SuccessEHS Release Notes 7.20

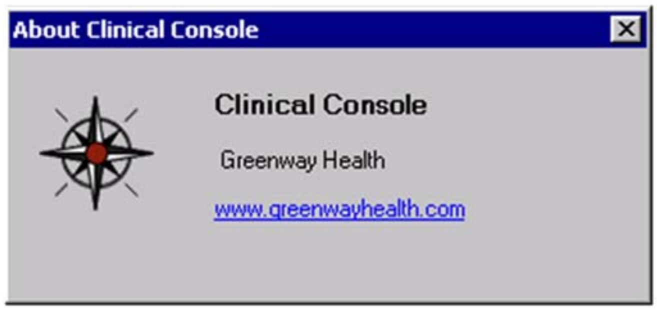
Table of Contents

All Modules

"About" Information for POC Launcher/Clinical Console Updated for Greenway

Project #EHS-20258

The information in the **About POC Launcher** and **About Clinical Console** dialog boxes has been updated to reflect the Greenway branding.



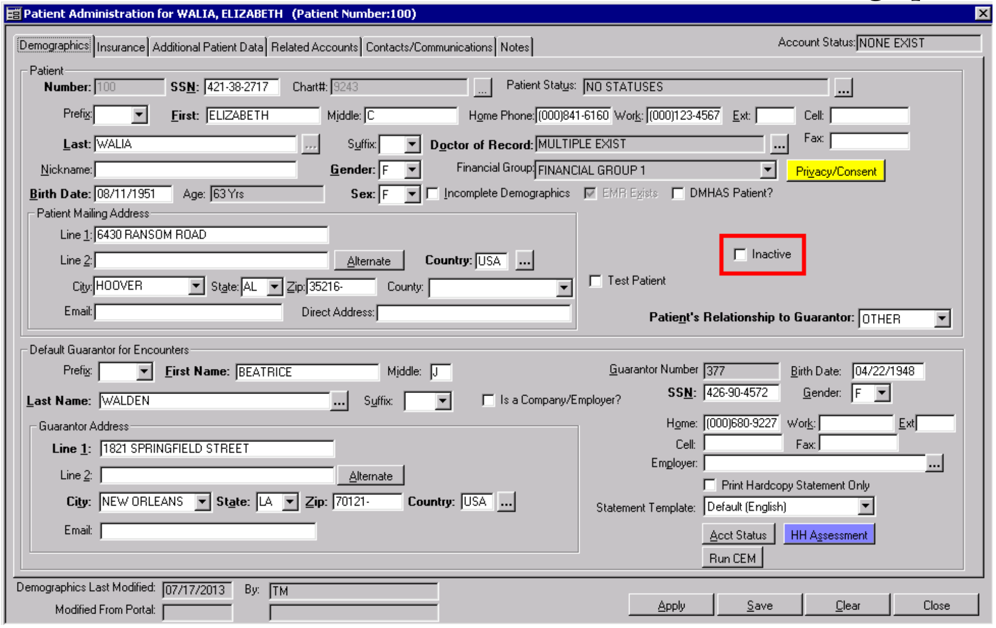
Changes for Inactive/Deceased Patients

Project #EHS-19759, EHS-19792, EHS-19793, EHS-19794, EHS-19795, EHS-19796

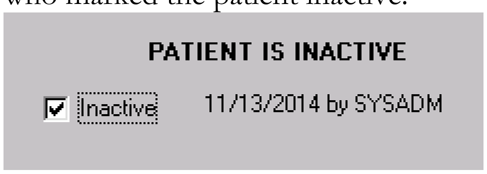
Changes have been made to better record and reflect the status of inactive and deceased patients in the system.

Patient Administration

- **Inactive label** – An **Inactive** checkbox has been added to the **Demographics** tab.



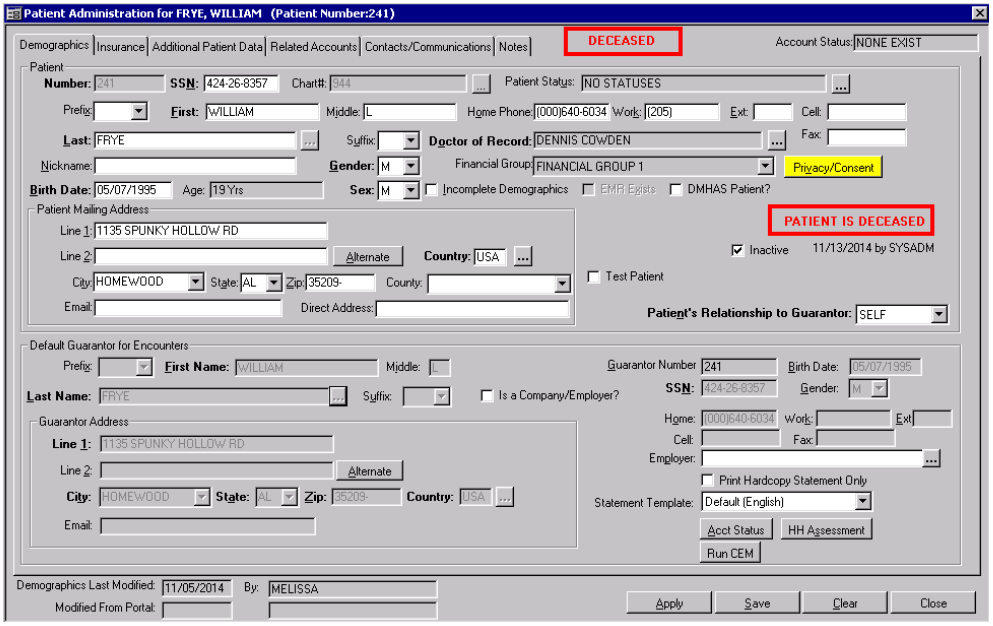
Selecting (checking) the **Inactive** checkbox will display a **PATIENT IS INACTIVE** label, along with the date the patient was marked inactive and the user ID of the person who marked the patient inactive.



The PATIENT IS INACTIVE label will also display in the following places in the system:

  - **Charge Entry** > View > Patient Demographics
  - **Check In** > Edit > Patient Demographics
  - **Receivables** > Apply Insurance Payments/Adjustments > View > Patient Demographics
  - **Scheduling** > Patient Appointment dialog > Patient Details button > Demographics
  - **Rounds** > Open Rounding list > Details button
  - **Chart Overview** > Patient Data > Demographics tab
  - **Inquiry** > View > Demographics
  - **Find Patient** dialog box

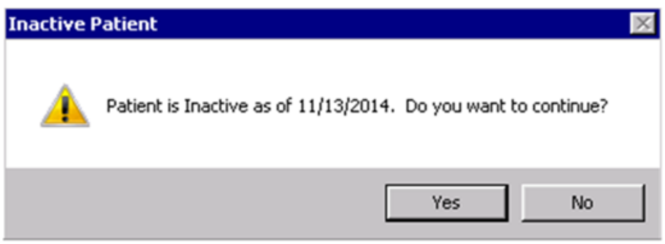
- **Deceased label** – A **DECEASED** label will display in **red text** when the user enters a **Date of Death** on the **Additional Patient Data** tab in **Patient Administration, Check In,** or **Charge Entry**.

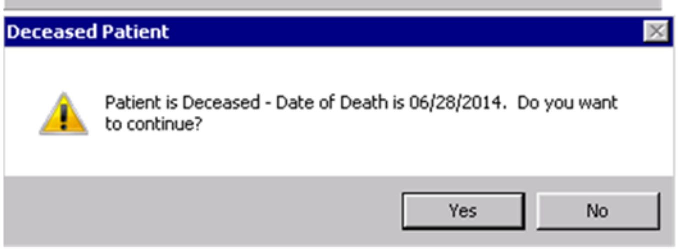


The **DECEASED** label will display even if the **Inactive** checkbox is selected (as deceased status overrides inactive status). The **DECEASED** label will display in the same places in the system as the **INACTIVE** label (listed above).

