

Office Practicum Version 14.9.21 Release Notes

Description:	This document contains the Release Notes for OP Version 14.9.21.
Document Version:	Final V2.0
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Revision History

Revision	Effective Date	Changes Made – Reasons for the Change
Final V1.0	26-Nov-2018	First release of OP 14.9.21 release notes.
Final V2.0	07-Dec-2018	Revised Section 2.2, specifically, the section that covers the Preferred Contact methods, what displays and is hidden depending upon the OP Notify correspondent being active or inactive in the Patient Register Patient and Contacts windows.
		This includes revising the bullet that starts, "When OP Notify is enabled, OP software updates the methods of Preferred Contact" and its sub-bullets.
		This revision also adds the bullet item that beings, "Unrelated to the OP Notify changes, this version of OP software also removes contact methods from several windows," and its sub-bullets.



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1. Office Practicum (OP) Version 14.9.21 Release Notes

Software Release Date: 26-Nov-2018

⚠ Flu Season Information

For CDC guidelines regarding the 2018-2019 flu season, <u>click here</u>. To access the FAQ page for the 2018-2019 flu season, <u>click here</u>. For general 2018-2019 flu season information, <u>click here</u>. For Pediatrics-specific 2018-2019 flu season information, <u>click here</u>. For AAP's Flu Vaccine Recommendations for 2018-2019, <u>click here</u>.

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

Note: Enhancements for the OP Notify feature are foundational and do not display automatically in the OP software until your Practice purchases the optional OP Notify functionality.

For Practices that have already purchased the OP Notify functionality, the OP Implementation team will work with each Practice to implement and configure the OP Notify system.

Practices that are considering purchasing OP Notify should contact their Client Advocate.

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 Utilities / System Admin / e-Correspondents
- 2.2.2 Schedule and Practice Workflow / Tracking / Patient Message Exchange
- 2.2.3 Patient Register / Patient

2.2.4 Patient Register / Contacts

Function:	OP 14 needs to offer Practices an alternative to the standard Patient Message eXchange (PMX) system of messaging.
	This optional messaging system should provide a more efficient and reliable system for sending messages, a more reliable display of appointment statuses, greater automation (to replace the manual aspect of system communications), and should support a more robust HTML editor for template creation and the look and feel of the messaging system.
	If a Practice decides to enable this optional messaging system, the Practice should be able to disable the current PMX features and to eliminate the buying and checking of messaging credits.
Solution:	Enhanced the software by adding support for OP Notify to OP software. OP Notify is an all-in-one patient communication platform designed for the EHR systems of pediatric Practices. This new messaging platform is powered by InteliChart, which is an industry-leading technology, and is fully integrated with the OP system. OP Notify offers high user and patient satisfaction and increased Practice revenue.
	High-Level Functionality of OP Notify
	OP Notify:
	Is fully integrated within the OP application.
	Supports seamless demographic exchange of information.



- Provides automated email, text and call reminder functionality.
- Allows the scheduling and automation of communications.
- Supports real-time updates for cancellations and rescheduling.
- Supports multiple event types and advanced recipient targeting.
- Supports a robust HTML editor for customizing the look and feel.

Specific Changes to OP Software

Note: These enhancements do not display automatically in the OP software until the Practice purchases the optional OP Notify functionality.

For Practices that have already purchased the OP Notify functionality, the OP Implementation team will work with each Practice to implement and configure the OP Notify system.

Practices that are considering purchasing OP Notify should contact their Client Advocate.

These enhancement include the following changes to OP software:

- Added the InteliChart Notify record to the eCorrespondents window. This includes the Correspondent ID
 (INTELICHRT), the Correspondent Name (INTELICHART), and the Correspondent Role
 (OPNOTIFY). All features and functionality of OP Notify require the purchase of the InteliChart Notify
 record and adding and enabling this record in the eCorrespondents window.
- When a Practice purchases OP Notify and adds and configures the InteliChart Notify record in the eCorrespondents window, OP 14 disables all PMX functionality specific to sending and receiving messages throughout OP software. The PMX is still active for recalls. Enabling OP Notify does not currently impact Recalls, Demographic Analysis/Recall, or On-Demand information.
- When OP Notify is enabled, OP software removes the Send Message and Confirm buttons from the Tracking window in Schedule and Practice Workflow.



