InteliChart Release Notes
Version 3.5.25

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On Friday, **December 1, 2023**, your InteliChart Patient Portal environment will be upgraded to version 3.5.25. 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.

General

New Patient Portal Mobile App!	The new app will be available in both the Apple App store and Google Play store beginning December 4th.

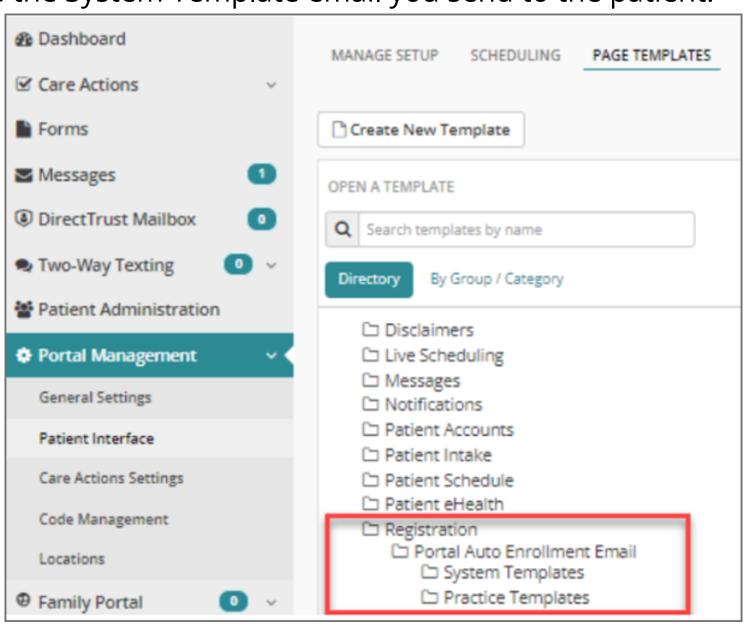
Enhancements - Practice Portal

Customize Registration Email for Auto-Enrollment

Practice Portal > Portal Mgmt > Patient Interface > Page Templates > Registration > Portal Auto Enrollment Email

There is a new customizable email template for the registration emails you send for Auto-Enrollments. The auto-enrollment email will continue to go out at the time of appointment creation and encounter creation - there are no changes to the process.

1. Navigate to the Page Templates for Registration by following the path in the left column.
2. Customize the System Template email you send to the patient.



Customize Refill a Medication Default Disclaimer

Practice Portal > Portal Mgmt > Patient Interface > Page Templates > Disclaimers > Medication Refill Disclaimer

When “Request a Refill” is clicked on the patient’s homepage, they will no longer receive the generic disclaimer message that requires clicking on Continue. When they select a medication to refill, the practice’s default disclaimer will now appear.

Ensure that your practice has a default **Refill Request disclaimer**:

1. Navigate to the path in the left column
2. updating the Refill template.

For more information about the changes on the Patient side, please see the Patient Portal release note below.

Add ‘Recent Provider Seen’ to Appointment Scheduling Workflow

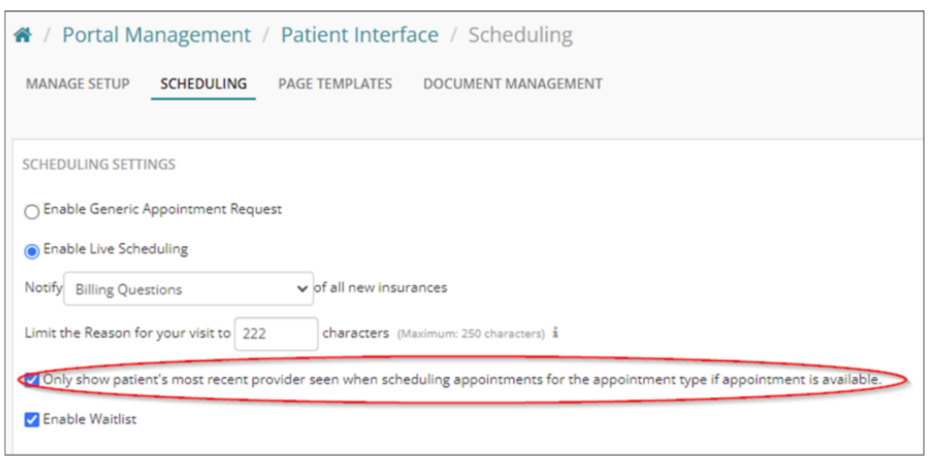
Practice Portal > Portal Mgmt > Patient Interface > Scheduling

This only applies if your practice has Live Scheduling enabled.

