EHR System Updates

Production Release January 2023

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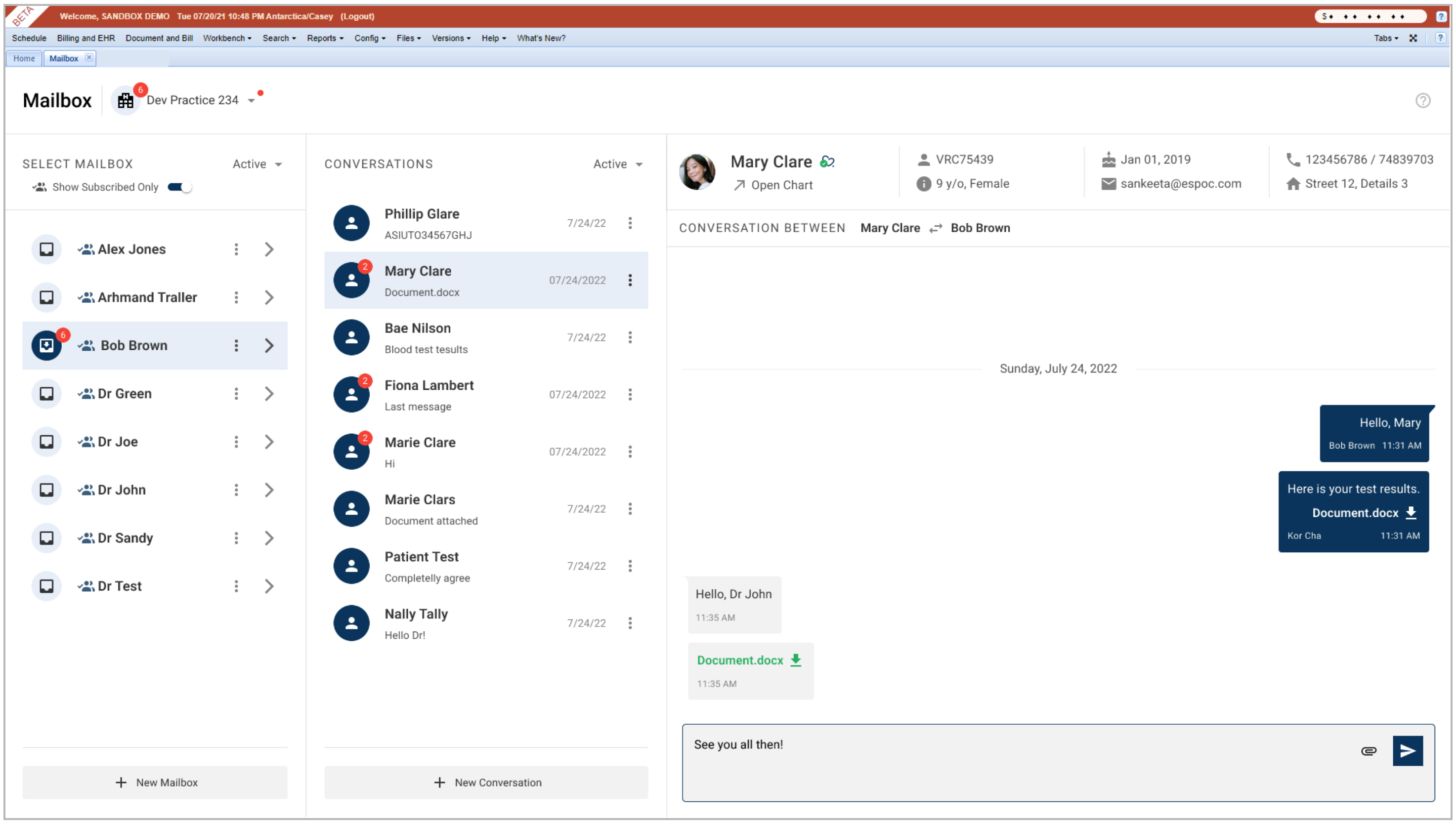
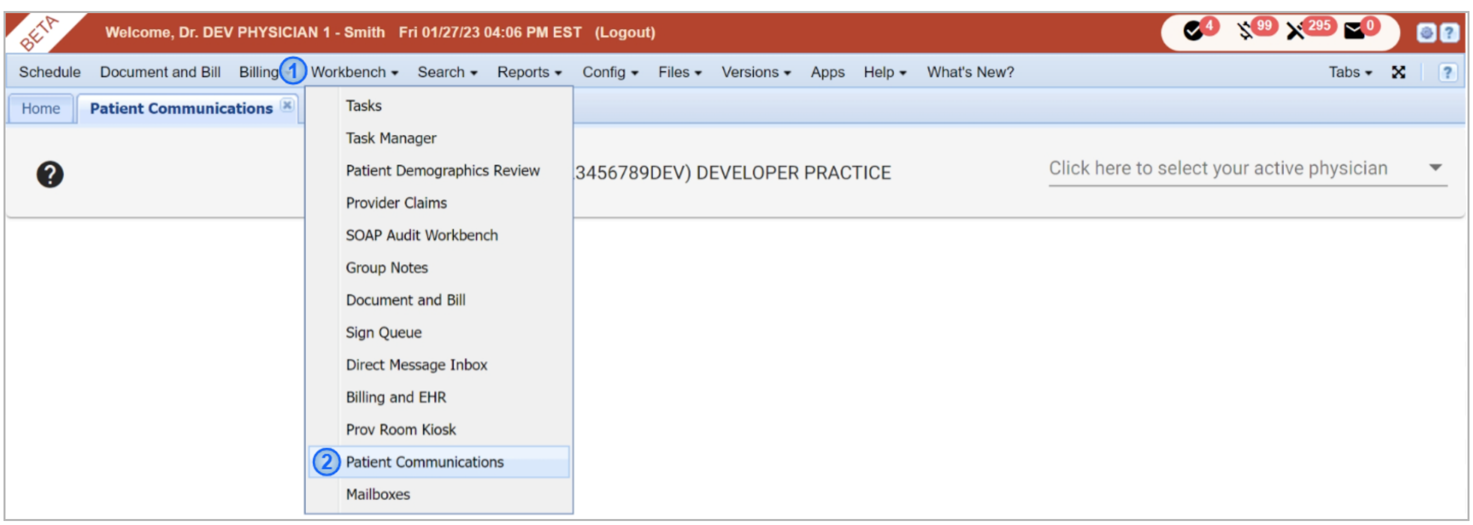
***If a setting is not available, please contact your Coach to enable the setting.**

