InteliChart Release Notes
# Version 3.5.19

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Release Date

On Friday, May 20, 2022, your InteliChart Patient Portal environment will be upgraded to version 3.5.19. The portal will be unavailable between 9:00 pm EDT to 9:00 am EDT Saturday, May 21, 2022. Please be aware that the InteliChart Patient Portal may be unavailable intermittently during the weekend to complete validation of the portal upgrade and additional work.

Enhancements: Patient Portal

Add to Calendar Option

The Appointment Details card offers the **Add to Calendar** text link under the appointment date. This allows the parent/guardian to save the appointment details to their device's calendar or Outlook.
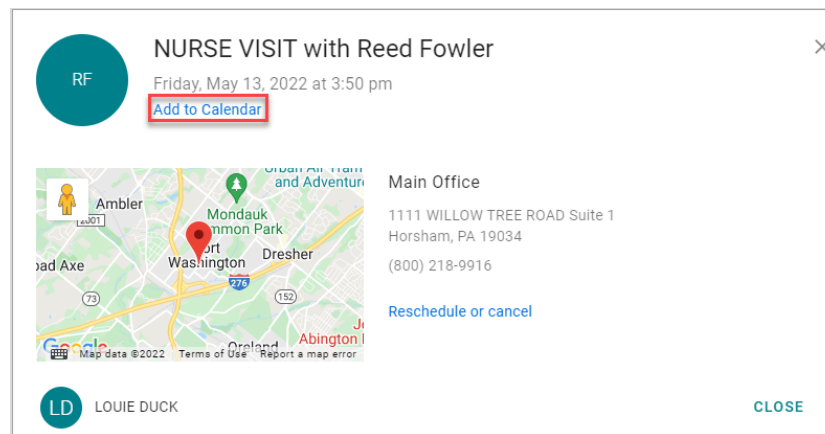
Mobile Updates to Improve Usability

The following updates have been made to make the use of mobile devices more user-friendly.

Patient Homepage
- The Floating Action button was restyled for improved phone and tablet usage.
- Scrolling in Landscape view has been updated for better menu scroll-through functionality; the Sign Out option is now displayed on-screen.
- The Dashboard displays the patient's avatar and full name.

My Chart Menu
- The navigation menu has been updated

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Automated Enrollment Emails	When Automated Enrollment is enabled, parents will receive one auto-enroll email per day (within 24 hours) regardless of multiple Visit Notes, appointments, or a combination of both. Click here to learn more about the optional Automated Enrollment feature in the OP Help Center.

Enhancements: Practice Portal

Option to Allow Attachments in Patient Portal Messages	Practices can now decide if they want parents/patients to be able to send attachments with messages from the Patient Portal. **Note:** This functionality is **not available** for the InteliChart Patient Portal Mobile app. If enabled, an Attach button 📎 is displayed in the Compose a New Message window. In OP, the message attachment is displayed in the Message preview panel once the message is selected (pictured below). From there, the recommended workflow is to click the attachment to launch Document Management where you can label the attachment/document appropriately. Refer to the **Label the Document** section of this article for information on how to label the attachment. Click here to jump to the Instructional Details for enabling this option.

*	Date Entered	▼	Date/Time of Message	▼	Spoke With	Sender	Recipient(s)	
▶	05/09/2022 09:49 am	▼	05/09/2022 09:49 am	▼		Web Portal User	2: REED FOWLER; Demosthenes Wiggin	

Ability to Bulk Approve/Reject Patient Updates	When Patient Updates is enabled, the Bulk Action button displays in the Patient Updates section allowing Practices to Approve/Reject in bulk per patient. Refer to the **Enable Patient Updates** section of this article for information on how to enable this feature.

ADMINISTRATIVE	CLINICAL	NOTIFICATIONS	COMMENTS		Actions ▾

Chart Summary	⤢	Engagement Summary	⤢	Patient Updates 9	⤢

Patient Updates

Approved or rejected updates will be applied to the Patient Chart as each section is saved.

Bulk Actions ▾
- Select all Updates
- Deselect all Updates
- Mark all Updates as Accepted
- Mark all Updates as Rejected

Demographic Updates

Select All	Accept	Reject	Save Updates

☐ DEMOGRAPHICS

(Optional) **New settings in Appointment Reason Mapping**	A new **Rules** button ⚙ is available to add scheduling rules per Appointment Type for age range and sex. Click here to jump to the Instructional Details on setting this up in Scheduling. **Note**: We do not recommend that you enable any rules for Well Visits.

Audit Report Date Default	The date range in the Audit report is automatically populated to reflect a 31 day reporting period based on the selected start or end date.

Enhancements: OP Notify

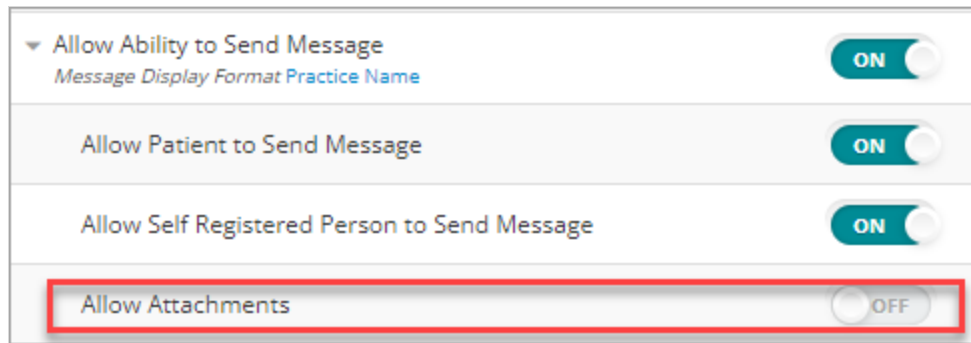|	
New Fields Added to Provider Administration	Two new fields have been added to Provider Administration to accommodate the inclusion of a patient-friendly Provider Name that can be added to Reminder Events via token. • **Custom Name** is used for Text or Email events. • **Phonetic Custom Name** is used for Call events.

Instructional Details

Option to Allow Attachments in Patient Portal Messages

1. In the Practice Portal, navigate to: **Main Navigation Panel > Portal Management > Patient Interface > Manage Setup > Portal Features.**
2. Click the arrow to expand the **Allow Ability to Send Message** option.
3. Use the **Allow Attachments** toggle to turn the option ON/OFF.

4. Click the **Save** button in the window.

(Optional) **New settings in Appointment Reason Mapping:**

1. In the Practice Portal, navigate to: **Main Navigation Panel > Portal Management > Patient Interface > Scheduling > Reason for Appointment Mapping**.
2. In the EPM column, navigate to the Appointment Type you want to select an Action for.
3. In the Actions column, click the **Rules** button.

4. In the Rules window, complete the Age and/or Sex fields to create the Rule for the Appointment Type:
   - **Age**:
     a. Use the first drop-down to choose your filter for age (Is, Is not, between, >, <, equals, etc).
     b. In the blank field, enter the age of the patients for which this Rule should apply.
     c. Use the last drop-down to select the age interval (Day(s), Week(s), Month(s), Year(s)).
   - **Sex**:
     a. Use the drop-down to choose from the sex options (male, female, undeclared).

5. Select the **Enabled** checkbox(es) to enable the newly added Rule(s).
6. Click the **Save** button.