurance Templates

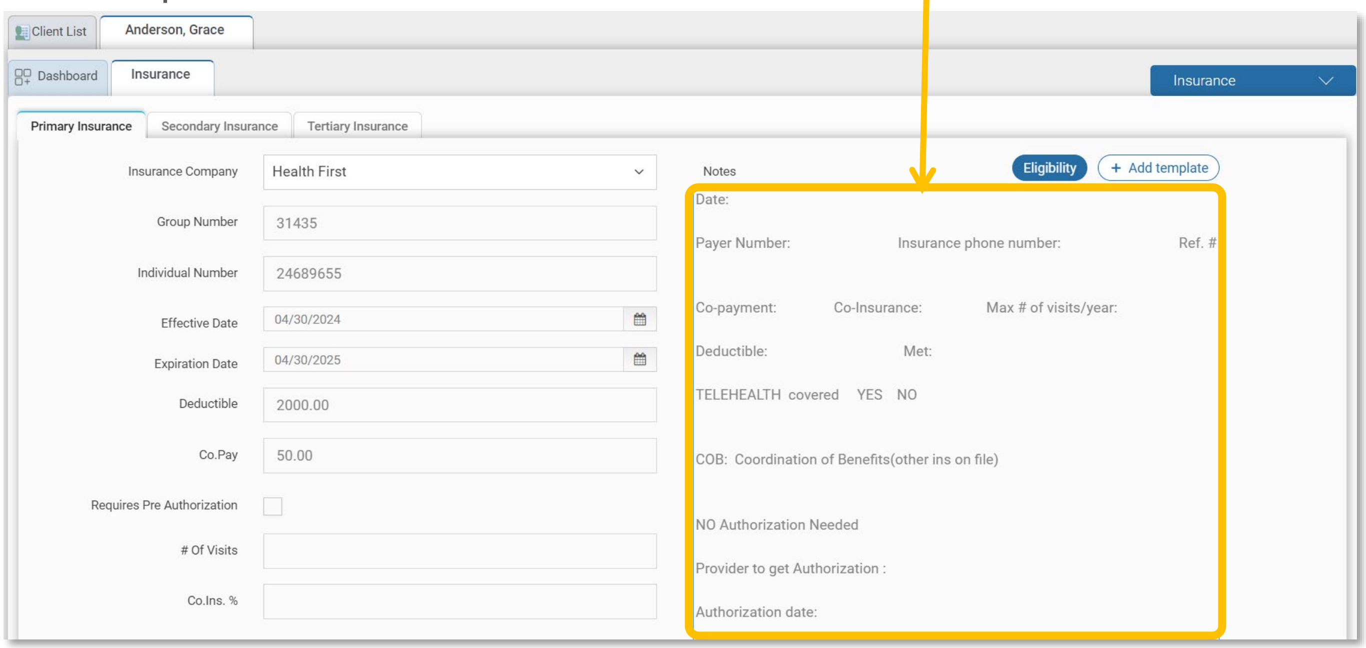
- We are pleased to announce the addition of templates to the Insurance notes field in the Provider Portal.
- Template Integration: Users with the appropriate profile rules for template usage can now add and modify templates within the Insurance notes field.
- Enhanced Free Text Area: Templates can be utilized in the free text area, providing a standardized and efficient way to manage and enter insurance notes.
- This update enhances the functionality of the Insurance notes field, allowing for more efficient and consistent note-taking.



Add Template



Inserted Template



Client Portal

Client Statement Report

- **We have added a new "Statement" report to the Payment History screen on the Client Portal. This enhancement allows clients access to open the Statement report directly within the Client Portal, providing quick and easy access to their statements.**