Note: New features may not be available on all servers until the feature rollout is complete.

Patient Messages Mailbox

This new feature allows the practice the ability to be more transparent with patient communications internally as well as provide better patient experiences when interacting with the clinician outside the clinic setting. Practices are able to set up more general mailboxes such as for their billing department, scheduling questions, and/or any communications that may not be provider specific.This gives the practice more flexibility on how patients can communicate with them through messages.



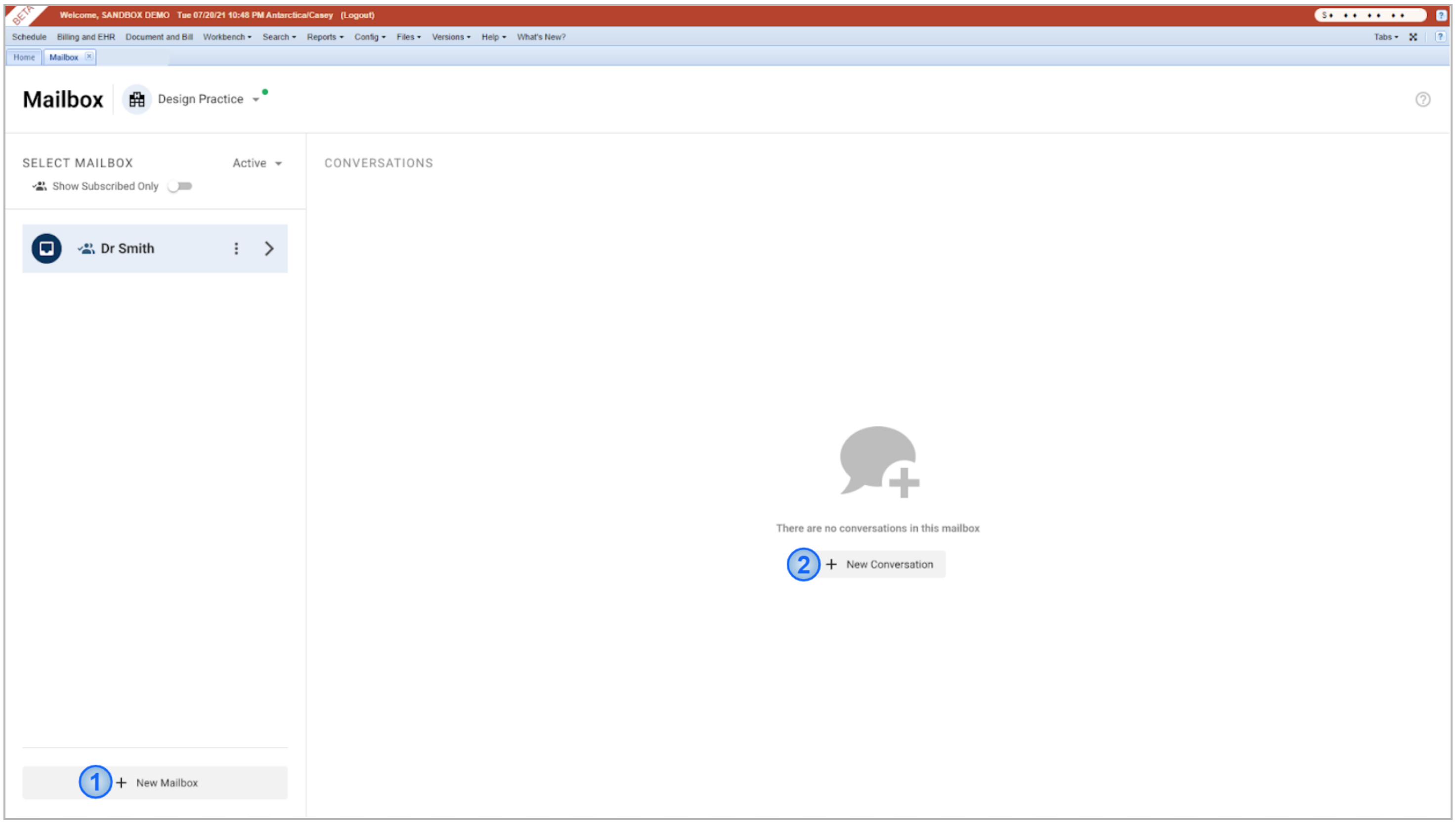


To view the Patient Messages Mailbox:

1. Click on **Workbench**
2. Then click on **Patient Messages Mailbox**

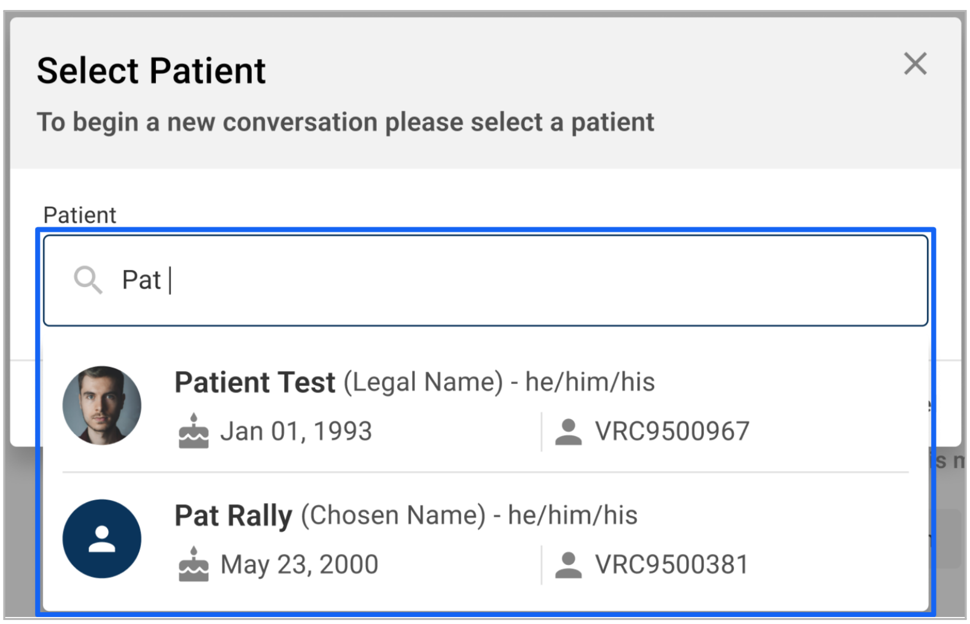
Alternatively, this can also be accessed via the message icon in the dashboard ticker.

Mailbox Usage

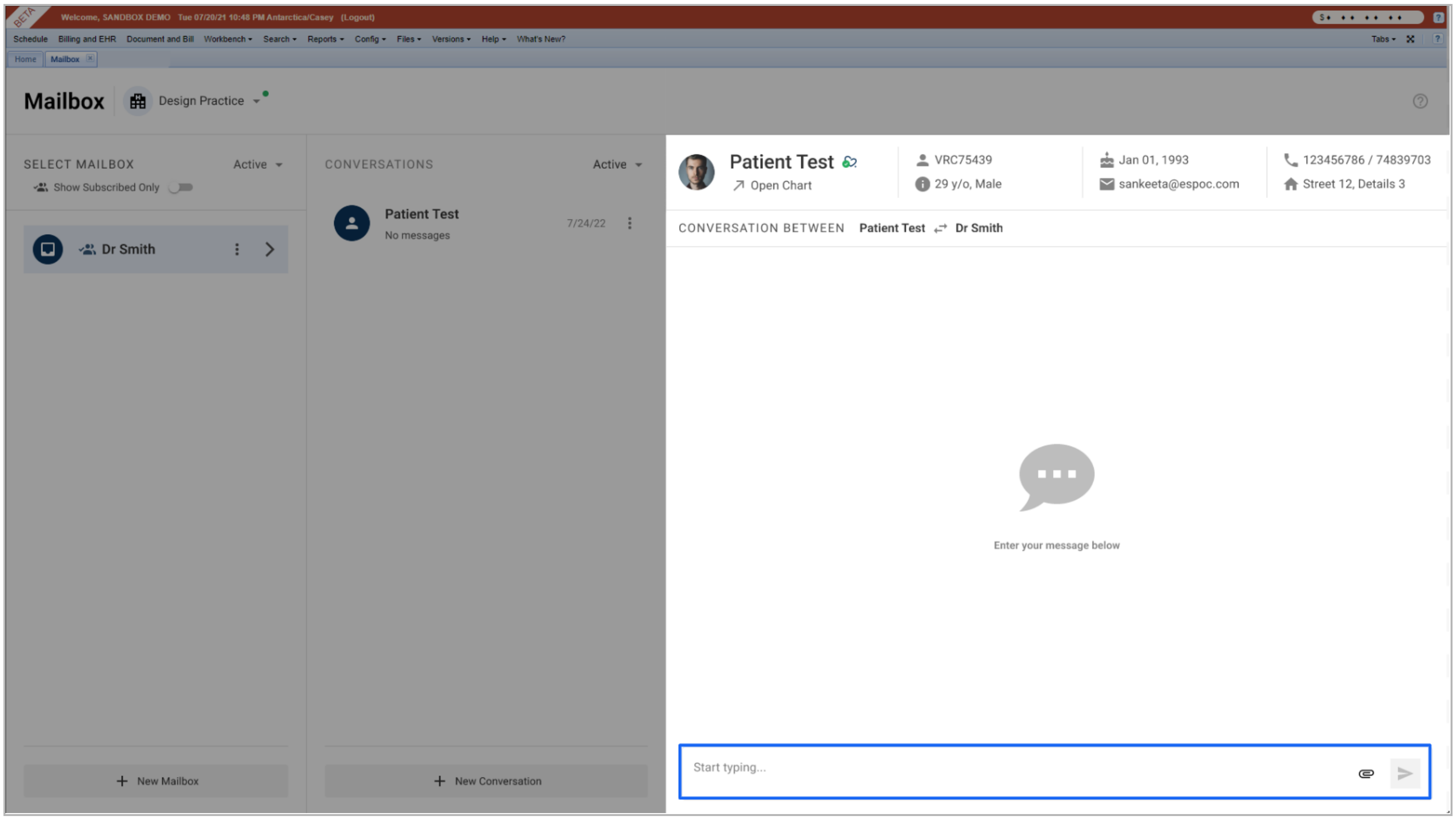


To start a patient conversation within a mailbox:

