Office Practicum Version 14.8
General Availability Release Notes

Description:	This document contains the Release Notes for the General Availability release of OP Version 14.8.
Document Version:	Final V1.0
Document Release Date:	10-Oct-2017

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1. Office Practicum (OP) Version 14.8 General Availability Release Notes for OP 14.8.14

Software Release Date: 10-Oct-2017

Flu Season Information

For CDC guidelines regarding the 2017-2018 flu season, **click here**.
To access the FAQ page for the 2017-2018 flu season, **click here**.
For general 2017-2018 flu season information, **click here**.
For Pediatrics-specific 2017-2018 flu season information, **click here**.
For AAP's Flu Vaccine Recommendations for 2017-2018, **click here**.

These Release Notes are organized according to functionality as presented in the application, which is not necessarily according to general workflow.

If an entry in these release notes is the result of a client's call to customer support and that issue was logged in our issue-tracking system, the Solution ID for that issue is included at the beginning of the solution or resolution.

Note: OP 14.8 introduces a complete overhaul of the Review Scanned Items and Input Scanned Items windows. The functionality of these two windows have been combined into a single new window labeled the Manage Documents window. These enhancements are part of the new Document Management approach to scanning and managing documents and includes several new features and enhanced windows. The overhaul is so extensive that they are all grouped together under the New Features sections to help separate them from the functionality present in previous versions of OP 14. Section 2.2.3 through Section 2.2.7 discuss these Document Management enhancements.

Note: Some functionality in this release (such as the new Teams functionality and the Appts/Frequency fields in the Orders Worksheet for follow-up appointments) are foundational for a future release. While they are visible and active in the OP 14 software, they do not provide any additional benefit at this time. End users do not have to use these functions, and OP recommends that they plan how to employ these features at the Practice level before using them individually.

2. New Features

2.1 Non Function-Specific New Features

There are no new features in this release that impact the overall application.

2.2 Function-Specific New Features

2.2.1 Reports / Demographic Analysis and Recall

Function:	As part of the new Team functionality (see Section 3.2.8 for details), OP 14 needs to allow the end user to run recalls specifying Team association.
Solution:	Enhanced the software by adding Team to the Show/Hide Columns list in the Demographic Analysis and Recall (DAR) report. Selecting this option displays the Team column on the DAR and allows the end user to run recalls based upon Team association. Use of this report is dependent upon configuring and using the new Teams functionality.

2.2.2 Utilities / Manage Practice / Appointment Preferences

Function:	OP 14 restricts the Practice to a set of default Zone Purposes. OP 14 needs to allow Practices to customize Appointment Types and Template Zones.
Solution:	Enhanced the software by adding the Zone Purpose tab to the Appointment Types and Zones window. This tab enables the Practice to configure a Zone Purpose. This enhancement also adds the Purpose field to the Appointment Type and Template Zones tabs so that Practices can associate a Zone Purpose with each Appointment Type and Template Zone.

	These enhancements will eventually automate the task of scheduling based upon the Purpose associated with Appointment Types and Template Zones. The Zone Purpose tab in the Appointment Types and Zones window allows the end user to add, edit, save and cancel Zone Purposes. This tab allows the end user to assign to each Zone Purpose a name, a description, and a Zone ID. If the Practice needs to assign a Purpose to a Group, the practice needs to define a Group specifically for this purpose. **Note:** This enhancement is foundational for a future release of OP 14. While the features are visible and active in the OP 14 software, they do not provide any additional benefit at this time. End users do not have to use these functions, and OP recommends that they plan how to employ these features at the Practice level before using them individually.

2.2.3 Manage Documents Window

Function:	The Review Scanned Items and Input Scanned Items windows provide a lot of helpful functionality. However, the layout of the windows and some features that appear in both windows can be confusing and can restrict the display of images and documents. OP 14 needs to overhaul these windows to make the scanning and documentation functionality simpler to access and easier to understand.
Solution:	Enhanced the software by overhauling the functionality in the Review Scanned Items and Input Scanned Items windows. This overhaul replaces these two windows with the Manage Documents window, reorganizes the features and functions of the two windows, adds several new functions, and improves the layout of the window and its document-management features. This entry in the OP 14.8 GA release notes is comprised of two sections: a list of the components of the Manage Documents window and then details of each component and function.

	Note: [Click here](#) for detailed information on this and related document-management features.
	
	List of the Components of the Manage Documents Window
	
	To access the Manage Documents window, click on the Docs button on the Smart toolbar. The Docs button replaces both the Review Scanned Items and Input Scanned Items buttons. The main areas and features of the Manage Documents window are:
	
	• **Title Bar**
	• **Global Actions buttons:**
	  o Patient Finder
	  o Search Records button
	  o New Document button
	  o Print button
	  o Export button
	• **Search for Documents window**: When the end user clicks the Search button (which replaces the Search button on the Input Scanned Items window), OP 14 displays the Search for Documents window. For details, refer to Section 2.2.4.
	• **Document List panel**:
	  o This is a vertical panel on the left side of the window and includes filter options and is organized by category.
	  o There is a drag-and-drop Grouping field toward the top of the panel.
	  o Under the Grouping field, OP 14 displays a the list of the documents associated with the selected patient.
	• **Thumbnails panel**: This is a vertical panel to the right of the Document List panel.
	• **Preview panel**: This panel is to the right of the Thumbnails panel.
	• **Document Controls toolbar**: This toolbar is above the Thumbnails panel and Preview panel.

	• **Document Details panel**: This is a vertical panel to the right of the Preview panel. • **Document Types and Categories window**: When the end user clicks in the Item Category field and clicks on the Document button (only active in Edit mode), OP 14 opens the Document Types and Categories window. For details, see section 2.2.5. • **Edit Page buttons**: When the end user clicks the New Document button or when the end user has selected a document and the end user clicks the Edit button in the Document Controls toolbar while viewing an existing document, OP 14 displays the Edit Page buttons at the bottom of the Preview panel. • **Acquisition panel**: When the end user clicks the New Document button or clicks the Edit button in the Document Controls toolbar while viewing an existing document, the Manage Documents window changes the Document List to the Acquisition panel. *Details of the Manage Documents Window* **Global Actions Buttons** **Patient Finder**: This is the standard Patient Finder throughout OP 14. **Search button**: Clicking the Search button opens the Search for Documents window, which is an enhanced window in OP 14.8. For details on the Search for Documents window, see Section 2.2.4. **New Document button**: This button replaces the Input button in previous versions of OP 14. Clicking the New Document button opens the Acquisition panel to input new documents. See Acquisition Panel below for details. **Print button**: Clicking the Print button displays a dropdown menu with the options: • Print Selected Record • Print Selected Record (with Info) • Print All Records (with info) **Export button**: Clicking the Export button displays a dropdown menu with the options:

	• Export Image • Export Page • Export Document **Document List Panel** **Note:** Most of the functionality in the Document List panel was in the List tab of the Review Scanned Items windows in previous versions of OP 14. The Document List panel is a vertical panel in the leftmost position of the Manage Documents window. It displays all documents associated with the selected patient. It includes several filter and grouping options that display documents based upon type (for example, Chart, Diagnostic Tests, Referrals, and Disclosure). The Grouping field at the top of the panel is similar to the Grouping field in other OP 14 windows and allows the end user to list the documents according to customized grouping. The end user can customize the size of this panel by clicking and dragging the right border of the panel. At the top of the Document List panel, OP 14 offers the following options for filtering the list of documents displayed in the Document List panel: • Dates: 1 Mo, 1 Yr, All • EFR (checkbox). Selecting this checkbox displays documents that have limited visibility. The Document List panel displays the following columns and filtering options: • Item Type • Category • Date • Notes

