Office Practicum Release Notes

Version 20.18 Build .2 (OP 20.18.2)

Release Availability

💻 **On-Premise**: November 8, 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.

Release Contents

Look for (21) throughout this document to identify work done to comply with the 21st Century Cures Act.

Before submitting a Support case related to a release issue, we recommend reviewing the **Support Trends** article to see if your issue has already been reported. If it has, there is no need to create another case.

New Features/Functionality

(21) **Identify Clinical Note Type on Encounter and Well Visit Notes**
➤ *Clinical tab, Practice Management or Billing tab > Patient Chart button > Encounters or Well Visits*

A **Clinical Note Type** drop-down has been added to the Summary section of Well or Encounter Visit note to allow Providers to delineate the type of clinical note if other than a Progress Note. The default selection in this drop-down is Progress Note (LOINC code 11506-3). If the note needs to be identified as a different type, the following options are available.

- Consultation Note (LOINC code 11488-4)
- History & Physical (LOINC code 34117-2)
- Procedure Note (LOINC code 28570-0)
- Imaging Narrative (LOINC code 18748-4)
- Discharge Summary Note (LOINC code 18842-5)

Note: The Clinical Note Type will not print or display on the Summary Note.

Clinical Analytics: Mental Health Monitor Dashboard
➤ *Tools tab > Clinical Analytics button (by permission only)*

Clinical Analytics provides clinically-focused and actionable dashboards to help manage, monitor, and treat your patients that have certain behavioral or mental health conditions. The **Mental Health Monitor (or Tracker)** focuses on Behavioral Health by leveraging GAD-7 and PHQ-9 survey scores.

Key highlights
- Access to the Clinical Analytics is protected by the permission, **Tools_ClinicalDashboards**. Only staff assigned this permission can access Clinical Analytics.
- Benefits of the Mental Health Monitor include the ability to:
  - Track patients at higher suicide risk based on survey responses
  - Monitor outstanding referrals
  - Track overall survey score trends
- Patient data is populated in the Mental Health Monitor by the Problem List SNOMED entry of Mental Health Promotion (385891009), which can be added for any patient as clinically indicated.
- Only the OP internal English surveys **GAD-7** and **Depression Screen: PHQ-9: Modified for Teens** are utilized in the Metal Health Monitor. CHADIS surveys will not be utilized at this time.

For detailed information, refer to the below articles found on the OP Help Center.

- [Clinical Analytics: Overview and Patient Enrollment](#)
- [Clinical Analytics: Dashboards](#)
- [Clinical Analytics: Exporting](#)

Note: At this time, the Mental Health Monitor is only available to Cloud clients.

Financial Analytics: Key Metrics Dashboard

➤ *Tools tab > Financial Analytics button (by permission only)*

A Key Metrics Dashboard has been added to Financial Analytics, the Key Metrics Dashboard includes:

- **CPT Category**: The CPT Category tab on the Key Metrics dashboard presents a 12 month summation by CPT category, billed amount, amount paid, adjustments and the average age of the claims.
- **Monthly**: The Monthly tab displays the monthly billed amount, payments, and adjustments for the last 12 months.

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Improved Functionality

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

[A] User improvements made to eFax functionality *(Contracted feature)*

The following enhancements have been made to improve the user experience with eFax functionality. These changes do not impact any overall eFax workflows.

- An **Attachment Error** is displayed when trying to fax a file with the unsupported file type, .xml.
- Hover-over tips were added to attachments in the Unread Fax tab of the Message Center.
  - **Processing**: The attachment is still processing: Please check back later.
  - **Deleted**: Attachment [ID number] has been manually deleted. This occurs when the eFax attachment has been deleted from Document Management.
- A hover-over tip, "*Transmit selected item as a message or fax attachment*" was added to the **Send** button in Document Management to add clarity to the functionality of the button.
- An **External ID** column can be added to the Unread Fax, Failed Fax, Read Fax, and Sent Fax tabs of the Message Center using the Show/Hide columns button.