- When OP Notify is enabled, OP software removes the Check Credits and Buy Credits functionality from the Usage Statistics tab. This removes all information from the bottom panel of this tab. However, OP software maintains the Usage Statistics tab and data from PMX usage for historical purposes. This change also removes the PMX-related Messaging popup window.
- When OP Notify is enabled, OP software updates the contact methods throughout the system. This includes:
 - o Removing from the Patient and Contacts tab of the Patient Register the Preferred Contact methods for Reminders.
 - o Removing from the Contact Preferences tab of the Patient Message eXchange window the Preferred Contact methods for Reminders.
- Unrelated to the OP Notify changes, this version of OP software also removes contact methods from several windows, because they are unnecessary fields. This includes:
 - o Removing from the Patient and Contacts tab of the Patient Register the Preferred Contact methods for Billing Statements and Medical issues.
 - o Removing from the Contact Preferences tab of the Patient Message eXchange window the Preferred Contact methods for Billing Statements and Medical Issues.
- When OP Notify is enabled, when the end user clicks the Create Msgs button of the Personalized Messages tab in the PMX window, OP 14 customizes the message to inform the end user how many patients (recipients) the message will be sent to (rather than the amount of credits the message will use). This enables the end user to confirm the recipient count before sending the message.
- When OP Notify is enabled, when the end user sends a message from Demographic Analysis and Recall, OP 14 sends a record of the message through the Message Center Archive to OP Notify in order to create an Event Audit record.



3. Improved Functionality

3.1 Non Function-Specific Improved Functionality

Function :	OP 14 needs to increase the character limit for county codes throughout the system.
Solution:	Enhanced the software by increasing the character limit from five to six characters for county codes throughout the system.

Function:	For Practices and Providers that have a large number of locations, OP 14 needs to manage these locations more efficiently to reduce system lag time.
Solution:	 Enhanced the software by improving how OP 14 processes Location information. These changes include: When the end user accesses the Insurance Payer Details window, OP 14 does not load the Locations until the end user selects the Insurance Contracts tab. When the end user logs on, OP 14 does not load all Location information until the end user clicks on a window that uses Location information. These changes help OP 14 to run more efficiently and reduce system lag time.

3.2 Function-Specific Improved Functionality

3.2.1 Utilities / Manage Codes/ Procedure (CPT) Codes

Function :	OP 14 allows the end user to delete a CPT code from the CPT-4 window even if that CPT code has been
	used for a visit or in a billing charge. OP 14 should warn the end user if a CPT code has been used for a visit



	or in a billing charge to give the end user the opportunity to cancel out of the deletion. OP 14 should also prevent the end user from deleting a CPT code if it has been used for a visit or in a billing charge.
Solution:	Enhanced the software so that, if the end user attempts to delete a CPT code from the CPT-4 window, OP 14 displays a confirmation window asking the end user to confirm deletion of the CPT code. If the CPT code has been used for a visit or in a billing charge, OP 14 does not allow the end user to delete that CPT code.

3.2.2 Utilities / Manage Clinical Features / Pharmacy Favorites

3.2.3 Address Book / Edit Address

Function:	Practices often use the Active checkbox in the Edit Address window to flag a pharmacy as a favorite. OP 14 needs to allow Practices to flag a pharmacy as a favorite and needs to improve the way Practices indicate which pharmacies are active and inactive.
Solution:	Enhanced the software with several changes that help Practices to clarify which pharmacies are favorites and which pharmacies are active and inactive. These enhancements include the following changes:
	• Added the Inactivate Pharmacy button to the bottom of the Choose a Pharmacy window. This enhancement allows the end user to select one or more pharmacies in the Choose a Pharmacy window and to click the Inactivate Pharmacy button to set all of the selected pharmacies as inactive. Selecting this checkbox for a pharmacy deselects the Active checkbox for that pharmacy in the Address Book.
	Added the eRx column and checkbox to the main Address Book window. Selecting the eRx checkbox allows the Practice to indicate that the selected Address Book record is linked to a pharmacy record.
	Note: If a pharmacy is listed in the Choose a Pharmacy window, Practices should select the eRx checkbox in the Address Book window. Practices should not select the eRx checkbox for records in the Address Book that are not pharmacies.



• Added the Favorite checkbox to the Choose a Pharmacy window (to the Favorites, All Previously Used by Any Patient, and SureScripts Master List tabs). Selecting this checkbox for a pharmacy allows Practices to indicate throughout OP 14 that the selected pharmacy is a favorite. This also allows Practices to reserve use of the Active checkbox in the Edit Address window to indicate in OP 14 which pharmacies are active and which have been deactivated.
• This enhancement also adds a flag to all pharmacy favorites throughout the OP software.
Note: The Practice cannot delete a pharmacy record in the Address Book if that record is linked to a record in the Choose a Pharmacy window.