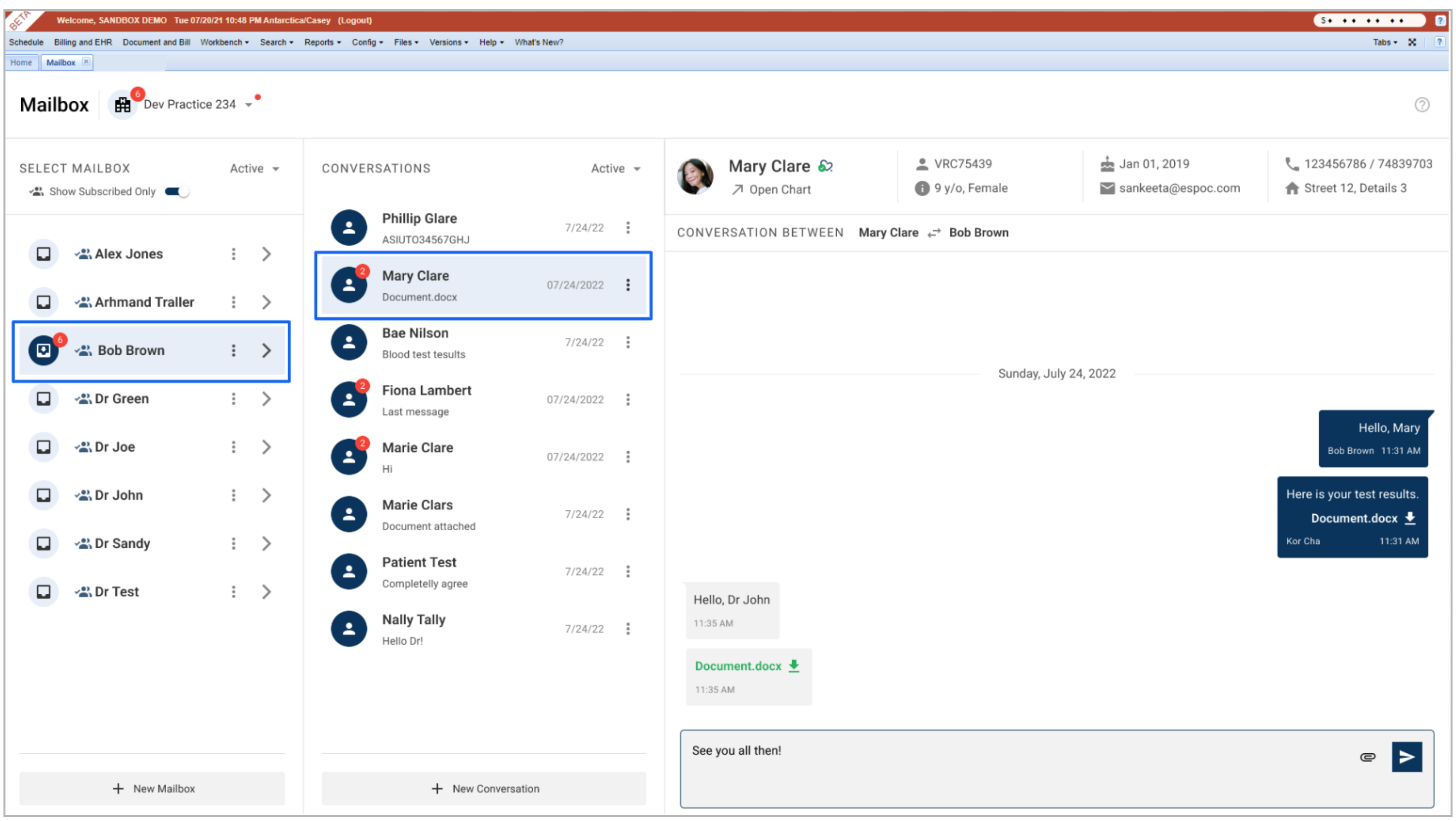
1. Select the **Mailbox**
2. Click on **+ New Conversation**
3. Type in the **Patient's name** on the search box



