




Office Practicum Release Notes

Version 20.16 Build .3
(OP 20.16.3)

Release Availability

 **On-Premise:** March 14, 2022, following the standard availability announcement

 **Cloud:** Cloud Practices will receive email communication regarding the availability of this release. To see which version of OP your Practice is currently running, navigate to **Help tab > About**, and refer to the **Build number** field.

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Before submitting a case highlighting release issues, we recommend reviewing the [Support Trends](#) to see if your issue has already been reported. If it has, there is no need to create another case.

All content is subject to change.

New Features/Functionality

Integrated eFax Solution

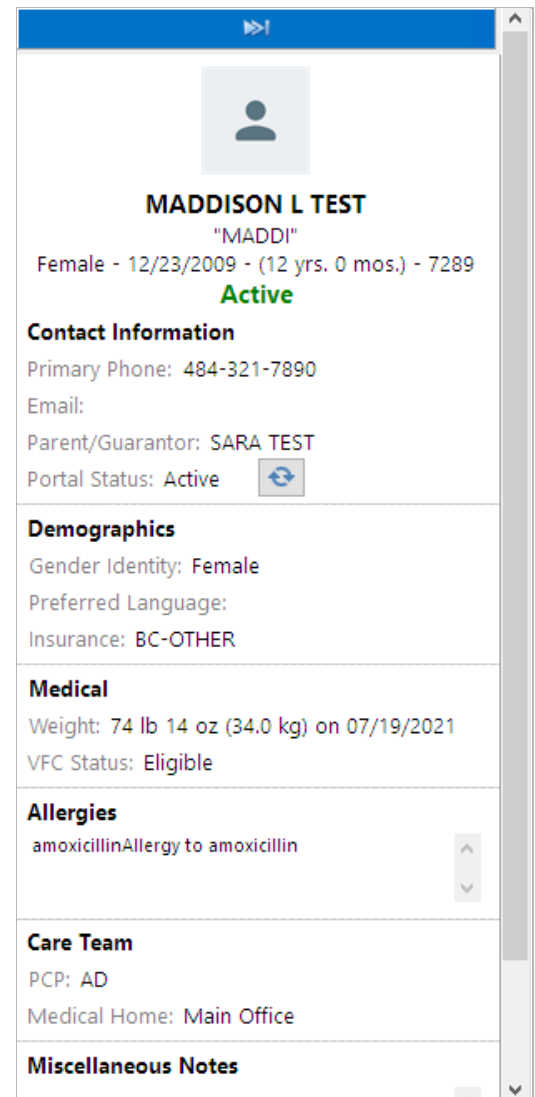
With this release, the functionality for a fully integrated and secure [eFax solution](#) where users can manage outbound and inbound electronic faxes directly from within OP is available. **Note:** This is a contracted feature and will be available for implementation once successful beta testing is complete. Contact the Account Management team at solutions@officepracticum.com to learn more.

Patient Banner

> *Personalize tab > Patient Banner*

A new Patient Banner can be enabled to display chart-driven patient info on the right-side of patient-specific windows, such as the Patient Chart, open Visits, and messages. Each logged-in user can decide what info they want to be included in the banner. **Note:** A patient must be selected in order for the Patient Banner to display.

When the banner is enabled, the following information is automatically included:	
- Patient's photo, if saved in OP	- Date of Birth (with calculated age on the date of visit)
- Patient name (first, middle initial, last)	- Patient ID
- Alternate name, if applicable	- Patient Status
- Sex	
Additional, optional information can also be included by the user to display in the banner. For ease of use, a Select all/Deselect all option is available for making these selections.	
- Primary phone	- Weight (recent date)
- Email	- VFC status
- Primary parent/guarantor	- Active allergies
- Portal account status	- PCP
- Preferred language	- Medical home
- Gender Identity	- Miscellaneous Notes
- Insurance	



Once enabled, the banner can be collapsed by clicking **>>|** at the top of the banner, and expanded by clicking **|<<<**. This can be saved as a user preference (**Personalize tab > Save Active Form**) in each window where it is displayed.

See [Enable and Customize the Patient Banner](#) for instructions and a video demonstrating how to customize and enable the Patient Banner.

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Improved Functionality

Provider [P], Clinical [C], Practice Management [M], Billing [B], All [A]

[P] Updated Problem Status options and addition of new options with MDM indications

- > Clinical tab > Encounter Templates > Encounter Note tab > Diagnosis section
- > Encounter Note > Assess/Plan

The Problem Status options have been updated and expanded to provide a more granular list of options for documenting problem complexity. The following Problem Status options have been removed: Acute-complicated, Acute-severe, Chronic-recurring, and Chronic-severe.