Also, if the Practice attempts to select the Active checkbox of a pharmacy record in the Address Book that is currently inactive and that pharmacy is linked to the pharmacy NCPDP ID of another pharmacy record in the Address Book that is set to active, OP 14 displays an error message and prevents the action.

3.2.4 Schedule and Practice Workflow / Calendar and Tracking

Function:	If a patient has an alternate first name populated in Patient Demographics, the Calendar and Tracking windows in Schedule and Practice Workflow should display that alternate first name so that Front Desk and Staff can use the preferred name when addressing the patient.
Solution:	Enhanced the software so that, if a patient has an alternate first name populated in Patient Demographics, OP 14 displays that alternate name in the Calendar and Tracking windows in Schedule and Practice Workflow.



3.2.5 Schedule and Practice Workflow / Tasks

Function :	OP 14 should close tasks automatically when the end user completes them.
Solution:	Enhanced the software so that OP 14 automatically closes tasks as the end user completes them. This enhancement applies to Tasks throughout OP 14, including the Patient Register, Insurance, Superbills, and queued claims.

3.2.6 Address Book

3.2.7 Patient Chart / Medications / ePrescribing

Function:	When the end user selects a pharmacy when writing an ePrescription, OP 14 checks that there is a pharmacy record in the Address Book. However, OP 14 also needs to check that the Active checkbox is selected for that pharmacy.
Solution:	Enhanced the software so that, when the end user selects a pharmacy when writing an ePrescription, in addition to checking that there is a pharmacy record, OP 14 checks that the Active checkbox is selected for that pharmacy. If the Active checkbox is not selected for the pharmacy record, OP 14 automatically displays an Update Address Book Record window that allows the end user to set the pharmacy as active in order to send the ePrescription. This retrieves the SureScripts data for the selected pharmacy and allows the end user to create a new pharmacy record and to pair it with a record in the Address Book.



4. Resolved Issues

4.1 Non Function-Specific Resolved Issues

Issue:	OP 14 was randomly logging off some end users and returning them to the Login window. When this occurred, OP 14 did not retain any unsaved changes the end user had been working on when OP 14 logged them off.
Resolution:	Updated the software to ensure that OP 14 does not randomly log off any end users.

4.2 Function-Specific Resolved Issues

4.2.1 Utilities / Manage Codes / Vaccine Codes

Issue:	OP 14 was sending 119 as the CVX code for Rotavirus.
Resolution :	Updated the software so that OP 14 sends 122 as the CVX code for Rotavirus.

4.2.2 Utilities / Manage Codes / Vaccine Products / Vaccine Code Table Details

Issue:	In the Vaccine Code Table Details window, OP 14 removed the leading zeros from the GTIN field and displayed dashes in the NDC ID fields.	
Resolution:	Updated the software to ensure that OP 14 does not remove the leading zeros from the GTIN field and removes the hyphens from the NDC ID field.	



4.2.3 Utilities / System Admin / Security Administration / Membership

Issue:	OP 14 collapsed all groups in the Security Settings window. Additionally, OP 14 was not displaying the members in each group alphabetically.
Resolution:	Updated the software so that OP 14 displays all of the groups in the Membership tab of the Security Settings in expanded formatted. Also, OP 14 displays the members in each group alphabetically.

4.2.4 Tools / QIC (MU Calculator)

Issue:	When the end user selected the PCMH Custom tab in the QIC window, selected and calculated results for any of the PCMH Custom reports, and then clicked the Grid (print) button, the Print Preview functionality displayed the calculations from other tabs.
Resolution:	Updated the software so that, when the end user selects the PCMH Custom tab in the QIC window, selects and calculates results for any of the PCMH Custom reports, and then clicks the Grid (print) button, the Print Preview functionality successfully displays the calculations for the selected PCHM Custom report.

Issue:	The Save button in the QIC was not working as designed. With this issue, if the end user clicked the No button when OP 14 displayed the popup asking to confirm saving the current results, OP 14 did not save the results but did display the "Results have been saved" message.
Resolution:	Updated the software so that, if the end user clicks Save to save results in the QIC and then clicks the No button in the popup to confirm saving the results, OP 14 does not display the "Results have been saved" message.



