PIMSY 8.0.0.280

12.08.2021 • Release Report

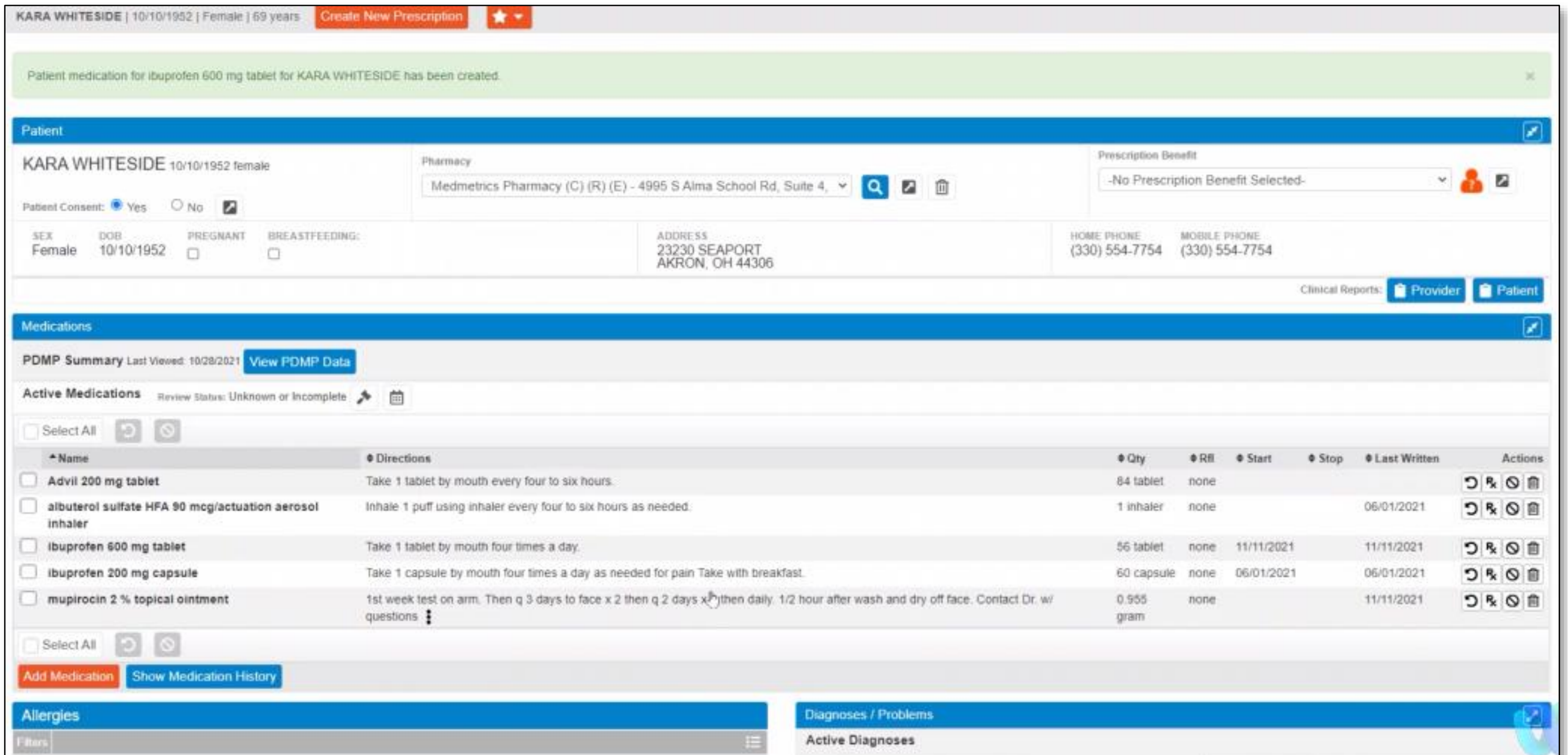
PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Release Notes
Platinum	Medical Records	Client Details	Desktop Provider Portal	The DrFirst integration is finally here! DrFirst is the newest integration we are excited to present to you. To quote, DrFirst "…will provide a better experience across the board for all prescribers. The platform is intuitive, safe, and organized; ultimately saving you time and money". This is an additional option for e-prescribing with very user-friendly and intuitive interface. DrFirst Notifications in PIMSY will allow you quick access to pending items in DrFirst. In addition, users will be able to see prescribing pharmacies listed in the client medication grid. One of the major differences users will see is once a patient is registered the medication and allergy tables will be locked in PIMSY and can only be modified through Dr First. The same situation also applies when switching between patients; Users will not be able to switch directly within Rcopia and will need to navigate to each patient within PIMSY and launch each out from there. Please reach out to PIMSY Support if interested. Please click the link to see a tutorial for DrFirst: https://drfirst.wistia.com/medias/nrd9kzndwr
All	Multiple	Notes Q&A	Provider Portal	We have enhanced the autosave function in Notes and Q&A for provider portal. While typing, you may notice the textbox will become outlined in blue; This is the autosave function at work. We have also changed the wording on the confirmation message when releasing a note. Users now have the option to opt-out of seeing the confirmation after releasing a note.
Platinum	Calendar / Scheduling	Scheduling	Desktop	We are excited to offer a new self-scheduling solution via DocASAP which is available as an Add On. This integration will allow patients to schedule both initial and follow-up appointments on the web. When scheduling initial appointments, patients are connected to only the providers who meet their needs such as location based, gender, specialty, payor, etc. Please reach out to PIMSY Support if interested in signing up.
All	Billing / Invoicing	Payments	Provider Portal Client Portal	Users and clients now can save the client's credit card information to the vault without taking payment on the client portal and provider portal if you are using global payment integration.

