Greenway SuccessEHS / Version 8.20

SuccessEHS Release Notes 8.20

Confidential

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Revision History

11/15/16

- Original draft.

12/29/16

- Updated **New Health Concerns/Goals Window** (Project #B-50454, B-49084, B-49616, B-50195)
- Removed **Medcin Family History Codes Now Feed to Chart/ESB** (Project #B-50192); this feature was addressed by an update from Medicomp.

All Modules

2017 ICD10 Codes Uploaded

Project #B-49394

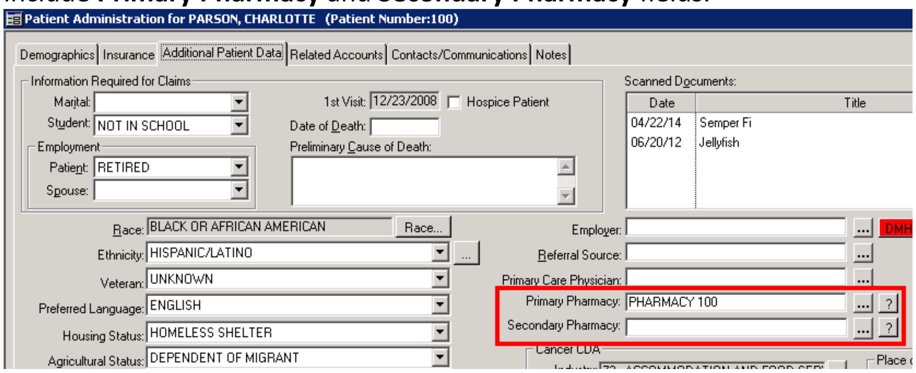
The updated ICD10 code list for 2017 has been uploaded to the system.

New Primary/Secondary Pharmacy Options

Project #B-49611

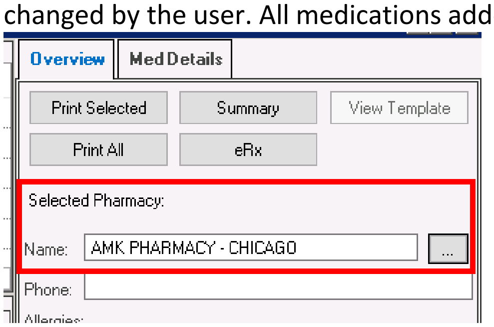
Users may now enter and save primary and secondary pharmacy information for patients.

- **Patient Administration** – The **Pharmacy** field on the **Additional Patient Data** tab has been updated to include **Primary Pharmacy** and **Secondary Pharmacy** fields.

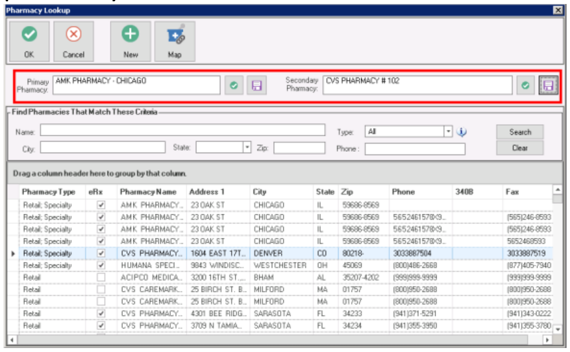


  Users may search for and select primary and secondary pharmacy information as per normal.

- **Medications**
  - **Selected Pharmacy** – The **Default Pharmacy** field on the **Overview** tab in **Med Details** has been renamed **Selected Pharmacy**. The default (i.e., primary) pharmacy will display in this field unless changed by the user. All medications added to the patient's record will use the selected pharmacy.

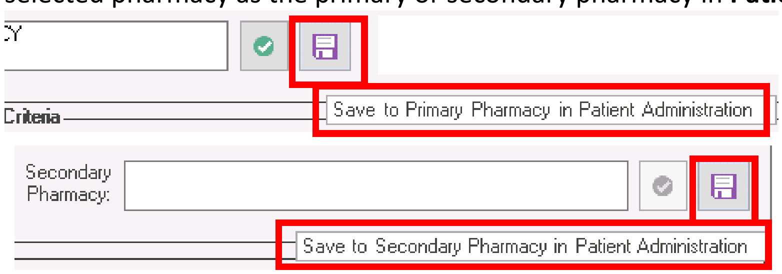


  - **Pharmacy Lookup** – **Primary Pharmacy** and **Secondary Pharmacy** fields have been added to the main **Pharmacy Lookup** dialog box to enable users to select and save primary and secondary pharmacy information.

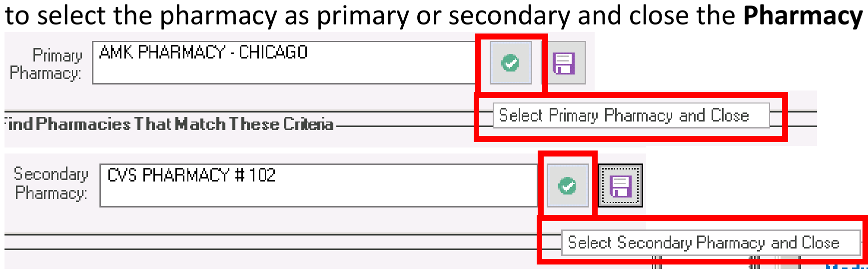


To save pharmacy information:

- Search for the appropriate pharmacy.
- Single-click the appropriate record row in the main grid.
- Click the save button in either the **Primary Pharmacy** or **Secondary Pharmacy** field to save the selected pharmacy as the primary or secondary pharmacy in **Patient Administration**.



- Click the green checkmark button in either the **Primary Pharmacy** or **Secondary Pharmacy** field to select the pharmacy as primary or secondary and close the **Pharmacy Lookup** dialog box.



Note - Pharmacy information must be set before medications are prescribed on the encounter in order to associate the pharmacy with any meds added to the visit. If the pharmacy is updated AFTER the medications are added and the intent was to have that pharmacy apply to all meds on the encounter, use the “Update all medications on this encounter” checkbox to apply the pharmacy to those medications. This checkbox can be found on the Overview tab on the Prescribe Medications screen.

Care Plan

Changes to Column Display for Encounter View Plans

Project #B-49800

Encounter View care plans have been updated to enable users to view plans without unnecessary blank rows.

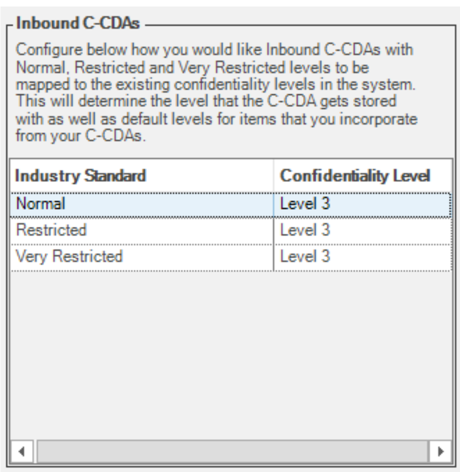
- Only columns that have **at least one data point in a given encounter column** will display.
- Columns/encounter dates with blank data in the care plan template will be hidden from view. In other words, even though certain data might exist on an encounter, it will not display if it does not populate the appropriate columns/fields in the care plan template.

Chart

Changes to CCDA Confidentiality Levels

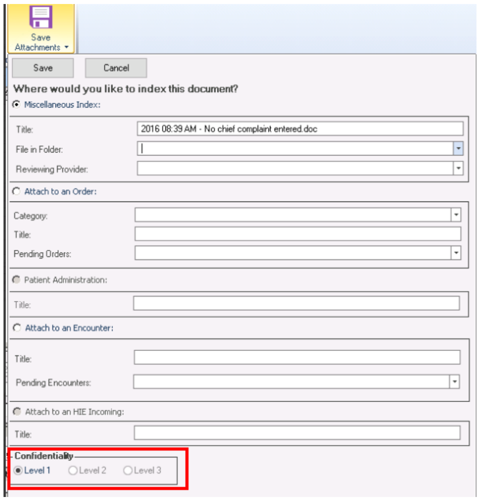
Project #B-48481

Inbound C-CDA documents received via the **Medical Messages** and **Direct Messages** screens may now be restricted from users based on the documents' confidentiality levels.



- If the **Confidentiality Level** configured in the **Inbound C-CDAs** table on the **Confidentiality Level Mapping** screen under **CCD Options** in **Interface Utilities** is higher than the user's confidentiality level, the user will not be able to view any C-CDA attachments with the higher level. A **Confidential Information Exists** indicator will display indicating that the information is restricted.

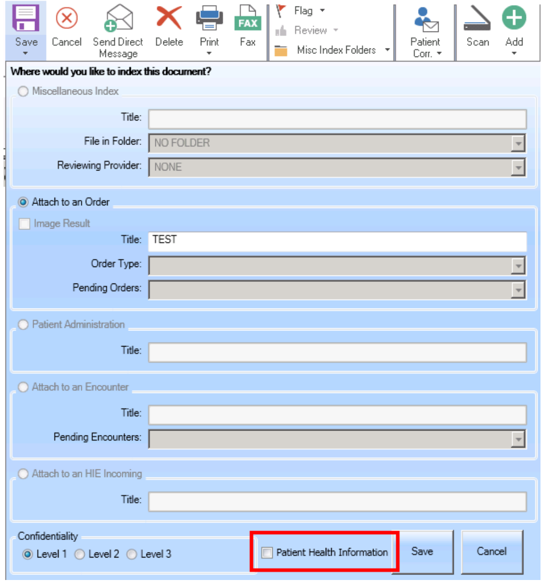
- When the user saves an inbound document, the **Confidentiality** level will automatically be selected on the **Save Attachments** screen based on the document's incoming confidentiality level.



Documents Tab, PHI Checkbox Added to Save Attachments Window

Project #B-50120

A **Patient Health Information** checkbox has been added to the **Save Attachments** window on the **Documents** tab in **Chart**.



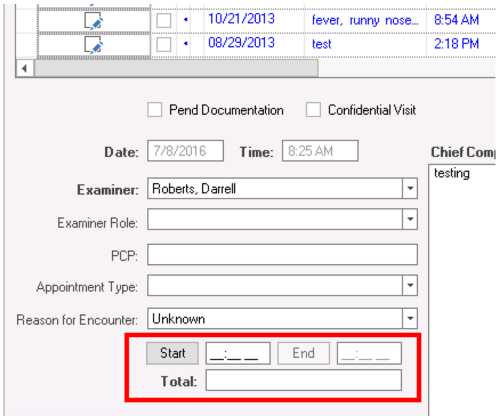
Enabling (checking) this checkbox will indicate that the attachment to be saved contains patient health information. When the attachment is subsequently accessed, the checkbox will automatically be enabled.

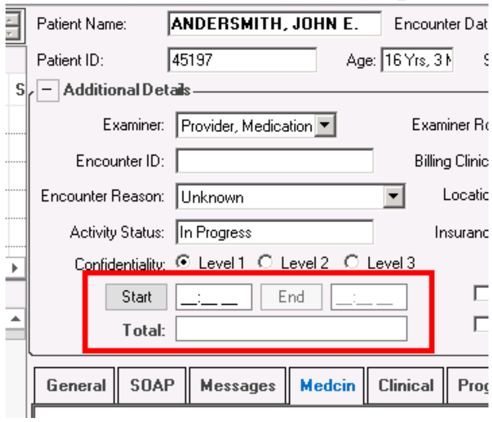
This checkbox will automatically be enabled when the window is accessed from the **Message Attachment Viewer**.

Encounters Tab, Start/End Time Fields Added

Project #B-48582

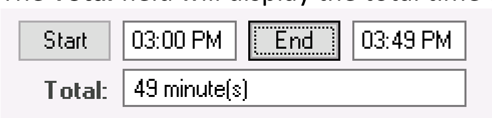
Start and **End** time fields have been added to the **Encounters** tab in **Chart** and the **Additional Details** section of all **Encounter Detail** screens that enable users to record the start and end times for an encounter.



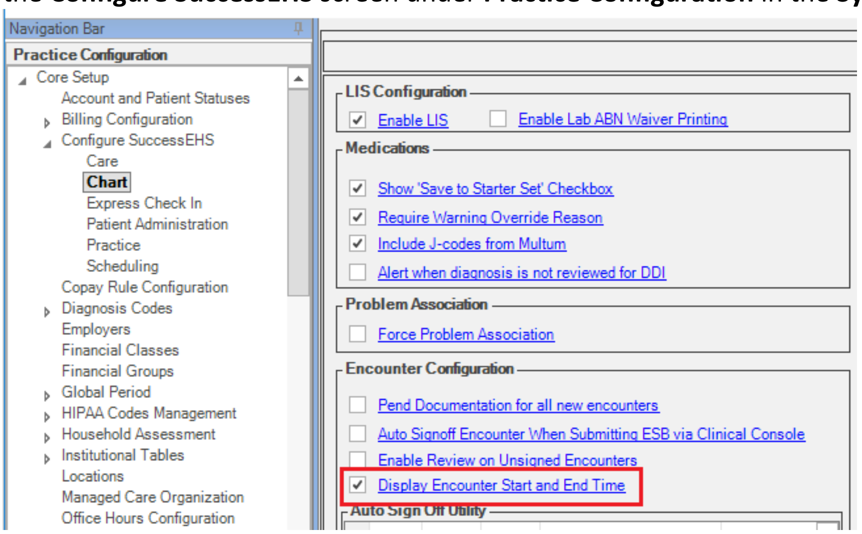


Users may enter the appropriate start/end times in HH:MM format. To enter the current time, click the **Start** or **End** button to populate the appropriate field with the current time.

The **Total** field will display the total time of the encounter in minutes.



This function is enabled by selecting (checking) the **Display Encounter Start and End Time** in the **Chart** section of the **Configure SuccessEHS** screen under **Practice Configuration** in the **System Administration Console**.

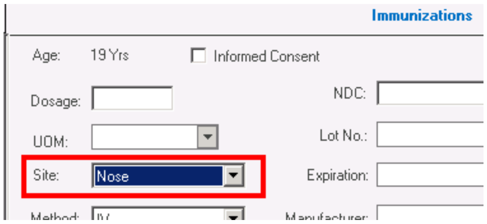


Immunization Modifications

Project #B-50828

The following modification have been made to Immunization orders:

- **Nose** has been added as a selection option in the **Site** drop-down list on the **Immunization Detail** window.



- Immunizations ordered from the **Code Selector** while in Historical mode will default both the **Ordering Clinician** and **Administered By** fields to **Outside Provider**.