4.2.5 Schedule and Practice Workflow / Diagnostic Tests

Issue:	When the end user selected a requisition with multiple diagnostic tests in the Diagnostic Tests window of the Patient Chart and set the result to Part'l Reviewed or Part'l Received, OP 14 removed the requisition from the Diagnostic Tests window of Schedule and Practice Workflow.
Resolution:	Updated the software so that, if the end user selects a requisition with multiple diagnostic tests in the Diagnostic Tests window of the Patient Chart and sets the result to Part'l Reviewed or Part'l Received, OP 14 does not remove the requisition from the Diagnostic Tests window of Schedule and Practice Workflow.

4.2.6 Schedule and Practice Workflow / Diagnostic Tests / Results Received/Reviewed

4.2.7 Patient Chart / Diagnostic Tests / Requisitions/Results

Issue:	OP 14 did not correctly display the superscript in reference-range values in the Diagnostic Tests window of Schedule and Practice Workflow and the Patient Chart. With this issue, OP 14 did not display the ^ symbol and the subsequent superscript value as they were displayed in the result.
Resolution:	Updated the software so that OP 14 correctly displays the superscript in reference-range values in the Diagnostic Tests window in Schedule and Practice Workflow and the Patient Chart.

4.2.8 Chart Rack / Demographics

Issue:	When the end user clicked on the Demographics tab in the Chart Rack window, OP 14 displayed the error
	message, "Ancestor for 'lblPreferredBilling' not found."

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Resolution: Updated the software so that, when the end user clicks on the Demographics tab in the Chart Rack window, OP 14 successfully displays the demographic information for the selected patient without displaying an erro message.
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4.2.9 Patient Register / Patient

Issue:	When the end user attempted to add a new patient in the Patient Register by clicking on the Patient Directory (search) button and then clicking the New Patient button, OP 14 displayed an error message.
Resolution:	Updated the software so that, when the end user clicks on the Patient Directory button and then clicks on the New Patient button, OP 14 does not display an error message.

4.2.10 Patient Register / Patient and Contacts

Issue:	When the end user added a new patient to the Patient Register, the labels and dropdown boxes in the Patient Preferred Contact Methods section were not aligned correctly.
Resolution:	Updated the software to ensure that, when the end user adds a new patient to the Patient register, the labels and dropdown boxes in the Patient Preferred Contact Methods section are aligned correctly.



4.2.11 Patient Register / Insurance

Issue:	OP 14 was not able to validate the insurance for a patient that had an apostrophe in their name.
Resolution:	Updated the software so that OP 14 can successfully validate the insurance for any patients that have an apostrophe in their name.

4.2.12 Patient Register / Consents

Issue:	When the end user modified and saved the image of a consent in the Consents window, OP 14 did not display the image in the Attached Form tab.
Resolution:	Updated the software to ensure that, when the end user modifies and saves the image of a consent in the Consents window, OP 14 successfully displays the image in the Attached Form tab.

4.2.13 Patient Chart / Tasks / Order Worksheet

Issue:	When the end user entered one or more tests in the Order Worksheet, saved the order then clicked the Do Now button, OP 14 displayed the tests in the Test Names section of the Diagnostic Test Requisition Form. However, if the end user clicked the Cancel button in the Diagnostic Test Requisition Form and then clicked the Do Now button again, OP 14 did not display the tests in the Test Names section of the Diagnostic Test Requisition Form.
Resolution:	Updated the software so that, if the end user enters one or more tests in the Order Worksheet, saves the order, then clicks the Do Now button, OP 14 displays the tests in the Test Names section of the Diagnostic Test Requisition Form. If the end user clicks the Cancel button in the Diagnostic Test Requisition Form and



then clicks the Do Now button again, OP 14 continues to display the tests in the Test Names section of the
Diagnostic Test Requisition Form.

4.2.14 Patient Chart / Medications

Issue:	OP 14 did not allow the end user to send a prescription to their local CVS pharmacy.
Resolution:	Updated the software so that end users can successfully send prescriptions to their local CVS pharmacy.

4.2.15 Patient Chart / Immunizations

Issue:	OP 14 displayed incorrect information in a popup message for HepB-CpG in vaclogic 3-283. With this issue, OP 14 indicated the following dosage schedule: 2 dose schedule, min interval at least 4 weeks apart, min age 18 years. 2-dose HepB vaccine series only	
	applies when both doses consist of HepB-CpG, administered at least 4 weeks apart.	
Resolution :	Updated the software to ensure that OP 14 follows this logic for HepB-CpG in vaclogic 3-283:	
	• 2 dose schedule, min interval at least 4 weeks apart, min age 18 years. 2-dose HepB vaccine series only applies when both doses consist of HepB-CpG, administered at least 4 weeks apart.	
	Series consisting of a combination of 1 dose of HepB-CpG and a vaccine from a different manufacturer (HepB-alum) must:	
	• Adhere to the 3-dose schedule minimum intervals of 4 weeks between dose 1 and 2, 8 weeks between dose 2 and 3, and 16 weeks between dose 1 and 3.	



