Office Practicum Version 14.19.1 (OP 19)
Release Notes

Description:	This document contains the Release Notes for OP Version 14.19.1 (OP 19).
Document Version:	Final V1.0
Document Release Date:	05-Jun-2019

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⚠ **Flu Season Information**

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

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

Note: If any content in these release notes discusses an issue that has medical implications, that text is displayed in red font.

1.1 OP 19 Software Versioning

While OP has officially unveiled the latest version of our flagship product and we continue to brand this fresh new look and feel as OP 19, OP 19 is still a member of the OP 14 certified family of products. You may notice (such as in Help > About) that the actual release version is OP 14.19.1. This is for technical and logistical reasons, so please rest assured that wherever you see OP 14.19.1, we are referring to OP 19 and that OP 19 is a member of the certified OP 14 family of products.

1.2 OP 19 Content in the OP Help Center

We are currently updating the OP Help Center for the release of OP 19, which is a member of the certified OP 14 family of products. OP 19’s official version is 14.19.1, which you may see in your software (such as in Help > About) and in the Help Center tabs labeled

14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

2. New Features

2.1 Non Function-Specific New Features

2.1.1 Overview of OP 19 Changes

Function:	OP software needs to be overhauled to bring the application up to current design standards, to make it simpler to view and understand data, to improve access to the data common to specific workflows, and to personalize navigation based upon personal workflow.
Solution:	Enhanced the software by updating the look and feel of the application, reorganizing and regrouping windows and functions, and allowing personalization of the navigation. These enhancements apply to the entire application. Some of the more noticeable enhancements regarding look-and-feel, workflow, and personalization enhancements include: • Updated menu bars and toolbars to the Ribbon and Navigation panels, simplified windows, increased the font size, improved the layout of information and optimized it for touch-type devices. These enhancements simplify daily workflows and allow end users to customize them based upon their roles. • Renamed the Schedule and Practice Workflow window to Calendar Schedule and redesigned it to allow end users to access messages and to review outstanding clinical and billing alert items (see Badges in the Nomenclature section below) while keeping the display of the schedule visible. • Throughout the application, buttons have been enhanced with clearer images and text and hints. • The role-based Ribbon at the top of the window streamlines workflows.

	• The Main Navigation panel is grouped by function and includes alert badges to ensure end users never miss incomplete work and provides a persistent display regardless of which windows are open to help organize tasks to be done. Like the Ribbon, the Main Navigation panel can also be collapsed to maximize the window area to better suit tablets and other handheld devices.
	• The end user can open more than one patient chart at the same time from the Schedule or Tracking windows. OP 19 displays the patient charts that are open in the tabbed interface under the Personalize tab.
	• The Patient Chart now includes information from the Patient Chart, the Patient Register, and the Patient Account so that all patient information displays in the same window. This includes clinical, demographics, reports and financial information for the selected patient.
	  o The Clinical group in the Patient Chart includes the information previously found in the Patient Chart (such as notes, diagnostic tests, medications, immunizations, and history).
	  o The Demographics group includes demographic information previously found in the Patient Register.
	  o The Account group includes financial information previously found in the Patient Account.
	  o The Communication group includes Messages, Tasks, and General Letters so that the end user can add or review correspondence without leaving the Chart.
	  o The Reports group includes the information previously found in Document Management (such as scans and imported documents) and allows the end user to access patient-specific medical records (previously found in the Event Chronology) and School/Camp forms.
	• OP 19 allows the end user to personalize navigation (using click, drag, and drop for groups and buttons) throughout the application (for example, within the Chart and Encounter and Well Visit notes) to best match individual workflows.
	• Most preferences that end users have set in OP 14 carry over to OP 19.
	• Passwords do not need to be reset in OP 19.

	Other Changes • When a Provider attaches a problem to an Encounter, OP 19 automatically adds it to the Assessment list. • Providers can add supplemental diagnoses to claims. • OP 19 automatically attaches BMI diagnosis codes to Well Visits. • OP 19 includes separate View and Edit permissions for certain functions and windows. • OP 19 makes it simple for end users to determine when patients are in the office. • When the end user modifies an existing Appointment Type, OP 19 automatically updates default settings associated with schedules, templates and Encounters or Well Visits. • OP 19 makes it simpler to determine which changes are made to a Visit Status, by whom, and when. • End users no longer schedule or create a new patient from the Add/Edit Appointment window. • The Schedule now has Calendar and Tracking buttons that allow the end user to switch back and forth between the two. • Tabs are now at the top of the Calendar window. • Multi-patient Mode replaces the Chart Rack. End users select the patient from a list (not from the Patient Chart). • If a patient has an appointment for the current day, the current Stage and Room display in the upper left corner of the Chart Overview. This information is editable, which allows the end user to restage and change the room from the Chart. **Note:** This list of changes is not exhaustive. Please refer to the remainder of the entries in the Release Notes document and to the resources listed below for additional details. **OP 19 Terminology** OP 19 has a different structure than OP 14. It is therefore important to understand the new terminology. The following list provides a basic understanding for terms used with the main structure of OP 19. This includes: Ribbon, Tabs, Buttons, Groups, Main Navigation Panel, and Windows Navigation Panel.