	The Show/Hide Columns button to the left of the columns allows the end user to select which columns to display. The Expand Grid button allows the end user to expand and collapse the categories. **Note:** OP 14.8 enhancements include adding the Save to Portal checkbox to the Statements tab in the Patient Account window. If the end user selects statements to send to the OP Patient Portal, OP 14 automatically displays these files in the Document List Panel of the Manage Documents window under the Item Type: STATEMENTS. **Thumbnails Panel** **Note:** This was the Image Thumbnail section that ran horizontally along the bottom of the Scanned Items windows in previous versions of OP 14. The Thumbnails panel is a vertical panel to the right of the Document List panel. Displaying the thumbnails vertically to the left of the Preview panel (as opposed to horizontally under the Preview panel in previous version of OP 14) allows for a larger overall Preview panel. This reduces scrolling up and down through selected documents and allows an overall larger preview of the selected document. OP 14 displays thumbnails of the pages in the document selected in the Document List panel. If the number of thumbnails fills the panel, OP 14 displays them in columns. The end user can customize the size of this panel by clicking and dragging the right border of the panel. If there are multiple rows of thumbnails, OP 14 changes the display to a single column of thumbnails. The Hide/Show Thumbnails button (highlighted above the Thumbnails panel) allows the end user to hide or show the Thumbnails panel. If the end user hides the Thumbnails panel, OP 14 uses that space to expand the Preview panel. **Note:** The Thumbnails panel does not display thumbnails of PDF files. **Preview Panel** **Note:** This was View Mode in previous versions of OP 14.

	The Preview panel is a vertical panel to the right of the Thumbnail panel. The end user can customize the size of this panel by clicking and dragging the right border of the Thumbnails panel. If the selected page is too big to display completely, OP 14 displays a scrollbar along the right border of the Preview panel to allow the end user to scroll up and down on the selected page. To maximize the viewing space of the Preview panel, the end user can hide both the Thumbnail panel and the Document Details panel. **Document Controls Toolbar** **Note:** The Manage Documents window organizes into a single toolbar many document-control functions that appeared in several places in the Review Scanned Items and Input Scanned Items windows. OP 14 displays the Document Controls toolbar above the Thumbnails panel and Preview panel. This toolbar allows the basic actions for and navigation through the selected document. Document Control functions are organized into three groups: 1. Previewing, printing, editing, and deleting the document. 2. Marking as reviewed, reconciling the document, and attaching it to items such as Diagnostic Tests and Referrals. 3. Document navigation and viewing. The functions organized in the Document Controls toolbar include: • **Show Image Fullscreen button**: Clicking this button opens the selected document in a separate browser window, which the end user can maximize to the full size of the computer screen. See Section 2.2.6 for additional details on the Show Image Fullscreen feature. **Note:** In previous versions of OP 14, if the end user clicked on the image or pressed a key while in fullscreen mode, OP 14 closed the fullscreen window. With these enhancements, OP 14 does not close the fullscreen window if the end user clicks on the image or presses a key.

	• **Print Selected Record button**: Clicking this button prints the selected document. • **Send button**: This is a new feature that allows the end user a simple way of sending a document to another end user. Clicking this button allows the end user to create a message and attach the selected document to the message and to send the message to internal or external recipients using Direct Messaging. • **Edit button**: Clicking this button puts the document in Edit mode. Edit mode allows the end user to make drawing, annotation, and pagination changes to the selected document and to the document details. See Edit Mode and Edit Page Buttons below for details on editing the document itself. See Document Details Panel below for details on editing document details. • **Delete button**: Clicking this button allows the end user to delete the selected document. When the end user clicks the Delete button, OP 14 displays the warning message, “Do you really want to PERMANENTLY delete the selected document? This correction is NOT recoverable. You may be discarding the last available copy of this document.” If the end user clicks Yes, OP 14 displays the Audit Trail dialog box requiring the end user to enter a reason for deleting the document. This information is added to the Audit Trail. • **Mark Reviewed button**: Clicking this button displays a popup window with the confirmation message, “Mark the selected document as reviewed by [name]?” where name represents the name selected in the Addressed To field of the Document Details panel. The options are: OK + Close; OK; Cancel. • **Reconcile button**: Clicking this button reconciles the selected document with the Patient Chart of the selected patient. • **Attach button**: Clicking this button allows the end user to attach the selected document to a Diagnostic Test or Referral. The end user is to use this button after a document has been saved. This is an additional option for linking a document to a Diagnostic Test or to a Referral. When inputting a document initially, the end user completes the Details panel. When the end user clicks the Category field, OP 14 displays a Paperclip icon, which allows the end user to attach a document. If the end user selects an Item type of either Diagnostic Test or Referral, clicking the Paperclip presents the popup box associated with the selected Item Type.

	• **Detach button**: Clicking this button allows the end user to detach the selected document from the medical records it is associated with. • **Scrolling buttons**: These are standard scrolling buttons. • **Zoom buttons**: These are standard buttons for zooming in and zooming out. **Note:** Some of the above buttons are not active in Edit mode and only activate when a document in Edit mode has been saved. **Document Details Panel** **Note:** This panel displays the information previously displayed on the Item tab and Notes tab in previous versions of OP 14. The Document Details panel is a vertical panel to the right of the Preview panel. OP 14 displays in the Document Details panel the document- and file-related details of the document selected in the Document List panel. The Hide/Show Details button (above the Document Details panel) allows the end user to hide or show the Document Details panel. If the end user hides the Document Details panel, OP 14 uses that space to expand the Preview panel. **Note:** The data fields are only editable when creating a new document or in Edit mode for an existing document. The Document Details panel displays the following information: <u>Patient Information</u> • **Patient ID**: This field replaces the Patient Number field in previous versions of OP 14. In Edit mode, it includes the Patient Search button and the Cancel button. Clicking the Patient Search button displays the Patient Directory. Clicking the Cancel button allows the end user to set the document so that it is not associated with any patient. OP 14 displays a confirmation message when selecting this option. • **Patient Name**: This field replaces the Identifier field in previous versions of OP 14.

	Review Details • **Item Type**: This field replaces the Type of Item field in previous versions of OP 14. In Edit mode, this field includes the Item Type dropdown button that allows the end user to select an Item Type. The end user determines the options listed in this dropdown using the Document Types and Categories window. For details regarding the Document Types and Categories window, see Section 2.2.5. • **Item Category**: This field replaces the Category field in previous versions of OP 14. In Edit mode, this field includes the Document Types and Categories button and the Attach button. Clicking the Document Types and Categories button opens the Document Types and Categories window. This window allows the end user to select an Item Category and to specify the options that the Item Category field offers. For details regarding the Document Types and Categories button, see Section 2.2.5. Clicking the Attach button displays the Choose a Medical Record to Attach to a Consent Record window, which allows the end user to attach documents while processing files (rather than having to do so after processing files). • **Reviewed? checkbox**: This field and checkbox replace the Was Item Reviewed? field and Yes/No radio buttons in previous versions of OP 14. Selecting this checkbox indicates that the selected document has been reviewed. • **Reviewed by**: Indicates the end user that reviewed the selected document. • **Review date**: This field replaces the Date Reviewed field in previous versions of OP 14. • **Privacy level**: In Edit mode, this field includes a dropdown menu with a list of Privacy Levels. This field replaces the Visibility Level field in previous versions of OP 14. • **Notes**: This field replaces the Item Note field in previous versions of OP 14. Administrative Details • **Creation Date**: This field replaces the Item Date in previous versions of OP 14. • **Created by**: This new field indicates the end user that created the document in OP 14. • **Created Location**: This field indicates the office location where the document was created.