All	Medical Records	Client Chart	Desktop	We have resolved an issue where the Date of Referral was not staying checked after creating a new client.
All	Medical Records	Client Chart	Desktop	We have resolved an issue where in rare instances desktop would allow users to move documents into folders that were not listed in a client chart.
All	Admin / Set up	Login Screen	Provider Portal	We have resolved a bug that would throw an error when a user signed in with an end time set to 12.
All	Medical Records	Client Details	Provider Portal	We have resolved a bug where the State Default would pull NC regardless of the default state.
All	Medical Records	Client Details	Provider Portal	Contact form – We have resolved an issue where client contacts were not auto saving as active when added from the Provider Portal.
All	Billing / Invoicing	Basics Screen	Client Portal	Clients can now view Client Payment History along with a printable receipt to the Client Portal if the new setting -762 is set to TRUE.
All	Calendar / Scheduling	Scheduling	Provider Portal	The phrasing has been changed for changing a recurring appointment to match Desktop.
All	Calendar / Scheduling	Scheduling	Provider Portal	The phrasing has been changed on the confirmation message when deleting an appointment. If a note is attached to an appointment users can no longer delete the appointment and will be required to delete the attached note first.
All	Medical Records	Notes	Provider Portal	We have removed the labels on the note report for the free text (body) areas of the progress / assessment note tabs if the note does not include text in these areas.
Platinum	Calendar / Scheduling	Scheduling	Provider Portal	A checkbox has been added on the scheduler to exclude the user's preferred hours and time scale preference when setting -232 is set to True. Unchecking "use custom user settings" will allow you to view the calendar based on your preferred selected views.
Platinum	Calendar / Scheduling	Scheduling	Provider Portal	We have resolved an error on the scheduler that would occur if the screen auto refreshed when the SAL edit is open.
All	Calendar / Scheduling	Scheduling	Provider Portal	Icons have been added to the edit SAL panel in the provider portal

Desktop and Provider Portal

DrFirst

- DrFirst is the newest integration we are excited to present to you. To quote, DrFirst "…will provide a better experience across the board for all prescribers. The platform is intuitive, safe, and organized; ultimately saving you time and money".



