PIMSY 08.09.2024 • Release Report

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Prime Professional Platinum	Billing / Invoicing	Eligibility	Desktop	New	*Real Time Eligibility* 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	Billing / Invoicing	Eligibility	Desktop	Enhancement	*Eligibility – Group Appointments* We have also made eligibility available on group appointments. By selecting the Group Member you can check individual eligibility.
Professional Platinum	N/A	Desktop User Interface	Desktop	New	*Updated Desktop User Interface* PIMSY Desktop Unveils Revamped User Interface 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.
Prime Professional Platinum	Reporting	Reporting	Desktop Provider Portal	New	*Improved Saved Search Functionality* 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.
Professional Platinum	Reporting	Reporting	Desktop	New	*Saved Search Report* 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.

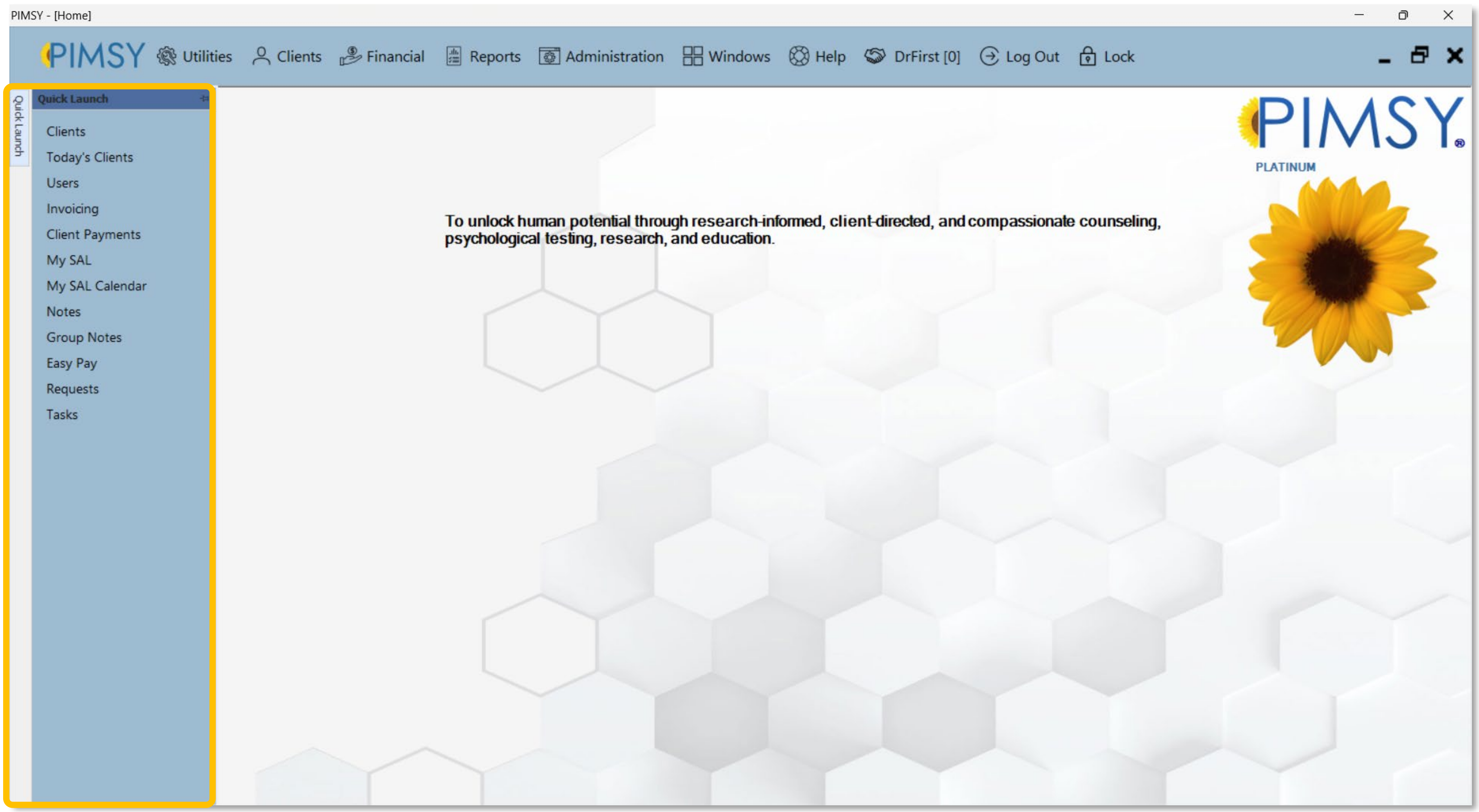
				COMING SOON!	*We will be adding a NEW Billing Dashboard to the Desktop.*
				COMING SOON!	*We will be adding Status Log and Disclosures to the client chart on the Provider Portal.*
Prime Professional Platinum	Utilities	Desktop User Interface	Desktop	Enhancement	*UI Enhancements and Layout Reset* If you have any preset layouts, it's important to reset them to avoid potential display issues. To do so, simply navigate to the *Utilities Menu* and select *Reset All Layouts.* This will ensure a smooth transition to the new interface changes.
Prime Professional Platinum	Medical Records	Client Chart	Desktop	Enhancement	*Client Chart Tab Reordering* 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