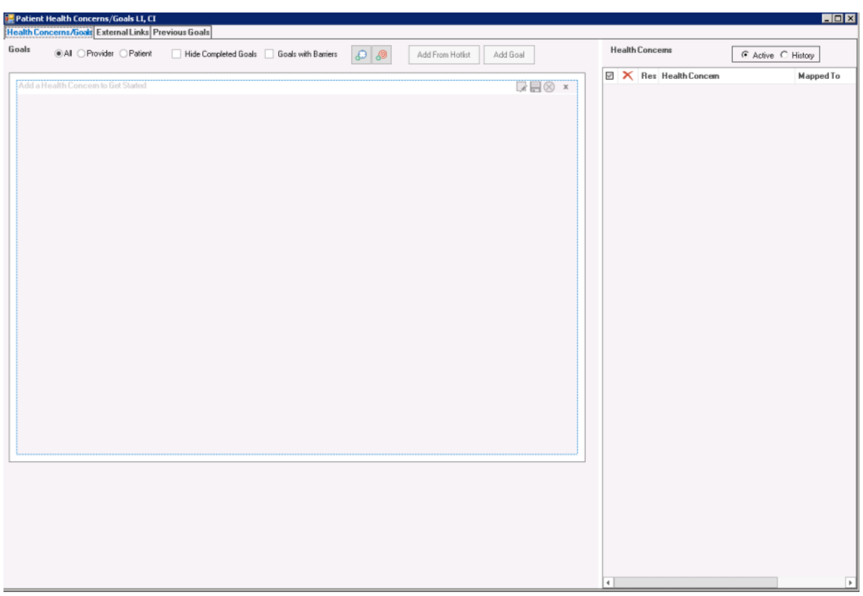
New Health Concerns/Goals Window

Project #B-50454, B-49084, B-49616, B-50195

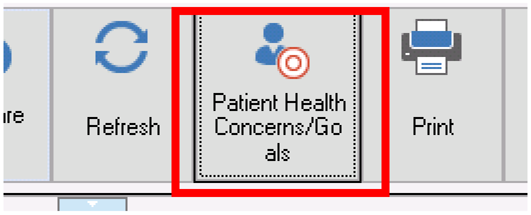
Users may now record health concerns, goals, and interventions on the patient **Care Plan** to meet Meaningful Use Stage 3 compliance.

A **Patient Health Concerns/Goals** icon has been added to the **Chart** menu ribbon that enables users to manage patient health concerns, goals, and outcomes for Meaningful Use Stage 3 compliance.

This icon can be added to the **Quick Access Toolbar**. Users may launch the **Patient Health Concerns/Goals** window if a patient has been selected.

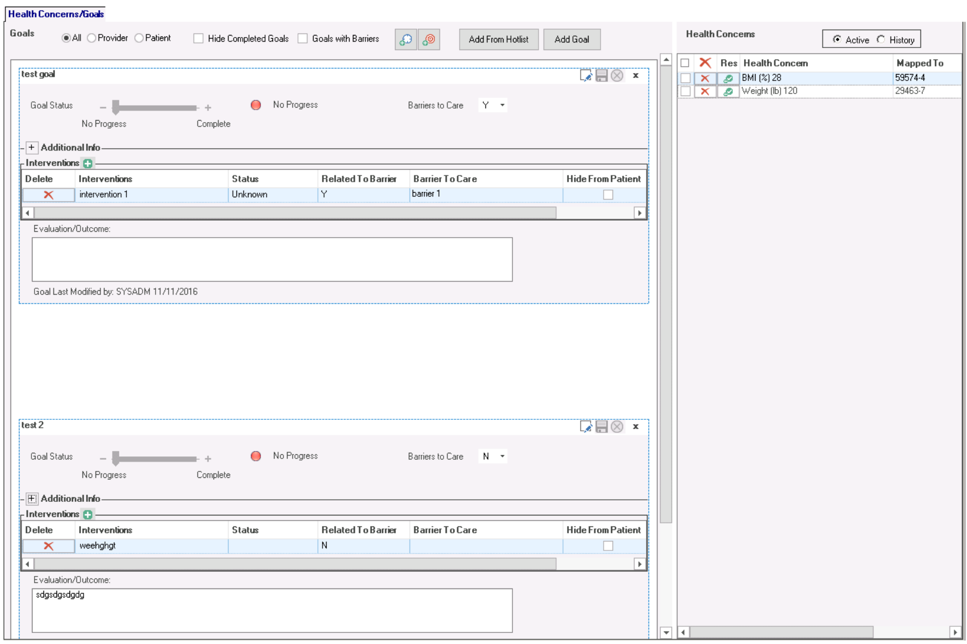


The icon has also been added within the **Care Plan** screen to replace the previous **Goals/Instructions** window in the Care Plan.



The **Patient Health Concerns/Goals** window contains three tabs: **Health Concerns/Goals, External Links,** and **Previous Goals**.

Health Concerns/Goals Tab



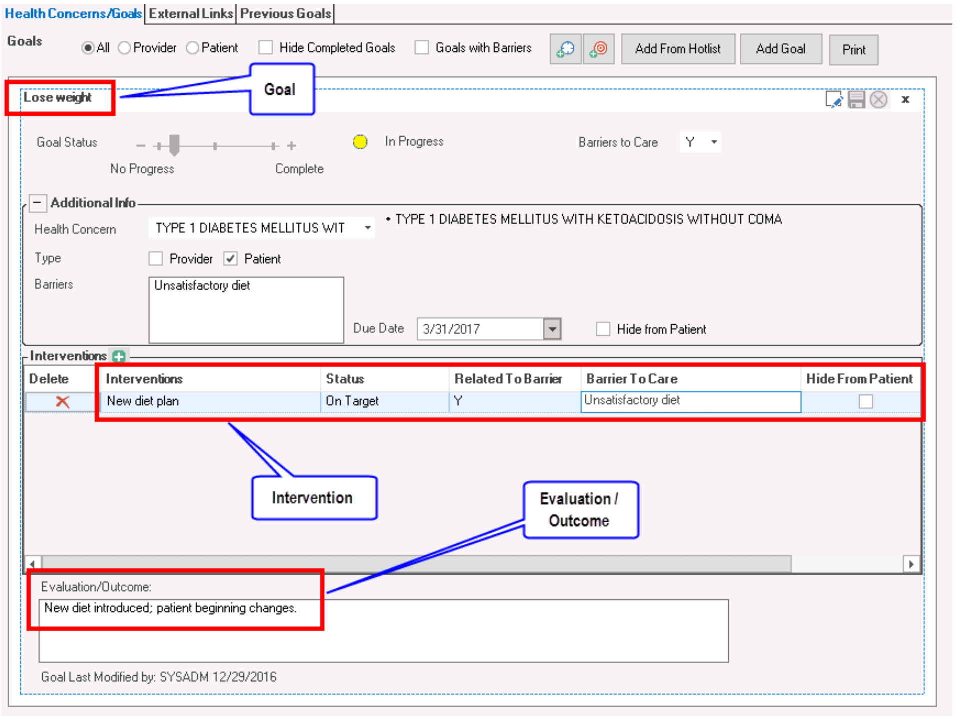
The **Health Concerns/Goals** tab enables users to record health concerns, goals, and interventions for a selected patient

UNDERSTANDING THE HEALTH CONCERNS TAB

Health concerns are created from specific problems recorded in the patient record (e.g., diabetes), a specific vital sign recorded in the patient's record (e.g., blood pressure 160/90), or from a specific Medcin finding documented within a given encounter note (e.g., Patient showing signs of Anxiety and Depression)

Goals are established (e.g., lose weight) to treat health concerns; as the patient makes progress toward a goal, **evaluations** and **outcomes** may be recorded regarding the goal. A progress indicator enables users to quickly view if the patient has started the goal or completed a given goal.

Interventions are designed (e.g., Adjust calorie intake to no more than 1200 calories per day or Attend tobacco cessation classes) to help the patient achieve a specific goal.



In short, the **Health Concerns/Goals** tab is structured thus:

Health Concern	Created from specific problems, vitals, or findings documented in the patient's record
Goal	Addresses one or more health concerns
	Tracked by evaluations and outcomes
Intervention	Supports/helps patient achieve specific goal

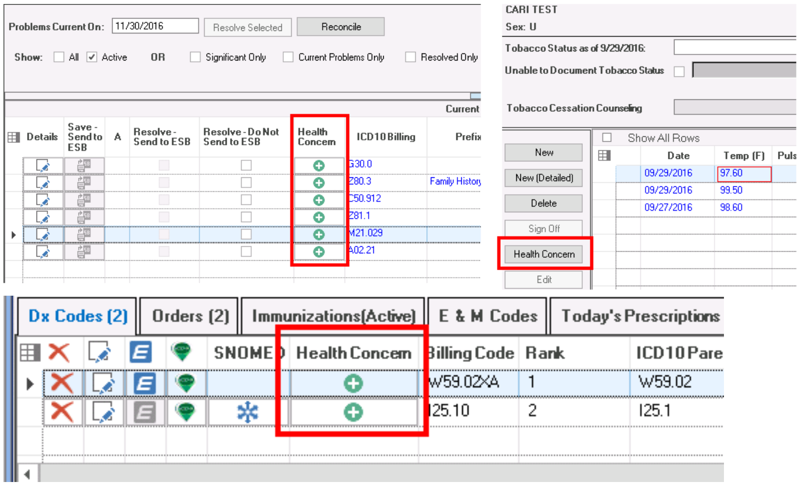
Adding Health Concerns

Health concerns may be added to the patient record from **Chart**, **ESB**, or **Medcin**.

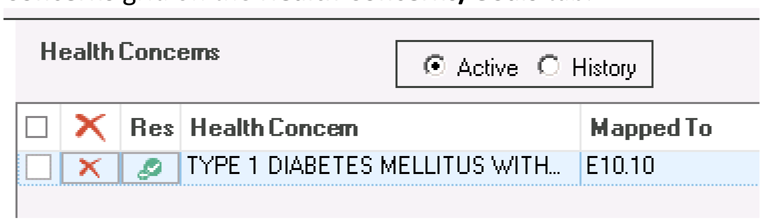
Note - Health concerns cannot be added directly from the Health Concerns/Goals tab. They must be added from the specific modules as outlined below.

ADDING HEALTH CONCERNS FROM CHART/ESB

A **Health Concern** button has been added to the **Problems** and **Vitals** tabs in **Chart** and the **Dx Codes** tab on the **Selected Items** table in the **eSuperbill**.

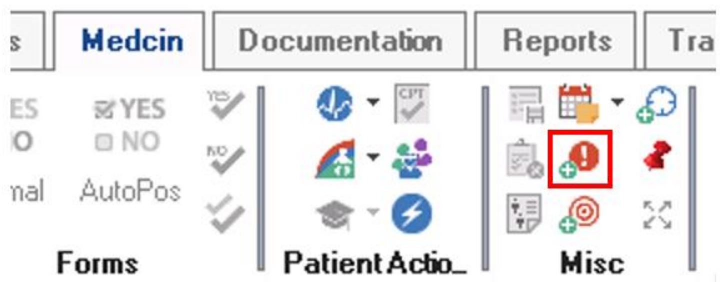


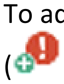
Clicking the **Health Concern** button for a specific problem or vitals measurement will add that item to the **Health Concerns** grid on the **Health Concerns/Goals** tab.



ADDING HEALTH CONCERNS FROM MEDCIN

Users may record Medcin findings as health concerns directly from the Medcin note via the **Add Health Concern** icon in the **Misc** section of the main **Medcin** ribbon.



To add a finding as a health concern, select the appropriate finding and click the **Add Health Concern** icon ().

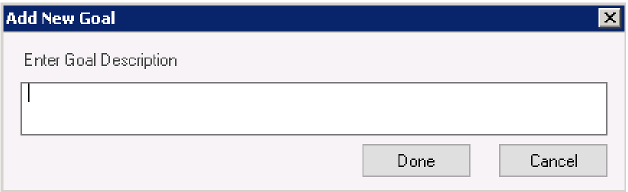
Adding Goals to Health Concerns

Goals may be added to health concerns directly on the **Health Concerns/Goals** tab (manually or from a hotlist) or from Medcin. Below will outline the different ways to document a goal:

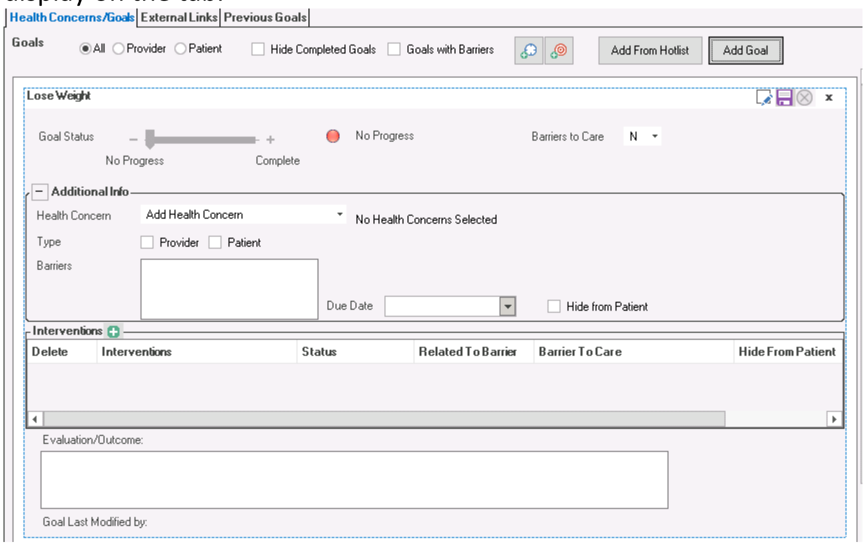
ADDING GOALS MANUALLY FROM THE HEALTH CONCERNS/GOALS TAB

To add goals directly from the **Health Concerns/Goals** tab:

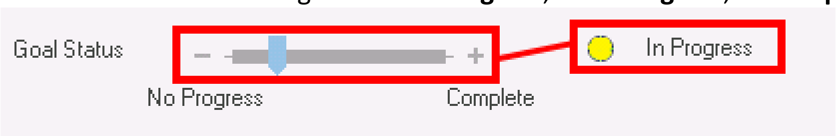
1. Click **Add Goal** on the **Health Concerns** tab. An **Add New Goal** dialog box displays.



2. Enter a description for the goal in the **Enter Goal Description** field and click **Done**. A blank goal card will display on the tab.

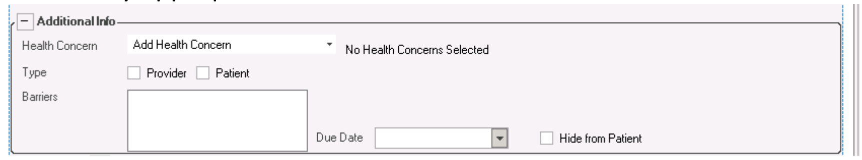


3. Record the current **Goal Status** by moving the slider along the status counter. As the slider is moved, the status indicator will change from **No Progress**, to **In Progress**, to **Complete**.

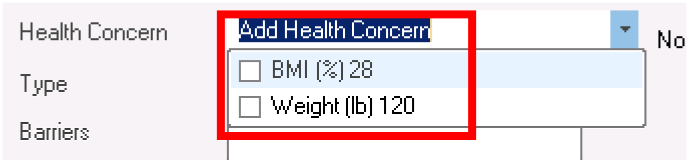


4. Record the presence of barriers to care by selecting **Y** or **N** from the **Barriers to Care** drop-down list.

5. Record any appropriate **Additional Info** in the section:



- Select (check) the checkbox for one or more health concerns to associate to the goal from the **Health Concern** drop-down list.



The selected health concerns will populate.

Note - Goals MUST be linked to health concerns before they can be saved.

- Select (check) the type of goal (**Provider** or **Patient**) in the appropriate **Type** checkbox.
- If **Y** was selected in the **Barriers to Care** drop-down list, enter the appropriate barriers to care in the **Barriers** field. If the barriers have a timed due date for resolution, enter the date in the **Due Date** drop-down list.
- Select (check) the **Hide from Patient** checkbox to hide the information from the patient's care plan information.

Note - The Hide from Patient checkbox will be significant in the SuccessEHS v9.0 release, when users may print the Care Plan in a CCDA format to give to the patient.