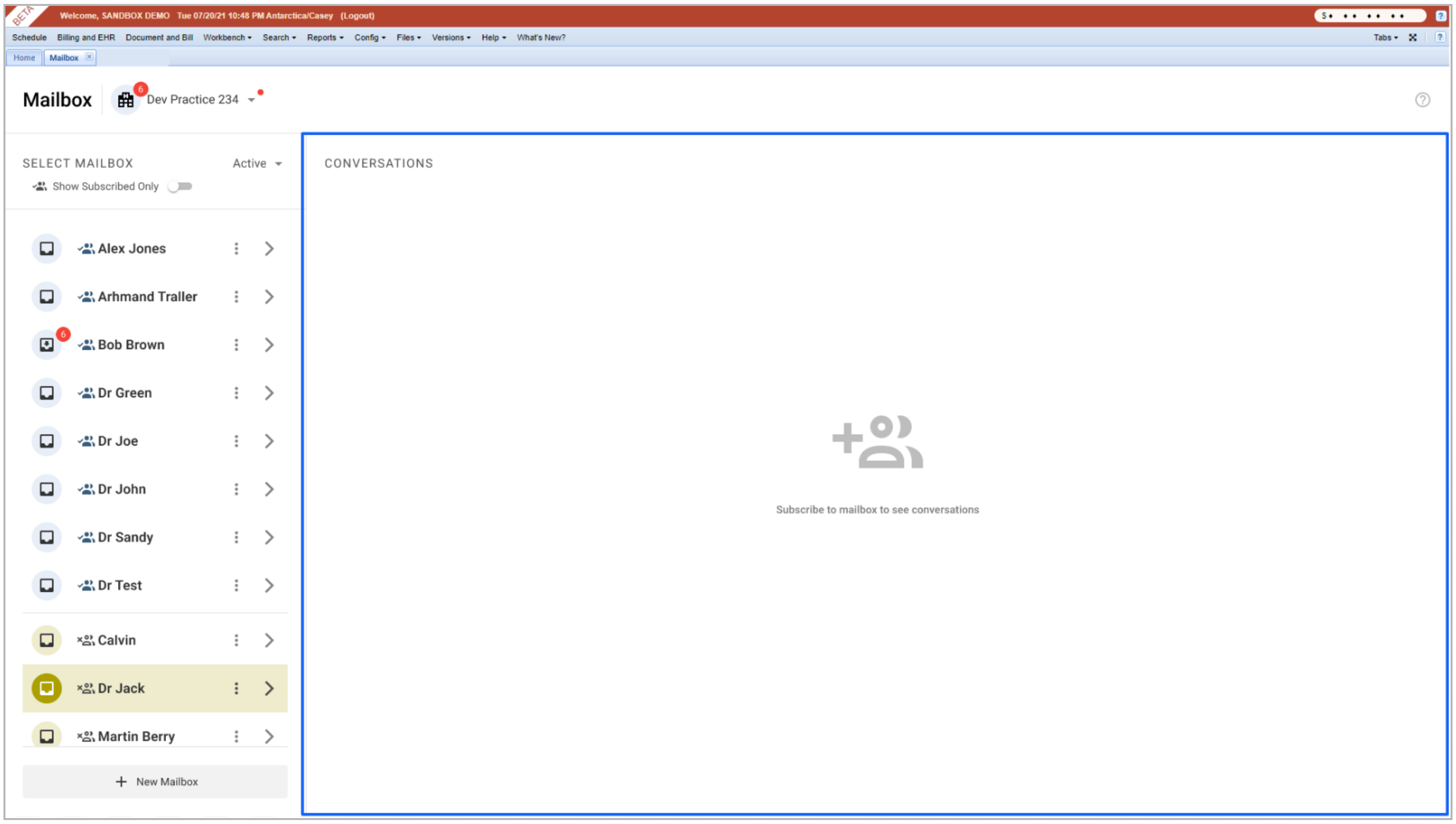
4. **Select the Patient** from the list
   a. The search box will display relevant accounts that show the **Patient's Full name, Preferred pronoun, Date of Birth, and Account number** to ensure that the correct Patient is selected.



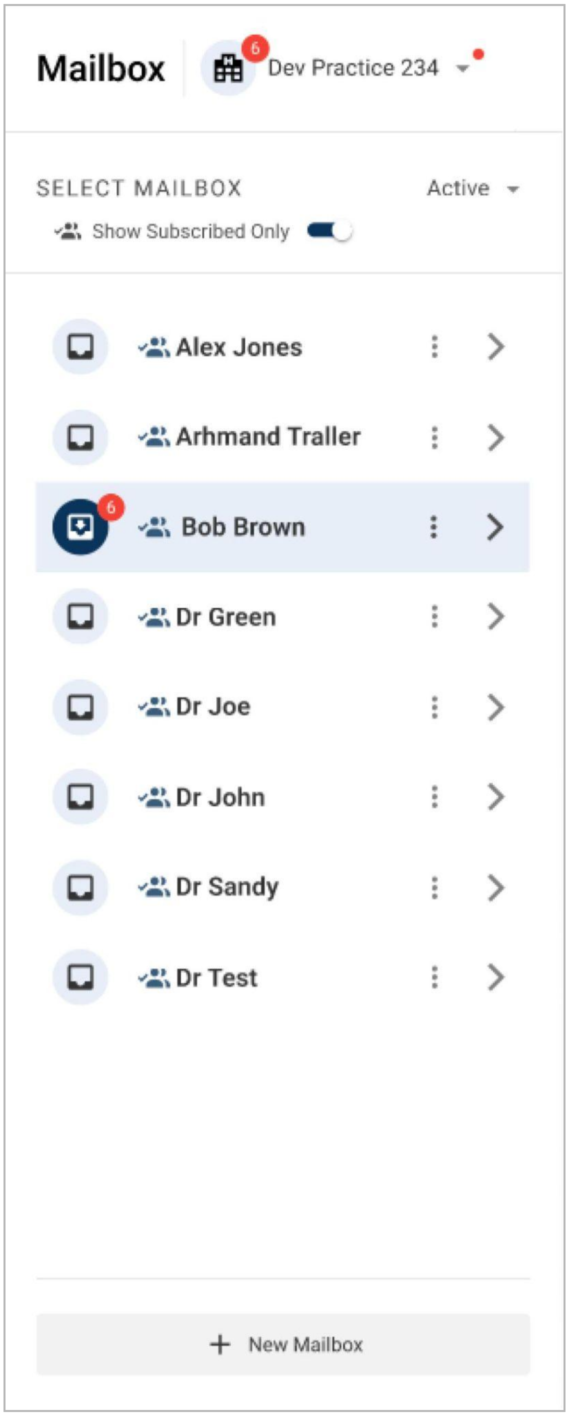
Once selected, the user can send a message to the patient by typing in the **empty textbox** at the bottom of the page. Messages can either be via text format, or users can also send attachments when needed.