(21) [M] Updates to the master list of Languages and Language selection for Family Contacts

- The **Allow Editing** checkbox is no longer available in the Vaccine Registry Codes table (Practice Management > More button (Reference Data group) > Vaccine Registry Codes), when Language is selected from the Code table to review/edit drop-down.
- The **Language** field in Family Contacts is now a predictive type-ahead that auto-populates language matches according to the text you enter. Additionally, the list has been expanded to contain over 1,000 language options.

(21) [A] Standardized Phone Number fields to allow only 10 numeric digits
➤ *Listed below*

The phone number fields have been standardized to allow only 10 numeric digits in the below areas of OP. A user will be alerted, upon editing and saving, if any existing phone numbers do not follow this standard.

- Messages: Phone field
- Add/Edit Appt: Create New Patient appointment workflow
- Address Book: Work Phone(s), Fax, Cell phone, and Home phone fields
- Staff Directory > Practice Info tab: Phone and Fax fields
- Practices: Phone and Fax fields
- Locations: Phone and Fax fields
- Insurance Payer Details > Basic Information tab: Contact phone field
- Basic Information: Primary phone, Day/Work, and Cell phone fields
- Family Contacts: Primary phone, Day/Work, and Cell phone fields

Refer to [Identify and Clean Up Invalid Phone Numbers](#) for instructions on identifying and correcting invalid phone numbers.

[A] Removed editing from Keycloak Correspondent record
➤ *Admin tab > Connections > Keycloak*

The Add, Edit and Delete buttons are disabled when selecting the Credentials tab for the Keycloak Correspondent record. In addition, the "*Click here to add new credentials*" has been removed from the grid.

[M, B] Insurance-validated PCP added to Appointment window
➤ *Clinical, Practice Management, or Billing tab > Schedule button*

The PCP populated by Insurance Validation (Patient Chart > Insurance > Medical Benefits tab > Capitation office field) is now displayed in the respective Primary or Secondary Insurance tab of the Add/Edit Appointment window.

[M] Disable the automatic creation of Miscellaneous Notes for No Shows
➤ *Admin tab > Global Preferences > Schedule tab*

A new Global Preference has been added to the Schedule tab of System Preferences to disable the automatic creation of a Miscellaneous Note when a patient is marked as No Show. In addition, you can now delete prior Miscellaneous Notes that were created when a patient was marked as No Show, and they will remain deleted when the global preference is enabled.

[P, C] Initiate Search using the Enter key for Implantable Devices
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Implantable Devices*

You can now press the Enter key to initiate a search for the Implantable Device once a UDI is entered.

(21) [A] Improved Audit Log tracking for external files brought into OP via Data Reconciliation
➤ *Admin tab > Audit Trail > Audit Trail of Changes to Records tab*

A **Source** column is available which allows you to track which data came in via Data Reconciliation.

[A] Improved Audit Log tracking when patient information is accessed
➤ *Admin tab > Audit Trail > Log of Access and Review of Records tab*

New Action Types have been added to the Audit Log to capture when patient information is accessed.

Action Type	Recorded when [area of the chart listed below] is accessed or exited:
Opened *(when accessed)*	Documents, Problem List
Closed *(when exited)*	Allergies, Care Plans, Diagnostic Tests, Documents, History, Immunizations, Medications, Problem List, Referrals/TOC, Risk Assessment, Surveys, Vitals/Growth

[A] Improved Audit Log tracking when patient History is added, updated, deleted, or copied
➤ *Admin tab > Audit Trail > Audit Trail of Changes to Records tab*

We've added tracking to the following actions to capture changes made to patient History records.