You are now able to set up a drop-down showing the patient’s most recently seen providers for them to select from during the Scheduling workflow.

To add this drop-down to your Scheduling Workflow:

1. Navigate to the **Schedule settings** by following the path in the left column.
2. Select the “Only show patient’s most recent provider seen when scheduling appointments for the appointment type if appointment is available” checkbox.
3. A drop-down called **Preferred Provider** will now appear in the patient’s scheduling workflow, showing the most recent providers seen.
    a. This drop-down will pull from the last 30 months of encounters in the patient portal appointment scheduling.
    b. If a patient has not seen any provider, the drop-down will default to “Any”.



DISCLAIMER: In order for this to pull the patient’s recently seen providers accurately, Encounter Notes MUST BE FINALIZED in OP for the encounter visit data to transfer to the Patient Portal.

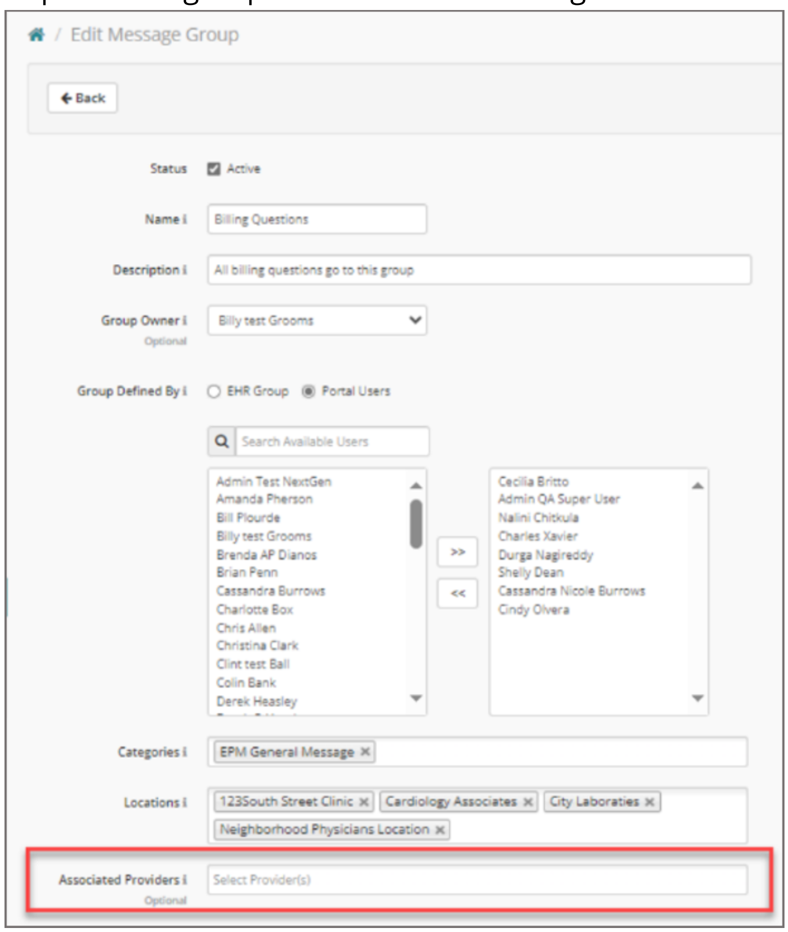
New 'Associated Provider' Field Added to Message Groups

Practice Portal > User Administration > Message Groups > Add Message Groups

You are now able to create a message group and associate a provider with that message group. This allows the associated provider's team to be able to see the messages without having to add the provider to the portal users.