Check In/Charge Entry

- **Warnings** – A warning dialog box will display in **Check In** and **Charge Entry** if a user attempts to access an inactive or deceased patient.





Users may click **Yes** to create a new visit for the patient, or **No** to return to the **Find Patient** dialog box and select a new patient.

  - For unposted visits in **Charge Entry**, the system will compare the Date of Service (DOS) with the Date of Death (DOD) or Inactive Date (ID) for deceased and inactive patients respectively. If the DOS is before the DOD or ID, the user will be able to apply/save changes to the patient record.
    If the DOS is **after** the DOD/ID, the appropriate warning will display again;

users may click **Yes** to save the data entered, or **No** to return to the **Charges** tab and make any necessary changes.

Clinical Event Manager

- **CEM exclusions** – Inactive and deceased patients will be excluded from all rule generations in the **Clinical Event Manager**.

Scheduling

- **Scheduling block** – Inactive and deceased patients will be prohibited from having appointments scheduled for them via the **Scheduling** module.

Problems Now Import in Order Selected
Project #EHS-19593

When importing problems into the superbill via the **Import Pt Problems** dialog box or into **Medcin.NET** from the **Problems** tab on the **Import Data** window, the problems will now import in the order in which they are **selected**, **not** the order in which they are displayed on screen. This will hold regardless of from where the problems are imported.

RSR Report Changes 2014
Project #EHS-18429

The following changes have been made in the system to accommodate the updates to the Ryan White Services Report for 2014.

Patient Administration

1. The following additions have been made to the **Ethnicity** drop-down list on the **Additional Patient Data** tab:
    - **Mexican, Mexican American, Chicano/a**
    - **Puerto Rican**
    - **Cuban**
    - **Another Hispanic, Latino/a or Spanish Origin**

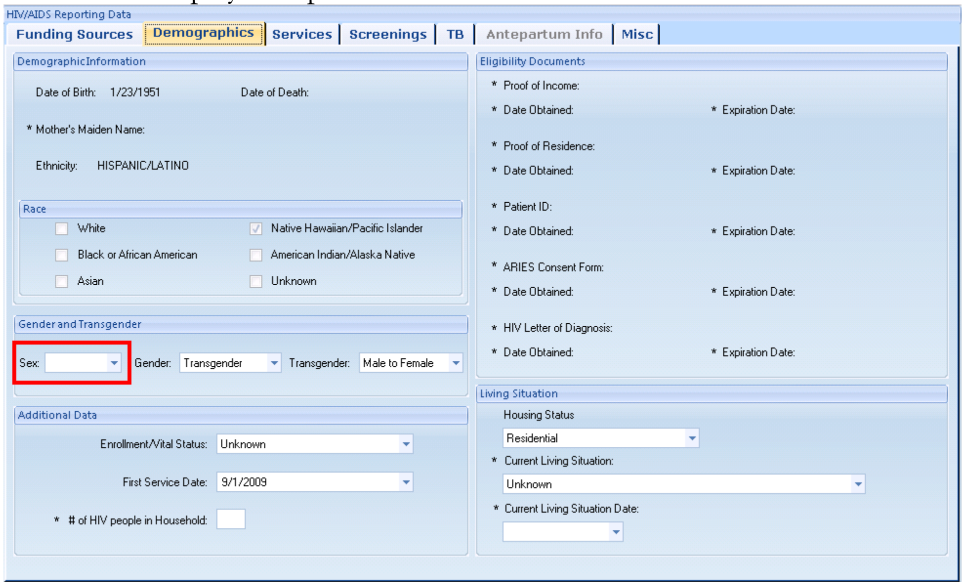
    The above ethnicities map to **Hispanic/Latino** for UDS reporting.
2. **Other Asian** has been added to the **Race** field (this maps to **Asian** for UDS reporting). This includes the RHIN mappings of Asian, Iwo Jiman, Laotian, Malaysian, Maldivian, Nepalese, Okinawan, Pakistani, Singaporean, Sri Lankan, and Thai.

These race/ethnicity updates have also been added to the **Patient Portal**.

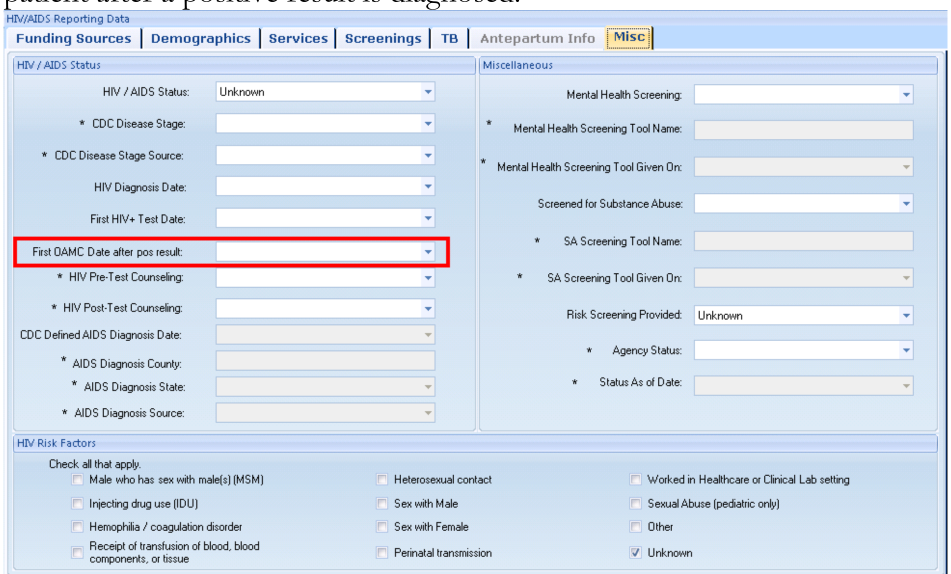
HIV/AIDS Reporting

The following changes have been made on the **HIV/AIDS Reporting Data Review** screen in Clinical Console:

1. **Demographics tab –** A **Sex** field has been added to the **Gender and Transgender** section that displays the patient's sex as recorded in **Patient Administration**.



2. **Misc tab –** A **First OAMC Date after pos result** field has been added to the **HIV/AIDS Status** section that allows users to document the first OAMC date for the patient after a positive result is diagnosed.



Report Changes

For details of specific changes within the RSR report, please visit the following website:
https://careacttarget.org/sites/default/files/file-upload/resources/2014%20RSR%20Client%20Level%20Data%20Elements%20FINAL%2011_14.pdf

Alpha II

Alpha II Update Q4 2014

Project #EHS-19932

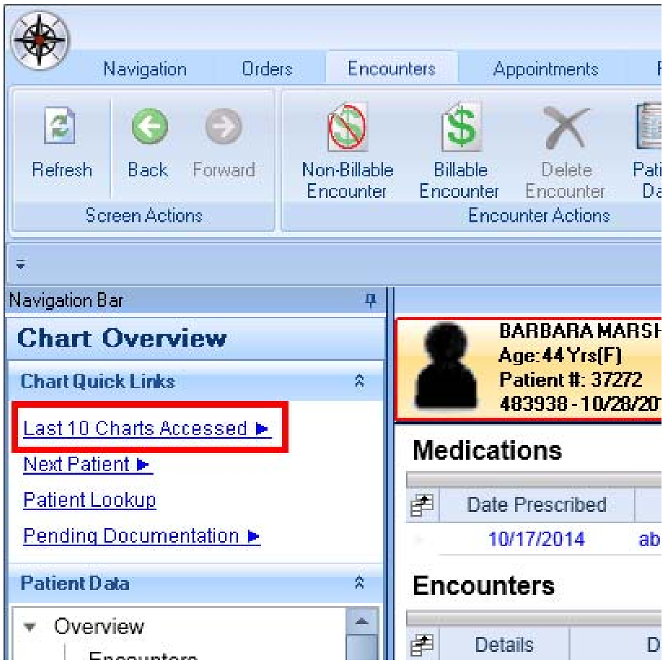
The Alpha II updates for Q4 2014 have been completed.