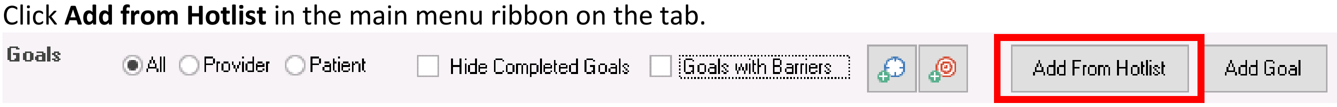
6. Enter any appropriate information for the intervention in the **Evaluation/Outcome** field.
7. Click the **Save** button ( ) to save your changes. Click the **Cancel** button ( ) to cancel any input.
8. To edit information for a care plan goal, click the **Edit** button ( ) for the appropriate goal. Make the desired changes and click **Save**.

ADDING GOALS FROM THE HOT LIST

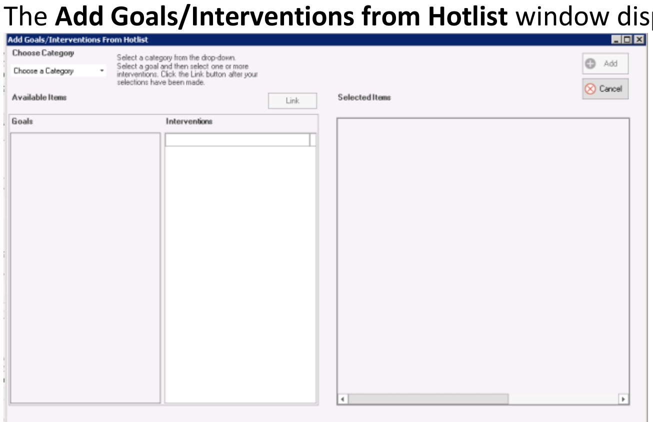
Note - Hot lists are configured in System Administration and allow users to pre-build goals and interventions as well as link them to health concerns to speed up the users' workflow.

To add a goal from the Hot List:

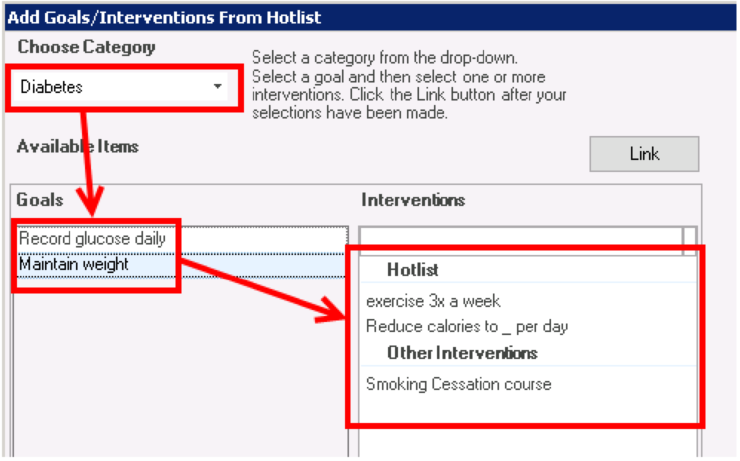
1. Click **Add from Hotlist** in the main menu ribbon on the tab.



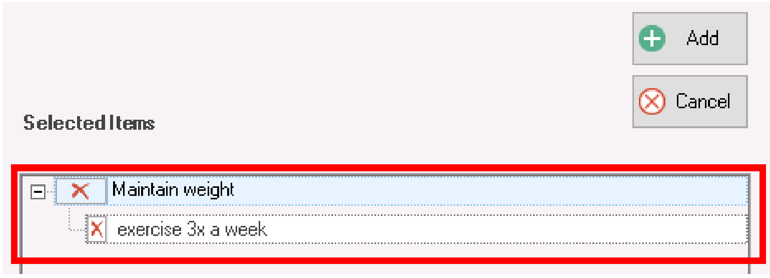
The **Add Goals/Interventions from Hotlist** window displays.



2. **Choose a Category** for the goal/intervention from the drop-down list.
3. Select the appropriate goal from the **Goals** list. Associated **Interventions** display.



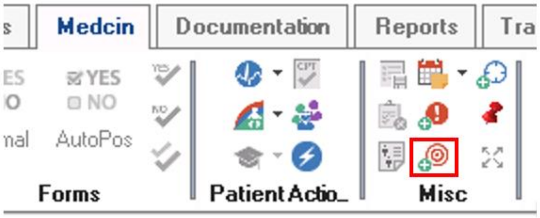
4. Select the appropriate intervention and click **Link**. The intervention will display in the **Selected Items** table.



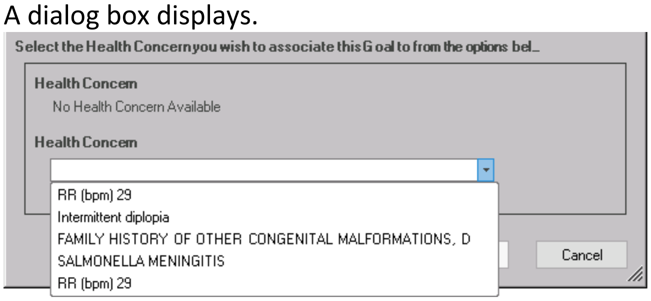
5. Select the appropriate intervention(s) and click **Add** to add them to the main **Health Concerns/Goals** tab.
6. Click in the main menu ribbon to import all goals to the Medcin note.

ADDING GOALS FROM MEDCIN

1. To add a Medcin finding as a goal, select the appropriate finding and click the **Add Goal** icon ( ) in the Medcin ribbon.



A dialog box displays.



2. Select the health concern to associate the medication intervention to from the **Health Concern** drop-down list and click **OK**. The goal will be added to the patient's Care Plan with the associated health concern.

Note - Goals MUST be linked to health concerns before they can be added to a Care Plan.

If a goal is added from Medcin, the user will select the Health Concern from the drop-down list.

If a goal is added directly on the Health Concerns/Goals tab in the Care Plan, the user will select the health concern directly within the specific goal section.

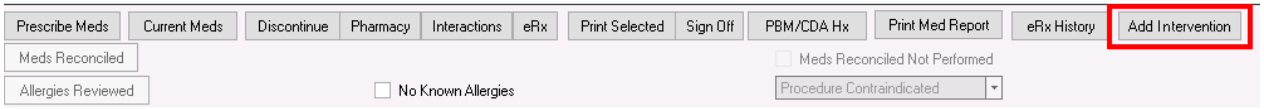
Goals added from the Hot List may be pre-linked to a specific health concern.

Adding Interventions

Interventions supporting goals may be added from **Medications**, **Medcin**, or directly from the **Health Concerns/Goals** tab.

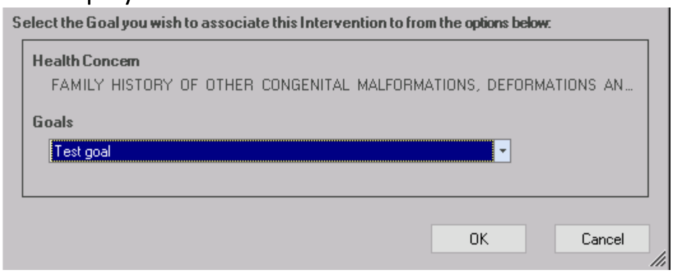
ADDING INTERVENTIONS FROM MEDICATIONS

An **Add Intervention** button has been added to the main menu ribbon on the **Medication Summary** window.



To add a medication intervention:

1. Select the appropriate medication in the **Active Meds** tab and click the **Add Intervention** button. A dialog box displays.

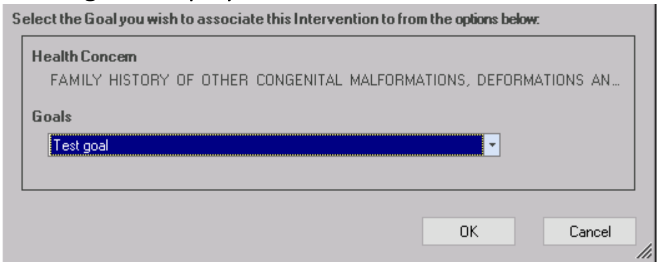


2. Select the goal to associate the medication intervention to from the **Goals** drop-down list and click **OK**. The intervention will be added to the patient's Care Plan.

ADDING INTERVENTIONS FROM MEDCIN

1. To add a Medcin finding as an intervention, select the appropriate finding and click the **Add Intervention** icon on the **Medcin** menu ribbon ( ).

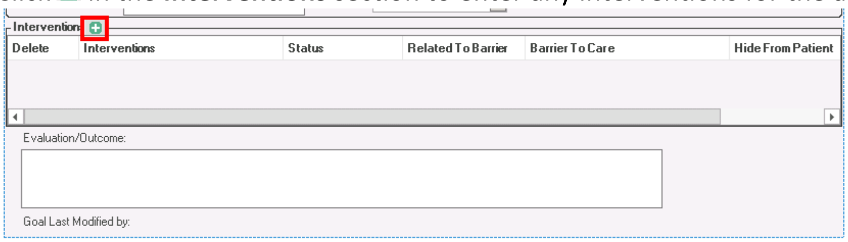
A dialog box displays.



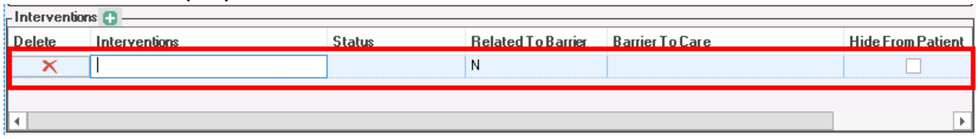
2. Select the goal to associate the medication intervention to from the **Goals** drop-down list and click **OK**. The intervention will be added to the **Interventions** list under the selected goal on the main **Health Concerns/Goals** window.

ADDING INTERVENTIONS MANUALLY FROM THE HEALTH CONCERNS/GOALS TAB

1. Click in the **Interventions** section to enter any interventions for the appropriate goal.



A blank row displays in the table.

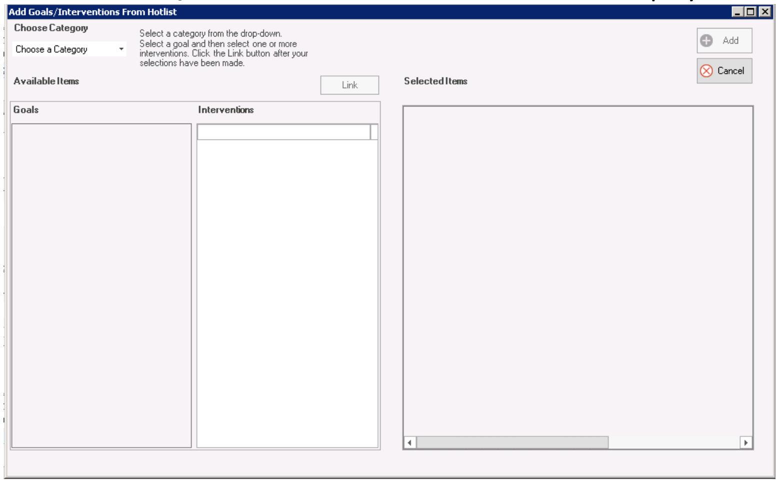


- Enter a description for the intervention in the **Interventions** column.
- Select the appropriate **Status** for the intervention from the drop-down menu. Statuses include **Unknown, Accomplished Goal, On Target, Improving,** and **Goal Not Met**.
- Select **Y** from the **Related to Barrier** drop-down list if the intervention is related to a barrier to care.
  – Enter the description of the **Barrier to Care**.
- Select (check) the **Hide from Patient** checkbox to hide the information from the patient's care plan information.

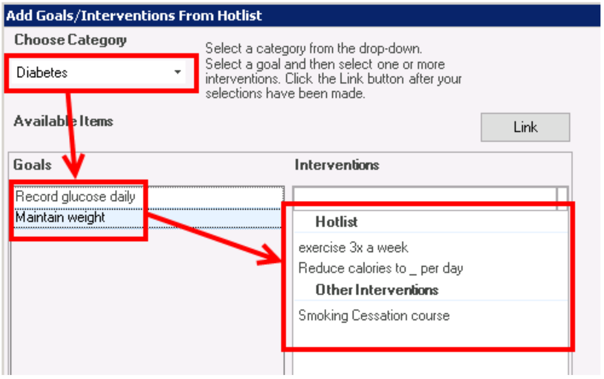
ADDING INTERVENTIONS FROM THE HOT LIST

1. Click **Add from Hotlist** in the main menu ribbon on the tab.

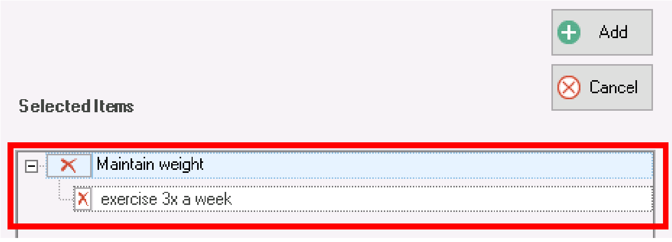
The **Add Goals/Interventions from Hotlist** window displays.



2. **Choose a Category** for the goal/intervention from the drop-down list.
3. Select the appropriate goal from the **Goals** list. Associated **Interventions** display.



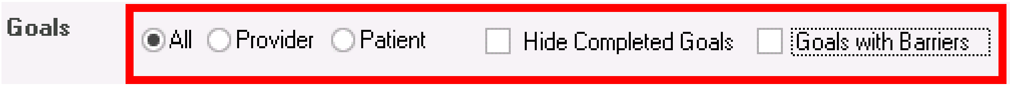
4. Select the appropriate intervention and click **Link**. The intervention will display in the **Selected Items** table.



5. Select the appropriate intervention(s) and click **Add** to add them to the main **Health Concerns/Goals** tab.
6. Click  in the main menu ribbon to import all interventions to the Medcin note.

Filtering the View on the Health Concerns/Goals Tab

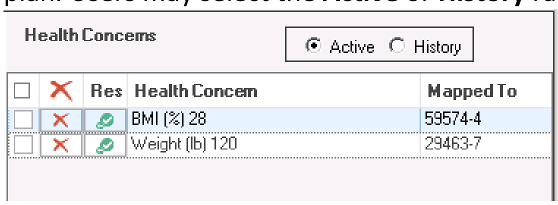
You may filter the view on the **Health Concerns/Goals** tab:

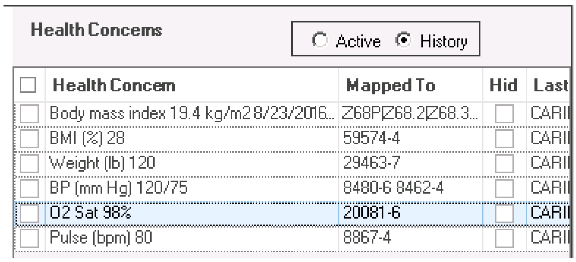


- Select the **All, Provider,** or **Patient** radio button to view the appropriate goal types.
- Select **Hide Completed Goals** to remove all completed goals from the tab.
- Select **Goals with Barriers** to view only those goals that contain barriers to care.

Active/Historical Health Concerns

The **Health Concerns** tables provide displays of all active and historical health concerns recorded in the care plan. Users may select the **Active** or **History** radio button to view active and historical concerns respectively.