Reason	Recorded when:
Record Creation	- Newborn, Past Medical, or Social History is added - Social History is copied between sibling records. The sibling record where the Social History originated displays "Copied from" in the After Changes column. *Originating record where Family History was added or updated:* - Family History is added; the Table Changed is dependent on the record where the Family History was added or updated *Originating record where Family History was added or updated:* *Copied record where Family History was added or updated:*
System Update	Newborn, Past Medical, Social, or Family History is updated
Record Deletion	Newborn, Past Medical or Social History record is deleted
Delete sibling copy	The table changed is Family Hx - Sibling Copy due to a sibling's copied history being removed from Family History.

[B] Removed ability to move columns in the Claims window
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Claims*

To maintain readability in the Claims window of the Patient Chart, columns can no longer be moved.

[A] Demographic fields updated for the ability to specify Orientation details
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Basic Information*

The Orientation options in the Demographics window have been updated to rename 'Unknown' to 'Don't Know' and include a new option, 'Other, please specify'. When 'Other, please specify' is selected, a new **Details** field is activated for free-text input to enter additional information about the patient's Orientation. If the Orientation selection is changed from 'Other, please specify', the information in the Details field is removed.

To accommodate the above-detailed changes, the Sex and Gender Identity fields have been moved to a single line labeled Sex/Gender Identity with respective drop-downs listed side-by-side.

[B] Renamed Delete button in Patient Charges window
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Charges*

The **Delete** button in the Charges section of the Patient Chart has been renamed 'Delete Sel' to add clarity to the functionality of the button.

[P, C] Symptoms and Severity visible in the Allergies and Problems window
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Allergies or Problem List*
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Encounters or Well Visits > Allergies or Problem List*

Symptoms and severity entered for Allergies or Problem List items are now displayed without the need to click the ellipsis button to view them.

[A] 'Select All' checkbox added to delete Documents from the Clinical Work window
➤ *Main Navigation Panel > Documents*

Selection checkboxes have been added to the Documents tab of the Clinical Work window so that you can select individual Documents to delete. Or, you can select the checkbox located in the column header to select all displayed Documents for deletion.

[P, C] Links in the Prescription window open in a Chromium-based web browser
➤ *Clinical, Practice Management or Billing tab > Patient Chart > Medications*
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Encounters or Well Visits > Medications*

Because Microsoft no longer supports Internet Explorer, the Links to external sites that are accessed from the Prescription window are now opened in a Chromium-based web browser.

[P] Medication History Requests are sent as logged-in Provider
➤ *Clinical, Practice Management or Billing tab > Patient Chart > Medications*
➤ *Clinical, Practice Management, or Billing tab > Patient Chart > Encounters or Well Visits > Medications*

When a request for Med History is made via the Med History button, the request is now sent with the

name of the Provider logged in to OP.

[A] Improved management of attachments received in a CDA via Direct Message
➤ *Main Navigation Panel > External > CDA Icon*

The following improvements were made to how attachments are received and reconciled once received into OP in a CDA via Direct Message.