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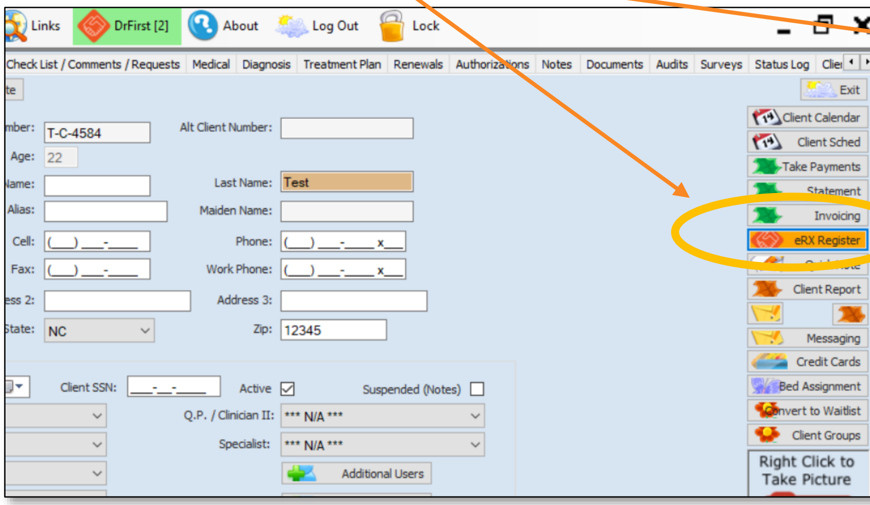
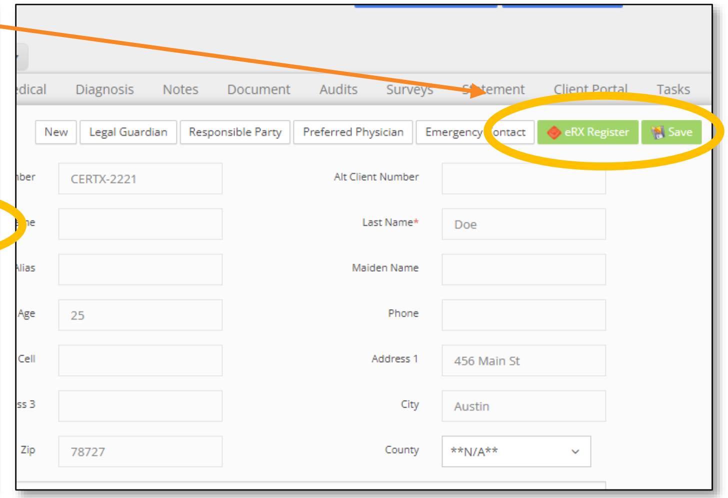
- Clients can be registered to DrFirst via the green eRx Register button from the client chart. The button will change from green to orange once the client becomes registered.

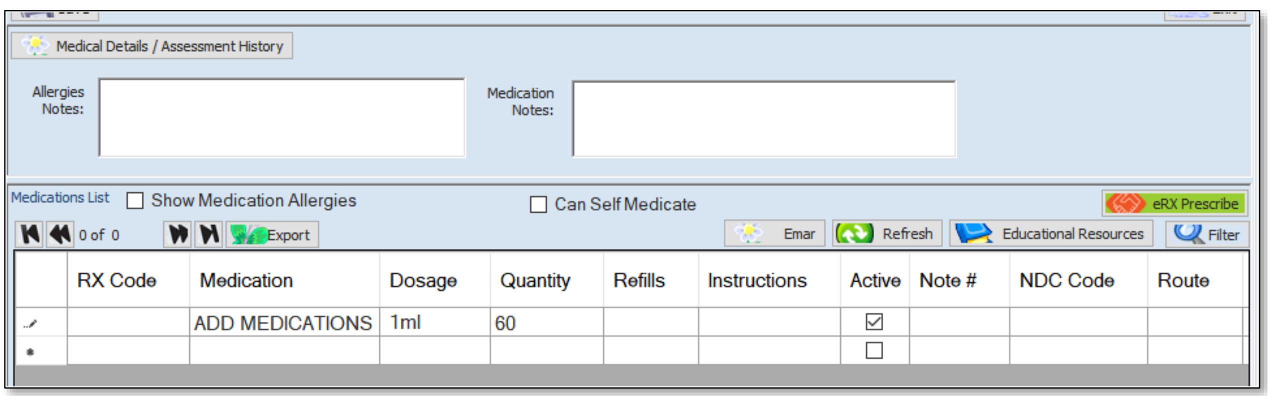
Desktop



Portal



- Once registered with DrFirst, the client medication and allergy tables in PIMSY will be locked down and all changes will need to be made through DrFirst. Conversely, client demographics cannot be changed through DrFirst and can only be changed through PIMSY.



