

### InteliChart Version 3.5.23

On Friday, **May 19, 2023**, your InteliChart Patient Portal environment will be upgraded to version 3.5.23. The portal will be unavailable between 9:00 pm EDT to 9:00 am EDT the following morning. Please be aware, the InteliChart Patient Portal may be unavailable intermittently during the weekend to complete validation of the portal upgrade and additional work.

### Enhancements - Practice Portal

#### View Labs, Imaging, and Pathology Reports Permission

*Practice Portal > User Administration > Roles > Patient Chart section*

New permissions are available to view Labs, Imaging, and Pathology results in a patient's chart. Under User Administration > Roles > Patient Chart section there is a new parent permission called **Test Results**. The new child permissions are **Labs**, **Imaging**, and **Pathology**.

- When these permissions are active, the user is able to view Results inside the Patient's chart.
- When these permissions are inactive, the user is NOT able to view Lab Results inside the Patient's chart.

#### Care Action Settings - Test Results and New Imaging and Pathology sections

*Practice Portal > Portal Management > Care Action Settings > Test Results*

In the Care Actions Settings tab, the Labs tab has now been renamed to **Test Results**, and three sections (original **Labs**, and new **Imaging** and **Pathology**) are now displayed. The Imaging and Pathology settings will mirror the Lab settings upon upgrading to the current version.

Configure the Imaging and Pathology settings as desired. At the bottom of the Test Results page, the **Save Settings** button will save your changes.

#### Limit characters in Reason for your visit

*Practice Portal > Portal Management > Patient Interface > Scheduling*

A new setting is available which allows you to limit the number of characters a patient can enter in the "Reason for your visit" field when requesting or scheduling an appointment in the Patient Portal. The default and maximum character limit is 250 characters.

See image on next page:

[Home](#) / [Portal Management](#) / [Patient Interface](#) / [Scheduling](#)

MANAGE SETUP   **SCHEDULING**   PAGE TEMPLATES   DOCUMENT MANAGEMENT

### SCHEDULING SETTINGS

Enable Live Scheduling

Notify  of all new insurances

Limit the Reason for your visit to  characters (Maximum: 250 characters) [i](#)

### Patient Portal Billing Message Disclaimer - Settings

[Practice Portal](#) >  
[Portal Management](#)>  
[Patient Interface](#)>  
[Manage Setup](#) >  
[Portal Features](#) >  
[Allow Ability to Send Message section](#)

A new setting was added in the Allow Ability to Send Message section called **Acknowledgment of possible charges by Messages**. This acknowledgement message will be defaulted to OFF. When The Allow Ability to Send Message is toggled on, this setting will remain off and must be specifically toggled on or off.

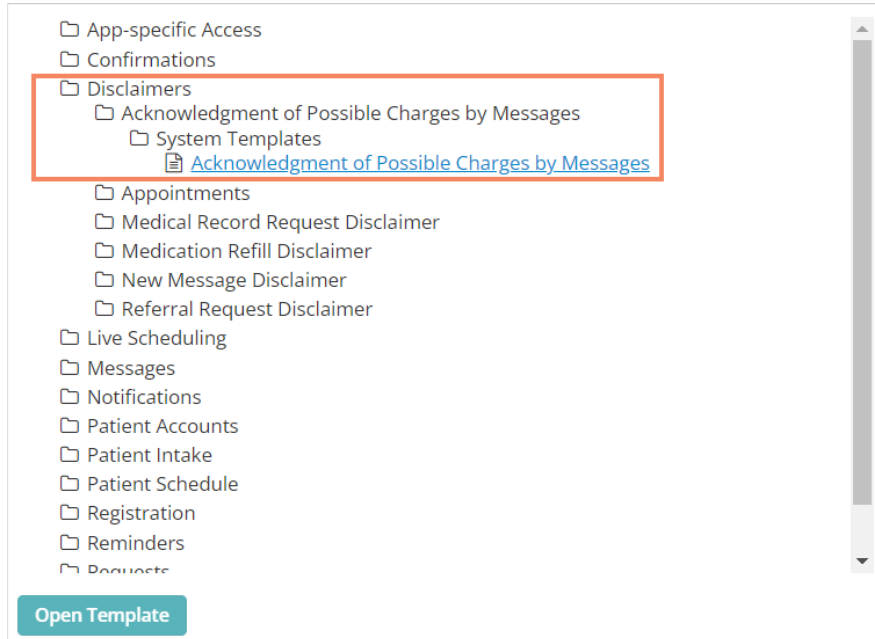
<ul style="list-style-type: none"> <li>Allow Ability to Send Message           <ul style="list-style-type: none"> <li>Message Settings</li> </ul> </li> </ul>	<input checked="" type="checkbox"/>
Allow Patient to Send Message	<input checked="" type="checkbox"/>
Allow Self Registered Person to Send Message	<input checked="" type="checkbox"/>
Allow Attachments	<input checked="" type="checkbox"/>
<b>Acknowledgement of possible charges by Messages</b>	<input type="checkbox"/>

### Patient Portal Billing Message Disclaimer - Message Template

[Practice Portal](#) >  
[Portal Management](#)>  
[Patient Interface](#)>  
[Page Templates](#)

A new Disclaimers subgroup **Acknowledgment of Possible Charges by Messages** where you can find the new system template for the Patient Portal Billing Message Disclaimer. The Template states "I acknowledge portal messages may incur an additional charge". Your practice can customize the message to what you want to display to the patient.