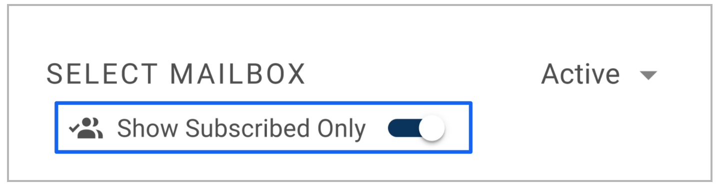
When several mailboxes are set up, a **blue shading** will indicate the currently selected conversation.



By default, **all mailboxes will be visible** to the users. If they select a mailbox that they have not subscribed to, the user will be prompted to subscribe to the mailbox to see and interact with the conversation.



The mailbox view can be filtered by using the **Show Subscribed Only** toggle at the top left corner of the screen.

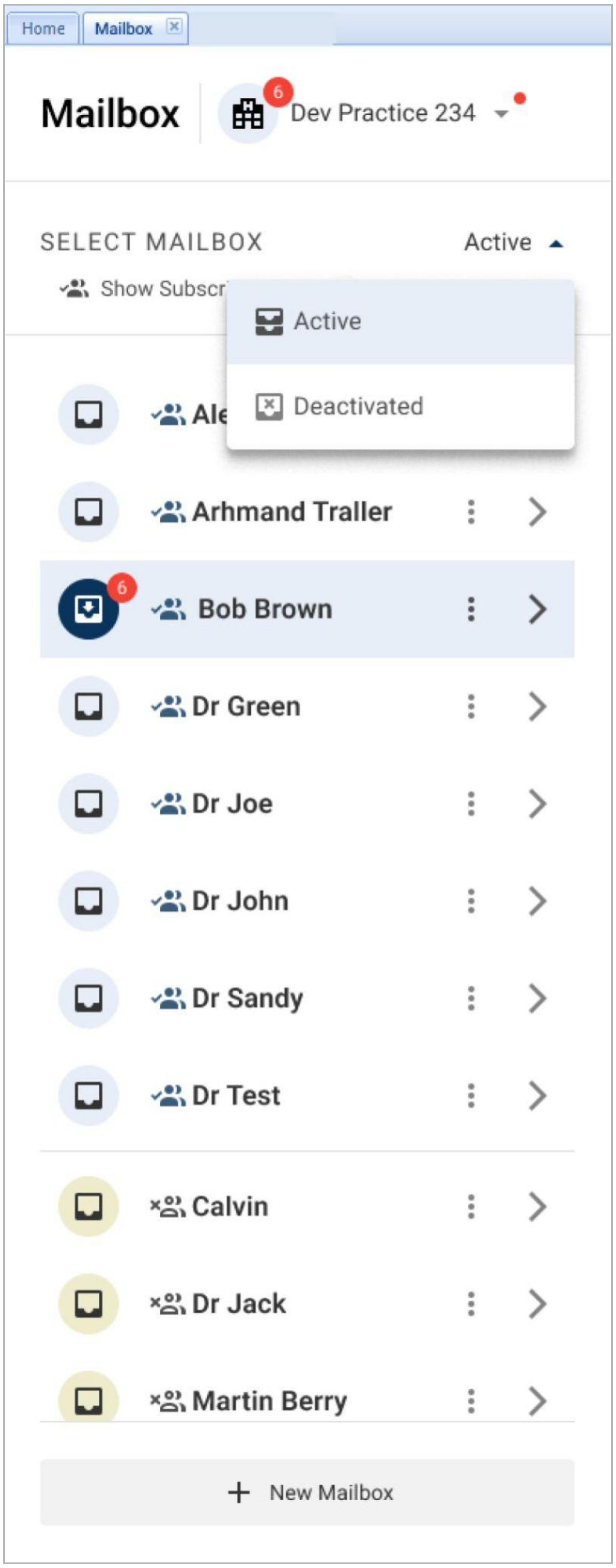


This allows for less mailbox clutter and provides the option to view unsubscribed mailboxes only when necessary.

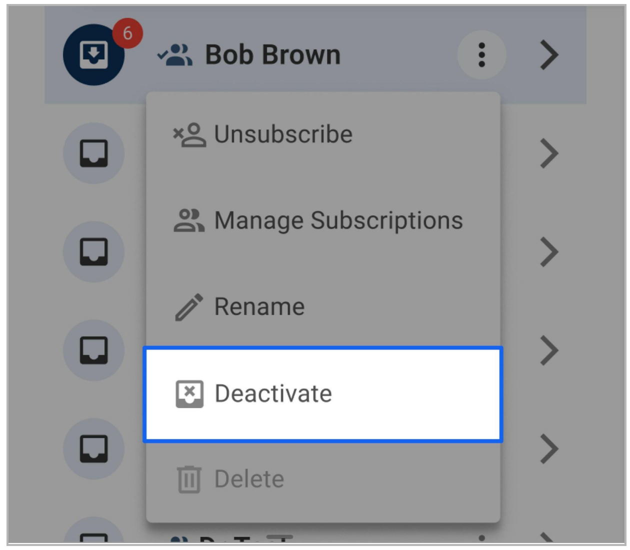
Note: In the Patient's Chart summary, users will be able to view and send patient messages even if they are not subscribed to the mailbox.