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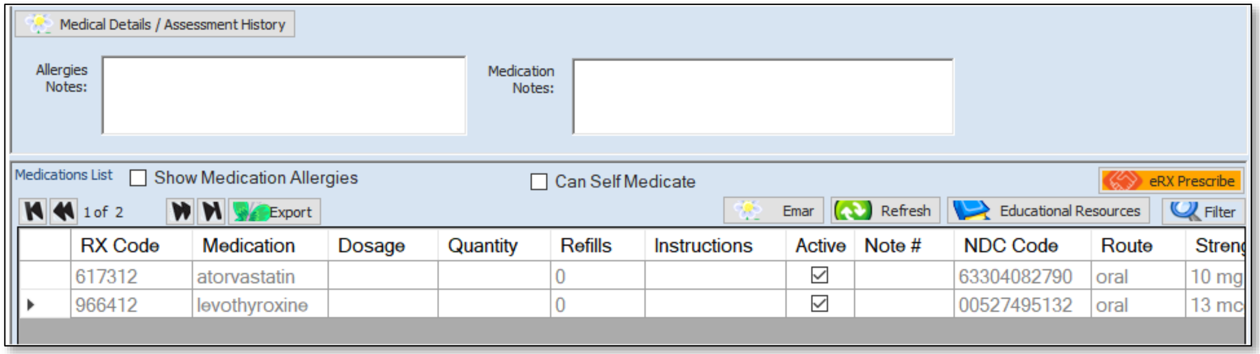
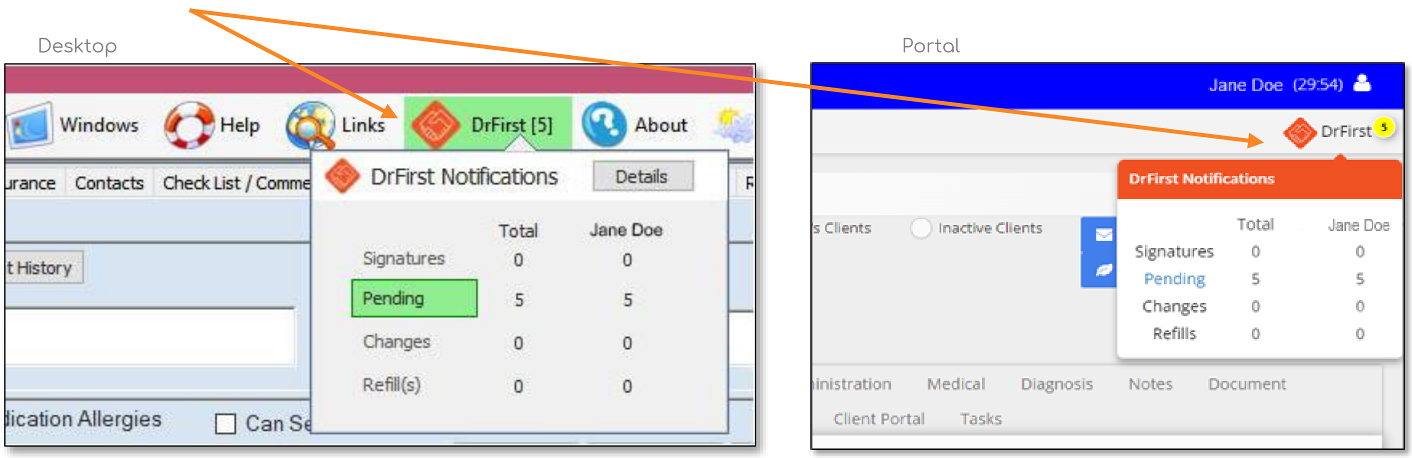


- Notifications for DrFirst can be found on menu at the top in Desktop where you can view pending items such as signatures and refill requests.

Desktop

Portal



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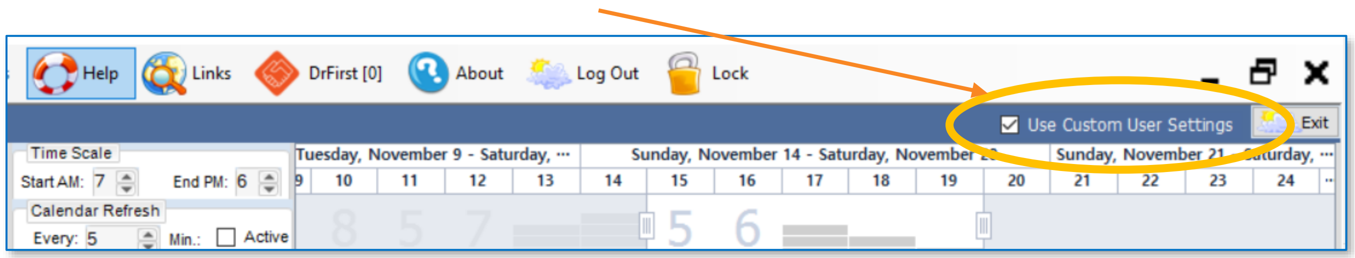
Desktop

