21.4.10 Release Notes

Last Modified on 11/11/2024 8:56 am EST

21.4.10 Release On-Premise: Coming soon | Cloud: Per email communication

Look out for these icons!	Less Clicks Campaign!	Major Update	You asked, we listened!

- New Features
- Improved Functionalities for All Users
- Improved Functionalities for Providers or Clinical Staff
- Improved Functionalities for Non-Clinical Staff or Billing Staff
- Performance Enhancement for Providers or Clinical Staff
- Issue Resolution for All Users
- Issue Resolution for Providers or Clinical Staff
- Issue Resolution for Non-Clinical Staff or Billing Staff

New Features

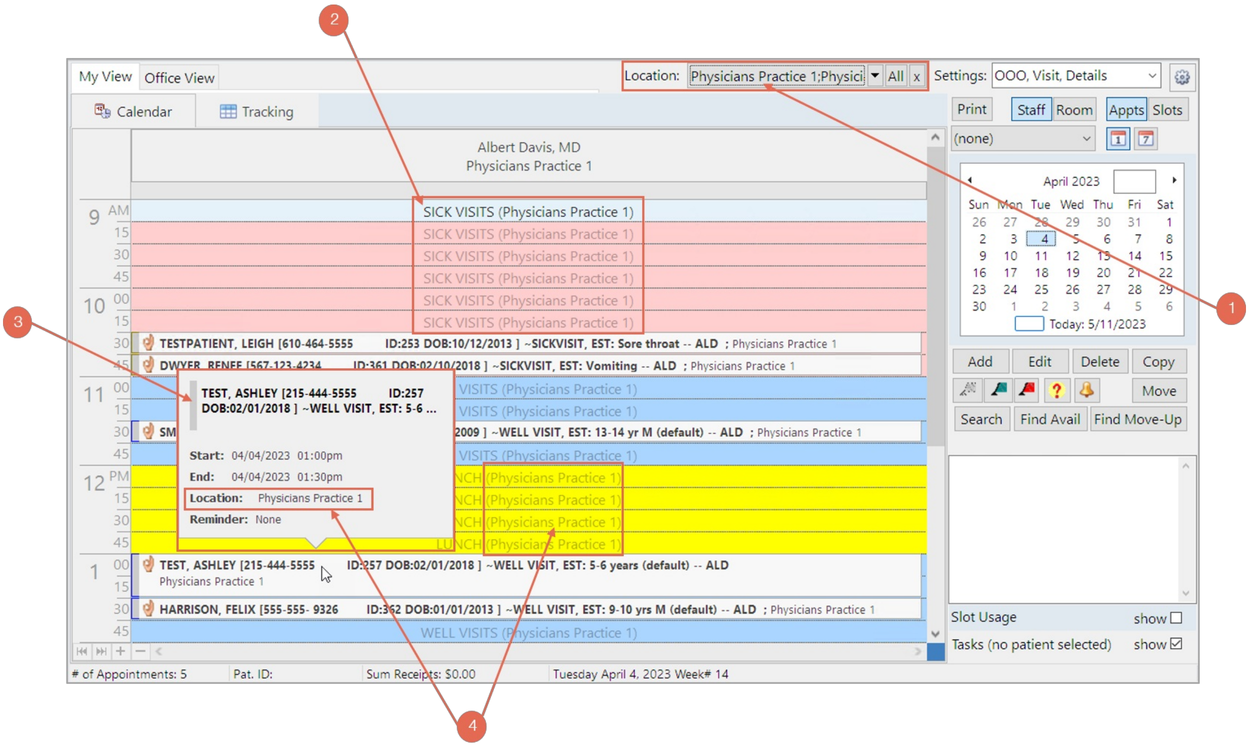
New Calendar View

The Schedule Calendar is being refreshed! New layout, colors, and features -- including a **multi-location calendar** that practices have been asking for.

Highlights

Some highlights include:

1. Single calendar view can contain **multiple locations** simultaneously.
2. Timeslot can contain the **name of the zone** for intended appointment types.
3. Wave-over hints make it easy to **see full event details** on crowded days without having to open the appointment.
4. In multi-location mode, both **timeslots** and **appointments** contain **location name**, to avoid confusion about what is happening where.