The available Problem Status options are listed below.

Problem Status List option <i>New / Updated / Unchanged</i>	Additional Notes	MDM Indication
Acute-complicated-injury	None	Moderate
Acute-uncomplicated	Represents Acute, uncomplicated illness or injury	Unchanged
Acute-illness/systemic-symptoms	Represents Acute illness with systemic symptoms	Moderate
Acute/chronic-life-threatening-problem	Represents Acute or chronic illness or injury that poses a threat to life or bodily function	High
Chronic-illness/worsening/SE	Previously Chronic-unstable/increased; represents Chronic illness with exacerbation, progression, or side effects of treatment	Moderate
Chronic-illness-severe-worsening	Represents Chronic illness with severe exacerbation, progression, or side effects of treatment	High
New-problem/uncertain-prognosis	Represents Undiagnosed new problem with uncertain prognosis	Moderate
Noncontributory	None	None
Self-Limited/Minor	Previously Acute-minor	Unchanged
Stable-chronic illness	Previously Chronic-stable	Unchanged

[A] Improvements to CDA Exports

- *Admin tab > CDA Export*
- *Practice Management tab > Demographic Analysis/Recall*

A new service is being implemented to populate the CDA Export list in OP. Additionally, several improvements, listed below, have been made to the CDA Export window and the workflows specific to One-Time and Recurring CDA Exports.

CDA Export Window Improvements

- The Edit button has been removed, and a Refresh button has been added
- A **Show Inactive** checkbox is available to determine which jobs you want displayed in the job list
- In the Recurring tab, the status of a recurring CDA Export job can be changed to Inactivate if the job need to be terminated
- Transaction errors are displayed for each Export job to provide clarity into unsuccessful exports

CDA Export Workflow Improvements

- Job Status and File Location no longer have to be entered when creating a new Recurring or One-Time CDA Export
- A functional Download button has been added to Recurring and One-Time Export jobs so a local copy of successfully exported files can be downloaded to a location of your choice

[P] Coding Statistics tab added back to Coding section of Encounter Notes

- *Encounter Note > Coding*

The Coding Statistics tab, previously removed, has been added back to the Encounter: Service and Procedure Coding window to support Practices who used this information to obtain percentages of patients in a given age group, by Provider, by the patient's insurance.

[P] Ability to deny prescription renewal requests for unknown patients

- *Main Navigation Panel > Refill Req*

Prescription renewals received into the ePrescribing Center for patients that do not exist in OP can now be responded to as Denied and include a Denial Reason, selected by the user. When this is the case, the Renewal Request Summary window displays *Cannot recognize patient*.

[P, C] eLabs: Unmatched results badge displayed in Main Navigation Panel (Alerts bar)

- *Main Navigation Panel > Unmatched*

eLabs users who have access to the Unmatched Received Results sub-tab the Diagnostic Tests tab of the Clinical Work window (via permission **DTI_UnmatchedResults**) will now see a badge count for **Unmatched** results in OP's Main Navigation Panel or Alerts bar. This badge is displayed in red when at least one Unmatched result is received into OP for the logged-in user.

- Logged-in Providers will see the count of results for which the Provider set to themselves in the Unmatched Received Results tab plus the results where no Provider is set in the OP Provider field.
- Logged-in non-Providers will see the count of all results where a Provider is set in addition to where no Provider is set.

[P, C] Diagnostic Test results via the Old Lab Importer

➤ *Tools tab > Old Lab Importer button*

The following improvements have been made to OP lab results and related processes:

- Requisitions that are marked as Canceled or Informed in the Patient Chart are no longer shown as possible matches for incoming lab results.
- The LOINC and Test ID sent in incoming result messages are saved to the proper fields in OP. **See:** [HL7 Specifications](#).
- Practices utilizing a results-only interface via the Old Lab Importer can now benefit from auto-matched results if the incoming results meet the criteria outlined in [Auto-Matching Criteria for Incoming Lab Results Via Lab Importer](#). **Note:** To enable this feature, contact the OP Support team.

[M] Enhancements to Duplicate Staff Functionality

➤ *Practice Management tab > Staff/Providers*

The Duplicate Staff functionality has been expanded to include the copying of User Preferences and Permissions (both Group and Individual) to the new user record.