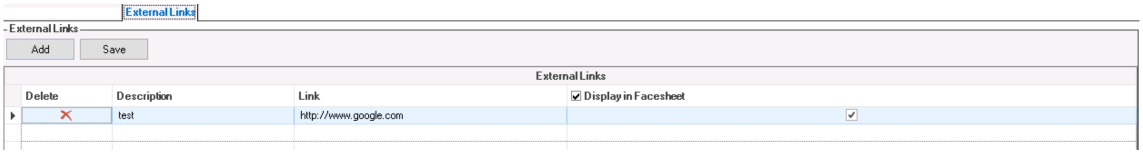
The following information is available for viewing:

- **Checkbox** – Enables the user to filter the view to goals/interventions tied to the selected health concern. Checking the box will only show goal cards that are tied to that health concern. Unchecking the item will bring back all items.
- **Delete** (Active only) – Click the **Delete** button to delete the health concern and any goals associated to the health concern.
- **Resolved** (Active only) – Click the **Resolved** button to resolve the health concern and remove it from the associated goal.

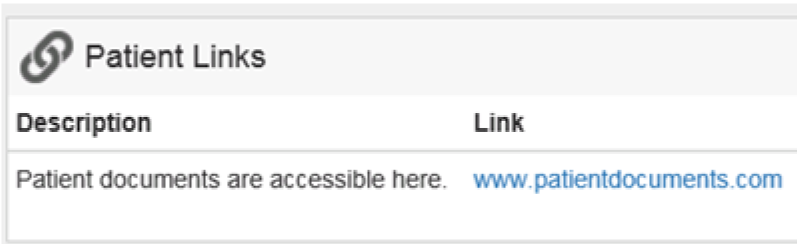
Note - If the health concern is resolved and all goals/interventions associated to it are ONLY associated to that health concern, the health concerns/goals/interventions will all be moved to historical. If there are goals that are shared between other health concerns, the goals/interventions will remain active until those health concerns are also marked resolved.

- **Health Concern** – Displays the name of the health concern.
- **Mapped To** – Displays the LOINC code associated to the health concern.
- **Hide from Patient** – Select (check) this checkbox to hide the health concern information from patient view.
- **Last Modified** – Displays the username and date the health concern was last modified.

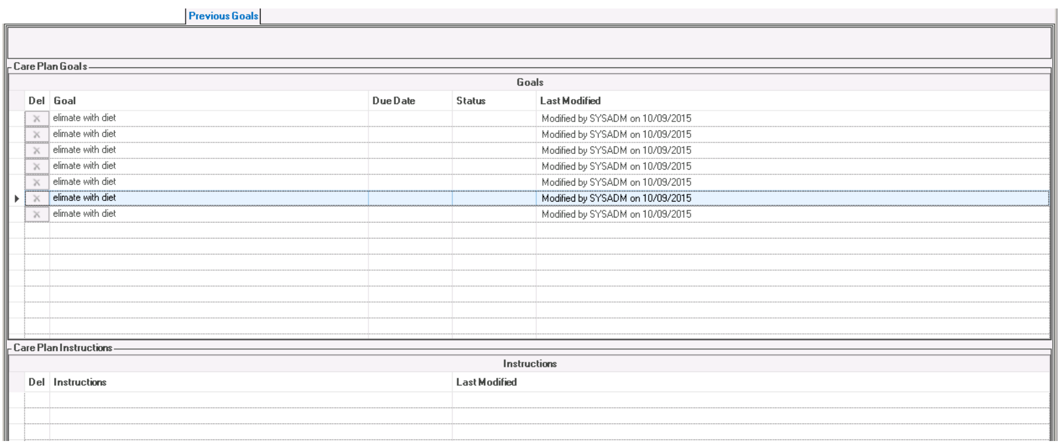
External Links



The **External Links** tab contains all external links to patient goals and health concerns. Users may add external links to patient goals, which can be configured to display in the **Patient Links** section on the **Facesheet** tab in **Chart**.



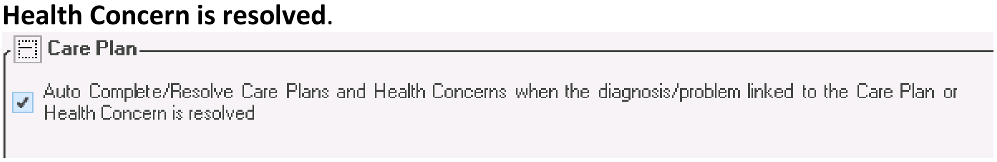
Previous Goals



The **Previous Goals** tab maintains a history of care plan goals and instructions.

User Preferences Updated

The user preference in the **Care Plan** section of **Clinical Console User Preferences** has been renamed **Auto Complete/Resolve Care Plans and Health Concerns when the diagnosis/problem linked to the Care Plan or Health Concern is resolved**.



If this preference is enabled, when a user resolves a problem or diagnosis code that is linked to a Health Concern for a given patient, the Health Concern will also be “resolved” in the Care Plan and reside in the historical view.

Order Detail, Consult Details View Optimized

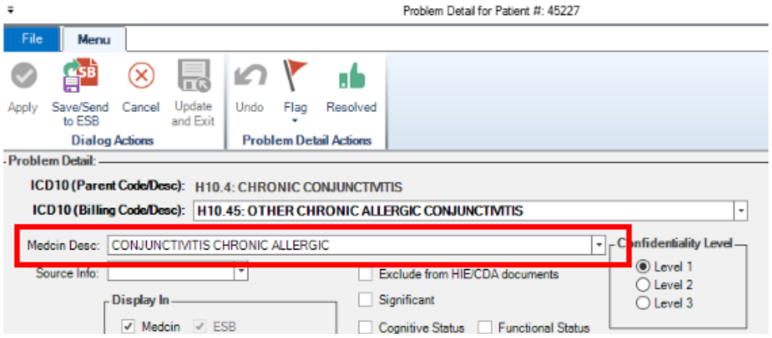
Project #B-52351

The text in the view-only **Consult Details** section on the **Order Detail** screen has been optimized for better contrast and on-screen readability.

Problems Tab, Medcin Description Field Expanded on Problem Detail Screen

Project #B-49593

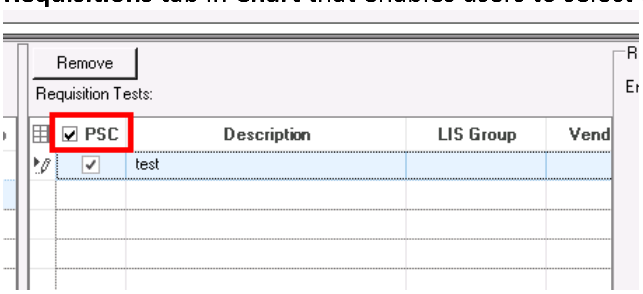
The **Medcin Description** drop-down list on all **Problem Detail** screens has been expanded to enable users to view the complete Medcin description for all selections.



Requisitions Tab, Select/Deselect All Checkbox Added to PSC Column

Project #B-49796

A **Select/Deselect All** checkbox has been added to the **PSC** column header in the **Requisition Tests** section of the **Requisitions** tab in **Chart** that enables users to select or deselect all requisitions to enable the PSC hold option.



Claims Console

BCBS AL Clients Updated from FTP to SFTP

Project #B-49355

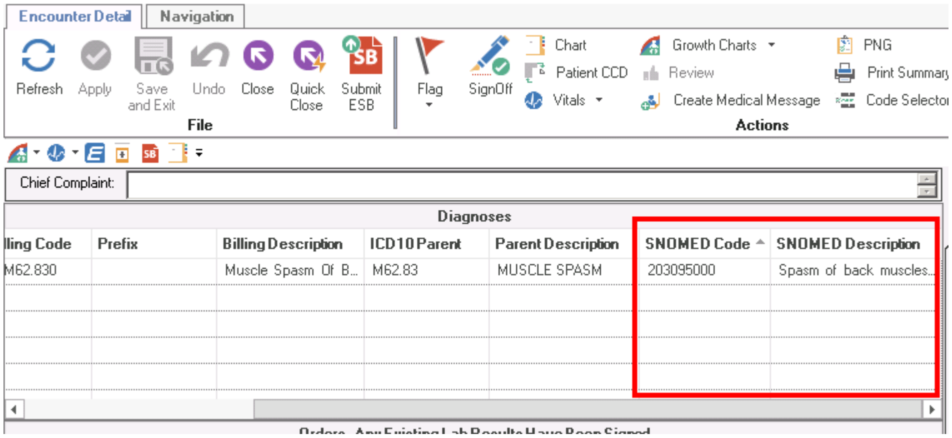
Blue Cross Blue Shield clients in Alabama will now submit claims via SFTP as opposed to the FTP.

Clinical Console

Encounter Detail, SNOMED Code/Description Columns Added

Project #B-50148

SNOMED Code and **SNOMED Description** columns have been added to the **Diagnoses** grid on the **Encounter Detail** screen.



These columns will display the SNOMED code and description respectively associated to the specific problem.

ExitCare Q3 2016 Updates

Project #B-50692

The ExitCare updates for Q3 2016 have been completed.

Medication Requests, EPCS Configured for Change Requests

Project #B-49784

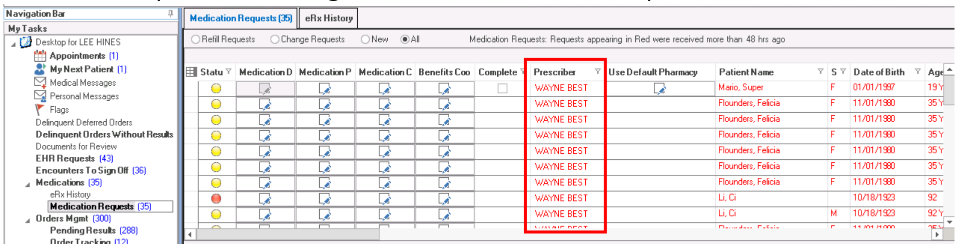
EPCS prescription are now available for change requests on the **Medication Requests** screen.

- EPCS prescriptions may be **Accepted** or **Accepted with Changes** if the prescriber on the original request is configured for EPCS.
- **Accepted/Accepted with Change**s responses will be sent through the DrFirst website for digital signature. Denied EPCS change request will be sent directly to Surescripts as per normal.

Medication Requests, New Prescriber Column

Project #B-49670

A **Prescriber** column has been added to the **Medication Requests** screen in Clinical Console that displays the name of the prescriber assigned to the medication request.

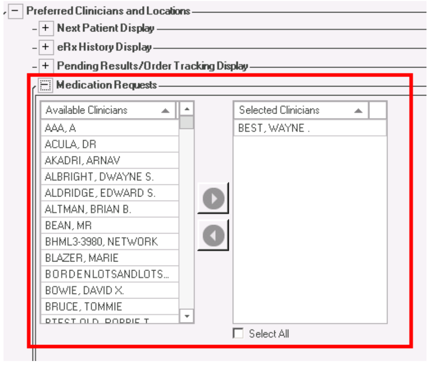


The **Prescriber** column is filterable; users may click the filter icon in the column header to display only certain providers in order to work the filtered providers' requests.

- If a user responds to a request for a provider different than their associated provider, the request will be removed from the original provider's list and added to the respondent's provider's list.

  Example: A medication request is sent to Dr. Smith, who is sharing her view with Dr. Jones. If Dr. Jones responds to the request, it will be removed from both his and Dr. Smith's request list to prevent duplicates.

In addition, a **Medication Requests** section has been added to the **Preferred Clinicians and Locations** screen in **User Preferences** that enables users to select which providers' medication requests they want to view on the main **Medication Requests** screen.



Users may select the appropriate providers in the **Available Clinicians** list and click to move the names to the **Selected Clinicians** list. (To select multiple providers, press the CTRL key on the keyboard and click the appropriate names.) To remove a provider, select the item in the **Selected Clinicians** column and click to return it to the **Available Clinicians** column.

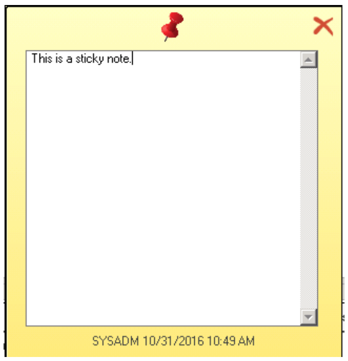
Only providers in the **Selected Clinicians** list will display on the **Medication Requests** screen.

New Sticky Note Function

Project #B-51213

A **Sticky Note** function has been added to the **Chart**, **ESB**, and **Medcin** menu ribbons that enables users to add viewable “sticky notes” to specific patient screens.

Clicking the **Sticky Note** icon on a particular screen displays a blank note. Users may enter appropriate note information (400-character limit) in the main note field. The creating username and date/time will display at the bottom of the note.



Sticky notes will remain on the screen on which they are added until the user clicks the **Delete** icon ( ) to delete the note, even if the user navigates to another screen. Notes may be repositioned on screen by clicking the note header and dragging it to an alternate position. Sticky notes may also be resized via the resizing cursor.

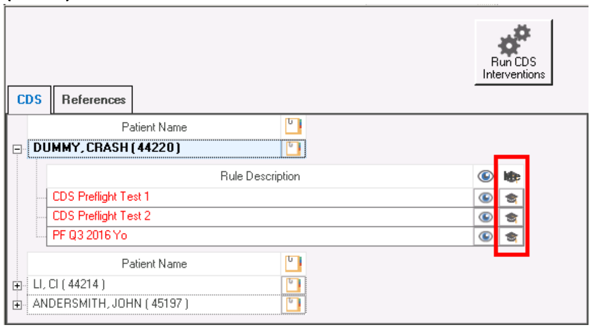
- Within **Chart,** sticky notes are chart-centric, so they will display for all users no matter what user accesses the patient’s chart.
- Within **Chart, ESB,** and **Medcin**, Sticky notes are visit-specific, so they will display for all users no matter what user accesses the visit.
- Within user lists (**Encounters To Sign Off, Orders To Sign Off**, etc.), sticky notes are user-specific and will only display for the user that created the sticky note.

MedLine Plus Patient Education Added to Clinical Decision Support Alerts

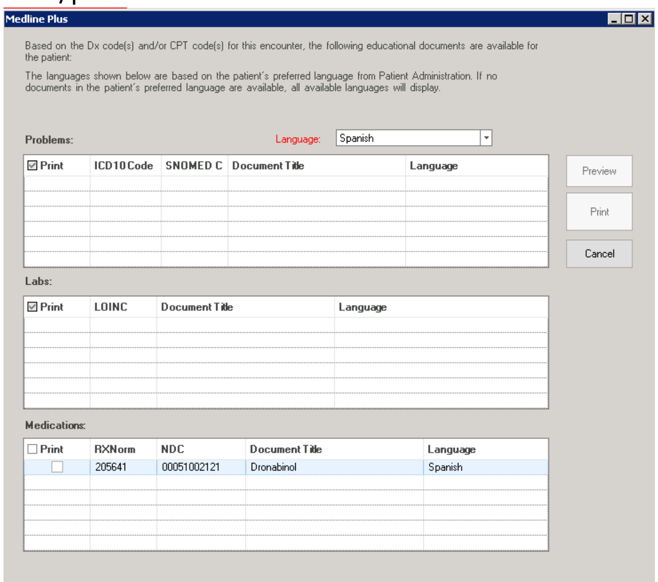
Project #B-50346

MedLine Plus patient education information has been added to the **CDS** tab on the **Clinical Decision Support** dialog box in Clinical Console.

MedLine Plus information may be accessed for a CDS rule by clicking the appropriate patient education icon
().