Scheduler Update

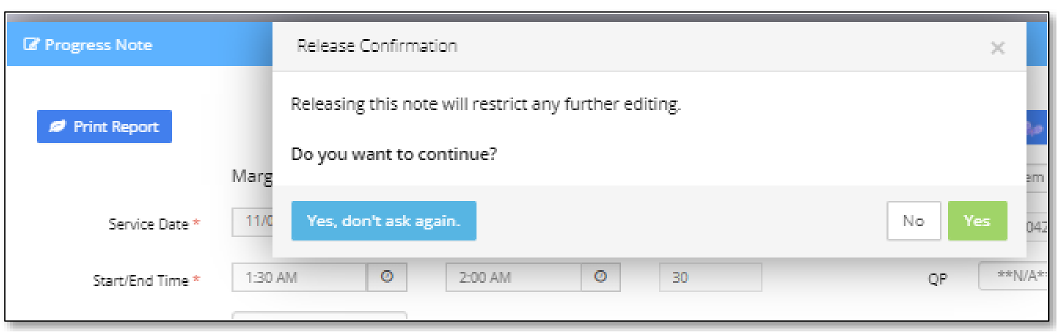
- A checkbox has been added on the scheduler to exclude the user's preferred hours and time scale preference when setting -232 is set to True. Unchecking "use custom user settings" will allow you to view the calendar based on your preferred selected views



Provider Portal

Confirmation Message When Releasing a Note

- Users now have the option to opt-out of seeing the confirmation after releasing a note.



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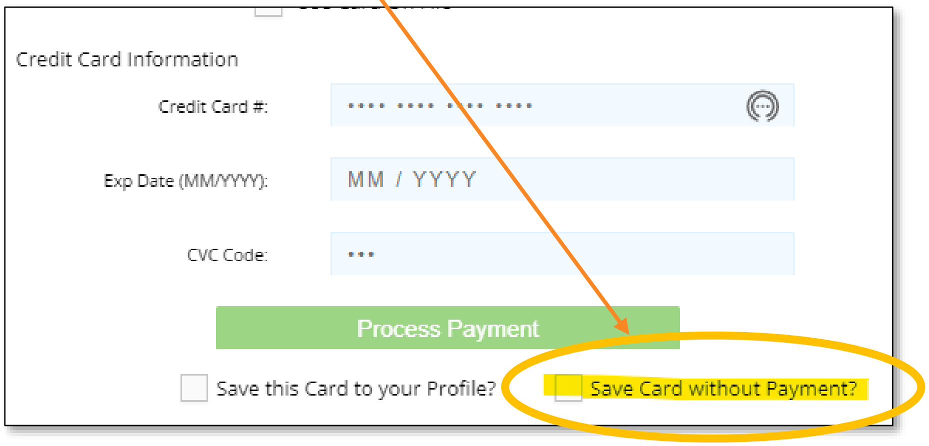
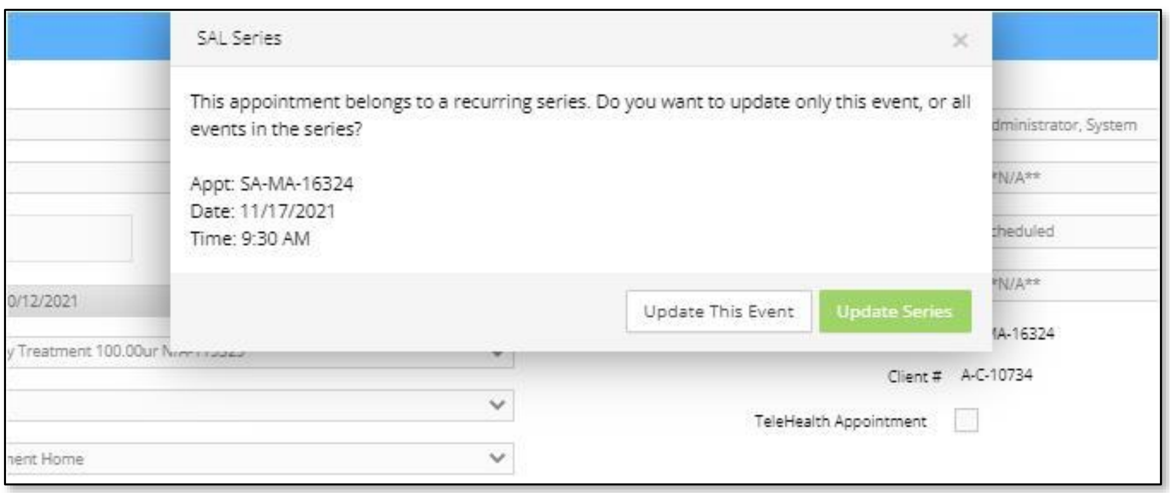
Save CC information to Vault without Taking Payment