Chart Overview

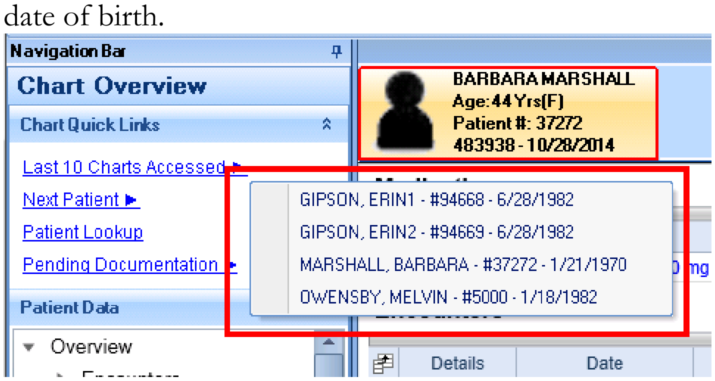
New Last 10 Charts Accessed Quick Link

Project #EHS-19760

A **Last 10 Charts Accessed** quick link has been added to the **Chart Quick Links** list in the main **Chart Overview** mode.



Clicking this link will display a pop-up listing up to the last ten charts accessed by the user in **Chart Overview**. The pop up menu will include the patient's name, patient number, and their date of birth.



Accessing a chart from the pop-up will open the patient's chart. The last ten patient charts will display in **the order they are first selected in the pop-up list**. Once a chart is selected, it will be cycled out of the list after 10 separate charts are accessed; i.e., if Chart #1 is selected, it will cycle out of the "last 10" list once Chart #11 is accessed, even if Chart #1 is re-accessed before the eleventh chart slot is filled.

Clinical Console

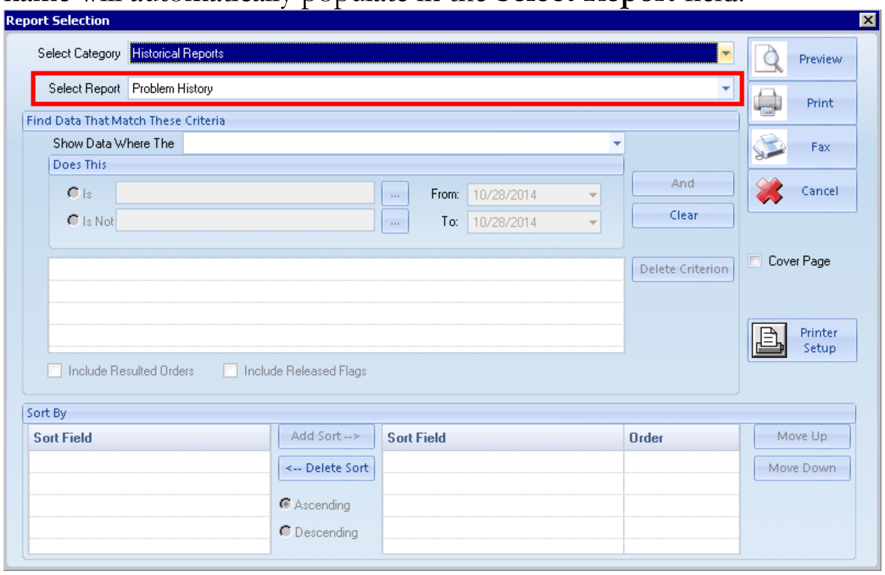
Clinical Console Report Changes

Project #EHS-19650, EHS-19639, EHS-19640, EHS-19641, EHS-19617, EHS-19659, EHS-19673, EHS-19686

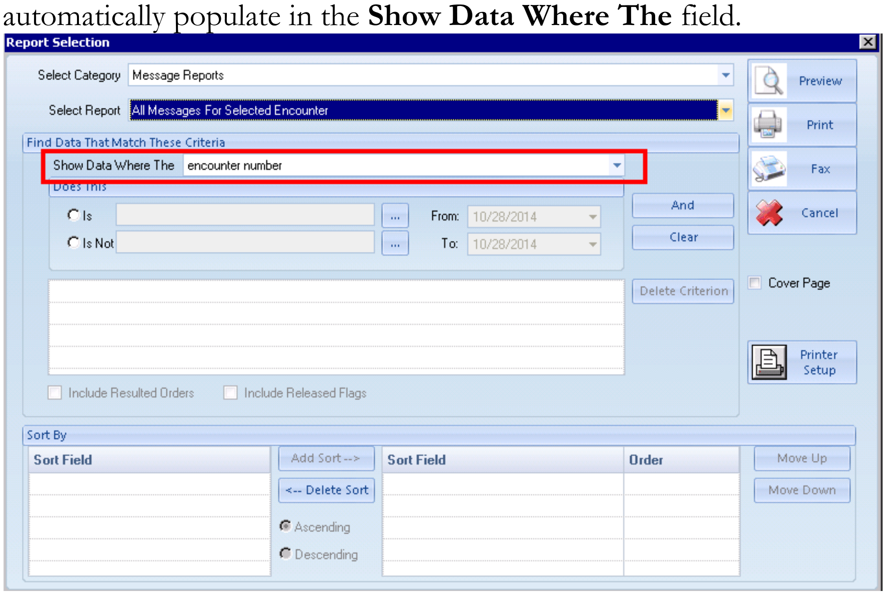
The following changes have been made to reports in Clinical Console.

Default Selections for Reports

- If a reports category in the **Process Reports** screen contains only one report, the report name will automatically populate in the **Select Report** field.



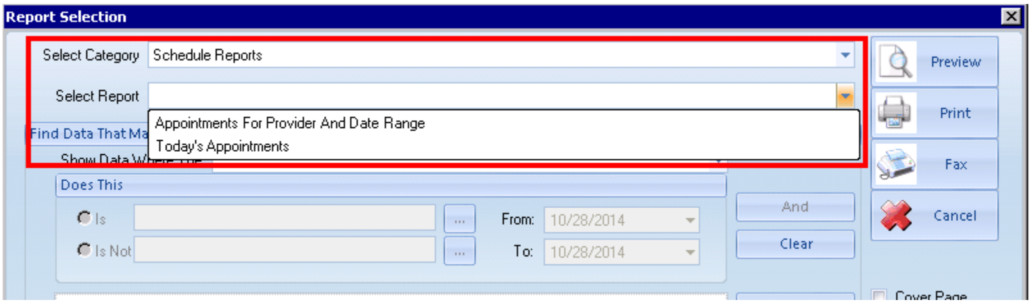
- If a report has only one search criteria connected to the report, the criteria will automatically populate in the **Show Data Where The** field.



New Report Categories/Reports

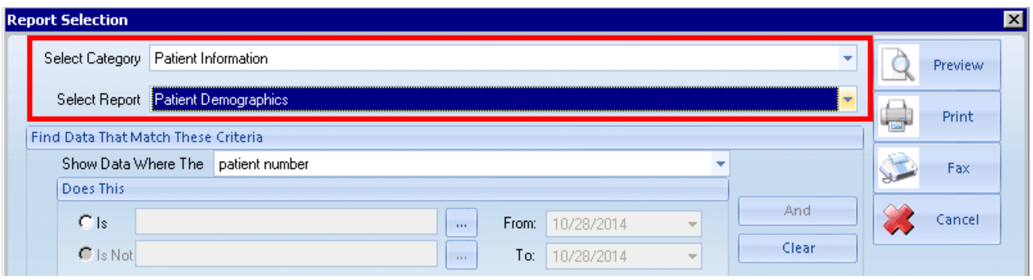
The following new reports categories/reports have been added to Clinical Console.