Other updates include:

- **Resource column limit increased** from 15 to 75.
- In **multi-location weekly mode**, providers can see their entire week at a glance, even if they are scheduled at more than one location.
- Calendar fills and draws **more efficiently**, so we expect it will perform faster, even under higher loads.
- In **multi-location mode**, administrators can monitor the **entire practice at a glance** and **calculate slot usage/load factors**.
- **Drag and Drop** to move appointments to a different provider on the same day.
- While **adding slots** to a provider's schedule, you can **specify the location**.
- Even with all these improvements and changes, **core user operations have not changed**. *The same action buttons and context menus mean you don't have to learn new behaviors.*

List of New/Updated Content

	Help Articles Written documentation of how-to steps
New Calendar Overview (21.3)	
New Calendar Setup (21.3)	
Creating a Schedule Using Slots (with 21.3 Updates)	

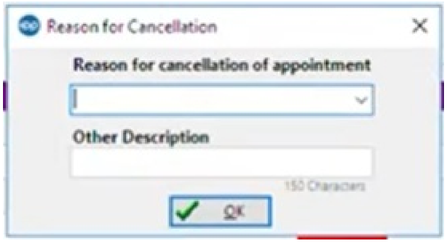
Calendar| Print button generates Appointment Schedule Report

We implemented the Appointment Schedule report to give users a useful print view of the calendar. Click Print, a pop-up will appear allowing you to select a date range, one or more providers, and the location before generating the report. This report has all the appointment information, patient contact information, co-pay information, and a section to add notes.

Improved Functionalities for All Users

Reason for Cancellation Pop-Up ♡

Added a reason for cancellation pop-up when an appointment is cancelled and the global preference requiring reason for cancellation is enabled. You can also select **Other** and enter the reason if it is not listed in the options.



Improved Functionalities for Providers or Clinical Staff

Add a Note section for each patient

Added **Notes** section for **Appointment Schedule Report** when OP User prints. Path:**Practice Management** > **Schedule** > **Calendar**.

Added Prescription Creation Without End Date

Updated OP Prescriber to allow saving or printing the NewRx without an end date when **Include in Chronic medication list** is selected..

Calendar | Printing Appointment Schedule Report| Add Provider

You can now filter the **Appointment Schedule** report by one or more providers. Path:**Tools** > **OP Reports** > **Administration** > **Schedule**.

Calendar | Cancel Reason| Add Unknown as an option

Added **Unknown** to the cancellation reasons in the Calendar.

Calendar | Confirmation pop-up when drag and drop appointments♡

A confirmation pop-up has been added when you drag and drop an appointment to a new time. This is only when dragging and dropping. If you right-click and select **Move Appointment** or select an appointment and click the **Move** button you will not get a confirmation pop-up.

Calendar | Appt. Zone missing in panel

The template name has been added back to the detailed information grid in the right panel when a time slot was selected. Path: **Practice Management** > **Schedule** > **Calendar** tab.

Add Race and Ethnicity Report

Added **Race** and **Ethnicity** to the Patient Demographics report.

Calendar | Add ability to disable drag and drop of appointments

Added the ability to disable the drag and drop feature to move appointments. This is to alleviate some of the issues with appointments being moved too easily.

Calendar | Font Color Change♡

Changed the font color to gray to improve readability and eye comfort.

Schedule Templates | Time Increments Improvement

Improved the way how the **Schedule Templates** show increments without requiring a forced refresh. It now also displays the start time, end time, and increments that are in the display settings for the template location.

Improved Functionalities for Non-Clinical Staff or Billing Staff

Correspondents: No Accidental Deletion

You can delete Correspondent records (Path: **Admin** > **Connections**) if your practice no longer uses a Correspondent (e.g. old clearinghouse, deprecated third-party vendor, etc.) Previously, you could delete a Correspondent record even if staff members were still present in the Credentials tab. So if a practice accidentally selected the wrong Credential to delete, they would have to re-create the credential then add back all the staff members. As a safeguard, the delete button to delete a Correspondent is now disabled until all staff members are removed from the Credentials tab. We have also disabled deletion of the Keycloak Correspondent record, since this record is needed for OP to function properly.

Activating/Inactivating OP Users Security

To inactivate/re-activate users, in addition to the `PM_StaffModify` permission, you will also now need the `AA_System_Admin` permission. This is to increase security and ensure background access management passwords are synced properly.