	Ribbon The Ribbon is the central hub that holds all of the OP 19 functions in one location. The Ribbon is broken out into Tabs that are defined by the roles used within your Practice. Each Tab contains buttons and groups of buttons. Each button opens a function in the OP 19 software. The Ribbon can also be collapsed and expanded. You can customize Ribbon settings and revert them to the original settings, and you can pin and collapse the Ribbon and change its display. **Tabs** Tabs contain Buttons and Button Groups within the OP 19 Ribbon. Tabs can be personalized by roles in your Practice, which allows you to use the OP 19 software more efficiently. The tabs that appear above your Ribbon are based upon the permissions associated with your login. **Buttons and Button Groups** Within each Tab are Buttons and Button groups. Each Button opens a window within OP 19. Many of the Buttons can be grouped together to form a Button Group. Buttons that appear on a Tab can be personalized to fit the needs of your role. **Main Navigation Panel** The Main Navigation panel (also known as the Alerts Notification panel) provides quick access to various functions in OP 19. This main panel cannot be removed from the OP 19 dashboard, but it can be collapsed and expanded. Each heading within the Main Navigation panel is called a Group (for example, the Messages group). Within each Group are functional Buttons. Numbers that appear to the right of each button are called Badges. Buttons within the Main Navigation panel can be moved. **Window Navigation Panel** The Window Navigation panel is a navigation panel that appears inside a window (such as the Patient Chart, Encounter note, or Preventive Exam note). Each heading within the Window Navigation panel is called a group (for example, the Messages group). Within each Group are functional Buttons. A number indication

	that appears to the right of a button is called a Badge. Buttons within the Window Navigation Panel can be moved. **Badges** Both the Main Navigation panel (also known as the Alerts Notification panel) and the Window Navigation panel include Badges. These badges indicate how many outstanding items need review by the logged-in user (such as messages, clinical documentation, or billing-related items). **Resources** For detailed descriptions and procedural information relevant to OP 19, please refer to the following resources. *What's New in OP 19* Click here to visit the What's New in OP 19 article in the OP Help Center. This article provides links to OP 19-related: • Videos • FAQs • Quick Reference Guides Click here to watch a short video introducing OP 19. Click here to access the new OP 19 nomenclature and the new software layout. *Crosswalk Information* Click here for a simple crosswalk between the OP 14 windows and features to OP 19 windows and features. As discussed in Section 3.1.1, OP 19 allows you to set both View and Edit permissions for certain windows and functions. Click here for the OP14 to OP 19 Permissions Crosswalk. **Paths**

	Many paths to windows and features have changed in OP 19. Please refer to the paths provided in the window maps for each F1 Help page (click here for an example of the window map for the Address Book) for detailed instructions on how to access each window.

2.2 Function-Specific New Features

There are no new features in this release that impacts a specific function.

3. Improved Functionality

3.1 Non Function-Specific Improved Functionality

3.1.1 OP 19 View and Edit Permissions

Function:	To prevent the inadvertent or incorrect editing of critical information, OP software needs to provide Practices with a means of assigning View and/or Edit permissions to end users
Solution:	Enhanced the software so that OP 19 divides access to the most critical information based upon View and/or Edit permissions. Assigning an end user View permissions to information allows that end user to view that information only and prevents that user from editing the information. Assigning an end user Edit permissions to information allows that end user to view and to modify that information. For a detailed presentation of the changes to View and Edit permissions, please refer to the OP 14 to OP 19 Permissions Crosswalk document on the OP Help Center.

3.2 Function-Specific Improved Functionality

3.2.1 Clinical / Patient Chart / Encounter or Well Visit

Function:	Currently, OP software allows end users to attach a Problem to an Encounter or Well Visit note. However, this action only adds a line item to the history. OP software should also add this information to the Assessment tab of the note so that it can be used for coding.
Solution:	Enhanced the software so that, when the end user adds a Problem to an Encounter or Well Visit note, OP 19 adds this information to the Assessment tab of the note. If there are no problems, the note states, “Problem List Reviewed – No Active Problems.”

3.2.2 Billing / Billing Center / Claims (A/R)

Function:	Currently, OP software sends to claims only those diagnoses that are required to support the attachments on specific charges. To allow payers to compute risk factors for patients based on diagnoses submitted on Claims, when a claim is constructed, after determining how many diagnoses are used on specific charges, OP software needs to supplement the diagnosis list based on other ranked diagnoses that were attached to the encounter to which the claim refers.
Solution:	Enhanced the software so that OP 19 supplements the diagnosis list on claims with the ranking of diagnoses entered in the Encounter or Well Visit note. This enhancement supports a maximum of 12 codes supported by ANSI 5010. See Section 3.2.2 for details on the enhancement that allows the ranking of diagnoses in an Encounter or Well Visit note.