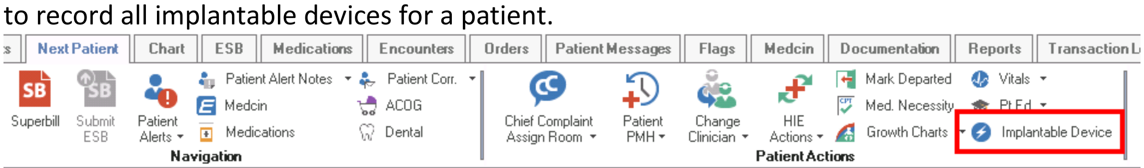
The **MedLine Plus** patient education screen will display with the appropriate patient education information to view/print.



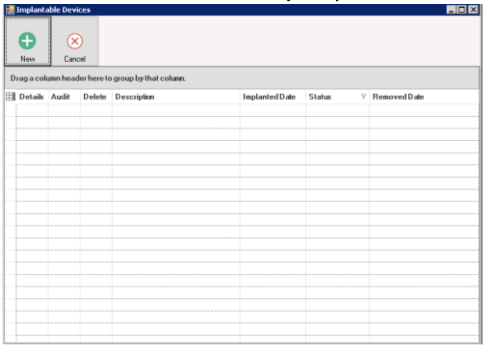
Next Patient, New Implantable Device Functionality

Project #B-48693, B-48729, B-48692, B-50677

An **Implantable Device** window has been added to the **Next Patient** ribbon in Clinical Console that enables users to record all implantable devices for a patient.

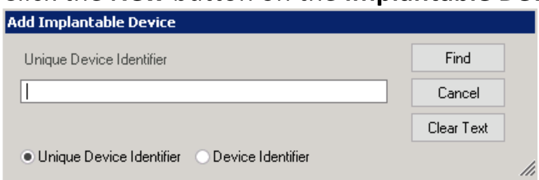


Clicking the **Implantable Device** icon displays an **Implantable Devices** window, where users can add, edit, and view information for any implanted devices in the patient.

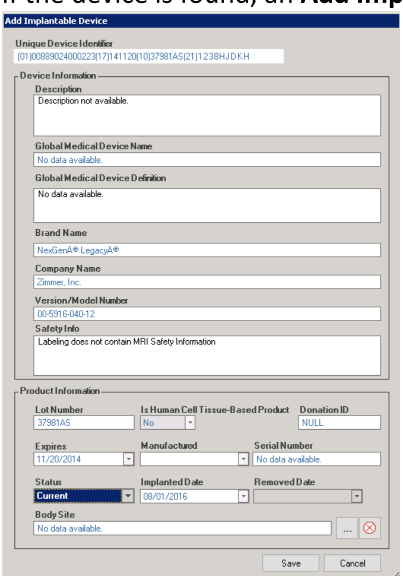


To add an implantable device:

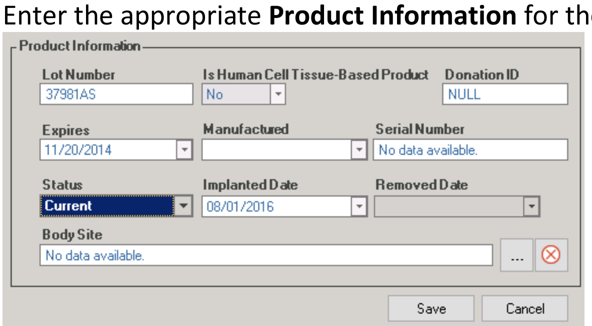
1. Click the **New** button on the **Implantable Devices** window. An **Add Implantable Device** dialog box displays.



2. Enter the **Unique Device Identifier** or Device Identifier (e.g., serial number) for the device and click **Find**.
3. If the device is found, an **Add Implantable Device** window displays with the details of the device.

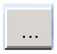


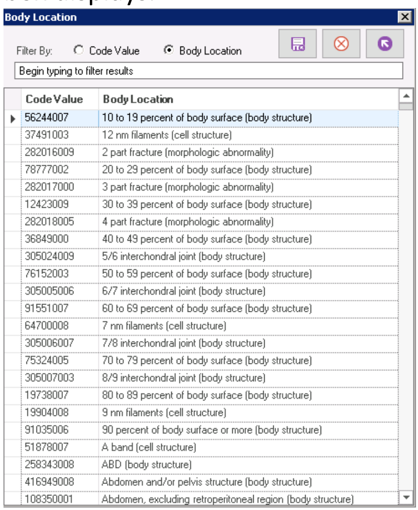
4. Enter the appropriate **Product Information** for the device as needed.



Note - If the user adds an implantable device using the Device Identifier (as opposed to the Unique Device Identifier), the fields under the Product Information section are editable. If the user adds an implantable device using the Unique Device Identifier, many of these fields are filled in automatically and cannot be edited.

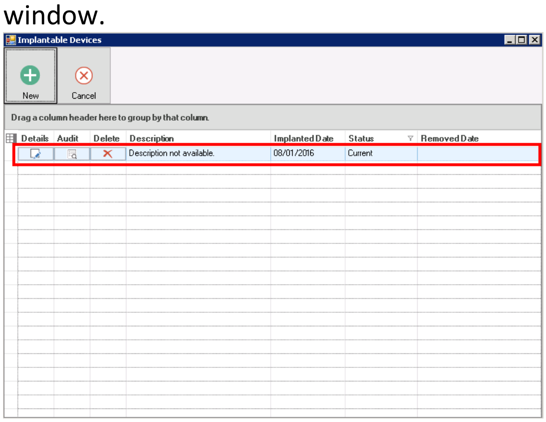
- Select the appropriate **Status** and **Implanted Date** (if necessary) in the **Product Information** section. (The default status is **Current**.)
- Select the appropriate **Removed Date** (if the device has been removed).

  If a **Removed Date** is selected, the **Status** will update to **Historical**.
- Click  in the **Body Site** field to record the site where the device is implanted. A **Body Location** dialog box displays.

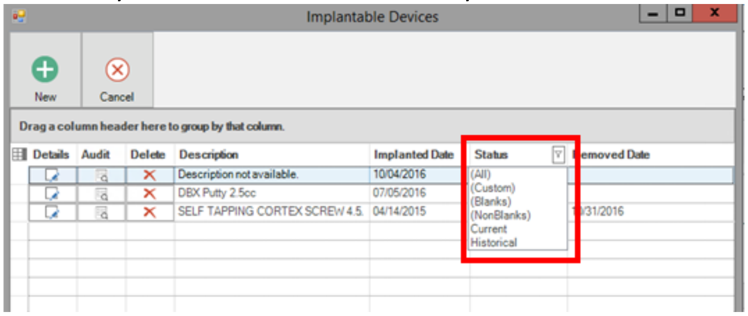
  

  Search for and double-click the appropriate body location or click the **Save** button to record the location.

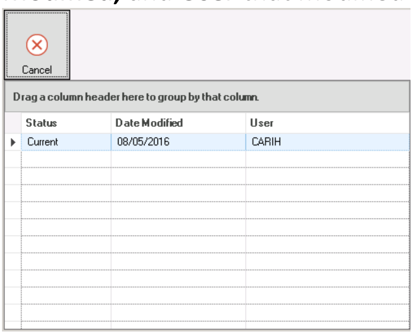
5. Click **Save** to add the device to the patient record. The device will display on the main **Implantable Devices** window.



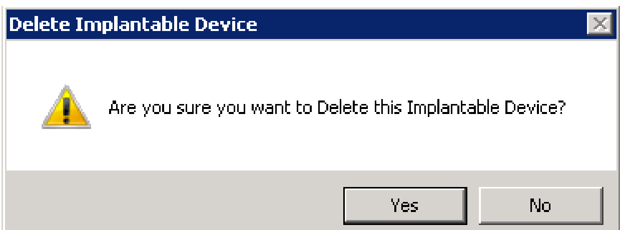
Users may filter the main devices list by the **Status** column.



6. Click the **Details** button to view the details for a device.
7. Click the **Audit** button to view an audit of all actions regarding the implantable device (**Status, Date Modified,** and **User** that modified the device information).

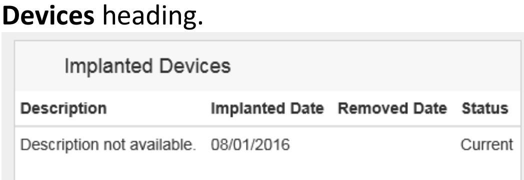


8. Click the **Delete** button to remove the device from the patient record. A confirmation window displays.



Click **OK** to remove the device from the record, or **Cancel** to cancel removal.

Implantable devices in the patient record will display on the **Facesheet** in **Chart** under the (new) **Implanted Devices** heading.



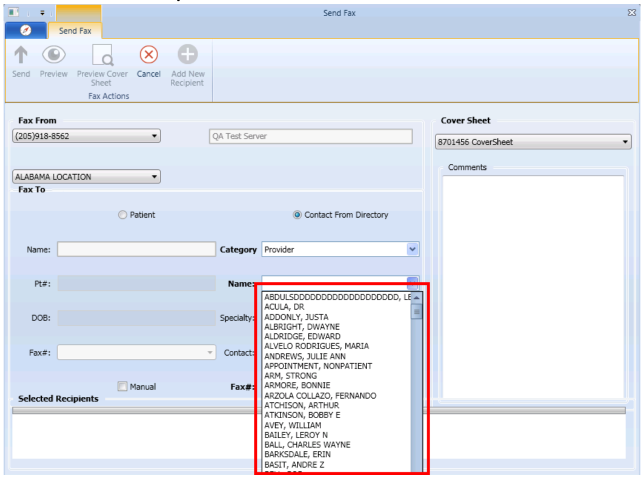
Implanted Devices

Description	Implanted Date	Removed Date	Status
Description not available.	08/01/2016		Current

Reports, New Sort for Provider/Referral Names on Send Fax Window

Project #B-49797

The **Name** drop-down list of the **Send Fax** window now sorts by last name for Provider and Referral categories.



WelchAllyn Software Updated for Windows 2012

Project #B-50113

Updates to driver software for WelchAllyn external devices have been completed for Windows 2012 systems.

Note - WelchAllyn EKG interfaces will not be completed until the end of 2016. Currently, only vitals measurements are available for the EKG device.

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eSuperbill

Problem Ranking Function Optimized

Project #B-49594

The drag-and-drop function for ranking problems on the Visit Summary tab in the eSuperbill has been optimized for better performance.

HIV/AIDS Reporting

Misc Tab, CDC Diagnosis Date Optional With HIV-Positive Status

Project #B-48886

The **CDC Defined AIDS Diagnosis Date** is no longer a required input field when the **HIV/AIDS Status** is set to **HIV-Positive (CDC defined AIDS)** on the **Misc** tab on the **HIV/AIDS Reporting Data Review** window.

Screenings Tab, RSR Reporting Updates

Project #B-48880

The **RSR Report** will display **No** if the user has entered **Unknown** for the following screenings on the **Screenings** tab on the **HIV/AIDS Reporting Data Review** window:

- **Hep B – Tx Immun Ind?** field
  - No will also be reported if the **Tx Immun Ind?** field is left blank if no code exists for the patient and nothing has been manually entered.
- **Syphilis** – **Screened** field
- **Screened for Substance Abuse**
- **Mental Health Screening**

Services Tab, Changes to Service Display

Project #B-48870

The **Services** tab on the **HIV/AIDS Reporting Data Review** window has been updated to reflect the information from the **RSR Report**.

Going forward, only those services that are **mapped and ordered by a mapped provider** will populate on the **Services** tab.

Services Configuration, Services Populate in RSR Per Ordered Date

Project #B-48843

All Ryan White services displayed on the **Services Configuration** screen under **HIV/AIDS Reporting** in **Clinic Configuration** in the **System Administration Console** will now pull to the **RSR Report** based on Ordered Date as opposed to the (previous) Performed Date. Thus, any mapped service with an Ordered Date will pull to the RSR regardless of whether it has a Performed Date.

Interfaces

Care Provider IDs Added to Immunization File for AR/TN Clients

Project #B-49828

The Care Provider ID now populates in the XML file transmitted for immunizations for all AR and TN clients.

Meaningful Use / PQRS / CQM

eCQM Updated Measures for 2016

Project #B-49108, B-49115, B-49077, B-49082, B-49139, B-49140, B-49117, B-49116, B-48637, B-48590, B-48583, B-48589, B-48586, B-48588, B-48591, B-48587, B-48585

The following CQM measures have been updated to be compliant with the 2016 CQM measure specifications:

- eCQM 50 – Closing the Referral Loop: Receipt of Specialist Report
- eCQM 52 – HIV/AIDS: PCP
- eCQM 62 – HIV/AIDS: Medical Visit
- eCQM 68 – Documentation of Current Medications
- eCQM 74 – Primary Caries Prevention Intervention
- eCQM 75 – Children Who Have Dental Decay or Cavities
- eCQM 77 – HIV/AIDS: RNA Control
- eCQM 82 – Maternal Depression Screening
- eCQM 125 – Breast Cancer Screening
- eCQM 127 – Pneumonia Vaccination Status for Older Adults
- eCQM 147 – Influenza Immunization
- eCQM 153 – Chlamydia Screening for Women
- eCQM 154 – Appropriate Treatment for Children with URI
- eCQM 156 – Use of High-Risk Medications in the Elderly
- eCQM 158 – Pregnant Women That Had HBsAg Testing
- eCQM 163 – Diabetes: Low Density Lipoprotein (LDL) Management
- eCQM 166 – Use of Imaging Studies for Low Back Pain

Client toolkits may be accessed via the Greenway Customer Community website.

Medcin

Medcin Q3 2016 Update

Project #B-50685

The Medcin update for Q3 2016 has been completed.

New Mental/Functional Status Group Headings

Project #B-50402

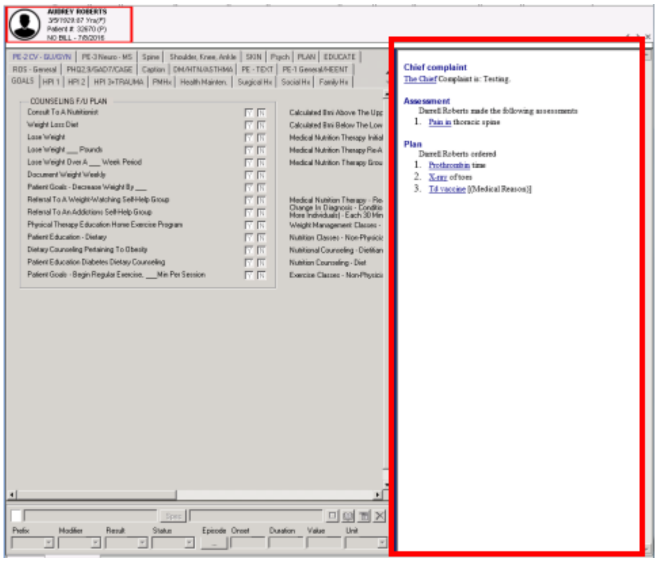
Mental Status and **Functional Status** groups have been added to the Medcin note. Users may select these groups to categorize appropriate mental- and functional-related findings.

This will be important for items to appear in these sections of the v2.1 CCDA coming in v9.0.

New Note View Pane in Forms

Project #B-49803

A note view slider pane has been added to all Medcin forms that enables users to view the note as they document on a form.