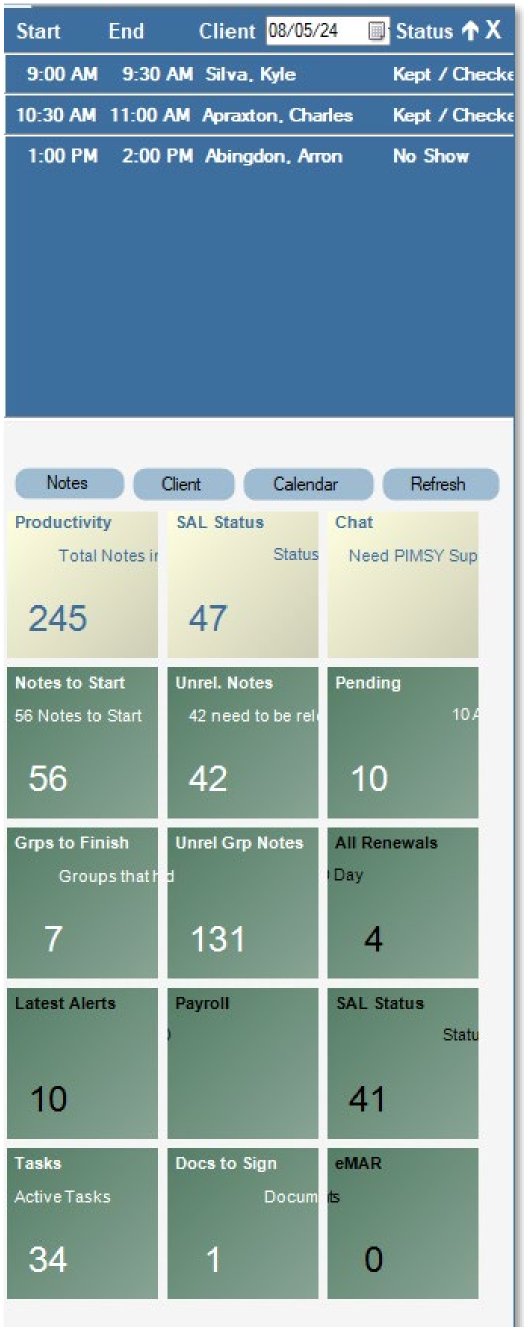
Desktop

New Desktop UI Update

- **Desktop Main Page and Quick Launch**



- **Dashboard**


Start End Client 08/05/24 Status X
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 i
245
SAL Status
Status
47
Chat
Need PIMSY Sup
Notes to Start
56 Notes to Start
56
Unrel. Notes
42 need to be rel
42
Pending
10
Grps to Finish