Active and Deactivated Mailboxes

Users can change their mailbox to show **Active** or **Deactivated** Mailboxes by clicking on the drop-down menu and selecting their preferred view.



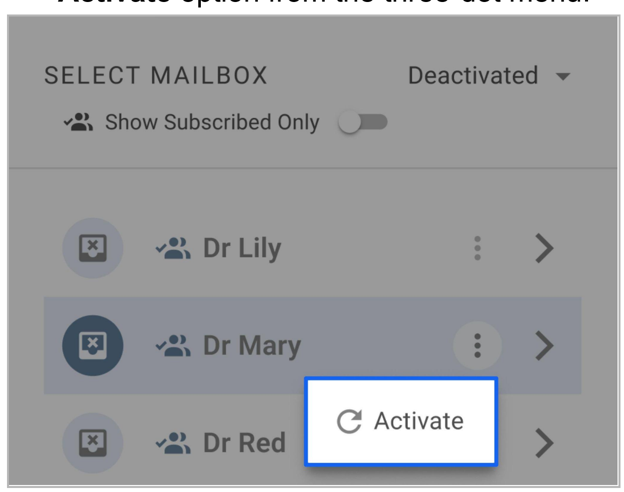
1. Only Mailbox Admins can Deactivate a mailbox by clicking on the **Deactivate** option from the three-dot menu.

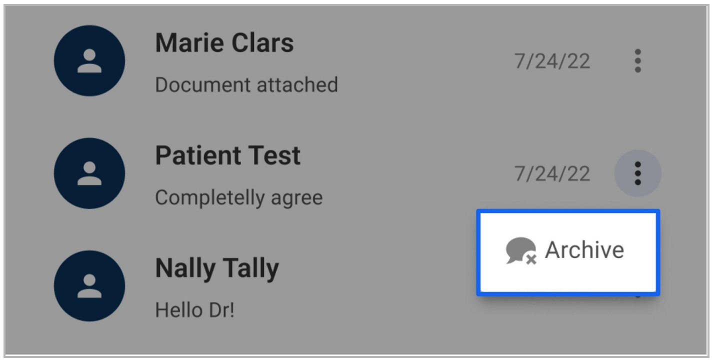


When a mailbox is deactivated:

- ➢ It becomes unavailable for all subscribers
- ➢ Patients will no longer be able to message the mailbox.

2. Deactivated mailboxes will appear as grayed out. Only Mailbox Admins can Activate a deactivated mailbox by clicking on the **Activate** option from the three-dot menu.

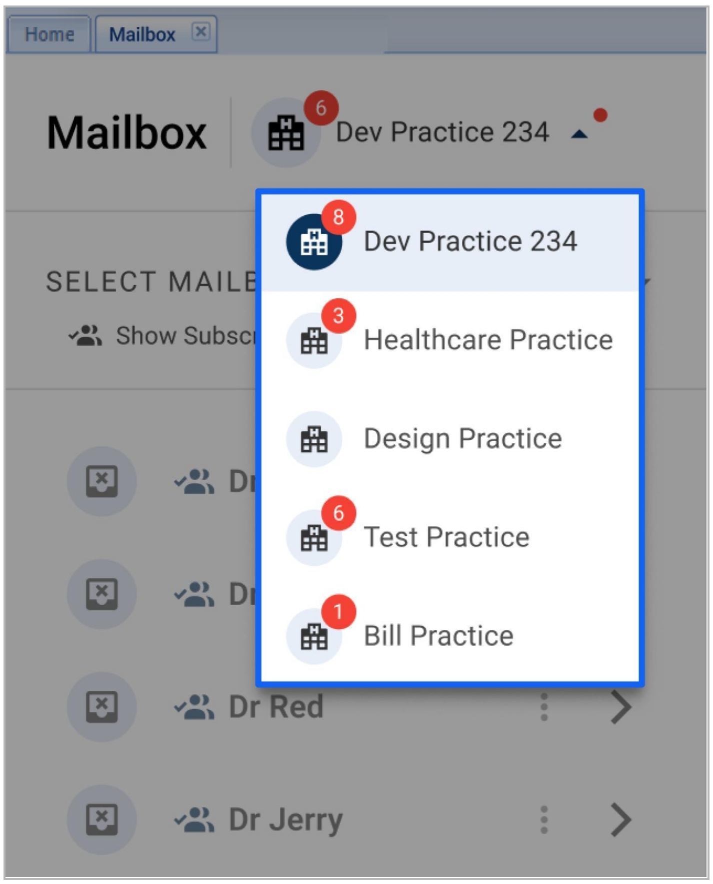




All subscribers have the option to **Archive** a conversation.

Archived conversations can be reactivated by:

- ➢ Sending a message to a patient.
- ➢ Receiving a message from a patient.
- ➢ Reactivating it from the archived conversations list.