- **Embedded PDFs** can now be viewed after clicking the CDA icon and the Attachments button in the Clinical Document Review and Reconciliation window. Once the document is displayed, the **Import** button can be clicked to launch Document Management where the patient can be searched for and selected. The PDF can also be saved by clicking the **Save to Disk** button.
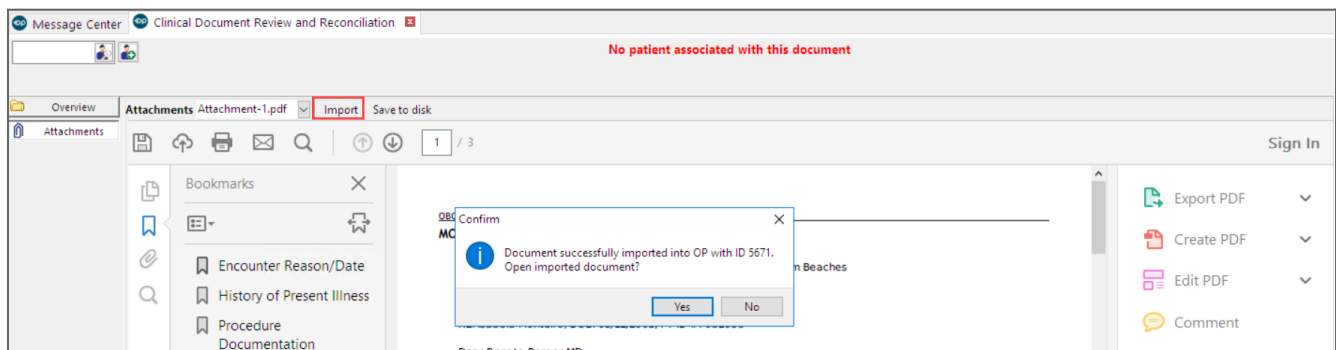
- **Zip files** will be unzipped and all documents will be presented as separate attachments which can be selected for review. Clicking the Zip icon opens the documents in Document Management, from which the patient can be searched for and selected to import or save the documents to disk. To view the documents and/or make edits, navigate to Document Management. A new Item Type, Zip Archive, has also been added. This is where you can view the documents from the original Zip file, however, the CDA cannot be reconciled from here.

  Note: For Zip files received prior to this release, navigate to Document Management to view the Zip Archive Item Type to select a document and import or save to disk. If a CDA, once imported you can reconcile the document.

See: Reconcile Incoming Transitions of Care (CDA) for detailed instructions.

[A] **Clinical Work and Message Center usability enhancements**

The following enhancements were made to improve the overall usability of the Clinical Work window and the Message Center.

- **Clinical Work**
  - Two free-type text fields, **Type** and **Category**, were added to the **Documents** tab so that you can further filter the list of Documents. All or part of the Document Type or Category can be entered in these fields, and you must tab out of the fields to begin your search.
  - A new field, **Referred to**, was added to the **Referrals** tab so that you can filter the referral list by clicking the Address book button and selecting from the list.
- **Message Center**
  - The **Sender** drop-down was added so that you can filter the Message Center tabs by who sent the Message.

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Resource Updates

Smallpox-Monkeypox Vaccine VIS
➤ *Clinical > More button (Reference Data group) > Immunization Codes > Vaccine Information Sheets tab*

The most recent Smallpox-Monkeypox Vaccine VIS, dated 8/23/2022, is now available.

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Issue Resolutions

On-Premise Practices who use Waystar: The "Statement file created, Transmit now?" pop-up displays as expected. When No is selected, the file is saved to the correct location to be picked up by the clearinghouse.
In the Schedule, the length of the **Location name** field was increased to 50 characters so that the location name is no longer cut off.
The right-click menus have been removed from the Users and Groups tabs within **Security Administration**. The workflows initiated by these menu options are still available from other areas of Security Administration.
The buttons in the **Contact Manager Merge** confirmation window no longer cut off the Contact ID number, the word Keep has been removed. The message in the confirmation was also updated to add clarity to the action.
The character limit for box 32 on the **CMS-1500 form** has been increased to 50 characters so that the Service Facility Location Information is no longer cut off.
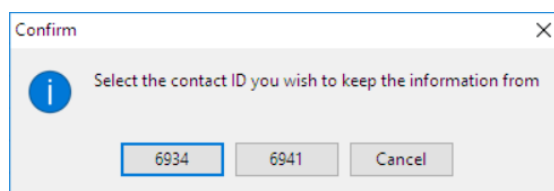
Users were unable to see restricted information after entering their **Emergency Override** credentials without refreshing the window. A **Refresh button** has been added to the following areas: Well Visits, Encounter Notes, Documents, Problems, Allergies, and General Notes. Also, the Emergency Override message has been updated to include "Click Refresh to see the information".

Modifier 95 for Telehealth claims is now applied to POS 10 as expected.