	• **Correspondent**: Clicking the ellipsis button in the Correspondent field opens the Address Book, which allows the end user to select a recipient with whom they want to link the document. • **Addressed to**: This field replaces the Addressee [Staff ID] field in previous versions of OP 14. This field indicates whom the end user is sending the document to for review. • **Status of Original**: This field replaces the Status of Original Item field in previous versions of OP 14. This field indicates the status of the selected document. • **Last Updated**: This field indicates the date the selected document was last updated. <u>Technical Details</u> • **Document ID**: This field displays a document ID that OP 14 assigns. • **Page Count**: This field displays the total number of pages in the selected document. • **Tech info**: This field displays file type, number of pages, and document size. • **URL**: This field displays the URL of the document, if it originated from a URL-based location. • **File extension**: This field indicates the file extension and is usually associated with the File Type field. • **File type**: This field was under the Notes tab in previous versions of OP 14 and indicates the type of file (such as PDF, JPG). • **Storage Type**: This field lists the database where the document is stored. **Document Types and Categories Window** For details on the new Document Types and Categories window, refer to Section 2.2.5. **Edit Mode** If the end user clicks the New Document button or clicks the Edit button while viewing an existing document, OP 14 switches the Manage Documents window to Edit mode. In Edit mode, OP 14 replaces the Document List panel with the Acquisitions panel. See Acquisition Panel below for details.

	When the Manage Document window switches to Edit mode, OP 14: • Changes the Document List panel to the Acquisition panel. • Displays the Edit Page buttons at the bottom of the Preview panel. See Edit Page Buttons below for details. • Makes the fields in the Document Details panel editable. • Displays the Save and Cancel buttons in the bottom right corner of the Manage Documents window. **Note:** After editing and saving a document, OP 14 displays the list of documents and focuses on the document the end user edited and saved. **Edit Page Buttons** When the end user clicks the New Document button or when the end user has selected a document and the end user clicks the Edit button, OP 14 displays the Edit Page buttons at the bottom of the Preview panel. The Edit Page buttons combine all the editing features of the scanning functionality in previous versions of OP 14 into a single toolbar and adds the new Sign button. The Edit Page buttons include the following: • **Undo Last Edit button** (icon of a curved arrow). This button only activates after making a change to the document. • **Resize/Rotate**. Clicking on this button displays a menu of options (Resize to 8.5 x 11”; Resize Image; Rotate 90º CCW; Rotate 90º CW; Rotate 180º; Flip Horizontal; Flip Vertical). • **Convert**. Clicking on this button displays a menu of options (Convert to Black/White; Convert to Grayscale; Convert to TrueColor; Antialias; Invert Colors; Adjust Brightness/Contrast). • **Cursor tool**. • **Zoom button** (icon of a magnifying glass). • **Cropping tool**.

- **Drawing tool** (icon of a pencil).
- **Highlight tool** (icon of a paintbrush).
- **Add Annotation tool** (icon of a pencil on paper).
- **Sign**. This button allows the end user to add a signature to the selected document. Adding a signature does not mark the item as Reviewed.

Acquisition Panel

When the end user clicks the New Document button or clicks the Edit button in the Document Controls toolbar while viewing an existing document, the Manage Documents window changes the Document List to the Acquisition panel. The Acquisition panel is comprised of two sections: the Acquire Images & Documents section at the top of the panel and below that the Sketch panel.

<u>Acquire Images & Documents</u>

The Acquire Images & Documents section includes the following:

- **Scan button**. This button allows the end user to Input an image directly from a scanner.
- **Card Scan**: This button (light background) allows the end user to input an image directly from a card scanner.
- **Import Images from Files button**. This button replaces the Import button and allows the end user to input single or multiple pages in JPEG, TIF, or BMP format.
- **Input Fax**: This button allows the end user to input faxes (received or sent).
- **Acquire from Camera**. This button allows the end user to acquire images from a camera.
- **Import PDF, CDA, or DICOM Documents button**: This button allows the end user to import PDF and CDA files. Clicking the dropdown arrow displays a list of import options (Import PDF, Import CDA, and Import Dicom).
- **Twain options**: these include the Use and Hide radio buttons.

	<u>Sketch Panel</u> The Sketch panel is a vertical panel below the Acquire Images & Documents buttons and includes the following buttons: • **Undo Last Sketch Operation**. • **Cut Image to Clipboard**. • **Copy Page to Clipboard**. • **Paste Image from Clipboard**. • **Delete Page**. • **Copy from Sketch Folder to Document**: Clicking this button allows the end user to drag-and-drop pages without having to use the Copy button. This is especially helpful when copying a range of pages. • **Copy from Document to Sketch Folder**. • **Delete all Images from the Sketch Folder**. • **Refresh Sketch Folder**. • **Number of Viewable Columns in Sketch Thumbnail**. • **Configure Scanners on this Workstation**: Clicking this button displays the following options: o Set up Predefined Devices. o Card Scanner Device: Card Scanner: Scan Again; Auto-convert to Black/White; Reduce Size (Original size 100%; Reduce Size to 33%; Reduce Size to 50%; Reduce Size to 66%). o Scan Destination: Scan to Sketch Folder; Scan to Image. o Advanced: Reset TWAIN. The bottom part of the Sketch panel displays the image after the end user has acquired it. The image remains in Edit mode until the end user saves the document.

	Note: These enhancements also include the changing the name of the Scanning tab in Schedule and Practice Workflow to Documents.

2.2.4 Manage Documents Window / Search for Documents

Function:	The Search for Scanned Items feature in the Review Scanned Items and Input Scanned Items window needs to provide the end user with a simpler and more powerful means of searching for scanned items.
Solution:	Enhanced the software by overhauling the Review Scanned Items and Input Scanned Items windows. This overhaul combines the two windows into the Manage Documents window, reorganizes the features and functions of the two windows, and improves the layout of the window and its document-management features. **Note:** **Click here** for detailed information on this and related document-management features. The Document Management enhancements allow the end user to access the Search function from the Manage Documents window. When the user clicks the Search button (which replaces the Search button on the Input Scanned Items window), OP 14 displays the Search for Documents window, which has been streamlined for greater ease-of-use. The Search for Documents window allows the end user to search by: • Patient • Contents of ID/Note • Item Type • Item Category • Staff Addressee • Date range

	• Correspondent • Not reviewed items only • EFR included OP 14 displays the thumbnails and images associated with each search result in a panel to the right of the Search Results grid. A Thumbnail and Images tab allows the end user to click back and forth between them. The end user can also select a document in the Search Results grid and print it from the search window by clicking the Print button. These enhancements also allow the end user to search for and select a document to edit. The end user can click the Show/Hide Columns button to determine which columns to display. The end user can also drag and drop columns to customize the order of the search results and can group search results. OP 14 displays the thumbnails and images associated with each search result in a panel to the right of the Search Results grid. A Thumbnail and Images tab allows the end user to click back and forth between them. Clicking the Filter button opens the Filter Builder window which allows the end user to create and save custom search filters using Boolean logic The end user can also select a document in the Search Results grid and print it from the search window by clicking the Print button.

2.2.5 Manage Documents Window / Document Types and Categories

Function:	The Item Type and Category features in the Review Scanned Items and Input Scanned Items windows are confusing. OP 14 needs to improve these features to make it simpler for the end user to select a scanned document based upon Type and Category and to create new Item Types and Categories.
Solution:	Enhanced the software by overhauling the Review Scanned Items and Input Scanned Items windows. This overhaul combines the two windows into the Manage Documents window, reorganizes the features and

	functions of the two windows, and improves the layout of the window and its document-management features. **Note:** [Click here] for detailed information on this and related document-management features. The Document Management enhancements in OP 14.8 include enhancements to the Document Types and Categories window. The end user accesses this window by clicking in the Item Category field to display the Document button and then clicking the Document button. The Document Management enhancements available in OP 14.8 allow the end user to assign an Item Type and Category to a document either in New Document mode or in Edit Mode (for an existing document). This window combines the Document Type and Document Categories fields in previous versions of OP 14 into a single window. This window allows the end user to add a Document Type and, after selecting a Document Type to add, to edit and delete categories associated with that Document Type.