3.2.3 Clinical / Patient Chart / Encounter or Well Visit

3.2.4 Clinical / Patient Chart / Vitals/Growth

Function:	When the end user measures a patient's height and weight during a Well Visit, OP software should add the calculated BMI diagnosis to the Assessment tab of the Well Visit note. The software should also send this code to the claim as a supplemental diagnosis even if it is not attached to a chargeable service.
Solution:	Enhanced the software so that, when the end user enables this feature then enters a patient's height and weight measurement in the Vitals/Growth window, OP 19 automatically adds the BMI diagnosis codes to the Assessment tab of the Well Visit note. OP 19 uses the following codes (based on BMI percentile, not absolute value), for patients 2 to 18 years of age:

	• Z68.51 (<5%) • Z68.52 (5%-85%) • Z68.53 (85%-95%) • Z68.54 (>95%) OP 19 uses the following codes (based on BMI percentile, not absolute value), for patients 18 years of age and older: • Z68.1 (19.9 or less) • Z68.2 to Z68.44 (30+ additional codes in small ranges) • Z68.45 (70 or greater) With this enhancement, even if the BMI diagnosis code is not attached to a chargeable service, OP 19 adds it to the claim as a supplemental diagnosis. See Section 3.2.2 for details on supplementing the diagnosis list on claims.

3.2.5 Clinical / Schedule / Patient Visit Tracking Summary

Function:	As a Practice Administrator, I need to be able to track changes to the Visit Status clearly and easily. The tracked changes need to include when they occurred and who made the change.
Solution:	Enhanced the software by adding Staff Name, ID, and Date to the Patient Visit Tracking Summary. This allows end users to see what changes were made to a Visit Status, by whom, and when.

3.2.6 Clinical / Schedule / Tracking

Function:	OP software needs to provide a means for clinical staff to determine which patients are physically in the office.
Solution:	Enhanced the software by adding the Exclude Not Checked In checkbox to the top of the Tracking window. This checkbox allows the end user to filter the Tracking window based upon those patients who have checked in to the office but who have not checked out, indicating which patients are physically in the office.

3.2.7 Practice Management / Customize / Appointments

3.2.8 Clinical / Schedule / Calendar / Add/Edit Appointment

Function:	When the end user changes an Appointment Type in the Appointment Types and Zones window, OP software needs to update automatically the existing Appointment Type information in future appointments on the Schedule, Encounters, Well Visits, and in Appointment Templates.
Solution:	Enhanced the software so that, when the end user modifies an Appointment Type in the Appointment Types and Zones window, OP 19 checks the system to determine whether there are any future appointments of that type on the Schedule, in Encounters or Well Visits, and in the Appointment Templates. If the Appointment Type exists in any of these areas, OP 19 displays a popup window stating, “You changed the Visit Type, which is currently used on X appointment(s), X encounter template(s), and X well visit template(s). If you have not changed the meaning of the Visit Type, choose [OK] to continue and synchronize all affected records. Otherwise, choose [Cancel] and archive this Visit Type, then create a new one with a new meaning.” If the end user clicks Cancel, OP 19 deletes the changes and returns the end user to the Appointments Types tab.

	If the end user clicks OK, OP 19 updates the defaults in the appointments on the Calendar, in the Appointment Templates, and/or Encounters and Well Visits with the new Appointment Type. If the end user clicks the More Info button, OP 19 displays an informational popup indicating that if it is an insignificant change (such as changing the spelling or name), it is safe to click Continue (to apply the change to future appointments, Templates, and Well/Sick Visit default appointment types) but that if the change is significant (such as dividing a Well Visit type into Infant Well, Toddler Well) that these changes cannot be safely aplite to future appointments, Templates, and Well/Sick Visit default appointment types. In this case, OP recommends creating a new Appointment Type. The end user can click either Continue to proceed with the changes or Cancel to delete the changes and return to the Appointment Types tab. This enhancement ensures that Appointment Type transactions run successfully in OP Notify.

4. Resolved Issues

4.1 Non Function-Specific Resolved Issues

There is no improved functionality in this release that impacts the overall application.

4.2 Function-Specific Resolved Issues

4.2.1 Clinical / Patient Chart / Encounter or Well Visit / Counselling/CoC

Customer-Reported Issue

Issue:	The software was not correctly calculating the time for visit levels.
Resolution:	Updated the software to ensure that OP 19 correctly calculates the time for visit levels. With this update, the software calculates the time spent based on whether it is greater than half way between the average time of both codes.

5. Known Issues

5.1.1 Billing / Billing Center / ERA Payments

Issue:	Occasionally, when the end user attempts to post multiple ERAs, OP 19 displays an SQL error message.
Workaround:	If OP 19 displays an SQL error while running ERAs, do not attempt to post all ERAs. Please contact OP Support.