See image on next page:



**Note:** Your practice needs the ability to create a customizable message from a system template to be able to send to the patient.

### Update the Mobile Phone Field

Demographics >  
Contact Info Tab


On the **Contact Info** Tab of the Demographics Edit modal, the "Mobile" label has been updated to **Mobile Phone**.

When a patient updates/saves a phone number in the **Mobile Phone** field, this will follow the current Patient Update workflow, where the practice must accept in the Practice Portal, and then update the information in OP.


## Enhancements - Patient Portal

### Separate buttons for Imaging and Pathology

Patient Portal > Test Results

Imaging and Pathology are now separated in the Patient Portal so that each can be reviewed as its own report. A flask icon  is displayed in the task card when there are new test results available in the header.

New icons display in the cards below header for each result type.

- A new rib icon  will display for all Imaging results on the dashboard card.
- A new microscope icon will display for all Pathology results on the dashboard card.

Other changes:

- The **All** button is removed. The default is now to display all results.
- Icons have been removed from buttons.
- The Imaging/Pathology button is renamed to **Imaging**.
- There is a new button labeled **Pathology**.
- There are multi-select enabled buttons. This means that different results can be made available for reporting.
- The "Clear Filters" option is renamed to **Reset**.
  - The **Reset** button is now displayed at the right of the **Pathology** button.
  - If **Reset** is selected, then it will reset to display **All Results**.

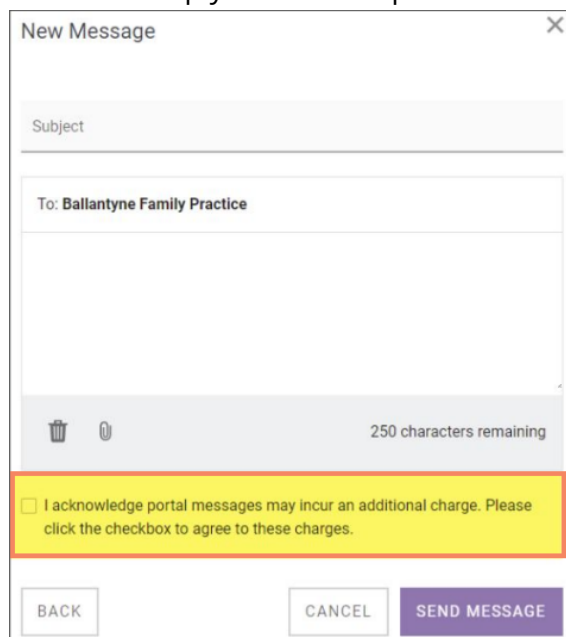
### Patient Portal Billing Message Disclaimer

*Compose New  
Message*

This is the view of the setting once set on the Practice Portal side (see above in the Practice Portal section). When a patient sends a message to a provider, there is a disclaimer that will appear under **Compose New Message**:

- The patient will have to select the **checkbox** to continue with the message.
  - If the patient **does not** select the checkbox, the send button will be grayed out and the user will be **unable to complete the message**.
- Once checked and the message is sent, the message disclaimer will appear at the bottom of the message to allow both the patient and the practice to have a record of the acknowledgement within the message.

This message disclaimer will appear each time the patient wants to send a new message or the first reply back to the practice.



New Message

Subject

To: Ballantyne Family Practice

250 characters remaining

I acknowledge portal messages may incur an additional charge. Please click the checkbox to agree to these charges.

BACK CANCEL SEND MESSAGE

### Live Schedule Appointments - Add to Calendar Link

*Appointment Confirmation*

When a patient schedules an appointment via the Live Schedule functionality in the Patient Portal, they will now have the ability to add the appointment to their calendar by clicking on **Add to Calendar** in the appointment confirmation modal.

#### Schedule an Appointment

##### Your appointment has been scheduled

Your Appointment has successfully been scheduled for Wednesday, January 25, 2023 11:30 AM with Ricki,Riddle at Ballantyne Family Practice, Ballantyne Commons. Please contact the office and/or cancel/reschedule the appointment using the portal if you are unable to keep your appointment.

Please contact the office or dial 911 if your symptoms get worse and you need immediate assistance.

[Add to Calendar](#)



### Select Default Profile

*Patient Portal*

A parent, guardian or proxy will now have the ability to select a default profile in the Patient Portal. The selected default profile will then be the profile that is presented first upon login going forward. This is displayed for desktop, mobile and tablet users.

**Note:** *If the parent, guardian or proxy account is associated, their own Patient Portal account with their medical information, this option is not available as the patient's own medical records will be the default account.*

### Update the Mobile Phone Field

*Demographics > Contact Info Tab*

On the **Contact Info** Tab of the Demographics Edit modal, the "Mobile" label has been updated to **Mobile Phone**.

- On the **Contact Info** tab of the Demographics Edit modal, the Mobile Phone is now editable.
  - The message at the top of the Demographics Edit modal "Note: Mobile Phone cannot be edited at this time." has been removed.

### Mobile Responsiveness

- Continued this release with ongoing efforts to enhance the user experience with better screens, appropriate back arrows and close buttons, and other user-friendly navigation tools.
- Continued efforts to update the Patient Portal to be in compliance with AAA Accessibility standards according to WCAG (Web Content Accessibility Guidelines).
- Continuous Spanish translations throughout the products.