Groups that h
7
Unrel Grp Notes
131
All Renewals
Day
4
Latest Alerts
10
Payroll
SAL Status
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41
Tasks
Active Tasks
34
Docs to Sign
Docum
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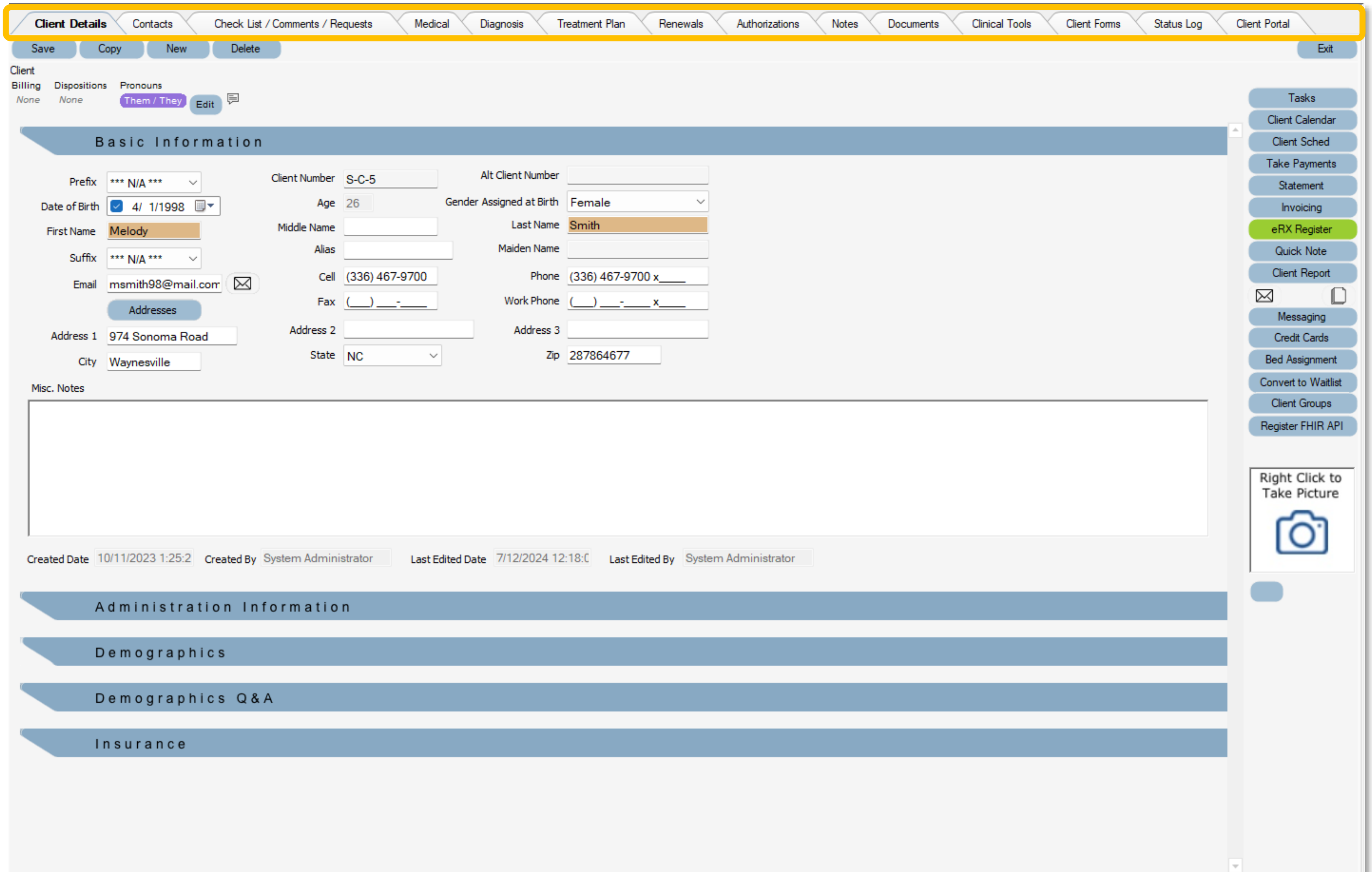
- **New Tab Design**



- **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.