Claim Scrubber| Ability to bypass CPT codes for Interest

You can now bypass claim scrubbing for interest rate CPT codes. There is a new global preference setting under **Billing** > **Superbills** Bypass Claim Scrubbing for Interest Payment CPT Code: `[CPT Code specified]`. When that setting is checked and the listed CPT code is the only one on a claim, scrubbing will be bypassed.

insurance for e. e. cummings

Insurance group numbers and insurance IDs might contain either digits or letters. When an insurance validation returned a group number or insured ID containing lower-case letters, OP would not let you rank that insurance.

Now, if an insurance sends back a group number or insured ID that contains lowercase letters, OP will convert it to all caps so it can be saved and ranked.

Confirmation when Deleting Correspondents

To prevent accidental deletion of Correspondent records (Path:**Admin** > **Connections**), there is now a confirmation pop-up that will appear when deleting a Correspondent record.

A Billing Dept By Any Other Name

Payment processing rules permit billing staff to set up automated workflows to set ERA statuses, create tasks, send statements, and more. Previously, some users could not process ERA while using payment processing rules. We discovered that this happened when a task for the Billing Department was being created, but that practice did not have a Department named "Billing," preferring to call that department "Back Office" or "Claims" or something else. Thus, OP was erroring when trying to create a task for a non-existent department (Path: **Practice Management** > **Departments** > **Departments** tab). Now, we have fixed the issue whereby OP now creates billing tasks for a department name specified by the practice. To tell OP what your practice's custom name is for your Billing department to receive these billing tasks, go to **Practice Management** > **Departments** > **Default Task Assignment** and set the Default Department for A/R Follow up to your custom department name. (Practices whose billing department is already called "Billing" need not change anything.)

Chart Creation from Add/Edit: Whodunnit?

The Audit Trail provides a useful tool to find out who did what, when, at your office. Previously, when a staff member created a new chart from the Add/Edit appointment window, there is no Audit Trail record of the chart creation event. Now, creating a patient's chart from the Add/Edit appointment window will create a RECORD CREATION line in the Audit Trail and track when, and by whom, that chart was created.

Performance Enhancement for Providers or Clinical Staff

System Performance | OP Classic | Consolidate access to Medhist table

Improved the performance of the patient chart by preloading the most commonly searched information about the patient.

Add time of birth to Patient query

Improved the performance of the patient chart by preloading time of birth. This used to be queried multiple times.

Updating IE forms in OP to Microsoft Edge- Post Delphi 11

Switched from Internet Explorer to Edge to keep the support for several features.

OPReports needs logic to obtain DB info from OPEN (On-Prem MySQL)

Added the ability for OP Reports, QIC, and Report Share to obtain database information from OPEN rather than relying solely on the opsetup.ini files.

Improper login sequence when entering the wrong password

Fixed an issue that was causing incorrect password logins to attempt to login via Keycloak before they receive the "incorrect username/password" message.

Billing | Automation Settings| Permission

OP has added `Billing_Automation_Preferences` to govern who can access the Billing Preference window used to set preferences for the OP Automation service. This used to be governed by the `Billing_Payer_Modify` permission. All users with the exiting `Billing_Payer_Modify` permission will have the new `Billing_Automation_Preferences` by default.

Issue Resolution for All Users

Access Violation Fix

Added the ability to have a chart open while another user makes updates to the chart. Previously, some very specific scenarios of two people in one chart caused Access Violations. When a user had the patient chart open while another one made changes to the schedule as well as when opening a patient chart from the schedule and having another one make changes to the chart would cause access violation errors. Now, this behavior has been corrected, so when a user has a chart open (but not in focus) and another user makes modifications to the schedule, the first user's chart updates without AVs.

Fixed Right-Hand Calendar Date Mismatch

Calendar | Fixed an issue that was causing the right-hand calendar to be scrollable and made the dates on the schedule and calendar to appear mismatched. You can still use the arrows to move to different months.

Reports | Label Change on Button

Renamed the Reporting button to **Practice Analytics**.

50 Shades of Black Rectangle

Previously, when importing a TIF file into Document Manager, then attempting to convert a color TIF to grayscale before saving it, the image would go completely black. Now, this behavior has been corrected so that TIF documents are converted to grayscale appropriately.

