



08.09.2024 • RELEASE REPORT

| PIMSY Plan | PIMSY Department | PIMSY Screen | PIMSY Platform | Type | Release Notes |
|-----------------------------|---------------------|------------------------|-------------------------|-------------|---|
| Prime Professional Platinum | Billing / Invoicing | Eligibility | Desktop | New | <p><i>Real Time Eligibility</i></p> <p>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.</p> |
| Prime Professional Platinum | Billing / Invoicing | Eligibility | Desktop | Enhancement | <p><i>Eligibility – Group Appointments</i></p> <p>We have also made eligibility available on group appointments. By selecting the Group Member you can check individual eligibility.</p> |
| Professional Platinum | N/A | Desktop User Interface | Desktop | New | <p><i>Updated Desktop User Interface</i></p> <p>PIMSY Desktop Unveils Revamped User Interface</p> <p>We are pleased to announce a significant update to PIMSY Desktop, focusing on enhancing your user experience through a comprehensive UI revamp. This update brings a fresh, modern look to the platform.</p> |
| Prime Professional Platinum | Reporting | Reporting | Desktop Provider Portal | New | <p><i>Improved Saved Search Functionality</i></p> <p>With the latest update, the Saved Search feature now displays the specific search criteria used to create each saved search, providing users with greater transparency and usability. This clear visibility of search parameters, including filters, keywords, date ranges, and other specified criteria, allows users to easily recall the purpose of each saved search and verify if it still meets their current needs.</p> |
| Professional Platinum | Reporting | Reporting | Desktop | New | <p><i>Saved Search Report</i></p> <p>We are incorporating a new report under Statistics by User named Saved Search Report. This enhancement provides detailed insights into the searches saved by individual users, improving visibility and analytics for user activity.</p> |

| | | | | | |
|-----------------------------|-----------------|------------------------|---------|--------------|--|
| | | | | COMING SOON! | <i>We will be adding a NEW Billing Dashboard to the Desktop.</i> |
| | | | | COMING SOON! | <i>We will be adding Status Log and Disclosures to the client chart on the Provider Portal.</i> |
| Prime Professional Platinum | Utilities | Desktop User Interface | Desktop | Enhancement | <i>UI Enhancements and Layout Reset</i> If you have any preset layouts, it's important to reset them to avoid potential display issues. To do so, simply navigate to the <i>Utilities Menu</i> and select <i>Reset All Layouts</i> . This will ensure a smooth transition to the new interface changes. |
| Prime Professional Platinum | Medical Records | Client Chart | Desktop | Enhancement | <i>Client Chart Tab Reordering</i> We're thrilled to introduce a new level of flexibility in Client Management! You can now effortlessly organize your client chart by simply dragging the tabs into the order that best suits your workflow. Create a sequence that flows perfectly for you, the system will remember your custom layout, making your experience smoother and more personalized every time you log in. |

See next page for more detail



Desktop

New Desktop UI Update

- Desktop Main Page and Quick Launch

The screenshot displays the PIMSY desktop application interface. At the top, a navigation bar contains the PIMSY logo and several utility icons: Utilities, Clients, Financial, Reports, Administration, Windows, Help, DrFirst [0], Log Out, and Lock. Below this is a 'Quick Launch' sidebar menu, which is highlighted with a yellow border. The menu items are: Clients, Today's Clients, Users, Invoicing, Client Payments, My SAL, My SAL Calendar, Notes, Group Notes, Easy Pay, Requests, and Tasks. The main content area features a background of white hexagons and a large yellow sunflower. The PIMSY PLATINUM logo is in the top right corner. A central text block reads: "To unlock human potential through research-informed, client-directed, and compassionate counseling, psychological testing, research, and education."

- Dashboard

| Start | End | Client | Status |
|----------|----------|-------------------|---------------|
| 9:00 AM | 9:30 AM | Silva, Kyle | Kept / Checke |
| 10:30 AM | 11:00 AM | Apraxton, Charles | Kept / Checke |
| 1:00 PM | 2:00 PM | Abingdon, Arron | No Show |

Notes
Client
Calendar
Refresh

| | | |
|--|--|---|
| Productivity Total Notes in 245 | SAL Status Status 47 | Chat Need PIMSY Sup 10 |
| Notes to Start 56 Notes to Start 56 | Unrel. Notes 42 need to be rel 42 | Pending 10 A 10 |
| Grps to Finish Groups that h 7 | Unrel Grp Notes 131 | All Renewals Day 4 |
| Latest Alerts 10 | Payroll 1 | SAL Status Statu 41 |
| Tasks Active Tasks 34 | Docs to Sign Docum ts 1 | eMAR 0 |

- New Tab Design

Client Details | Contacts | Check List / Comments / Requests | Medical | Diagnosis | Treatment Plan | Renewals | Authorizations | Notes | Documents | Clinical Tools | Client Forms | Status Log | Client Portal

Save | Copy | New | Delete | Exit

Client
Billing: None | Dispositions: None | Pronouns: Them / They | Edit

Basic Information

| | | |
|----------------------------|----------------------|----------------------------------|
| Prefix: *** N/A *** | Client Number: S-C-5 | Alt Client Number: |
| Date of Birth: 4/ 1/1998 | Age: 26 | Gender Assigned at Birth: Female |
| First Name: Melody | Middle Name: | Last Name: Smith |
| Suffix: *** N/A *** | Alias: | Maiden Name: |
| Email: msmith98@mail.com | Cell: (336) 467-9700 | Phone: (336) 467-9700 x |
| Addresses | Fax: () - - | Work Phone: () - - x |
| Address 1: 974 Sonoma Road | Address 2: | Address 3: |
| City: Waynesville | State: NC | Zip: 287864677 |

Misc. Notes

Created Date: 10/11/2023 1:25:2 | Created By: System Administrator | Last Edited Date: 7/12/2024 12:18:0 | Last Edited By: System Administrator

Administration Information

Demographics

Demographics Q & A

Insurance

Tasks

Client Calendar

Client Sched

Take Payments

Statement

Invoicing

eRX Register

Quick Note

Client Report

Messaging

Credit Cards


Bed Assignment

Convert to Waitlist

Client Groups

Register FHIR API

Right Click to Take Picture



- **Client Chart Tabs are now moveable**

- We're thrilled to introduce a new level of flexibility in Client Management! You can now effortlessly organize your client chart by simply dragging the tabs into the order that best suits your workflow. Create a sequence that flows perfectly for you, the system will remember your custom layout, making your experience smoother and more personalized every time you log in.