1. Navigate to the Message Groups by following the path in the left column.
2. You will see the new field labeled "Associated Provider". This field is a multi-select field.
3. Click in the field and select the provider(s) you would like to be associated with this message group.
4. Complete the setup/editing of the message group as you normally would.

NOTE: The Associated Provider will NOT receive the message; only the portal users that are set up for that provider's group will receive the message.



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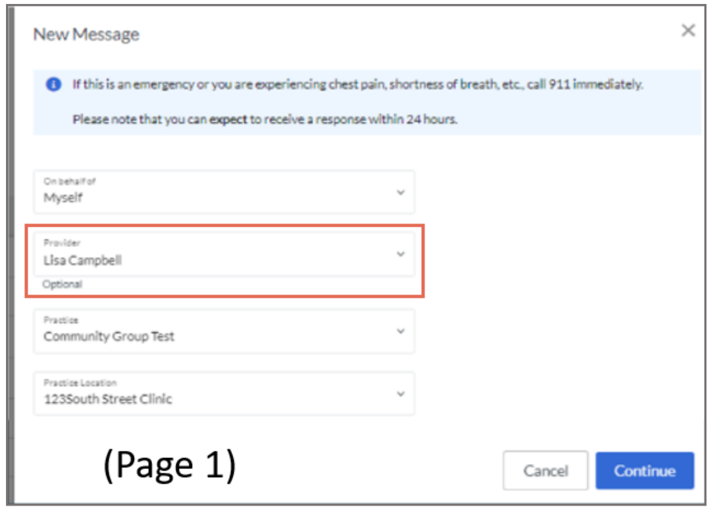
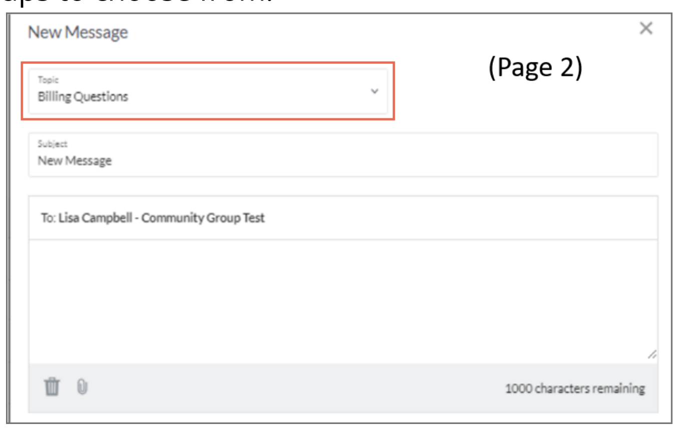
Enhancements - Patient Portal

Refill Workflow	The Refill a Medication workflow has changed to allow a Practice Default Disclaimer to open when requesting a refill. Practices can customize this default disclaimer to present the patient with what they need to know about your practice-specific refill process.
	
	When “Request a refill” is clicked on from the Home Page or My Chart:
	1. Users will be taken directly to the **Refill a Medication** modal.
	  a. When requesting a refill from the **Home Page**, and the medication is selected, the system will recognize *which practice that particular medication was prescribed from*.
	    i. Selecting the medication will trigger that practice’s default disclaimer to appear below the “Select your medication” field.
	  b. When requesting a refill from **My Chart** > **Medications**:
	    i. The practice’s default disclaimer will appear below the text "You are requesting a refill for _______".
	  c. ***NOTE***: Practices are currently able to configure their medication refill disclaimer templates in the Practice Portal. Please see release note above.
	2. When the disclaimer displays, 2 dropdown fields appear:
	  a. **Send refill request to**: *(required)* Select the person that will receive the request.
	  b. **Pharmacy**: *(required)* Select the pharmacy the med will be picked up from.
	    i. If the desired pharmacy is not available in the drop-down, users can click “Add a Pharmacy” button underneath the drop-down.
	3. After filling out the request details, click **Send Refill Request** to submit, or **Cancel** to cancel the request.