KeyCloak Error Message | Background access management login failed

Issue: Users were having to reset their Keycloak password multiple times a week. It was discovered that you can log into OP with a space at the end of your user name. Keycloak sees the space and thinks there is a mismatch between your user name already in keycloak and your OP user name. This is what caused the keycloak log in issues and users to have to reset their password.

Resolution: If a user puts a space at the end of their username by mistake, OP will throw the log in error pop-up message and no longer allow the user to log into OP.

Calendar | Unable to Save Preference to open to the Tracking Screen

Fixed an issue that caused users to lose the ability to save their preferred view in the Calendar (either Calendar or Tracking Screen View). You can save this preference by going to **Personalize** > **Save Form**.

Calendar | Fixed non-owner protected slot error

Fixed an issue in the Calendar that was causing an error message to show when trying to add an appointment right after an owner-protected slot.

Alternate ID Search Restored

In OP version 21.3.30, while correcting another problem, we inadvertently disabled the ability to search for patients by alternate ID. Now, we have reinstated this functionality. Of note, users may only search for numeric Alternate IDs. If a patient's alternate ID is the same as another patient's OP ID (`PATNO`), both will show in the search results.

Name Change Without Access Change

OP users can change their names (first name, last name, or login) to reflect life changes, while preserving the user ID number. For example, if OP user Wanda Maximoff (WM) became Scarlet Witch (SW), OP still knew it was the same person, because Wanda/Scarlet's OP ID number remained the same. Previously, when a user's name was changed, it would accidentally disable the user's access to certain areas of OP and the user would get a "Background access management" warning message. This occurred because OP updated the user's name in the Staff table but did not make a matching update to that user's entries in the Correspondent Credentials table. Now, this behavior has been corrected so that updating the user's name propagates to the user's privileges in the Correspondent table.

Crop the Pose, Nothing To It

Previously, when users moved multiple images to the Sketch Pad, then manipulated one or more of the images (e.g. cropping), the manipulation would not save, and the image would revert to its pre-manipulated state. Now, this behavior has been fixed so that the cropping/other image manipulation will persist.

Visit Status Sticks!

Previously, at random times, when setting a visit status on the Tracking screen, the new status would not persist and the visit status would revert to the previously-selected status. This happened when the cache event processed while the user had the drop down open. Now, the visit status will not revert to an older status and will keep the selection the user has made.

Timestamp on Cursor Fix

Fixed an issue that was causing the timestamp to not put the information where the cursor is.

Issue Resolution for Providers or Clinical Staff

Access Violation Errors when opening Patient Chart

Access Violations occurring when opening a patient's charts have been resolved.

Fixed Access Violations When Accessing Patient History Section

Access Violations occurring when opening a patient's chart history section have been resolved.

Fixed Growth Charts Showing Inaccurate Age

Fixed an issue where a user was able to enter text in the **weeks** dropdown (instead of using the preset values) field of the gestation age field at **Chart > History > Birth History**. Doing so caused an error in OP's internal calculation of the age which impacted the corrected age being displayed.

State and Zip Code don't have a space to separate when printed

Fixed an issue that was causing reports to not show a space between the State and the Zip Code on General Letters. Path: **Clinical** > **Patient Chart** > **General Letters**.

Security Admin | Reason popup occurring when removing permission from user

Fixed an issue that was causing the Audit Trail for User Access to show up when the user moves the permission to the permission tab.

Fixed Access Violation when closing Chart after saving Basic Info

Fixed an access violation error showing up when closing a patient chart after saving basic info.

Diagnostic Tests Error Message Fix

Fixed an issue causing Diagnostic Tests to incorrectly display an error message.

Issue Resolution for Non-Clinical Staff or Billing Staff

Claims | CAS Rejections | Fix Claim Posting Process

Issue: When a claim had a patient responsibility that was transferred to secondary, the 837 file was showing a duplicate CAS*PR* segment listing the patient responsibility twice. This was leading to rejections by the clearing house.

Resolution: The CAS*PR segments will no longer be duplicated

MySQL| Batch Statements| Error message when Excluding Older than dates

MySQL Clients Only. When entering an excluding older than date on the Batch Billing Statements window, users were getting an error and unable to run batch statements.

Resolution: This error has been resolved and users can run batch statements in MySQL DB's with no errors.