2.2.6 Manage Documents Window / Full Screen Mode

Function:	OP 14 needs to update the Full Screen Document viewer in Scanned Items so that it does not close when the end user clicks on it or clicks on any key.
Solution:	The Document Management enhancements in OP 14.8 include enhancements that improve the Show Image Fullscreen feature. When the end user is viewing a document in Full Screen Document mode in the Manage Documents window and either clicks on the image or clicks a key on the keyboard, OP 14 no longer closes the document. This enhancement also includes: • Moving the Image Control toolbar to the top of the window. • Moving technical details of the selected document to the bottom of the window. • Deleting the unnecessary Done button. **Note:** [Click here] for detailed information on this and related document-management features.

2.2.7 Manage Documents Window / Send Feature

Function:	OP 14 allows the end user to attach a document using two methods (creating electronic referrals and encounter notes). If end users forget to attach a document, they have to start the message again. OP 14 needs to simplify the means of attaching a document to a message and needs to allow the end user to attach any document by selecting it directly from the list of existing scanned items and documents.
Solution:	The Document Management enhancements in OP 14.8 include enhancements include adding a Send button to the Manage Documents window and adding the Attach paperclip in the New Message window. The Attach paperclip allows the end user to access the Search for Documents window to search a patient's documents and to select a document to attach to the message. The enhancements in OP 14.8 also add a grid to the bottom of the New Message window. This grid displays all documents attached to the message. **Note:** **Click here** for detailed information on this and related document-management features.

3. Improved Functionality

3.1 Non Function-Specific Improved Functionality

3.1.1 Output Options

Function:	OP 14 needs to improve the output options for files. These improvements need to make it easier for the end user to preview and print documents, to send them, or to create PDF files of the documents. It would also be helpful if these enhancements could be set as a preference at each workstation.
Solution:	Enhanced the software by overhauling and expanding the functionality of what used to be the Print/Preview toggle button on the Smart toolbar in previous versions of OP 14. In previous versions of OP 14, this button supported two output modes: Preview to Screen and Print Directly. With these enhancements, the toggle functionality of the Print/Preview button is replaced with a dropdown menu. When the end user clicks on the Printer button on the smart toolbar, OP 14 displays the following four options: • Preview • Printer • Transmit • Save PDF Selecting one of these options predetermines the behavior of the Print button in all windows that output patient records. This includes school forms, vaccine summaries, and records from the Event Chronology. **Preview**

	If end users select Preview on the Printer button, clicking Print on windows that output patient records displays a preview window that allows them to inspect the document they are about to print. End users can preview the document and can then decide to print or transmit it. **Print** If end users select Print on the Printer button, when they click Print on windows that output patient records, OP 14 bypasses the preview window and goes straight to the print options. End users should select this output mode when they are certain the document(s) they are going to print are ready to be printed. **Transmit** This new option allows end users to prepare a document to be transmitted using Direct Messaging (depending on system settings). If end users select Transmit on the Printer button, when they click Print on windows that output patient records, OP 14 creates a PDF of the document, stores that PDF file in DOCIMAGES (in the Manage Documents window under the new DISCLOSURE group), and then opens a new message with the PDF file attached to the message. If the document is patient-oriented, the new message defaults to the selected patient in the Subject field and provides information regarding the attached file(s) in the Message Body. The Transmit option does not present a preview. **Note:** Messages now support multiple attachments. **Save PDF** This new option allows end users to select a document and to create a PDF version of the document. If end users select Save PDF on the Printer button, when they click Print on windows that output patient records, OP 14 immediately creates a PDF of the selected document and stores the PDF in DOCIMAGES and asks the end user if they want to view it immediately or file it. **Other Output Enhancements**

	• OP 14 automatically stores a copy of all outputted documents that are printed, transmitted, or saved as PDF files in the DISCLOSURE group in the Manage Documents window. This applies even if OP 14 is not in Transmit or Save PDF mode. This feature provides a backup of all materials sent outside of OP 14. With this enhancement, end users no longer have to re-scan certain documents back into OP 14 before sending them. The exception to this feature is that, if an item is saved to the OP Patient Portal, OP 14 places a copy of the item in the Forms Item Type in the Manage Documents window. • Several windows in previous versions of OP 14 had a set of radio buttons that allowed the end user to choose between Preview and Print. The enhancements in OP 14.8 remove these radio buttons. • Several windows in previous versions of OP 14 had the Save as PDF checkbox. These labels have been changed to Save to Portal. Because all outputted patient records are archived in the Manage Documents window, the end user can make any record visible on the OP Patient Portal by changing its top-level Type from DISCLOSURE to FORM. • All outputted patient records now have a formal Category and Note that describe their intended purpose. This information is displayed in DOCIMAGE so that the end user can quickly scan the DISCLOSURE list without opening each item individually to determine its contents. • OP 14 now offers the option of viewing PDF files with an internal or external PDF viewer. This preference is on the Basic tab of the System Preferences window. The default setting is Internal because most workstations have PDF plugins installed and enabled. The External options allows practices to use an external PDF viewer. See section 3.2.3 for details. • The Save to Portal checkbox replaces the Save as PDF checkbox in the Forms, Statements, and Diagnostic Test Requisition windows. Selecting this checkbox allows the end user to save the document to the OP Patient Portal. **Setting Output Option as a Preference** These enhancements allow the end user to set an output mode as a preference. To set an output mode as a preference, the end user selects the output mode and clicks on the Pref button. This allows the end user to set

	a default type of output for a particular workstation. After the preference is set, when the end user clicks the Print button, the output defaults to that setting. **Note:** The output mode saved as a preference is specific to the workstation, not to the logged-on end user.

Function:	OP 14 needs to update its HIPAA-related information to match the latest HIPAA requirements on the X12 website.
Solution:	Enhanced the software by updating its HIPAA-related information so that it matches the latest HIPAA requirements on the X12 website.

3.2 Function-Specific Improved Functionality

3.2.1 Reports / A/R Aging Analysis

Solution ID: No

Function:	OP 14 needs to allow billing managers to determine which patient accounts are oldest (and may be delinquent) based upon the date the patient became responsible for their outstanding balance.
Solution:	Enhanced the software by adding two A/R Aging Analysis reports. The new reports (available on the A/R Report Type dropdown menu) are: • Ins.Payer - Pat Resp. Date A/R • Ins Payer-Secondary Resp. Date A/R

	These reports display aging information using the Patient Responsibility Date from the date the patient became responsible for their outstanding balance.

3.2.2 Utilities / Manage Codes / Vaccine Products

Function:	OP 14 needs to give Practices greater control over managing vaccine names.
Solution:	Enhanced the software with several changes that give Practices greater control over managing vaccine names in OP 14. These changes include a new permission and several changes throughout the software. **New Permission Name** OP 14.8 introduces a new Permission named Vacnames_Administration. When this Permission is assigned to an end user, it allows that end user to add rows to the Vaccine Codes window and to edit the Vaccine field in the Vaccine Codes window. By default, OP 14 does not assign this Permission to any group or user initially. The Administrator must specifically assign this Permission to an end user. **Other Changes** These enhancements also include: • The addition of the Add button in the Vaccine Codes window. This button is only visible to those end users assigned the Vacnames_Administration Permission. Clicking the Add button inserts an editable line at the top of the Vaccine Codes window. • The addition of the Save button in the Vaccine Codes window. This button is only visible to those end users assigned the Vacnames_Administration Permission. If the end user edits the Vaccine Codes table and presses the Save button, OP 14 displays a confirmation message asking whether to save the changes. Clicking OK saves the changes. OP 14 then implements these changes as appropriate throughout the software.