•	However, if HepB-CpG is substituted for dose 2 of HepB-alum, a provider has the option of
	administering the next dose of HepB-CpG a minimum of 4 weeks from the previous dose for a complete
	series.
•	Doses administered at less than the recommended minimum interval should be repeated.

Issue:	OP 14 displayed the incorrect 2 nd to 3 rd dosing interval for the MenB-FHbp vaccine.
	Updated the software by changing the 2 nd to 3 rd dosing interval of the MenB-FHbp vaccine to: [4 months - 4 days, 6 months]. 3rd dose due 4 months after 2nd (42 days min. interval), 6 months from 1st) This previously displayed the dosing interval as [42 days, 6 months]. Note: This issue and resolution are based on the following CDSi note from the CDC: "Correction of an error in the original supporting data."

Issue:	OP software was not forecasting correctly for OPV/IPV for patients that received a third dose after the age of four. With this issue, OP software incorrectly forecasted OPV at 2 mo, IPV at 4 mo, IPV at 4 ½. OP 14 should have forecasted Series Complete (SC) for this dosage.
Resolution:	Updated the software to ensure that OP 14 correctly indicates the OPV/IPV Series Complete when 3 or more doses of polio have been administered, with the last valid dose received after 4 years of age and 6 months after the previous dose. With this update, trivalent OPV doses are only valid if administered prior to April 2016 to complete the series.



4.2.16 Patient Chart / Vitals/Growth / Enter Vital Signs

Issue:	OP 14 did not lock down the values in the Secondary Vitals tab and allowed the end user to change those values without clicking the Edit button.
Resolution:	Updated the software to ensure that OP 14 locks down values entered in the Secondary Vitals tab and requires the end user to click the Edit button in order to change and save any updates to those values.

4.2.17 Patient Chart / Diagnostic Tests

Issue:	When the end user clicked in the Result field of a diagnostic test, scrolled through the list of Result options, and then clicked out of the Diagnostic Tests window, OP 14 changed the status of the Result without the end user having saved the change.
Resolution:	Updated the software so that, if the end user clicks in the Result field of a diagnostic test, scrolls through the Result options, and then clicks out of the Diagnostic Tests window, OP 14 does not change the status of the Result.

4.2.18 Patient Account / Charges/ Add/Edit Charges

Issue:	OP 14 was not populating insurance contracts correctly based on Effective Date and Expiration Date. With this issue, OP 14 was not using the correct contract based upon the Expiration Date.
Resolution:	Updated the software to ensure that OP 14 uses the correct insurance contracts when the end user creates claims. With this update, OP 14 correctly uses expiration dates for insurance contracts when determining which contract to use in the claim that the end user is creating.



4.2.19 Electronic Billing Center / Claims + A/R

Issue:	When the end user changed the status of a claim in the Status Category field of the details grid in the Claims + A/R window, OP 14 did not update the status of that claim for the entire claim.
Resolution:	Updated the software to ensure that, when the end user changes the status of a claim in the Status Category field of the details grid in the Claims + A/R window, OP 14 successfully reflects that change for the entire claim.

4.2.20 Electronic Billing Center / Transmit Queue

Issue:	OP 14 was taking the CAS*CO*45 segment from the primary payer's ERA and turning it into segment CAS*OA*45 on an outgoing electronic secondary claim.
Resolution:	Updated the software to ensure that OP 14 preserves the CAS*OA*45 segment on outgoing electronic secondary claims as-is and does not change it.

4.2.21 Manage Documents

Issue:	When the end user linked a scanned document to a referral, OP 14 displayed the column header and displayed ICD codes as the description ICD-9 code and ICD-9 Description.
Resolution:	Updated the software so that, when the end user links a scanned document to a referral, OP 14 displays either ICD-9 or ICD-10 values depending upon which was selected in the Referral. Additionally, the column headers are now labeled as ICD Code and ICD Code Description.



Issue:	When the end user opened the Manage Documents window, selected a patient and a document then selected another patient in the Patient Information section and clicked the Send button, OP 14 displayed the name of the previously selected patient in the Subject field of the message.
Resolution:	Updated the software so that, when the end user opens the Manage Documents window, selects a patient and a document then selects another patient and clicks the Send button, OP 14 successfully displays the correct patient name in the Subject field of the message.