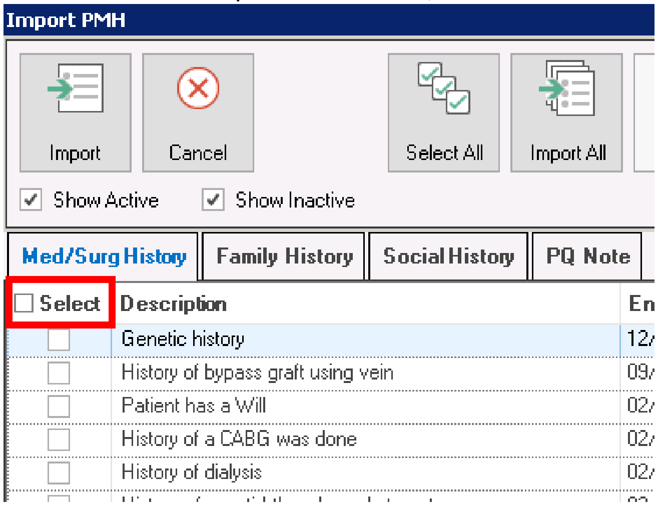


The note view pane is read-only. Information will automatically update in the pane when the user adds/removes data on the form. The size of the pane can be adjusted by sliding it from left to right. This size will persist for any logged in user.

Select All Function Added to Import PMH

Project #B-52349

A select-all checkbox has been added to the **Select** column header on the **Import PMH** dialog box in **Medcin** that enables users to import all histories/information on a specific tab. This function is available on all tabs.



Medications

DME Prescriptions Now Transmittable via eRx

Project #B-49620

Medications designated as DME may now be sent via eRx.

Formulary Updates

Project #B-49354

Formulary data has been updated in Medications for all medications in the system.

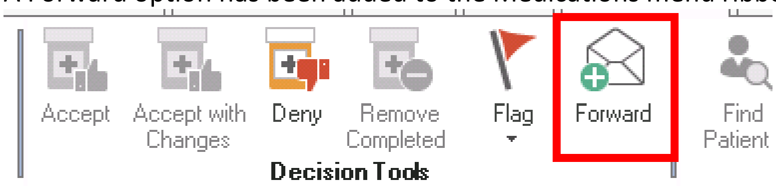
Note - **Clients must contact Greenway Support to be updated with the new formulary data throughout the beta testing period for version 8.20. Once the beta period has been completed, and the service has been tested, all clients will be migrated to the new formulary service. Clients will be notified before the global migration takes place.**

Medication Requests, New Forward Option

Project #B-49854

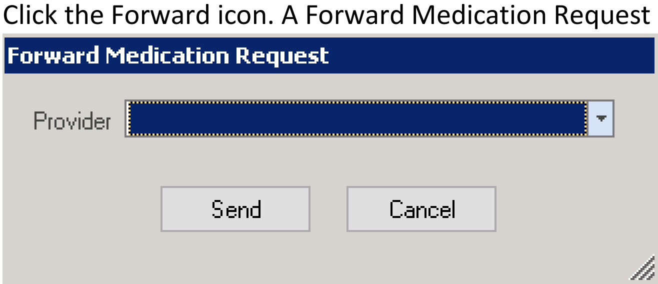
Users may now forward medication requests to other providers.

A Forward option has been added to the Medications menu ribbon on the Medication Requests screen.



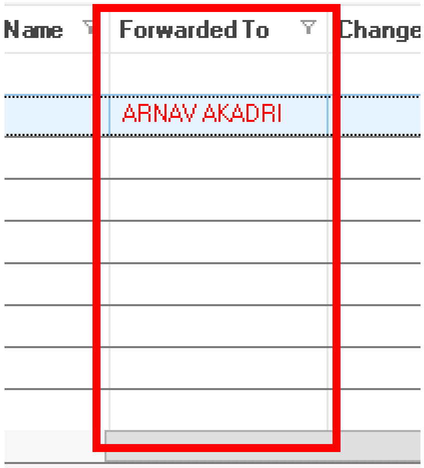
To forward a medication:

1. Select the appropriate medication.
2. Click the Forward icon. A Forward Medication Request dialog box displays.



3. Select the appropriate **Provider** from the drop-down list and click **Send**.
   Click **Cancel** to cancel the forward.

The (new) **Forwarded To** column displays the name of the provider to whom the request was forwarded.

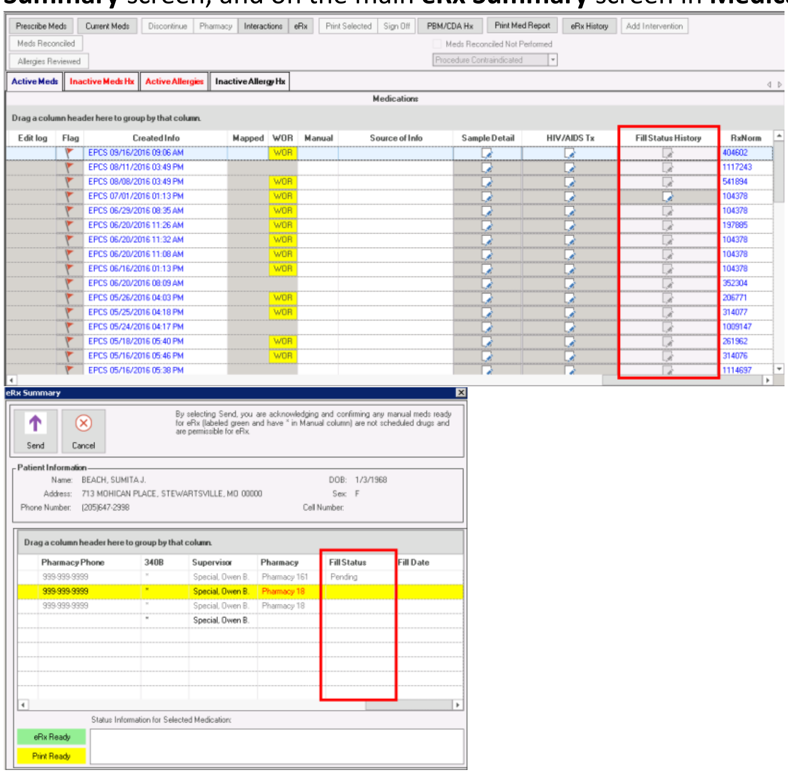


Note - **Auto-refresh is not operative for forwarded medications. Users must manually refresh the screen to send any updated information.**

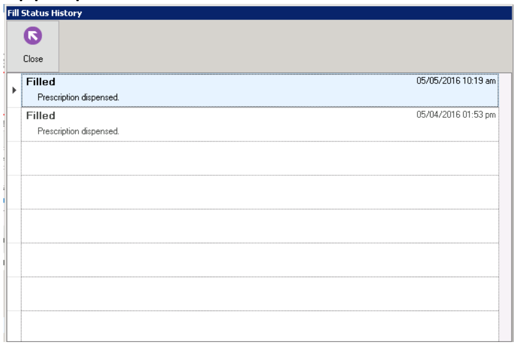
New Fill Status History for Active/Inactive Meds and eRx Summary

Project #B-48578, B-48577

A **Fill Status History** column has been added to the **Active Meds** and **Inactive Meds Hx** tabs on the **Medications Summary** screen, and on the main **eRx Summary** screen in **Medications**.



Users may click the icon in the **Fill Status History** column on the **Active Meds** and **Inactive Meds Hx** tabs for the appropriate medication to view a **Fill Status History** dialog box for the medication.



A transaction history will display with the fill status, date, and time. (For the **eRx Summary** screen, the **Fill Status** and **Fill Date** columns will display the fill status and fill date respectively.)

The following statuses are available:

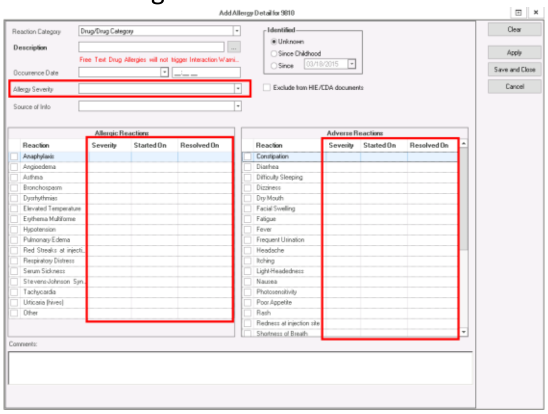
- **Filled**
- **Not Dispensed**
- **Partially Filled**
- **Blank** (if the medication has not been sent via eRx)
- **Pending** (if the medication has been sent via eRx but no response has been received)

Note - This transaction type is currently not in production and in use by pharmacies. Once pharmacies begin using this new transaction type, SuccessEHS customers will be able to take advantage of this enhancement.

Changes to Add Allergies Window

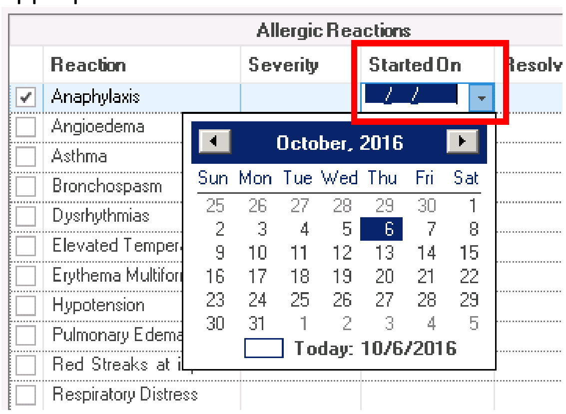
Project #B-49249

The following additions have been made to the **Add Allergy Detail** window:



- The **Reaction Severity** field has been renamed **Allergy Severity**. The following severity levels are available for selection: **Mild, Mild to Moderate, Moderate, Moderate to Severe, Severe,** and **Fatal**.
- A **Severity** column has been added to the **Allergic Reaction** and **Adverse Reaction** tables to enable the user to associate one of the above severity levels to an allergic or adverse reaction. After selecting the appropriate reaction, users may select the **Severity** from the appropriate drop-down list.
- **Started On** and **Resolved On** columns have been added to the **Allergic Reaction** and **Adverse Reaction** tables to enable the user to document the dates that the allergic/adverse reaction was established and

(if applicable) resolved. Users may enter the date or select a date from the drop-down calendar in the appropriate field.



Inactive Meds Hx, Historical Medications Sorted in Descending Order

Project #B-49592

Historical medications displayed on the **Inactive Meds Hx** tab in **Medications** will now sort in alphabetical order at the drug name level and within each drug name category in descending date order (i.e., the most recent date first).

Updates to NCPDP Unit of Measure Mapping for Surescripts eRx Transactions

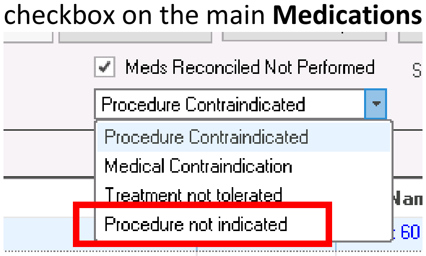
Project #B-51031

The code mapping for NCPDP and SuccessEHS Custom units of measure for Surescripts eRx transmissions has been updated.

Summary Screen, Additional Meds Reconciled Not Performed Selection

Project #B-48592

Procedure not indicated has been added to the reason drop-down list for the **Meds Reconciled Not Performed** checkbox on the main **Medications Summary** screen.



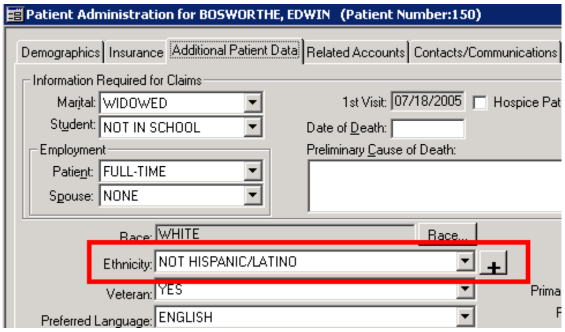
Patient Administration

Additional Patient Data Tab, New Option for Multiple Hispanic/Latino Ethnicities

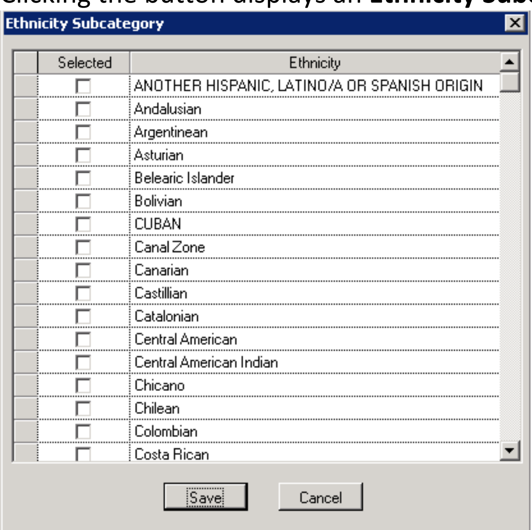
Project #B-50657

Users may record multiple ethnicities for Hispanic/Latino patients on the **Additional Patient Data** tab.

A plus sign button has been added to the **Ethnicity** field that enables users to add one or more secondary ethnicities.

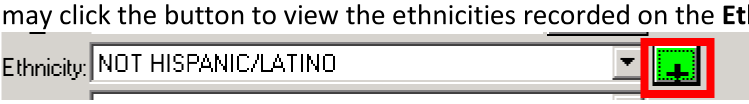


Clicking the button displays an **Ethnicity Subcategory** dialog box.



Users may select (check) the appropriate ethnicity(ies) and click **Save** to add it to the patient record.

The plus sign button will be highlighted in green if an ethnicity subcategory exists on the patient record. Users may click the button to view the ethnicities recorded on the **Ethnicity Subcategory** dialog box.

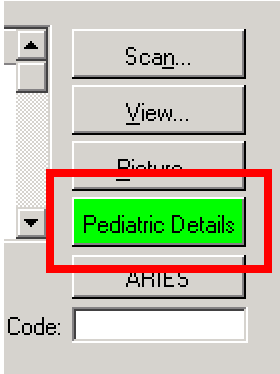


If the subcategory is removed, the button will no longer be highlighted.

Additional Patient Data Tab, New Pediatric Details Indicator

Project #B-49795

The **Pediatric Details** button on the **Additional Patient Data** tab in **Patient Administration** will be highlighted in green if pediatric information exists for the specific patient.



Additional Patient Data Tab, PDF Format Available for Scanned Documents

Project #B-49591

The **Scanned Documents** section of the **Additional Patient Data** tab in **Patient Administration** now supports PDF documents for patients who are scanning to a PDF or uploading a PDF from their local machine.

Once the PDF has been successfully scanned/uploaded, users may select the PDF document and click **View** to view the PDF via the PDF viewer screen used in **Chart**.

Coding Updates for Patient Administration

Project #B-50118, B-50115, B-50149

The following updates have been made in **Patient Administration**:

- The **Preferred Languages** table has been updated to include 486 possible languages from the previous count of 185.
- The **ISO Code** column on the **Preferred Languages** window will display a 2-character code if one exists; if no 2-character code exists, it will display a 3-character code.
- The SNOMED code for **Straight or Heterosexual** has been updated to **20430005**.

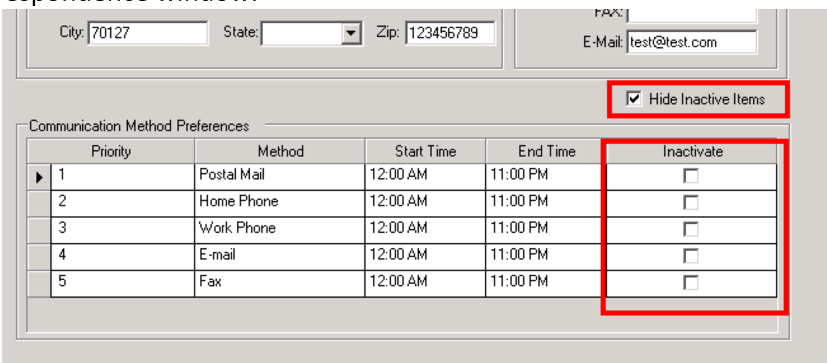
Patient Correspondence

Inactivate Column Added to Communication Method Preferences

Project #B-49590

Users may inactivate unused or irrelevant communication methods in **Patient Correspondence**.