3.2.3 Utilities / System Admin / System Preferences / Basic tab

Function:	OP 14 needs to allow Practices to determine whether OP 14 opens a PDF file internally (using Document Manager) or externally in a separate window.
Solution:	Enhanced the software by adding the Default PDF Reader Options to the Basic tab in System Preferences. These options include the following radio buttons: • Internal (within Document Manager) • External (launch separate window) With this enhancement, if the end user selects the Internal radio button, OP 14 opens PDF files using the Document Manger. Selecting External allows a Practice to open PDF files in a separate window (as in previous versions) **Note:** The default setting for this option is Internal.(within Document Manager)

3.2.4 Utilities

Function:	The Image Brightness/Contrast and Copy Pages functions in Utilities need to be updated to match other OP 14 windows in look and feel.
Solution:	Enhanced the software by reorganizing the features of the Image Brightness/Contrast and Copy Pages functions in Utilities to be more intuitive. This enhancement also updates the look and feel of these windows so that they match other OP 14 windows.

3.2.5 Utilities / Manage Clinical Features / Report Criteria Editor

3.2.6 Patient Chart / Encounter / Prior Notes tab

Function:	OP 14 needs to modify the Prior Notes tab so that the synopsis information that it displays when the end user hovers the mouse over the note is more meaningful and relevant and so that the information is more readable.
Solution:	Enhanced the software by changing how OP 14 populates the synopsis information that OP 14 displays when the end user hovers the mouse over the note. These enhancements allow the end user to specify the data presentation in the Prior Notes tab. To select the information OP 14 displays when the end user hovers over the note, the System Admin can go to Utilities / Manage Clinical Features / Report Criteria Editor, select the Prior Notes set and modify the settings. With these enhancements, the synopsis information focuses on the Chief Complaint and Assessment/Plan information. These enhancements also include improving the format of the information so that it is more readable and removing the Exclude Negative ROS/Normal Exam Findings checkbox. These changes also ensure that OP 14 retains the column and filter settings when the end user saves the window preferences for this tab.

3.2.7 Tools / QIC (MU Calculator)

Function:	CMS issues new guidance regarding which Secure Messages qualify for credit under the Secure Messages credit. In previous versions, the message had to originate from the patient. OP 14 needs to be updated to reflect the new guideline that allows credit to be granted to eligible Providers who send an unsolicited Secure Message to the patient.

Solution:	Enhanced the software by adding the Secure Messaging, 2017 measure to the QIC. This updated guideline allows credit to be granted to eligible Providers who send an unsolicited Secure Message to the patient and is no longer based solely on the message originating from the patient. **Note:** Credit is given to the Primary Care Provider (PCP) listed on the Register based on that patient having sent or received a secure message with anyone in the Eligible Provider's Practice. If an Eligible Provider sends a message to a patient for whom they are not listed as the PCP, they will not receive credit for that message.

Function:	Many older OP 14 scripts and favorites did not specify whether a prescribed medication was Generic or Brand. The QIC (MU Calculator) in OP 14 needs to allow the end user to calculate older data based upon Generic or Brand medications.
Solution:	Enhanced the software so that the QIC (MU Calculator) in OP 14 allows the end user to calculate older data based upon Generic or Brand medications. This enhancement allows Practices to calculate for performance-improvement initiatives. This enhancement also adds some missing elements in the QIC queries that drove this calculation and that included reference medications in the denominator.

Note: Section 3.2.8 and Section 3.2.9 discuss enhancements to the scheduling feature in OP 14.8. These enhancements allow the end user to create Teams, to assign Providers to Teams, to assign patients to Teams, and to set up a sequence of follow-up appointments. Although these enhancements impact several windows, all scheduling-related changes are grouped together below as Scheduling changes.

These features are foundational for a future release of OP 14. No Practice is required to use any of these features. To use these features successfully, Practices must plan carefully how they need to define teams in their Practice and how to support multiple, sequential follow-up appointments.

3.2.8 Utilities / Manage Practice / Departments and Utilities / Manage Practice / Staff/Provider Directory and Patient Register / Patient tab

Function:	OP 14 needs to allow Practice Administrators to configure Teams for the Practice. This functionality needs to allow end users to assign patients to a Team that the Practice defines.
Solution:	Enhanced the software by adding support for Teams. This includes: • Adding the Teams tab to the Department Management window. This tab allows the Practice Administrator to define teams for the Practice. • Adding the Team(s) column to the Staff/Provider Directory. • Adding the Team field to the Patient tab of the Patient Register. **Defining Teams** Utilities / Manage Practice / Departments / Teams tab The Teams tab in the Department Management window allows the Practice Administrator to Add, Delete, and Edit teams. Other buttons include the Save, Cancel, and Refresh button. Clicking the Add button inserts a new row at the top of the Teams list and allows the Practice Administrator to define the following: • Team Name • Team Color • Team Description **Assigning Staff to Teams** Utilities / Manage Practice / Staff/Provider Directory After defining Teams for the Practice, the Practice Administrator can assign Staff to Teams. These enhancements include the addition of the Team(s) panel in the Staff/Provider Directory. To the right of and

	similar to the Department(s) and Location(s) panels, the Team(s) panel provides the Add, Delete, Edit, Save, and Cancel buttons. **Assigning Patients to a Team** Patient Register / Patient tab After the Practice Administrator has defined Teams for the Practice and assigned Staff/Providers to those teams, the end user can then assign a patient to a Team of Providers. These enhancements include the Teams field in the Patient tab of the Patient Register. Clicking the Team dropdown arrow displays a list of all the Teams defined for the Practice. Selecting a Team from the dropdown list assigns the selected patient to that Team.

3.2.9 Utilities / Manage Clinical Features / Well Template Editor and Patient Chart / Encounters or Well Visits / Assess/Plan / Order Worksheet

Function:	The Follow-Up Orders functionality in the Order Worksheet is based on the assumption that only one follow-up appointment needs to be scheduled. However, for therapists and other specialists, a series of follow-up appointments is frequently required. OP 14 needs to support creating a sequential recurrence of multiple follow-up orders for a selected patient.
Solution:	Enhanced the software so that end users can select multiple follow-up appointments for a selected patient. These enhancements include: • Adding the Appts and Frequency fields to the Well Visit Template Editor. These fields are located on the Followup tab of the Orders/Workflow window. This enhancement allows the Practice to set up a default number and frequency of appointments for each Well Visit Template. • Revising the Order Worksheet by adding two fields to the Follow-up grid, one for Appts (appointments) and one for Frequency. These columns allow the Provider to schedule a sequentially recurring series of

	follow-up appointments (for example, 10 appointments with a Weekly frequency or 5 appointments on a Bi-monthly frequency). The default setting for these fields is 1 and Once (1 Appt for a Frequency of Once). As in previous versions of OP 14, if the end user double-clicks on a Task saved using the Appts/Frequency fields, OP 14 opens the Calendar tab in the Schedule and Practice Workflow window. **Note:** If end users choose the Appts and Frequency fields to schedule follow-up appointments, they should use the Timeframe/Instructions field to enter special instructions (for example, “can only come on Tuesdays”) but not to enter the number of appointments and the frequency of the visits. These fields offer a benefit to most Practices by allowing them to schedule a yearly follow-up visit. If Practices choose not to use the Appts and Frequency fields to schedule follow-up appointments, they can continue using the Timeframe/Instructions field as in previous versions of OP 14 (for example, by entering, “1 a week x 4 weeks”).

3.2.10 Help / Internet Speed Test

Function:	OP 14 needs to update the URL to the Internet Speed Test so that it links to the correct OP web page.
Solution:	Updated the software so that the URL to the Internet Speed Test links to the latest OP web page. The latest URL is: http://officepracticum.speedtestcustom.com

3.2.11 Schedule and Practice Workflow /Diagnostic Tests and Patient Chart / Diagnostic Tests

Solution ID: No

Function:	When the end user is reviewing labs in the Diagnostic Tests window and then clicks the Scan button, OP 14 opens the Scanned document associated with the lab window as a separate window. This blocks the other windows and interferes with the workflow and can make some systems appear to freeze.

Solution:	Enhanced the software so that, when the end user is reviewing labs in the Diagnostic Tests window and then clicks the Scan button, OP 14 opens the Scanned document associated with the lab in the Diagnostic Tests window.