Messages Model Changes *Patient Portal > Messages*	A few changes have been made to **Messages** in the Patient Portal: ● There is a new drop-down on the first page of Messages called **Provider**, which will allow the patient to choose a recently seen provider. This field is <u>optional</u>, and if no recently seen provider exists, then the field will NOT display.



- The Category field has been moved to the second page of the message model, and has been renamed **Topic**. This drop-down will display a list of associated message groups to choose from.



- The **To** field will display the following: “To: [Provider name] (if applicable) - [Practice]”

DISCLAIMER: In order for this field to pull the patient’s recently seen providers accurately, Encounter Notes MUST BE FINALIZED in OP for the encounter visit data to transfer to the Patient Portal.

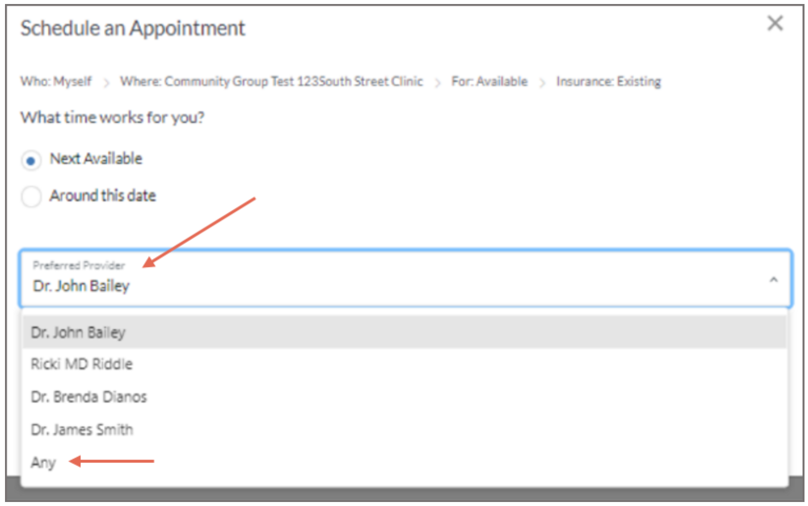
New “Preferred Provider” in Scheduling Workflow

Patient Portal > Schedule an

This only applies if your practice has Live Scheduling enabled.

If your practice adds the new Recent Provider Seen to the **Scheduling workflow**, patients will now be able to view and select their most recent providers in a drop-down called **Preferred Provider** when scheduling, making it easier to schedule follow-up appointments quickly.

Appointment



More details about the **Preferred Provider** drop-down:

- The Preferred Provider drop-down is populated with the providers the patient has had an encounter with.
- If the patient has only seen one provider at a location, then that provider is defaulted in the Preferred Provider field.
- If the patient has not seen any provider, the field will default to 'Any'.

DISCLAIMER: In order for this to pull the patient's recently seen providers accurately, Encounter Notes MUST BE FINALIZED in OP for the encounter visit data to transfer to the Patient Portal.

Account Balances Update (Bill Pay)

Patient Portal > Schedule an Appointment

This only applies if your practice has BillPay enabled.

The following changes have been made to the BillPay page, in order to more accurately reflect account balances.

1. The BillPay page has been updated to display only the **Account Number** and the **balance due**.
    - The demographic information will be removed from the **BillPay** page and the **Print View** page. The **Account Number** will replace the patient's name on the BillPay screen and Print View page grids.
    - Only the name of the **logged in user** will appear on the Print Screen.
        i. In the event that associated bills are present for a logged in user, then only the account number will be displayed.
    - The patient's name has also been removed from the **Make a Payment** screen, the **Confirmation Page**, and the **exemption pages** (these screens appear after the patient clicks "Make a Payment").

2. Only one Account Number will display on the BillPay page. Matching account numbers will display the **total sum associated with the account**, or in other words, the total amount due for associated patients with matching account numbers will display as the balance.
    - For example, if there are three matching account numbers with matching balances, only a single balance will appear on the BillPay page.