An Inactivate column has been added to the Communication Method Preferences table on the main Patient Correspondence window.



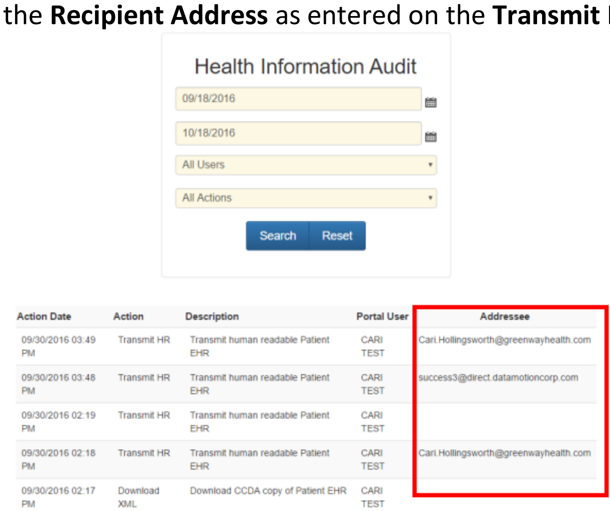
Users may select (check) the **Inactivate** checkbox for any communication method to make it inactive. Users may select (check) the **Hide Inactive Items** checkbox to remove inactive communication methods from the table.

Patient Portal

Health Information Audit, New Addressee Column

Project #B-50007

An **Addressee** column has been added to the **Health Information Audit** grid in the **Patient Portal** that displays the **Recipient Address** as entered on the **Transmit Health Information** screen.

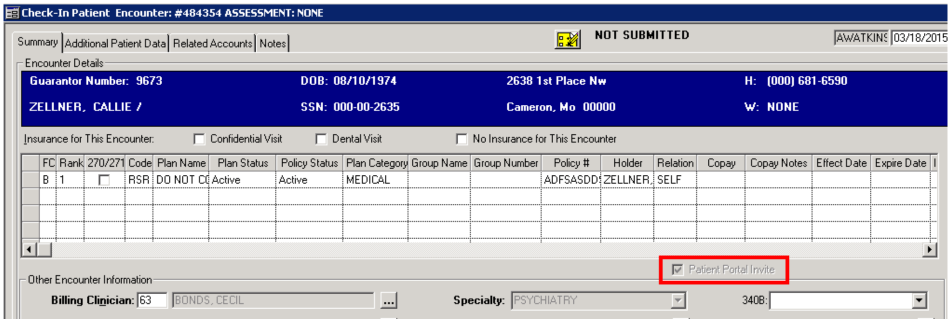


The addressee will display only for the **Action** type **Transmit HR**; the column will be blank for all other action types.

Patient Portal Invite Indicator in Check In/Charge Entry

Project #B-48673

The **Patient Portal Invite** checkbox in **Patient Administration** has been added to the **Summary** tabs in the **Check In** and **Charge Entry** modules as an indicator to the user to determine whether the patient was invited to join the Patient Portal.



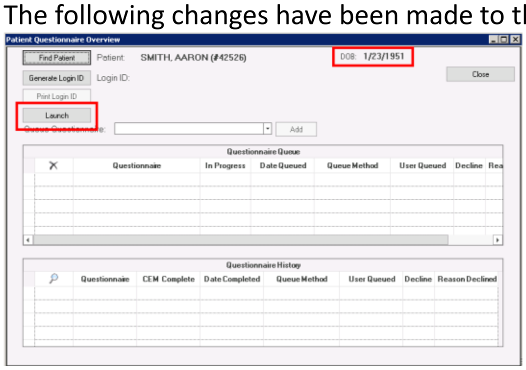
This checkbox is always disabled (grayed out). A checkmark indicates that the patient was invited to the Patient Portal; an unchecked box indicates that the patient was not invited. If the latter, users may navigate to **Patient Administration** to invite the patient to join the Patient Portal and indicate as such on the **Demographics** tab.

Patient Questionnaire

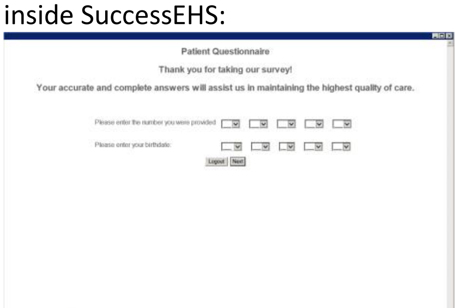
Changes to Questionnaire Overview Screen

Project #B-49205

The following changes have been made to the main **Patient Questionnaire Overview** screen.



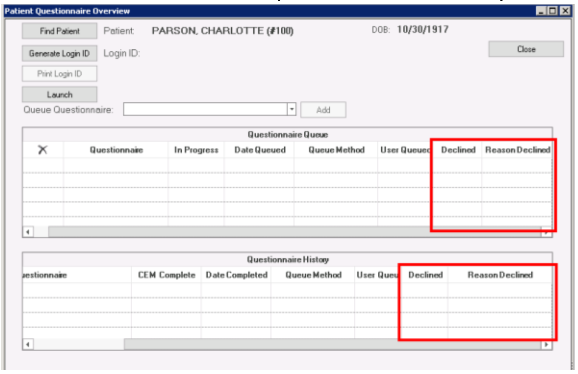
- **DOB** – A **DOB** field has been added that displays the patient's date of birth.
- **Launch** – A **Launch** button has been added that, when clicked, will launch the questionnaire directly inside SuccessEHS:



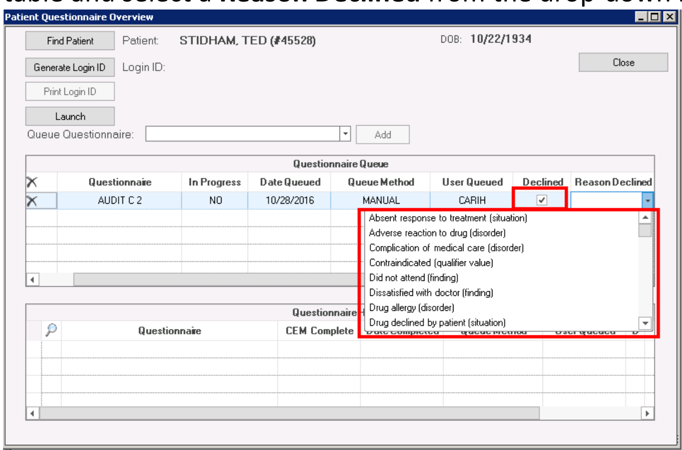
Declined Options Added to Questionnaire Overview

Project #B-50779

Declined and **Reason Declined** columns have been added to the **Patient Questionnaire Overview** window that enable users to record patient denial for questionnaires and surveys.



Users may select (check) the **Declined** checkbox for the appropriate questionnaire in the **Questionnaire Queue** table and select a **Reason Declined** from the drop-down list.



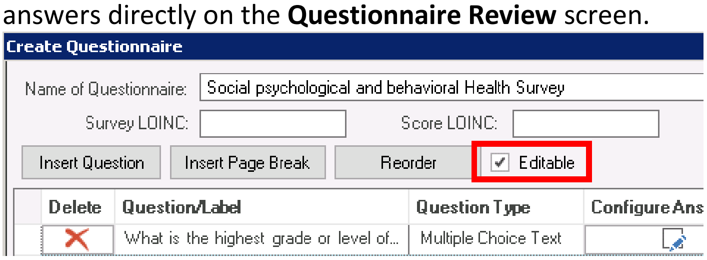
Once a questionnaire has been declined, it will automatically display in the **Questionnaire History** table. Declined reasons are editable and can be updated if necessary.

Questionnaire Review, Answers Editable

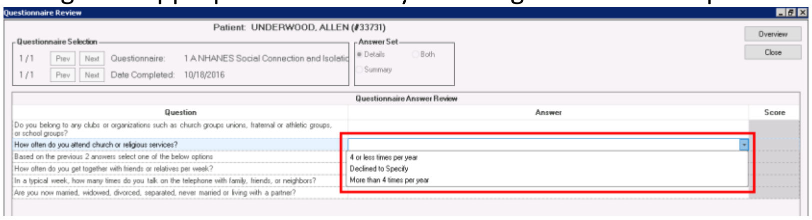
Project #B-49194

Users may edit patient questionnaire answers from the **Questionnaire Review** screen in **Next Patient**.

If the **Editable** checkbox is enabled on the **Create Questionnaire** window under **Patient Questionnaire Configuration** in the **System Administration Console**, users will be able to edit **Multiple Choice, Grid,** and **Y/N** answers directly on the **Questionnaire Review** screen.



The **Answer** column functions as a drop-down list containing all configured answers for the question. Users may change the appropriate answer by selecting it from the drop-down list.



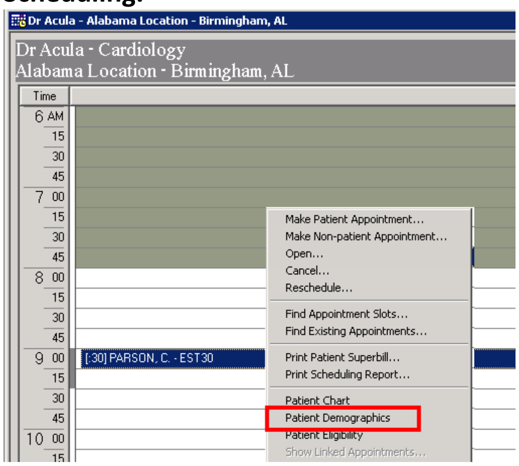
For scored questions, the values in the **Score** column will automatically recalculate as answers are changed. Clicking **Close** will save all edited questionnaire answers.

Scheduling

Appointment Book, Patient Demographics Option Added

Project #B-49826

A **Patient Demographics** option has been added to the right-click menu on the **Appointment Book** window in **Scheduling.**

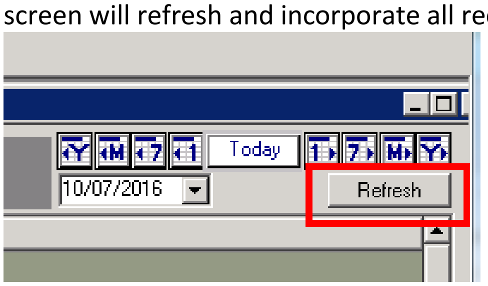


When this option is selected for an appointment, the **Demographics** tab in the **Patient Administration** module will launch for the selected patient.

Appointment Book, Refresh Option Added

Project #B-49829

A **Refresh** button has been added to the main **Appointment Book** window in **Scheduling**. When clicked, the screen will refresh and incorporate all recently added/edited information.

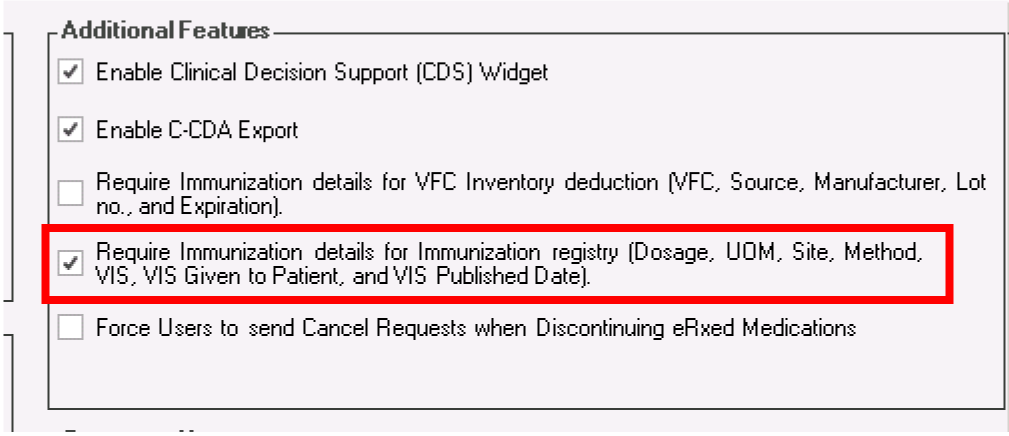


Security Console

Misc. Configuration, Additional Requirements for Immunization Registry

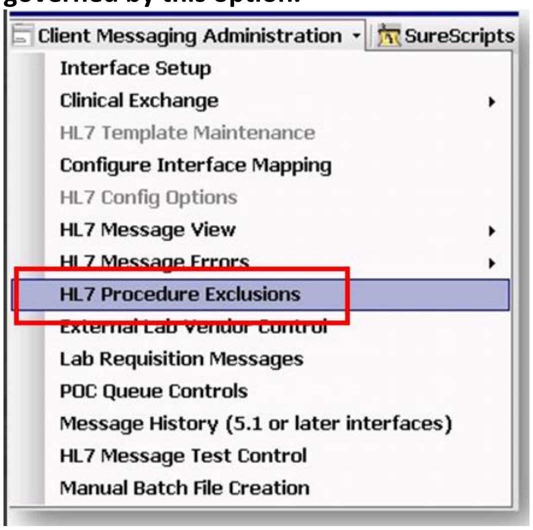
Project #B-49804

VIS, VIS Given, and **VIS Publish Date** have been added as data requirements governed by the **Require Immunization Details for Immunization registry** option on the **Misc. Configuration** screen in **Security Console**.



These data options will now be required entries for immunization registries if this option is enabled.

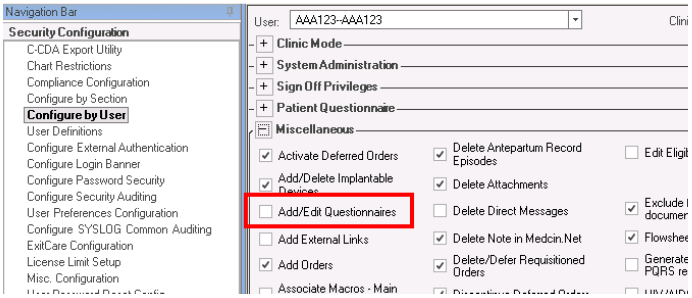
Note - **Immunizations configured to be excluded from HL7 messages via the HL7 Procedure Exclusions option on the HL7 Message Center Admin screen in System Administration will be excluded from the requirements governed by this option.**



New Add/Edit Questionnaires Option

Project #B-49207

An **Add/Edit Questionnaires** option has been added to the **Miscellaneous** mode of the **Configure by User/ Configure by Section** screens in **Clinical Console Security**.



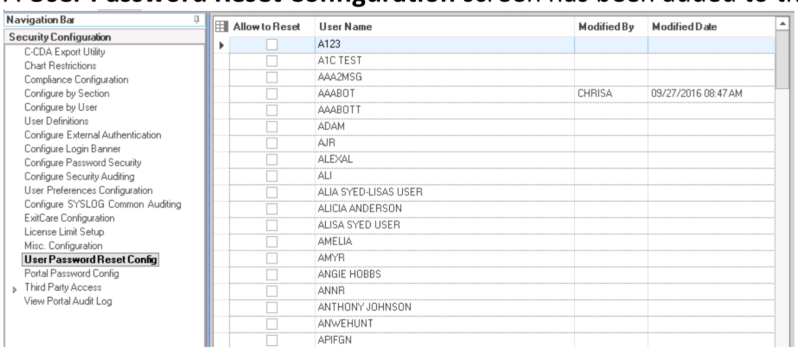
This option is deselected (unchecked) by default. When checked for a specific user, it enables the user to edit questionnaire answers and launch a questionnaire from the **Patient Questionnaire Overview** screen.