- **Schedule Reports** – The following reports have been migrated from classic **Chart** to the (new) **Schedule Reports** category:
  - **Appointments for Provider and Date Range**
  - **Today's Appointments**



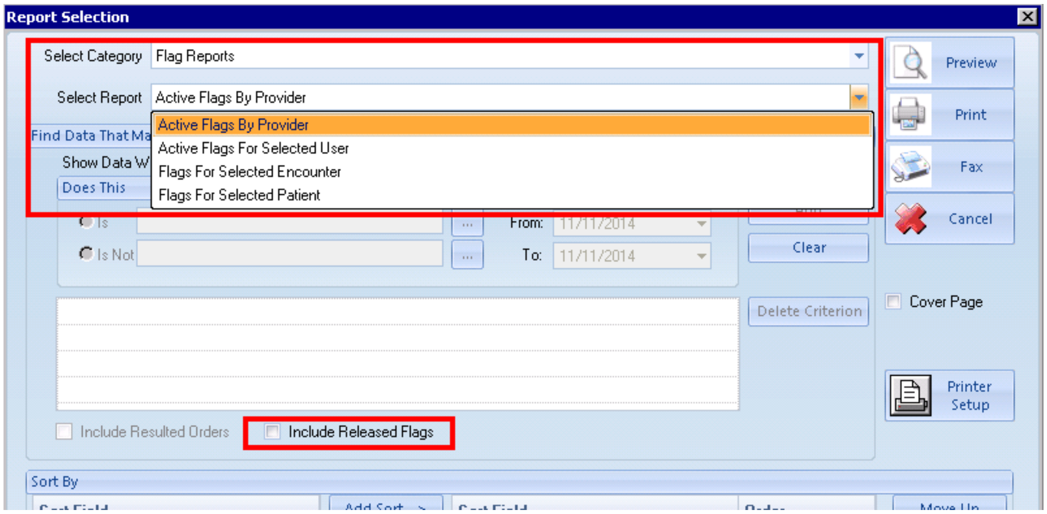
No criteria or functions have changed in the migration.

- **Patient Information** – The following report has been migrated from classic **Chart** to the (new) **Patient Information** category:
  - **Patient Demographics**



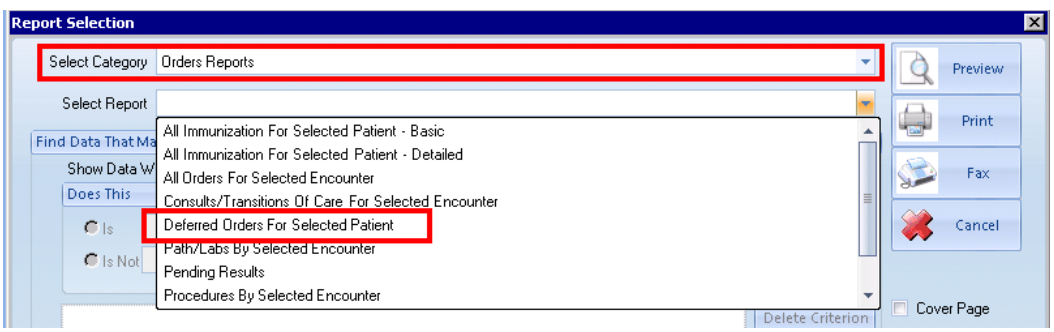
No criteria or functions have changed in the migration.

- **Flag Reports** – The **Flag Reports** category includes the following:
  - **New Reports**
    - **Flag Report By Selected Patient** – Replaces the **All Flags For Selected Patient** and **Active Flags For Selected Patient** reports in classic **Chart**.
    - **Flags Per Provider** – Replaces the **All Provider Flags** and **All Active Provider Flags** in classic **Chart**.
    - **Flags For Selected Encounter** – Replaces the **Flags By Encounter** report in classic **Chart**.



- Include Released Flags – An **Include Released Flags** checkbox has been added to the **Find Data That Match These Criteria** section for the **Active Flags by Provider, Flags for Selected Encounter, and Flags for Selected Patient** reports. When selected (checked), released flags will be included in the appropriate report pull.

- **Order Reports** – The following report has been migrated from the **Patient Alerts** tab in classic **Chart** to the **Order Reports** category:
  - **Deferred Orders for Selected Patient**

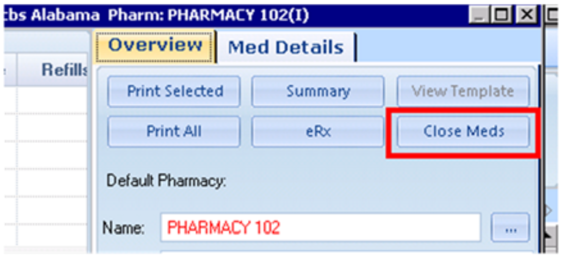


No criteria or functions have changed in the migration.

Medications.NET

Add Medications, New Close Meds Button Project #EHS-19754

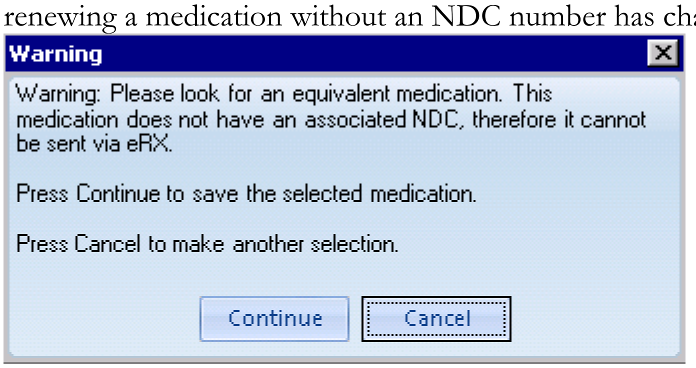
A **Close Meds** button has been added to the **Overview** and **Med Details** tabs on the **Add Meds** screen in **Medications.NET**.



Clicking this button from either tab will exit out of **Medications.NET** completely.

Change in NDC Prompt Warning Project #BHML3-303

The text in the **Warning** prompt on the **Add Medications** window when prescribing or renewing a medication without an NDC number has changed to the following:



"Warning: Please look for an equivalent medication. This medication does not have an associated NDC, therefore it cannot be sent via eRx."

FDB Update October 2014 Project #EHS-19901

The FDB update for October 2014 has been completed.

Pharmacy Information Displays in Header Bar Project #EHS-19749

Pharmacy information for a patient will now display in a **Pharm:** section in the blue header bar on both the **Med Summary** and **Add Meds** screens in **Medications.NET**.

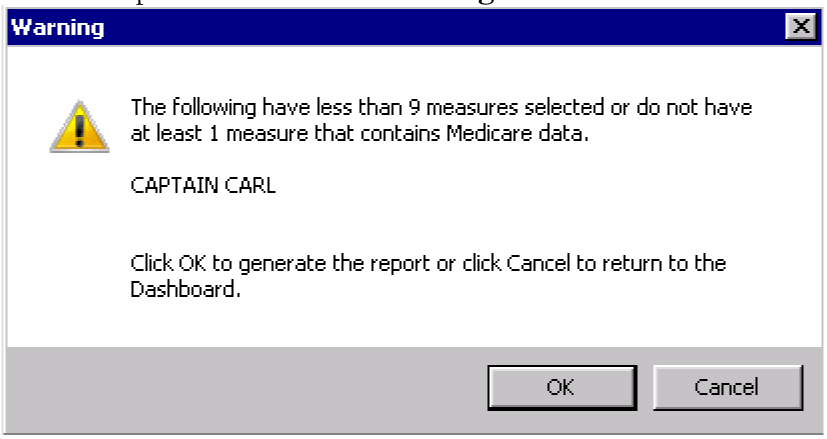
An **(I)** designation after the pharmacy name indicates that the pharmacy is inactive in the system.

Meaningful Use/PQRS/CQM

CQM, Changes to QRDA Wording for Measure Submission

Project #EHS-19866

Changes have been made to the wording on the **Warning** dialog box for users generating CQM measure reports on the **Incentive Programs** window.



Previously, if a planned report had fewer than nine measures selected or no measures with Medicare data, the report would not generate. In this current release, users will be able to generate the CQM report with fewer than nine measures or without Medicare data by clicking **OK** on the **Warning** dialog box.