3.2.12 Patient Register / Patient tab

Function:	In order to support value-based payments, OP 14 needs to allow Practice Administrators to assign patients to risk groups that the Practice defines.
Solution:	Enhanced the software by adding the Risk Group field to the Patient tab in the Patient Register. Clicking the Risk Group dropdown arrow displays the following options: • Not Applicable • High Risk • Medium Risk • Low Risk This enhancement includes adding Risk Group to the Show/Hide Columns menu in the Demographic Analysis and Recall report list so that end users can add the Risk Group column to the DAR.

3.2.13 Patient Register / Patient Demographics and Contacts and Insurance

Function:	OP 14 needs to add a Country field to the following windows in the Patient Register: • Patient Demographics • Contacts

	• Insurance
Solution:	Enhanced the software by adding the Country dropdown menu to the following windows in the Patient Register: • Patient Demographics • Contacts • Insurance

3.2.14 Address Book and Patient Register / Patient Demographics and Contacts and Insurances

Function:	Outside of the US, State codes may be longer than two characters and Zip Codes may be longer than five or nine numbers. OP 14 needs to be enhanced to support longer State abbreviations and longer Zip Codes.
Solution:	Enhanced the software so that OP 14 supports up to six characters for the State field and up to ten numbers for the Zip Code Field. This enhancement applies to both of these fields in the following windows: • Address Book • Patient Register / Patient Demographics • Patient Register / Contacts • Patient Register / Insurance

3.2.15 Address Book / Signature

Function:	OP 14 needs to improve the functionality for adding signatures to a Provider’s account and for adding signatures to documents throughout OP 14 that require a Provider’s signature.

Solution:	Enhanced the software by modifying the Signature functionality and by allowing Providers to create and attach a signature to documents. After the end user imports a signature graphic using the Manage Documents window, the end user can link signatures to the Address Book and can attach signature graphics to documents. These changes include: • Displaying in the Edit Address window the Add Signature Graphic button if a signature has not been linked to the selected Provider. • Replacing the Add Signature Graphic button with the View Linked Signature button if a signature has been linked to the Selected Provider. • If a signature has been linked to the selected Provider, displaying a thumbnail of the signature graphic on the Staff/Provider tab. • Making the thumbnail an active link that, when clicked, displays the Image Link window, which allows the end user to remove the link. **Note:** With these enhancements, signatures are no longer managed through the Scanned Images window (as in previous versions of OP 14). They are now managed through the Address Book. Clicking the Add Signature Graphic button opens the Search for Documents window (see Section 2.2.4 for details). This window allows the end user to search for all imported Signature Graphic files by selecting Office Administration as the Item Type and clicking Search. The results field displays any imported Signature Graphic images and displays a thumbnail of each file in the Thumbnail panel of the Search for Documents window. The end user can then select the file and click the Use Selected Document button. OP 14 returns the end user to the Staff/Provider tab of the Edit Address Book window with the selected Signature Graphic image linked to the Provider selected in the Address Book. With these changes, after a Signature Graphic image is linked to the Address Book, when the end user edits a selected Provider's Address Book, OP 14 displays a thumbnail of the linked Signature Graphic instead of the Add Signature Graphic button. To remove or replace a linked Signature Graphic, the end user clicks on the thumbnail. OP 14 displays the Linked Address Book and Image Items window. To remove the link, the

	end user clicks the Remove Link button. OP 14 displays the confirmation message, "Are you sure you want to remove the link between this image and the address book item?" Clicking OK removes the link. **Note:** Click here for detailed information on this and related document-management features.

3.2.16 Patient Chart / Immunizations

Function:	OP 14 needs to update its list of licensed vaccine vendors so that it matches that list maintained by the CDC at the following website: https://www2a.cdc.gov/vaccines/iis/iisstandards/vaccines.asp?rpt=mvx
Solution:	Enhanced the software to ensure that its list of licensed vaccine vendors matches the list of licensed vaccine vendors that the CDC maintains.

Function:	Currently, OP 14 identifies all vaccine products that a Practice has purchased during the last 12 months. If the Practice switches vendors or if new products are available, the Administrator must update this list of available vaccine products manually. OP 14 should identify changes to the list of available vaccine products and update the list automatically.
Solution:	Enhanced the software so that OP 14 automatically searches for changes to the list of available vaccine products and updates the list automatically. With this enhancement, OP 14 runs an update that identifies newly purchased products and adds them to the list automatically.

3.2.17 Patient Chart / Immunizations

Solution ID: No

Function:	OP 14 needs to be updated support the latest version of VacLogic.
Solution:	Enhanced the software by updating to VacLogic Version 3-272.

3.2.18 Patient Chart / Immunizations / Sync Registry

Function:	The Nevada immunization registry (Nevada WebIZ) requested that OP 14 not send the PV1 segment in the HL7 interface to ensure that the messages comply with CDC guidelines. OP 14 needs to be updated to support this requirement.
Solution:	Enhanced the software so that OP 14 no longer sends the PV1 segment in the HL7 interface to the Nevada WebIZ.

Function:	The Minnesota Immunization Information Connection (MIIC) made several changes in its requirements. These changes include: • Changing the code from "N" in PID-22.1 for Non-Hispanic. • Sending the address of Next of Kin. • Sending the completion status. OP 14 needs to be updated to meet the new MIR requirements.
Solution:	Enhanced the software so that OP 14 meets the new MIR requirements. These enhancements include:

	• Previously, the WIR required “N” for Non-Hispanic in PID-22.1. This has been updated to use “NH” for Non-Hispanic. • Previously, OP 14 was not required to send the address for Next of Kin segments in NK1-4. This has been updated so that OP 14 sends the address for Next of Kin in NK1-4. • Previously, OP 14 was not required to send the Completion Status in RXA-20. This has been updated so that OP 14 sends the Completion Status of “CP” in RXA-20 for New and Historical Immunizations. Additionally, for Refused Vaccine or Immunity of Disease (where the vaccine was not administered), OP 14 sends the correct RXA-9, RXA-20, and RXA-18 (Refusal Reason) information.

3.2.19 Patient Chart / Encounter / Encounter Summary Sheet

Solution ID: No

Function:	The Encounter Summary Sheet needs to support HTML for the Primary Note.
Solution:	Enhanced the software so that the Encounter Summary sheet supports HTML for the Primary Note. With this enhancement, when the end user opens the Encounter Summary Sheet, if the original note was saved in HTML format, the web browser will display the data accurately without having to convert the data to RTF.

3.2.20 Patient Chart / Vitals/Growth

Solution ID: No

Function:	On August 22, 2017, the American Academy of Pediatrics issued new Clinical Practice guidelines for the screening and management of high blood pressure in children and adolescents. OP 14 needs to support the latest AAP guidelines for Blood Pressure and the definition of Hypertension (HTN) for children and adolescents.

Solution:	Enhanced the software to ensure that OP 14 supports the latest AAP guidelines for Blood Pressure and the definition of Hypertension. These enhancements ensure that the Vital Signs Charts support on the Vitals/Growth tab of the Patient Chart support these latest guidelines.

3.2.21 Forms / School/Camp Form

Solution ID: 00008294

Function:	If a patient has been administered three or more doses of the Tdap vaccine, when the end user prints the School and Camp Form, the printed report shows only the first two doses that were not administered, not the most recent dose administered. OP 14 needs to show the most recent Tdap vaccines administered.
Solution:	Enhanced the software so that the School and Camp Form displays the two Tdap vaccines most recently administered rather than the first two Tdap vaccines administered.

3.2.22 Patient Account / Claims

Solution ID: 00008183

Function:	OP 14 does not give the end user the opportunity to void Patient Responsibility or Revert Responsibility lines from a claim when the end user daysheets these transactions. When the end user voids one of these transactions, OP 14 creates an additional Revert line and moves the Responsibility to that new line instead of removing it from the original transaction. This sometimes causes rejections for Secondary Claims. OP 14 needs to allow the end user to void Patient Responsibility and Revert Responsibility lines from a Claim.