New User Password Reset Configuration

Project #B-50262

Users can now be configured to reset other users' passwords within shared financial groups.

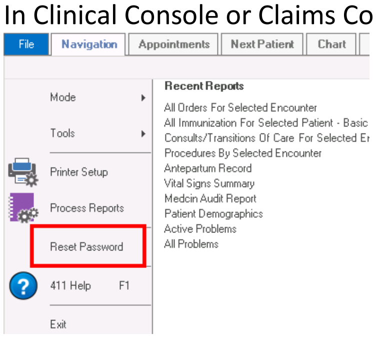
A **User Password Reset Configuration** screen has been added to the **Security Console**.



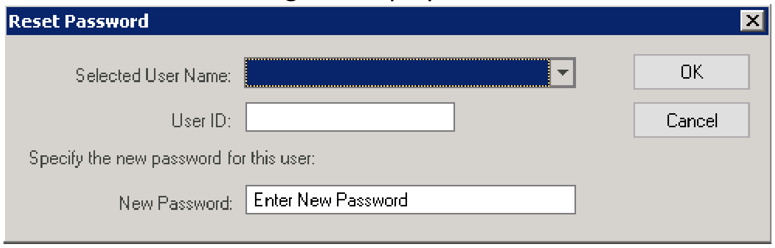
This screen enables users with Security Console access to grant users the ability to reset passwords for other users. Selecting (checking) the appropriate **Allow to Reset** checkbox for the appropriate user(s) will grant those users the password reset function.

To reset a user's password:

1. In Clinical Console or Claims Console, select **Reset Password** from the **File** menu.



A **Reset Password** dialog box displays.



2. Select the appropriate users name in the **Selected User Name** drop-down list. The **User ID** will automatically display.
3. Enter the **New Password** for the user.
4. Click **OK** to reset the password.

Note - Users cannot reset their own password.

Note - Users can only reset passwords for other users that share all financial groups.
For example, if User A has access to Financial Group 1 and 2, and User B has access to Financial Group 1, then User A can reset User B's password, but User B cannot reset User A's password (as B does not share all of A's financial groups).

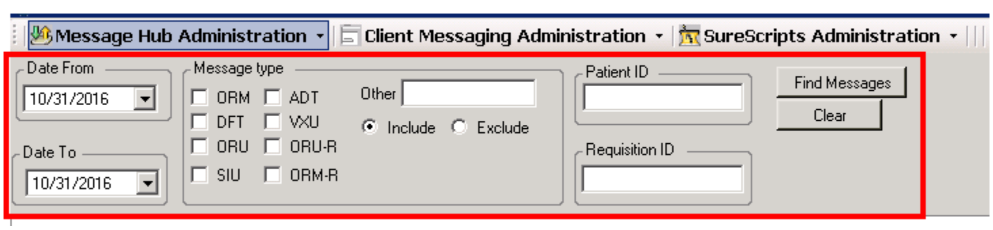
System Administration

HL7 Message Center Admin, Filtering Added

Project #B-50793

Filter options have been added to the following screens on the **EHS Messaging Administration** window in classic **System Administration** to improve load times for HL7 messages:

- **Message Hub Administration** tab
  - **Message Hub Production**
  - **Message Hub Test**
- **Client Messaging Administration** tab
  - **HL7 Message View - Transport In**
  - **HL7 Message View - Transport Out**
  - **Message History 5.1 or Later Interface**
  - **Lab Requisition Messages**
  - **HL7 Message View – Old HL7 Interfaces**
  - **HL7 Legacy ADT Errors**
  - **HL7 Lab HL7 Errors**



Users may filter by the following parameters:

- **Date From/Date To** – Enables search by a starting date to the current date (**Date From**) or within a certain time frame (**Date From – Date To**).
- **Message Type** – Enables search by selecting (checking) the appropriate message type(s) (**ORM, ORM-R, ADT, DFT VXU, ORU, DFT, ORU-R,** or **SIU**).
  - Users may enter a different message type in the **Other** field.
  - Users may choose to **Include** or **Exclude** selected message types by selecting the appropriate radio button.
- **Patient ID** – Enables search by the Patient ID.
  - The **Transport In** and **Transport Out** screens will return all messages containing the ID entered.
  - On all other screens, the results will be filtered by the **Patient ID** column, if it exists.
- **Requisition ID** – Enables search by the requisition ID.
  - The **Transport In** and **Transport Out** screens will return all messages containing the ID entered.
  - On all other screens, the results will be filtered by the **Req Id, Hub Id,** or **Msg Seq#** column, if they exist.
  - This field will not filter the **Message Hub - Production** or **Message Hub - Test** screens.
- After entering the filter parameters, users may click **Find Messages** to display all messages containing the filter criteria. Users my click **Clear** to clear the entered filter parameters.

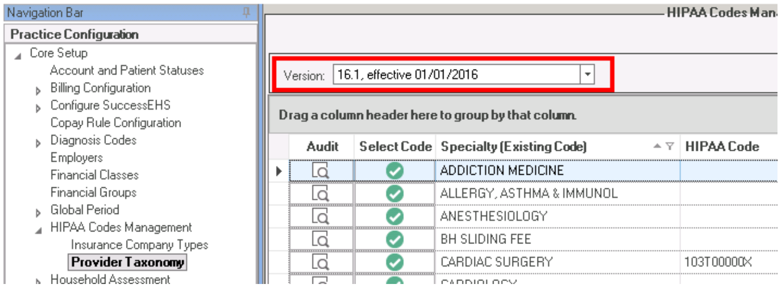
Note - **The Transport In and Transport Out screens will be limited to displaying the first 1000 records that fall within any entered filter parameters.**

System Administration Console

HIPAA Taxonomy Code List Updated

Project #B-49491

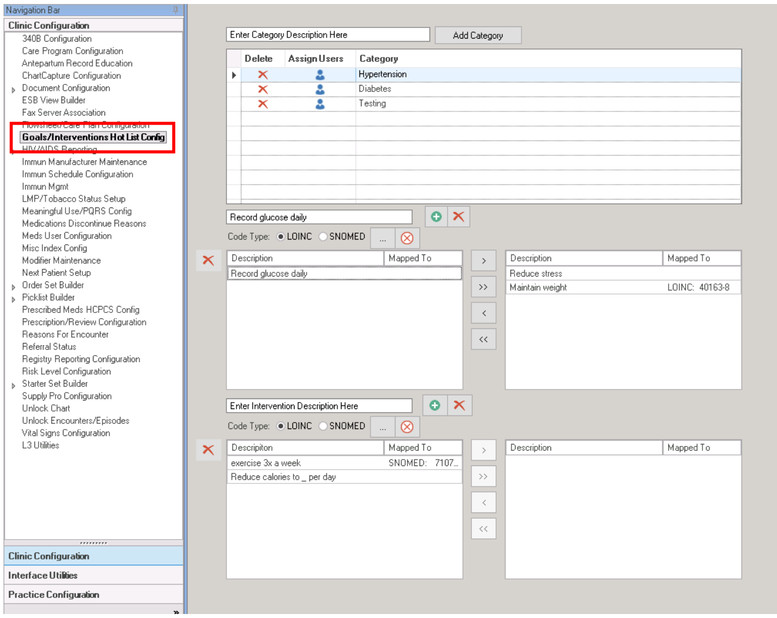
The Version 16.1 code list has been added as an option on the **Provider Taxonomy** section of the **HIPAA Codes Management** screen under **Practice Configuration** in the **System Administration Console**.



New Goals/Interventions Hot List Configuration

Project #B-49134, B-49955, B-49848

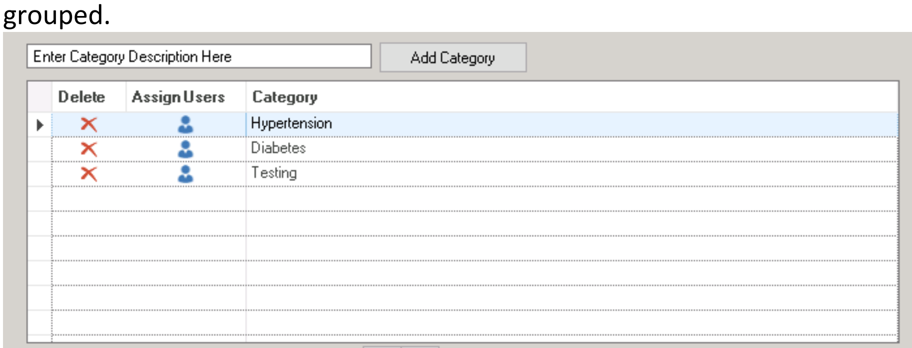
A new **Goals/Interventions Hot List Configuration** screen has been added under **Clinic Configuration** in the **System Administration Console**.



This screen enables users to create hot list categories of goals and interventions for care plans and assign them to specific providers in the system.

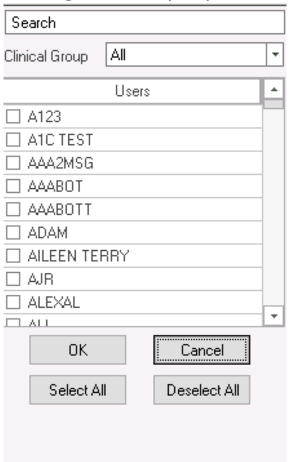
Creating Goal/Intervention Categories

Users may create categories (e.g., diabetes, hypertension, etc.) under which multiple goals/interventions can be grouped.



1. To create a category, enter the name of the category in the **Enter Category Description Here** field and click the **Add Category** button. The category will be added to the main grid.

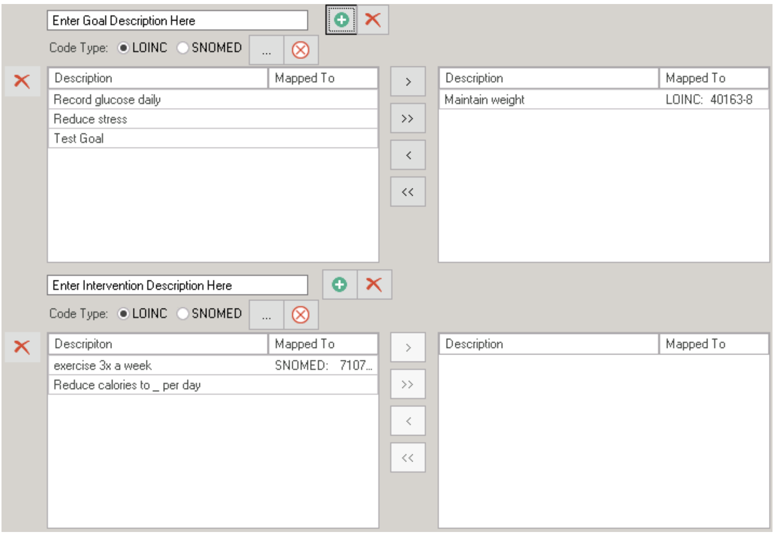
2. To assign users to the category, click the **Assign Users** button ( ) for the category. A user assignment dialog box displays.



- Select the appropriate **Clinical Group** from the drop-down list.
- Select (check) the checkbox(es) of the user(s) to whom you want to grant access to the patient chart.
  - To locate a specific user, enter the user's name in the **Search** field.
  - Multiple users may be selected (checked). To select all users, click **Select All**. To deselect all users, click **Deselect All**.
- Click **OK** to grant access to the selected user(s).

3. To delete a category, click the **Delete** button ( ) in the appropriate record row. The category and all associated goals/interventions will be deleted.

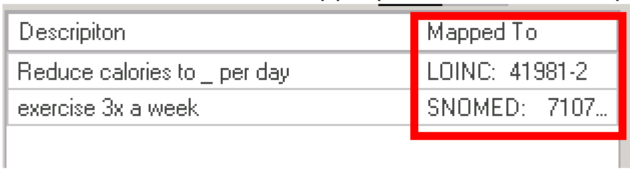
Creating Goals and Interventions



To create a goal or intervention for a category:

1. Select the appropriate category.
2. Enter the appropriate description for the goal/intervention in the **Enter Goal Description Here** or **Enter Intervention Description Here** field, as applicable.
   (You may clear the field's contents by clicking the **Delete** button ( ) to the right of the field.)

3. Click the green plus button ( ) to save the goal or intervention in the main (left-hand) goal or intervention grid.
4. To map a LOINC or SNOMED code to a goal/intervention:
   - Select (check) the **LOINC** or **SNOMED** radio button and click the ellipsis button (...) to display the **LOINC Lookup** or **SNOMED Code Lookup** dialog box.
   - Search for and select the appropriate code. The mapped code will display in the **Mapped To** column.



Descripiton	Mapped To
Reduce calories to _ per day	LOINC: 41981-2
exercise 3x a week	SNOMED: 7107...

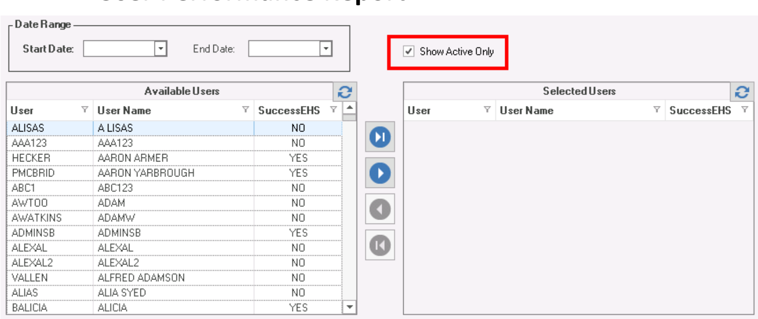
   - To remove a code mapping, select the appropriate goal or intervention and click the **Clear Mapping** button ( ). The code will be un-mapped from the goal or intervention.
5. To assign a goal or intervention to a category, select the appropriate goal or intervention in the main (left-hand) grid and click > to move it to the right-hand grid. Click >> to move all items to the right-hand grid.
6. To remove a goal or intervention from a category, select the item in the right-hand grid column and click < to return it to the main (left-hand) grid. Click << to move all items to the left-hand grid.
7. To delete a goal or intervention, select the appropriate item and click the main **Delete** button ( ) to the left of the appropriate left-hand grid. The goal/intervention will be deleted.

Reports, Show Active Users Only Option Added to Practice Management Reports

Project #B-49675

A **Show Active Only** checkbox has been added to the user tables for the following reports in **Practice Configuration** in the **System Administration Console**:

- **Claim Notes Productivity Report**
- **Claim Review Productivity Report**
- **Refile Productivity Report**
- **Rejected Claims Productivity Report**
- **Transaction Entry Productivity Report**
- **User Performance Report**



This option is selected (checked) by default; when checked, only active users in the system will display on the above screens. To view both active and inactive users, deselect (uncheck) the checkbox; the user grids will refresh to display both types of users.

Utilities

Balance Adjustment, Collections Responsibility Option Added

Project #B-49875

A **Collections** option has been added to the **Balance Responsibility** section on the **Balance Adjustment** window in **Utilities** that enables users to set up write-offs of collections balances in the same manner as for guarantor or insurance balances.