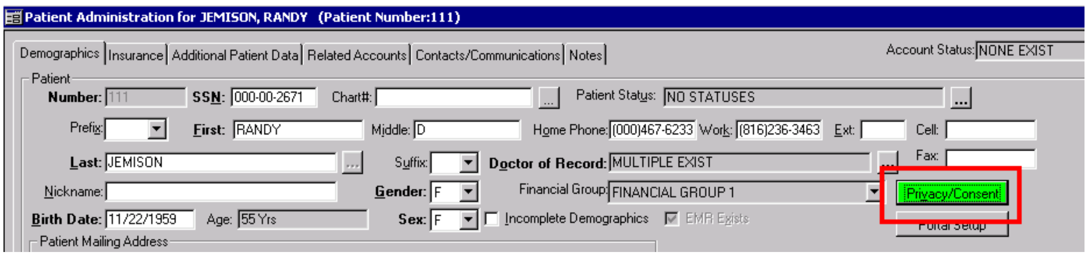
Patient Administration

Demographics Tab, Privacy/Consent Changes Project #EHS-19758

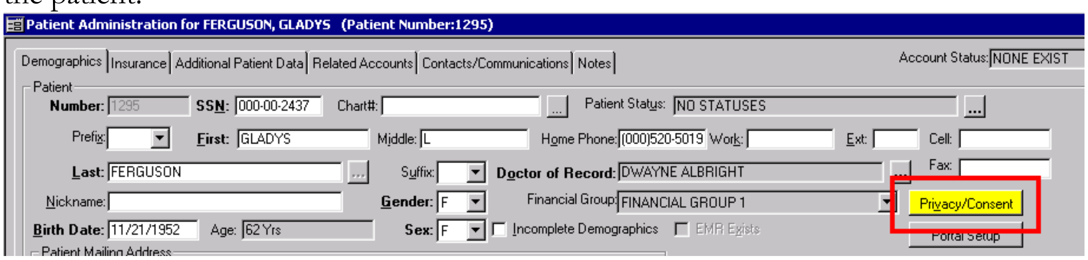
Changes have been made to the privacy/consent settings on the **Demographics** tab in **Patient Administration** that enable users to more easily discern the privacy/consent status of patients.

Color-Coding: Color-coding has been added to the **Privacy/Consent** button as follows:

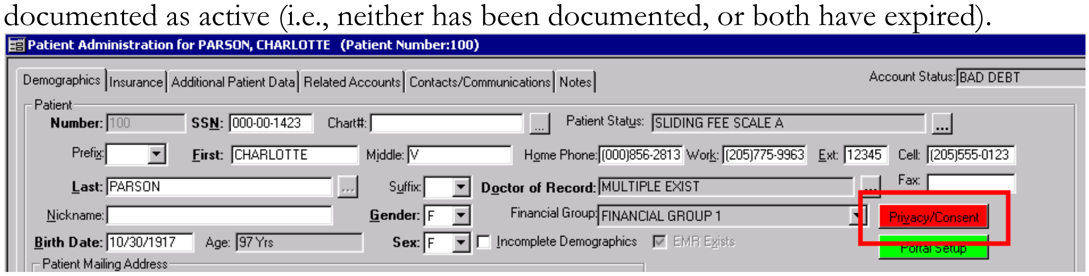
- **Green highlights** – Both the HIPAA privacy statement and the consent form have been documented as active and are not expired on the **Privacy/Consent Information** screen.



- **Yellow highlights** – One or the other (privacy policy or consent form) has expired for the patient.



- **Red highlights** – Neither the privacy policy nor the consent form are currently documented as active (i.e., neither has been documented, or both have expired).



Order/Immunization Detail Icon: A **Privacy/Consent Info** button has been added to the menu ribbon in all **Order Detail** and **Immunization Detail** screens in **Clinical Console** to display the privacy/consent status for the patient.

The **Privacy/Consent Info** icon displayed as follows based on the patient's status:

- If both privacy and consent documented and are not expired, a checkmark icon displays: 
- If both privacy and consent are documented and one or both are expired, **OR** neither privacy nor consent are documented, an X/exclamation point icon displays: 
- Clicking the **Privacy/Consent Info** button will launch the main **Privacy/Consent Information** screen from **Patient Administration**, where the user may make any needed updates.

Prompt for Expired/Missing Information: If the system is set up to enforce privacy/consent configuration (via the **Privacy/Consent Configuration** screen in the **System Administration Console**), an **Expired or Missing Privacy/Consent Information** prompt will display in **Patient Administration** and **Charge Entry** if the user saves changes to a patient record that has missing and/or expired privacy/consent information.

System Administration

Accounting Periods, Financial Groups Removed from Report

Project #EHS-19905

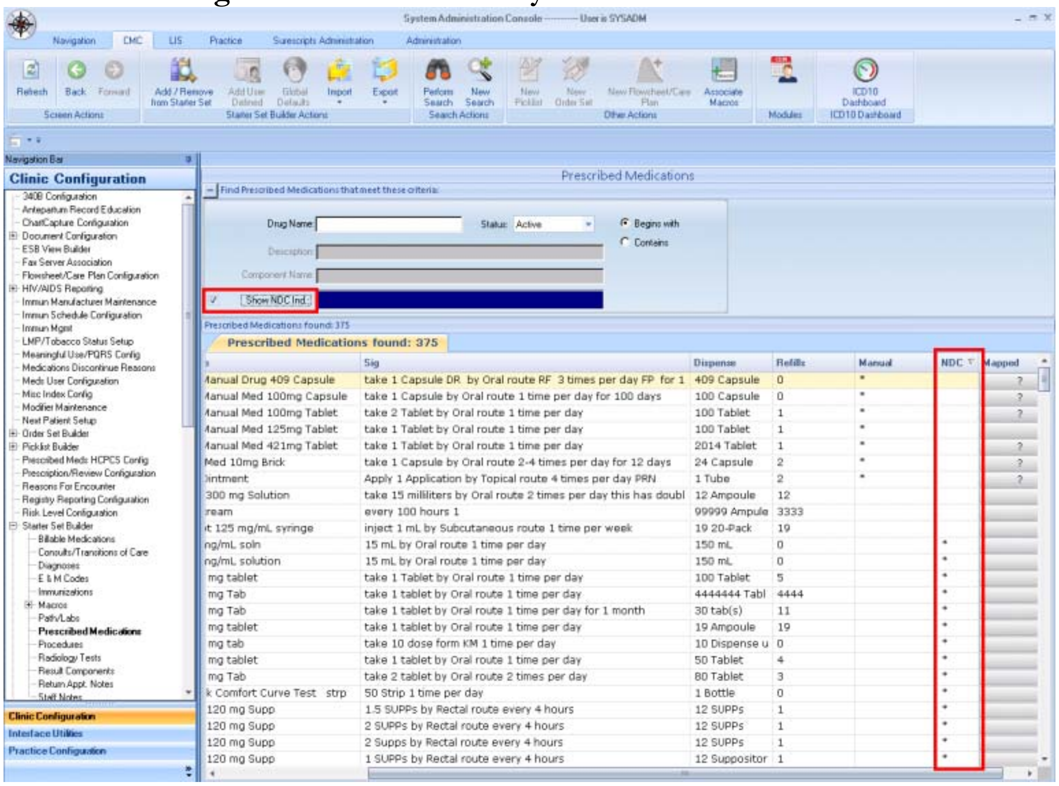
Financial group information has been removed from the **Accounting Period** report in **System Administration**.

System Administration Console

Clinic Configuration, NDC Columns Added to Prescribed Medications Starter Set

Project #BHML3-397

A **Show NDC Indicator** option has been added to the **Prescribed Medications** starter set in the **Clinic Configuration** section of the **System Administration Console**.