Solution:	Enhanced the software so that end users can void Patient Responsibility or Revert Responsibility lines from a Claim. This functionality is now similar to the void functionality for Payments and Adjustments.

Function:	OP 14 needs to allow end users that use Direct Messaging to send PDF files in addition to CDA records and to send messages with multiple attachments.
Solution:	Enhanced the software so that OP 14 supports attaching multiple files (including PDF files) to outbound Direct Messages. This enhancement is supported in part by the overhaul to the Scanned Images functionality included in the new Manage Document window (see Section 2.2.3 for details).

4. Resolved Issues

4.1 Non Function-Specific Resolved Issues

There are no resolved issues in this release that impact the overall application.

4.2 Function-Specific Resolved Issues

4.2.1 Tools / QIC (MU Calculator)

Issue:	There were no date ranges for Referral Letter in MU Inbound Reconciliation Stage 2. With this issue, those records were not limited to the measurement period.
Resolution:	Updated the software to include date ranges for Referral Letter in MU Inbound Reconciliation Stage 2. This ensures that those records are limited to the measurement period.

Issue:	The date bounds for the CQM named Chlamydia Screening for Women only ran backward from the end of the measurement period (to no start date).
Resolution:	Updated the software so that the date bounds for the CQM named Chlamydia Screening for Women include a start and end date for patients seen during a given period.

Issue:	OP 14 was not calculating Maternal Depression Screening (CMS 82) correctly. With this issue, OP 14 was only calculating surveys administered during the report period, not for surveys administered in the child's first six months of life.

Resolution:	Updated the software so that the QIC (MU Calculator) correctly calculates Maternal Depression Screening (CMS 82). This update ensures that OP 14 calculates this measure for surveys administered in the child's first six months of life.

Issue:	A previous version of OP 14 introduced Location as a filter for the MU measures related to ERX and COPIE/Medications. However, the calculation inadvertently included Medication Favorites that the selected Provider created during the Report Period. These were not live prescriptions and should have been excluded from the measure. This affected the following measures: • E-Prescribe (all, with formulary) • E-Prescribe (as permitted, with formulary) • CPOE for medication orders, 2014 • CPOE for medication orders, 2015-2017
Resolution:	Updated the software to ensure that Medication Favorites are removed from the result sets of MU calculations and that Medical Home Location are included in the calculations for the following measures: • E-Prescribe (all, with formulary) • E-Prescribe (as permitted, with formulary) • CPOE for medication orders, 2014 • CPOE for medication orders, 2015-2017

4.2.2 Schedule and Practice Workflow

Solution ID: No

Issue:	The Calendar Options panel of the Schedule and Practice Workflow window was overlapped the Patient Health Cases button.
Resolution:	Updated the software so that the Calendar Options panel of the Schedule and Practice Workflow window does not overlap the Patient Health Cases button.

4.2.3 Chart Rack

Solution ID: 00008408

Issue:	When the end user created Well Visit appointments in the Calendar for a patient and the patient's linked sibling and then used the Rack to create an Encounter from the existing Well Visit appointments, OP 14 listed the incorrect patient demographics for the sibling in the Encounter Summary.
Resolution:	Updated the software so that, when the end user creates Well Visit appointments in the Calendar for a patient and the patient's linked sibling and then uses the Rack to create an Encounter from the existing Well Visit appointments, OP 14 correctly lists the patient demographics for the sibling in the Encounter Summary.

4.2.4 Patient Account / Charges

Solution ID: 00008317

Issue:	When the end user attempted to post a claim with Self Pay charges, OP 14 populated the balance as Insurance Responsibility. This issue occurred whether the end user clicked Post All, Post Selected, + Claim from Acct, or AutoPost in the Tracking window.
Resolution:	Updated the software so that OP 14 successfully posts Self Pay charges as Patient Responsibility.

4.2.5 Patient Account / Claims

Solution ID: 00007921

Issue:	For patients that have an apostrophe in their name, OP 14 was deleting the apostrophe when the end user created 837 files, which resulted in claim rejections (based upon mismatched names) at the payer level.
Resolution:	Updated the software so that, for patients with apostrophes in their names, OP 14 retains apostrophes in both the Patient Name and Subscriber Name fields when the end user creates an 837 file for them.

Solution ID: 00007921

Issue:	If a patient had an apostrophe in their name, OP 14 deleted that apostrophe from the 837 files. This caused rejections at the Payer level (due to mismatched names).
Resolution:	Updated the software to ensure that OP 14 maintains the correct spelling of patient names in 837 files. This includes allowing apostrophes in patient names and subscriber names when creating 837 files.

4.2.6 Patient Chart / Encounter or Well Visit / History

Solution ID: 00008252

Issue:	If the end user edited the Oz. field in the Birth Measurement section of the Birth Info tab in the History window of an Encounter or Well Visit note, OP 14 did not save the changes. As part of this issue, when the end user returned to the Birth Info tab the window was not editable.
Resolution:	Updated the software so that, if the end user edits the Oz. field in the Birth Measurement section of the Birth Info tab in the History window of an Encounter or Well Visit note, OP 14 successfully saves the changes. If the end user leaves and then returns to the Birth Info tab, OP 14 successfully allows the window to be editable.

4.2.7 Patient Chart / Medications / Medication History

Solution ID: 00008362

Issue:	When the end user selected a patient and attempted to retrieve that patient's entire medication history by clicking the Med Hx button in the Medications window and entering 0 in the Medication History dialog box, OP 14 did not display any medication history and displayed the message, "No External Medications Found." With this issue, if the end user attempted to retrieve a portion of the patient's medication history (such as, three months), OP 14 successfully displayed medication history.
Resolution:	Updated the software so that, when the end user attempts to retrieve a selected patient's entire medication history by clicking the Med Hx button in the Medications window and entering 0 in the Medication History dialog box, OP 14 successfully displays the selected patient's entire medication history.

4.2.8 Patient Chart / Immunizations

Solution ID: 00008784

Issue:	According to the Immunization Action Coalition, "doses of quadrivalent meningococcal vaccine (either MPSV4 or MenACWY) given before 10 years of age should not be counted as part of the series. If a child received a dose of either MPSV4 or MenACWY before age 10 years, they should receive a dose of MenACWY at 11 or 12 years and a booster dose at age 16." With this issue, OP 14 was not forecasting correctly for the MCV vaccine.
Resolution:	Updated the software to ensure that OP 14 forecasts correctly for the MCV vaccine.

Solution ID: 00008777

Issue:	OP 14 indicated that a second dose of the Flu Vaccine was due when a patient received accurate dosing based upon the timeframe recommended by the CDC. The CDC guidelines are as follows: Has the child received 2 (or more) doses of trivalent or quadrivalent influenza vaccine before July 1, 2017 (Doses need not have been given during same or consecutive seasons): YES - 1 dose of 2017-18 influenza vaccine NO - 2 doses of 2017-18 influenza vaccine (administered 4+ weeks apart)"
Resolution:	Updated the software so that OP 14 does not indicate that a second dose of the Flu Vaccine is due if the patient receives accurate dosing based upon the timeframe recommended by the CDC.