- Users and clients now have the capability to save the client's credit card information to the vault without taking payment (Via CP and PP if you are using global payment integration)



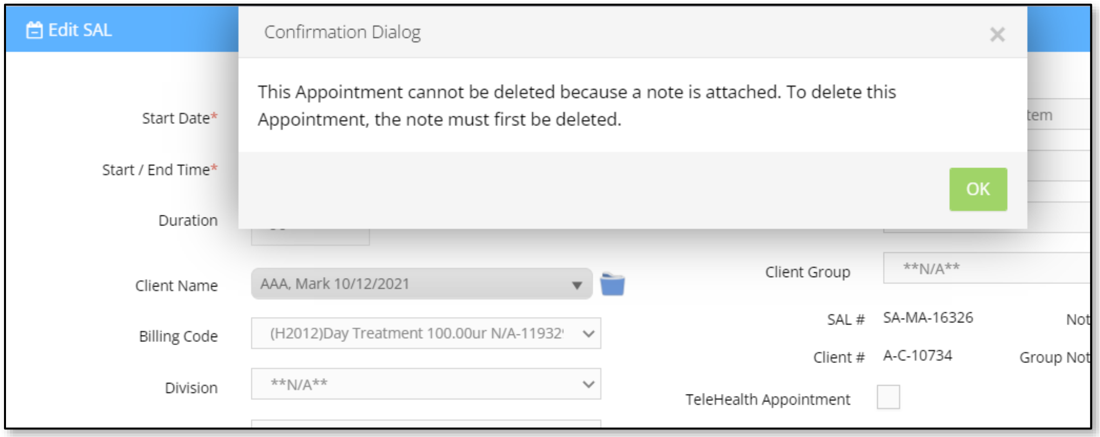
Recurring Appointment Phrasing

- The phrasing has been revised when changing a recurring appointment to match Desktop.



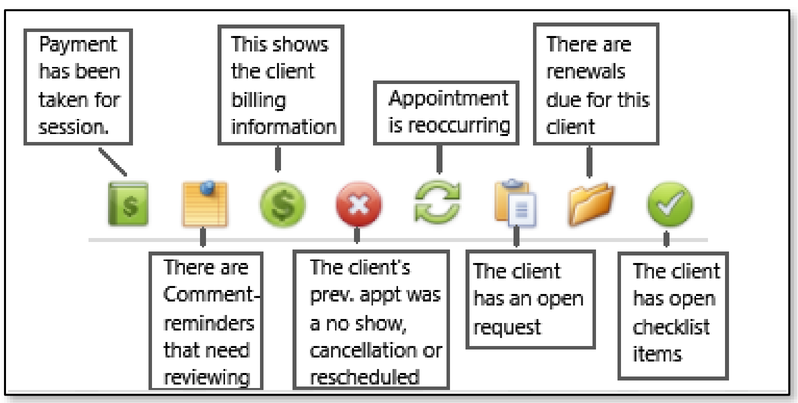
Confirmation Message Phrasing

- The phrasing has been revised on the confirmation message when deleting an appointment.



Icons on the Edit SAL Panel

- Like Desktop, the edit SAL panel in the provider portal now has icons.



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Client Portal

Client Payment History

- Clients can now view their payment history along with a printable receipt in the client portal.

Payment History

Service Date	Amount Paid	
9/30/2021	40.00	Print Receipt
9/23/2021	1.00	Print Receipt
9/22/2021	2.00	Print Receipt
8/2/2021	5.00	Print Receipt
9/20/2020	7001.00	Print Receipt
6/12/2020	200.00	Print Receipt