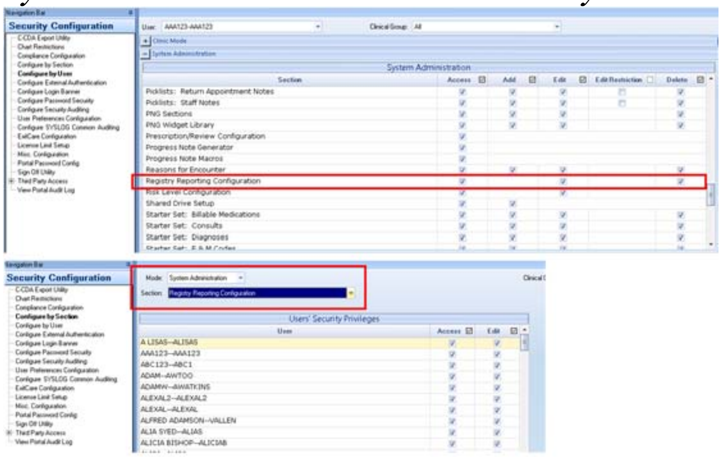
Selecting (checking) this option will display an **NDC** column in the **Prescribed Medications** main grid. An asterisk (*****) will display for all medications that have an NDC number.

Clinic Configuration, New Registry Reporting Configuration for Blood Lead Tests (FL Clients Only)

Project #EHS-20058

To accommodate blood lead test reporting requirements on in-house equipment for Florida-based clients, a **Registry Reporting Configuration** screen has been added to the **Clinic Configuration** section of the **System Administration Console**.

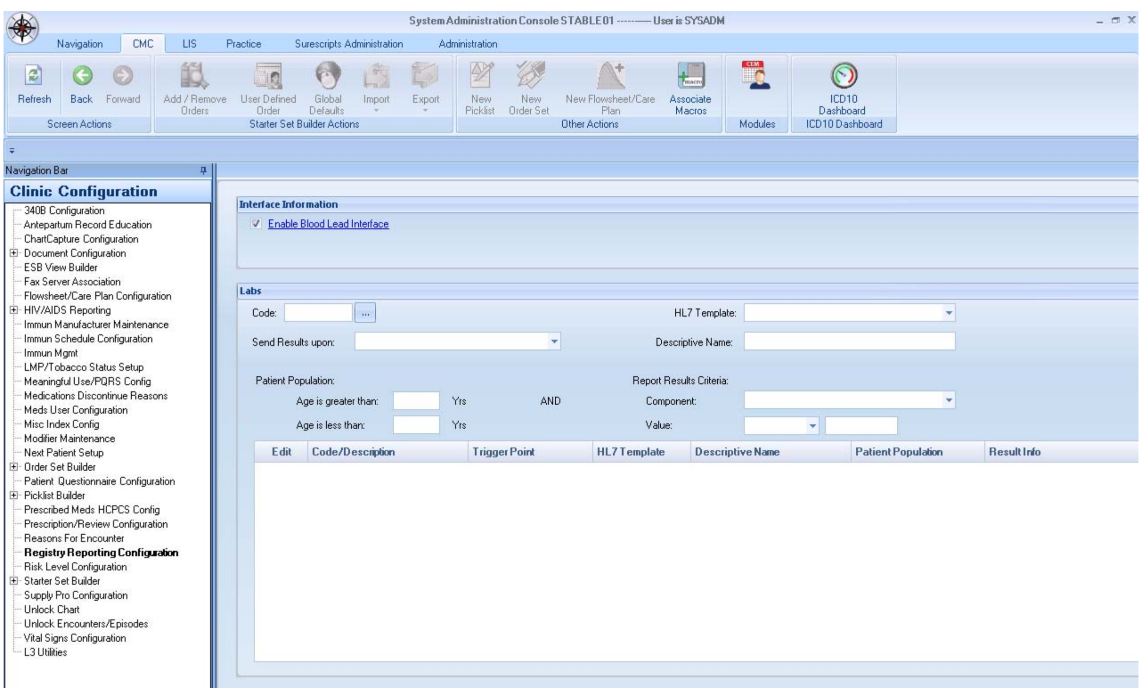
*Access is defined by enabling the **Registry Reporting Configuration** option for the user in the **System Administration** mode of the **Configure by User/ Configure by Section** screens in **Clinical Console Security**.*



The following access levels are available:

- ***Access** – Enables users to access the screen.*
- ***Edit** – Enables users to edit the CPT code selection and the trigger point on screen.*
- ***Delete** – Enables users to delete a CPT code from the code table.*

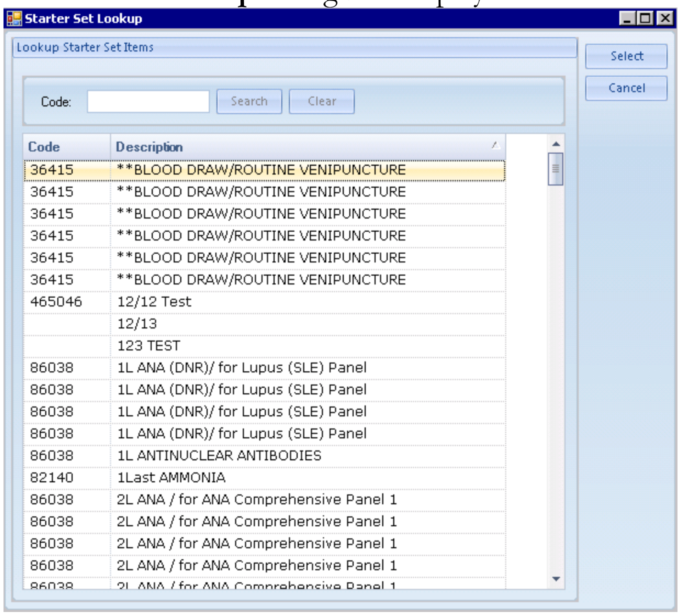
The **Registry Reporting Configuration** screen enables SYSADM users to configure certain CPT codes in the system to automatically send blood lead results to the state when certain values are present on the appropriate order.



To configure CPT codes for the blood lead interface:

1. Select (check) the **Enable Blood Lead Interface** checkbox in the **Interface Information** section. The **Labs** section will enable.

2. Click in the **Code** field and search for the appropriate CPT code to configure. A **Starter Set Lookup** dialog box displays.



Search for and select the appropriate code and click **Select** to populate the **Code** field on the main screen.

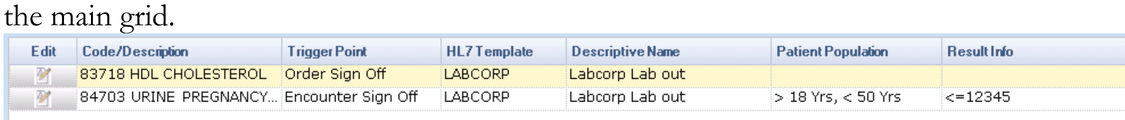
3. Select the appropriate trigger point (the point at which to send the lab results) from the **Send Results upon** drop-down list. Selections include **Order Sign Off** and **Encounter Sign Off**.

4. Enter the appropriate **Patient Population** age range from which to send the results.

5. Select the appropriate **HL7 Template** to use to send the results from the drop-down list. The **Descriptive Name** field will populate once a template is selected.

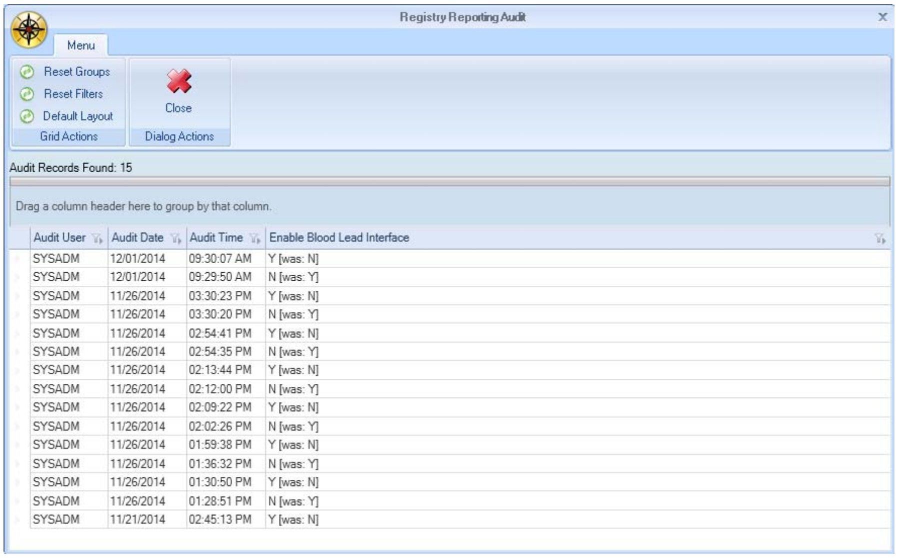
6. In the **Report Results Criteria** section, enter the appropriate **Component** and **Value** configurations for the CPT code.