4.2.9 Patient Chart / Immunizations / Sync Registry

<table>
<tr><td>Issue:</td><td>OP 14 was not sending some required information to the Kansas 2.5.1 Bi-directional Immunization Registry. With this issue, OP 14 sent the following fields as blank:
ORC-3.2
OBX-4 was blank for the first two OBX segments
Additionally, OP 14 was sending V06 as the VFC code for State-Specific (CHPLUS B). According to the Kansas registry, V06 is an unrecognized and unsupported value for the VFC eligibility code.</td></tr>
<tr><td>Resolution:</td><td>Updated the software to ensure that OP 14 conforms to the HL7 specifications for the Kansas Bi-directional Immunization Registry. These updates ensure that OP 14:
Populates the ORC-3.2 field when the ORC-3.1 field is populated. OP 14 automatically populates the ORC-3.2 field with “OP” (the name of the system that populated the ORC-3.1 field).
Populates the OBX-4 field with a positive number. For new vaccine messages, OP 14 sets the OBX-4 field to 1 for all OBX segments for the first group of OBX (including the OBX for VIS) to link them all together. For the second group of OBX, OP 14 sets the OBX-4 to 2 for all OBX segments to link them all together. OP 14 continues to increment the OBX-4 for subsequent OBX segments.
Additionally, with this update OP 14 sends V22 instead of V06 for the VFC eligibility code.</td></tr>
</table>

<table>
<tr><td>Issue:</td><td>OP 14 received several errors when syncing with the Delaware Immunization Registry. With these issues, OP 14:
Did not have a value for “Other.”
Was populating the MSH 3.2 field with the application name.
Was looking for the universal ID in MSH 4.2.</td></tr>
</table>

	• Was not sending the ORC 3 Name Space ID in the HL7 message. • Was not sending a positive integer for OBX-4. • Was not sending “CP” for RXA 20 (Completion Status) as required when RXA 9.1 was “00” (New Immunization). • Did not populate OBX 5.3 with the name of the coding system.
Resolution:	Updated the software to ensure that OP 14 conforms to the HL7 specifications for the Delaware Immunization Registry. These updates ensure that OP 14: • Has a value for “Other.” • Leaves the MSH 3.2 field blank. • Leaves the MSH 4.2 field blank. • Sends the Facility Code in the ORC 3.2 field. • Sends a positive integer for OBX-4. • Sends “CP” (for completed) for the RXA 20 field as required when RXA 9.1 is “00” (New Immunization). • Populates the OBX 5.3 field with the name of the coding system (for example, “HL70064”).

Issue:	OP 14 was sending to the New York State Immunization Information System (NYSIIS) a two-character language code for the PID-15.1 field ("EN" for English and "SP" for Spanish).
Resolution:	Updated the software to ensure that OP 14 sends to the NYSIIS the correct language code for the PID-15.1 field. This ensures that OP 14 conforms to the registry standard. With this update, OP 14 uses the following codes for the PID-15.1 field: • "eng" or "English" for English • "sp" or "Spanish" for Spanish

Issue:	OP 14 was not sending some required information to the Nevada (WebIZ) 2.5.1 Immunization Registry. With this issue, OP 14 sent the following fields as blank: • ORC-3.2 (Filler Order Number Namespace ID) • RXA-20 (Completion Status) • OBX-4 (Observation Sub-ID)
Resolution:	Updated the software to ensure that OP 14 sends all required information to the Nevada (WebIZ) 2.5.1 Immunization Registry according to the latest HL7 specifications for the state of Nevada. These enhancements ensure that OP 14. • Populates the ORC-3.2 field when the ORC-3.1 field is populated. OP 14 automatically populates the ORC-3.2 field with "OP" (the name of the system that populated the ORC-3.1 field). • Populates the RXA-20 field if the RXA-9 (Source of Record) field is populated. OP 14 automatically populates this field with "CP" for Newly Administered & Historical vaccines. OP 14 automatically populates this field for Refused Vaccine or Immunity of Disease based upon the refusal reason. OP 14 populates this field with the information in RXA-9, RXA-20, or RXA-18, as appropriate.

	• Populates the OBX-4 field with a positive number. For new vaccine messages, OP 14 sets the OBX-4 field to 1 for all OBX segments for the first group of OBX (including the OBX for VIS) to link them all together. For the second group of OBX, OP 14 sets the OBX-4 to 2 for all OBX segments to link them all together. OP 14 continues to increment the OBX-4 for subsequent OBX segments.

Issue:	When the end user imported vaccines using the Sync Registry function, OP 14 did not automatically refresh the Sync window and the Complete List of vaccines. With this issue, the Refresh buttons did not work, which forced the end user to exit and reopen the Immunizations window in order for OP 14 to reflect the synchronization changes.
Resolution:	Updated the software so that, when the end user imports vaccines using the Sync Registry function, OP 14 successfully refreshes the Synchronize Immunization Records window and the Complete List tab of the Immunizations window automatically. This update ensures that OP 14 highlights with a white background all vaccines that have a chart and registry match.

Issue:	OP 14 was sending the VXC52 for Public Funding to the Kansas 2.5.1 Bi-directional Immunization Registry Interface which had been replaced with VXC50.
Resolution:	Updated the software so that OP 14 sends VXC50 for Public Funding to the Kansas 2.5.1 Bi-directional Immunization Registry Interface.

4.2.10 Patient Chart / Surveys

Solution ID: 00008325

Issue:	When the end user clicked the DX dropdown arrow in the Survey: [*survey name*] window and OP 14 opened the DX Code Lookup window, OP 14 selected the ICD-9 radio button by default.
Resolution:	Updated the software so that, when the end user clicks the DX dropdown arrow in the Survey: [*survey name*] window and OP 14 opens the DX Code Lookup window, OP 14 selects the ICD-10 radio button by default.

4.2.11 Manage Documents Window (Replaces Review Scanned Items and /Input Scanned Items Windows

Issue:	OP 14 was not successfully updating the Audit Trail with changes made through the Review Scanned Items/Input Scanned Items window. Specifically, OP 14 was not updating the Audit Trail with changes the end user made that revised the metadata for document and image files.
Resolution:	Updated the software to ensure that OP 14 successfully updates the Audit Trails with all auditable changes in the Review Scanned Items/Input Scanned Items windows (replaced with the Manage Documents window).

Issue:	When OP 14 received a Zip file or a PDF file through Direct Messaging, the software put four entries into the Scanned Items window. Some of these entries indicated that OP 14 could not render the data in the files.
Resolution:	OP 14.8 introduces a complete overhaul of the Review Scanned Items and Input Scanned Items windows. The functionality of these two windows have been combined into a single new window labeled the Manage Documents window. Section 2.2.3 through Section 2.2.7 discuss these Document Management enhancements.

	These enhancements also update the software so that OP 14 does not create unnecessary entries in the Manage Documents window when OP 14 receives and renders Zip and PDF files through Direct Messaging.

4.2.12 Direct Messaging

Solution ID: No

Issue:	The Direct Messaging feature in OP 14 was not sending or receiving direct messages. When the end user attempted to send a Direct Message, OP 14 displayed an error message. OP 14 did not receive Direct Messages even when the end user attempted to fetch messages.
Resolution:	Updated the software so that the Direct Messaging feature in OP 14 successfully sends and receives messages.

4.2.13 ePrescribing

Solution ID: No

Issue:	The ePrescribing feature in OP 14 was not working correctly as a result of the OP 14.6.21 update.
Resolution:	Updated the software so that the ePrescribing feature in OP 14 works successfully.

4.2.14 ePrescribing / Pending EPCS

Solution ID: 00007904

Issue:	When the end user voided an EPCS medication order, OP 14 left the order in the Pending EPCS tab in ePrescribing.
Resolution:	Updated the software so that, when the end user voids an EPCS medication order, OP 14 successfully removes it from the Pending EPCS tab in ePrescribing.

4.2.15 ePrescribing / Refill / ePrior Auth

Solution ID: 00008410

Issue:	When the end user selected a patient on the Refill tab of the ePrescribing center, then selected a patient on the ePrior Auth tab, and then opened the Patient Chart, OP 14 opened the Patient Chart with the patient the end user selected on the Refill tab and did not change the patient name in the top ribbon.
Resolution:	Updated the software so that, when the end user selects a patient on the Refill tab of the ePrescribing center, then selects a patient on the ePrior Auth tab, and then opens the Patient Chart, OP 14 successfully opens the Patient Chart with the patient the end user selected on the ePrior Auth tab and successfully updates the patient name in the top ribbon to reflect the patient the end user selected on the ePrior Auth tab.

5. Known Critical Issues

There are no known issues in this release.