The letter "A" no longer defaults in the **Contact name / email:** field of the Contact Manager window; you can now enter the search criteria and press Enter on your keyboard to initiate the search.

The **Insurance and Patient Adjustment** columns have been added back to the Patient Claims window.

Audit Trail preferences are now saved as expected when the save is initiated from all tabs of the Audit Log.

MySQL clients only: The County code automatically populates when saving a new patient record.

After clicking New Document in **Document Management**, the None option functions as expected to clear the patient's information from the Manage Documents tab.

The **Primary and Secondary Insurance columns** have been added back to the Claims window of the Patient Chart. When a patient has a Primary and Secondary Insurance, the payer to which the claim is queued will be displayed in italics.

Users will no longer receive an error when **deleting a CPT code** from the Procedures tab of a Well Visit Template.

Non-clinical users will not be permitted to edit the **Finalized by** or **Cosigned by** fields on an Encounter or Well Visit note. Only a Mid-Level or Full Provider will be permitted to cosign a note. The user who cosigns the note must have a higher clinical level than the user who finalized the note.

The user cosigning a Well Visit note will be captured as expected.

You no longer need to exit the chart to save **Birth Weight** in the Birth Info tab of a patient's History.

We've resolved several issues related to the assignment of items to **inactive staff**.

- Inactive Staff is no longer displayed in the **Addressed to drop-down** in Document Management
- Inactive staff is displayed in the **Staff addressee** field when performing a Search in Document Management.
- In all tabs of the Clinical Work window, except Diag Tests, selecting the **Everyone** radio button allows you to view all items that are assigned to inactive staff. See the examples below.

Encounter/Well Visits:

	Date		Patient Name	Progress Note	Primary DX	Staff
☐	08/26/2021		TEST, ROSIE	**CC/HPI**		AUBRIE HATFIELD (not active)
☐	08/26/2021		TEST, AVA	**CC/HPI**	H10.31 Unspecified acute conjunctivitis, right eye	AUBRIE HATFIELD (not active)

	Date	Patient Name	Progress Note	Staff
☐	04/22/2022	ANDERTON, MARY	**Interval History**	AUBRIE HATFIELD (not active)

Referrals:

Review / Edit	Print	Referred to:		☐ include prior to flag date		Lines/record: 1 ▼

Date	Patient Name	Referral Notes	Primary DX	Staff
07/28/2021	ZALLY, ZALLY	To: DAVID AVALOS 123 NOWHERE AVE	L70.0 Acne	AUBRIE HATFIELD (not active)

Documents:

	Date	Patient Name	Category	Record Content	Staff	
Type : :CDA						
☐	09/13/2022	[no patient specified]		File type: PDF/pdf	WP (not active)	27848
Type : :REFERRAL LETTER						
☐	09/12/2022	TEST, JORDAN	EFAX		WP (not active)	27839

Surveys:

Date	Patient Name	Survey Assessment	Primary DX	Staff
12/02/2021	FULTON, STEVEN	**BF 24-Month Developmental Surveillance, taken on 12/02/2021**		Cindy Malek, RN (not active)

The **dispense value** on a Prescription displays the same when you double-click or select and click the Edit button.

Clicking the **Cancel** button in the Demographics window no longer prevents you from adding or editing information.

The **Buy Credits** button was removed from the Usage Statistics window of Patient Message eXchange.

Visit Notes **finalized** by Clinical staff that did not require a cosignature are no longer displayed as unfinalized.

Blank spaces will be removed from an **Insurance code** upon saving the Insurance record. **Note**: This change will not correct existing insurances that may have a blank space, only newly entered insurances.

The total on the **Well Exams by Month** in OP Reports will no longer change when moving between the first and last page of the report.

eLabs only: The Hearing and Vision Screen Order and Results will display in the correct patient record. Any existing patient records with an incorrect Hearing and Vision Screen Order and Results will be corrected.

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