[M] Grouping of Active and Inactive Staff and Providers in the Staff Directory

➤ *Practice Management tab > Staff/Providers*

When the Show Inactive checkbox is selected in the Staff Directory, the Staff list is grouped by Active and Inactive users so that the lists are clearer and can be sorted.

[A] Race options updated to comply with official Race list

➤ *Clinical, Practice Management, or Billing tab > Patient Chart button > Basic Information*

The Race drop-down selections in the Basic Information section of the Patient Chart have been updated to include "Other Race" as an option as well as match the preferred wording of "Native Hawaiian or Other Pacific Islander" as opposed to the previously available "Hawaiian Native or Pacific Islander".

[A] Expanded Referral information included in Note Summary and sent to Patient Portal

To ensure that all medical records accurately reflect the scope of what was discussed/treated during a patient's visit, additional patient referral information, such as the referral reason and to whom the patient is referred is now included in:

- The Plan section of the Note Summary in Encounter and Well Visit Notes
- The Treatment Plan section of Encounter and Well Visit Notes in the Patient Portal (located under Visits > Clinical Documents)

[A] Default Global Preference for Family History Display

➤ *Admin tab > Global Preferences > Special tab > Medical sub-tab*

The Default to OP 14 family history style for new patients system preference option is selected by default and uneditable.

[A] Task improvements to facilitate efficient Task creation and completion

> *Various*

The following updates have been made to the entry and management of Tasks.

- Gridlines have been removed from the Task Manager window to improve the overall appearance of the window.
- The Date Requested column in the Tasks window (Task Manager) has been renamed **Created Date** and displays the date each Task was created. This date is not editable and is pulled from a new hard-coded field in the Add Task window also labeled **Created Date**.
- A new column, **Task Age**, can now be added to the Task Manager window and displays the age of each Task based on the Tasks' Created Date. Task aging stops when the Task has a status of Completed. This column can be sorted, filtered, and grouped so that the completion of older Tasks can be prioritized. Additional functionality to report on Task Age is under development.
- **Provider** and **Insurance** drop-downs have been added to the Add Task window to include further detail needed to complete the Task.
- Edits can be made to all Tasks fields for Tasks that are not completed.
- The Save button was relabeled **Save & Close** to better explain the button's functionality.

[B] DN, DK, and DQ Qualifiers added to printed HCFA's (CMS-1500s)

The appropriate DN, DK, and DQ Qualifiers have been added to Item Number 17 to accommodate CMS-1500 guidelines requiring this information. Note that because Item Number 17 is also used for Referring Provider and Ordering Provider, the guidelines give the priority order as:

1. DN - Referring Provider
2. DK - Ordering Provider
3. DQ- Supervising Provider

[B] CPT Hover-overs added in Adjudications window

> *Billing tab > Billing Center button > Adjudications tab*

Users posting adjudications from the Matched and Unmatched tabs of the Adjudications window, can now hover over the CPT codes to see the code description.

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Issue Resolutions

Archived VIS sheets no longer display as drop-down options when users attempt to select/assign a default VIS sheet to a vaccine.

The description for the **Pager1** field in the Register table of Database Viewer has been updated to accurately point to the parent's cell phone, rather than the patient's cell phone.

Incoming CDAs can be successfully attached to patients who have apostrophes in their names without error.

When ordering a **Medication in the Order Worksheet**, the selected medication is correctly displayed in the Prescription Writer.

When added to the Prescription report, the **Fax # field** is correctly populated with the Fax number for the Practice.

The on-screen pop-up displayed when creating **PMX messages** correctly displays the number of patients the message will be sent to rather than the number of credits being used.

A patient's **Health Status** can only be edited by double-clicking in the Health Summary-Recommendations field located in the Clinical Overview of the Patient Chart. The Health Status field no longer appears to be editable in the Patient Register: Notes and Coordination of Care and Patient Information windows.

Accurate error messages, including the identification of missing required fields, are displayed when necessary when **free-text medications** are sent electronically.

The **VFC Immunization Analysis report** runs as expected when the same date is selected for both the Start and End dates.

Tasks that are marked as **Deferred or N/A** in the Tasks window no longer re-generate/ display a Queued status.

Height, weight, and head circumference measurements that contain a decimal are displayed in the Growth Chart and Visit Note Summary with the decimal places that were originally entered and are not rounded.

An error message is no longer encountered when attempting to access a restricted chart by entering **Emergency override** credentials. However, the user will need to enter their credential twice to gain emergency access.

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