7. Once the above information is entered, the record will automatically save and display on the main grid.



Users may click in the **Edit** column to edit the information in a particular record; the information will populate the appropriate fields and allows the user to make changes.

8. **Auditing** – Users may click the **Enable Blood Lead Interface** hyperlink in the **Interface Information** section to display the interface enable audit.



The following information is available for viewing:

- **Audit User –** Displays the user ID of the person that modified the audit (always SYSADM).
- **Audit Date –** Displays the date the modification was made.
- **Audit Time –** Displays the time the modification was made.
- **Enable Blood Lead Interface –** Indicates (via **Y** or **N**) whether the interface was enabled or disabled for the in-house equipment.

Configure SuccessEHS, Duplicate Patient Override Checkbox Removed

Project #EHS-19761

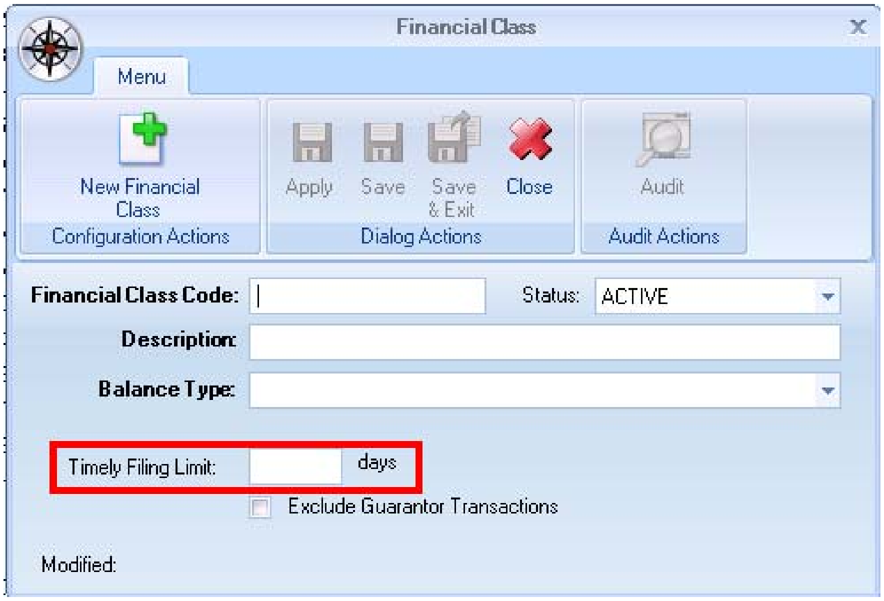
The **Duplicate Patient Override** checkbox has been removed from the **Patient Administration** section of **Configure SuccessEHS** under **Practice Configuration** in the **System Administration Cons**

Financial Classes, New Timely Filing Limit Option

Project #EHS-20185

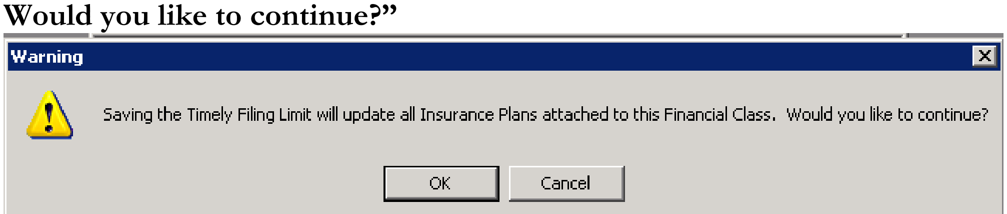
A **Timely Filing Limit** option has been added to the **Financial Class** dialog box in the **Financial Class** dialog box in **Core Setup** under **Practice Configuration** in the **System**

Administration Console:



The Timely Filing Limit option allows users to enter a set number of days in the **Timely Filing Limit** field past which the claim is considered overdue for timely filing for all claims in the appropriate financial class.

If the user chooses to enter a timely filing limit, the following message displays:
"Saving the Timely Filing Limit will update every plan attached to this Financial Class. Would you like to continue?"



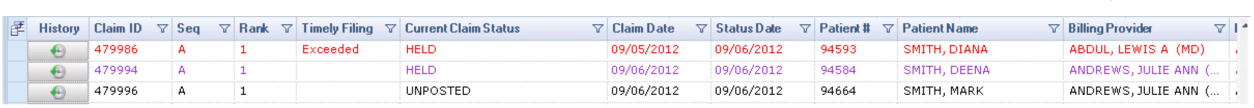
Clicking **OK** will update all insurance plans associated to the appropriate financial class with the entered timely filing limit. **Any existing information on the affected insurance plans will be overwritten.**

Clicking **Cancel** will cancel the setting of a filing limit to the financial class.

Timely filing limits are editable and auditable in the **Financial Classes** screen, and will be reportable in Business Objects reports.

Timely Filing in Claims Console

Individual claims in **Claims Console** are color-coded to indicate the status of timely filing limits.



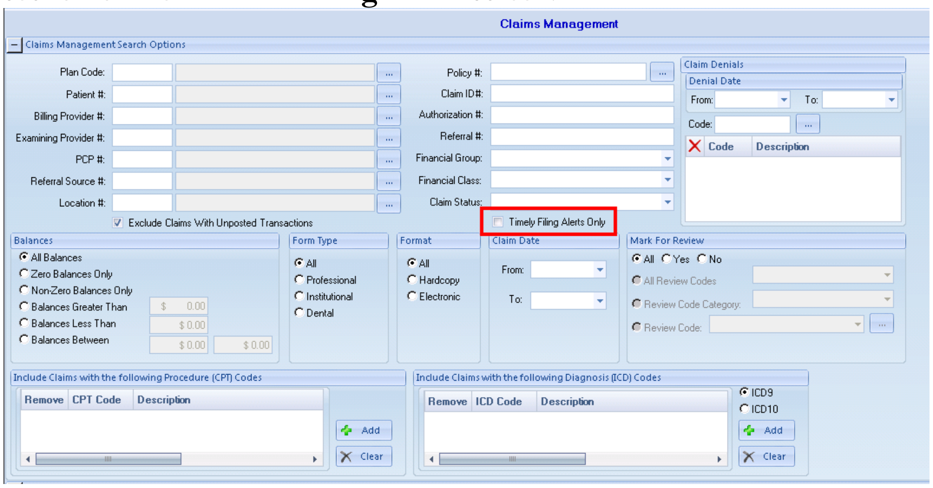
History	Claim ID	Seq	Rank	Timely Filing	Current Claim Status	Claim Date	Status Date	Patient #	Patient Name	Billing Provider
	479986	A	1	Exceeded	HELD	09/05/2012	09/06/2012	94593	SMITH, DIANA	ABDUL, LEWIS A (MD)
	479994	A	1		HELD	09/06/2012	09/06/2012	94584	SMITH, DEENA	ANDREWS, JULIE ANN (...
	479996	A	1		UNPOSTED	09/06/2012	09/06/2012	94664	SMITH, MARK	ANDREWS, JULIE ANN (...

- **Claims in black text** – The claim is within the timely filing limit.

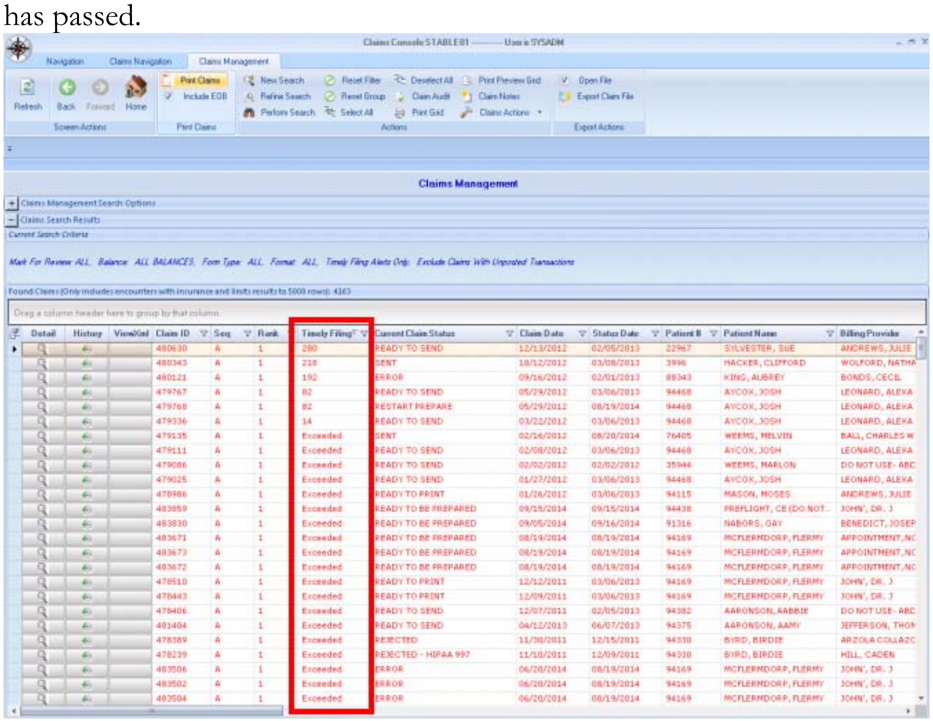
- **Claims in red text** – The claim has exceeded the timely filing limit. An **Exceeded** label will also display in the **Timely Filing** column.
- **Claims in purple text** – The claim is past due and has been marked for review. Past due claims marked for review that have also exceeded the timely filing limit will display in **red text** as indicated above.

Filtering Timely Filing in Claims Searches

In **Claims Console**, users can search for only those claims that have a Timely Filing alert attached to them by selecting (checking) the **Timely Filing Alerts Only** checkbox in the search section of the **Claims Management** screen.

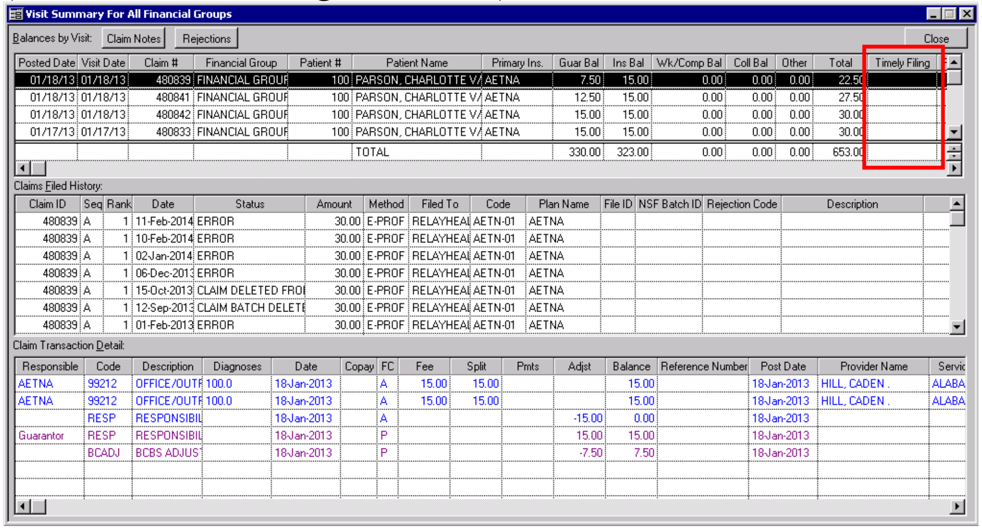


A **Timely Filing** column has been added to the search results grid that displays the number of days in which the timely filing limit will be reached; an **Exceeded** label indicates that the limit has passed.

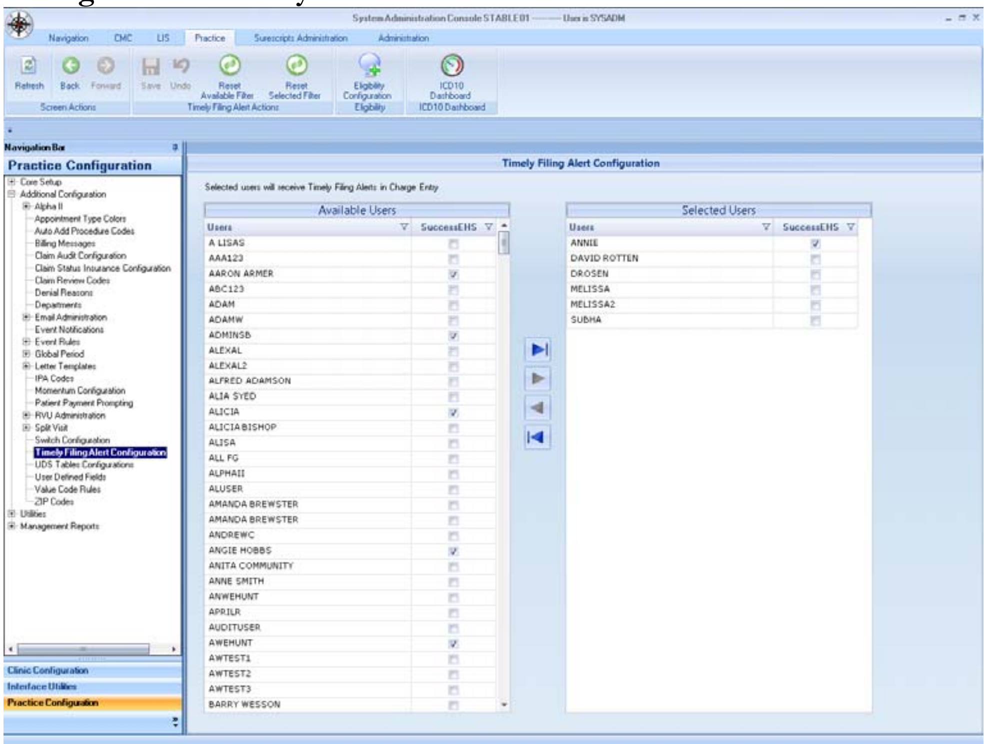


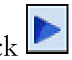
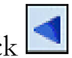
Timely Filing in Other Modules

- **Inquiry** – A **Timely Filing** column has been added to the **Balances By Visit** grid in **Inquiry** that displays the number of days in which the timely filing limit will be reached (similar to **Claims Management** above).



- **Charge Entry alerts** – Users with System Administration access can configure timely filing alerts to display for individual users in **Charge Entry** via the **Timely Filing Alerts Configuration** screen in the **Additional Configuration** section under **Practice Configuration** in the **System Administration Console**.



Users may select the appropriate user IDs in the **Available Users** column and click  to move them to the **Selected Users** column. To remove one or more users, select the users in the **Selected Users** column and click  to return it to the **Available Users** column.

Selected users will receive timely filing alerts in **Charge Entry** when a claim exceeds the timely filing limit.

HIE Consent Configuration, Restrictions for Syndromic Surveillance Outgoing Messages

Project #EHS-20347, EHS-20349

Restrictions are now in effect for all outgoing messages sent regarding syndromic surveillance.

- **Consent-based restrictions** – Only patients with a signed HIE consent form (via the **Privacy/Consent Information** window in **Patient Administration**) will have syndromic surveillance messages sent when the ESB is submitted and the applicable financial group is configured (via the **HIE Consent Configuration** screen in the **System Administration Console**) to send data to the applicable HIE. If patient consent is not present and/or the financial group is not configured appropriately, no data will be sent.
- **Financial group restrictions** – In addition, messages are also subject to financial group restrictions. If Financial Group A is configured to send messages to State X, then only messages generated for patients checked in to Group A will be sent. Messages will not be sent to State X from any other financial group.