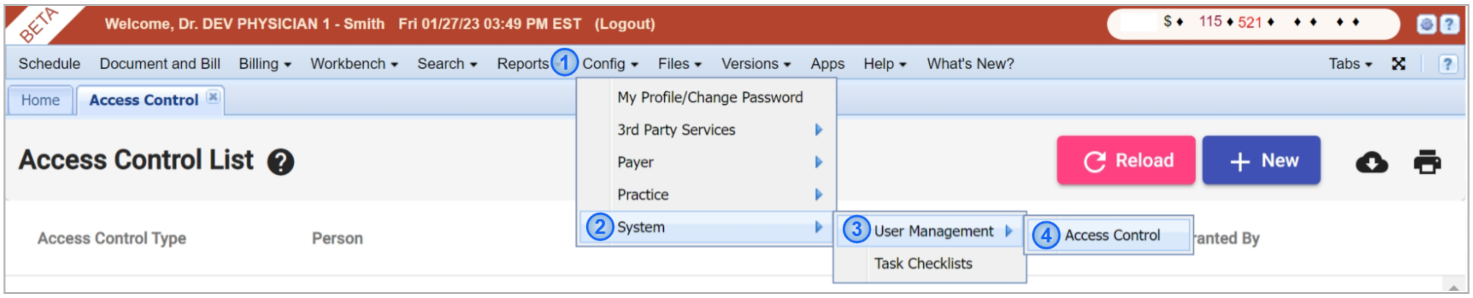


If the user has access to multiple practices, they can easily switch mailbox views by clicking on the current practice. A dropdown will display all the available practices to easily switch between practice mailboxes.

Mailbox Admin Setup

Only Mailbox Admins will be able to set up the mailbox for their practice, the setup process will not be available to the rest of the users.

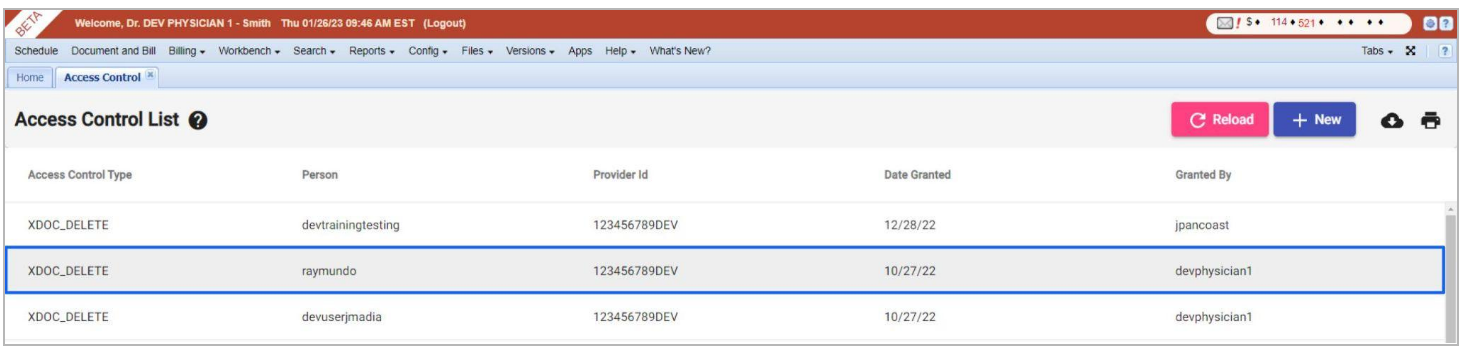
Practice Owners or Administrators are able to give account permissions to users.



To do so:

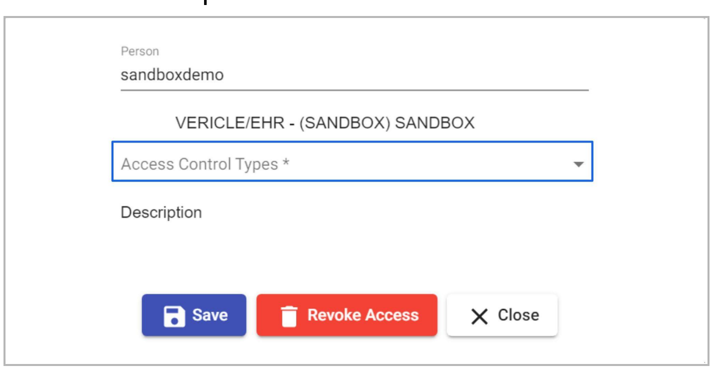
1. Click on **Config**
2. Hover over **System**
3. Hover over **User Management**
4. Click on **Access Control**

A list of all users for the practice will then be displayed.

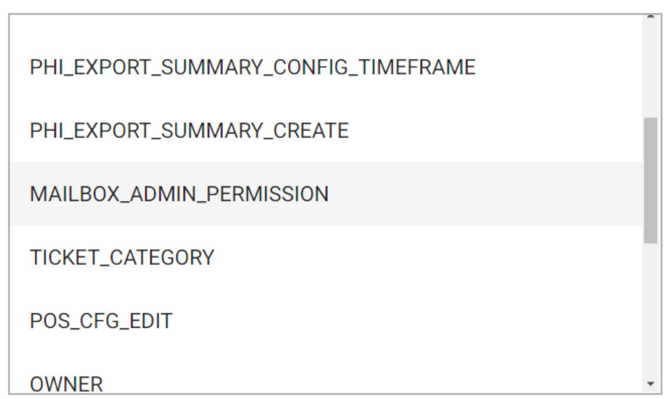


Select the user that you wish to grant access as Mailbox Admin.

Click on the dropdown below the username.



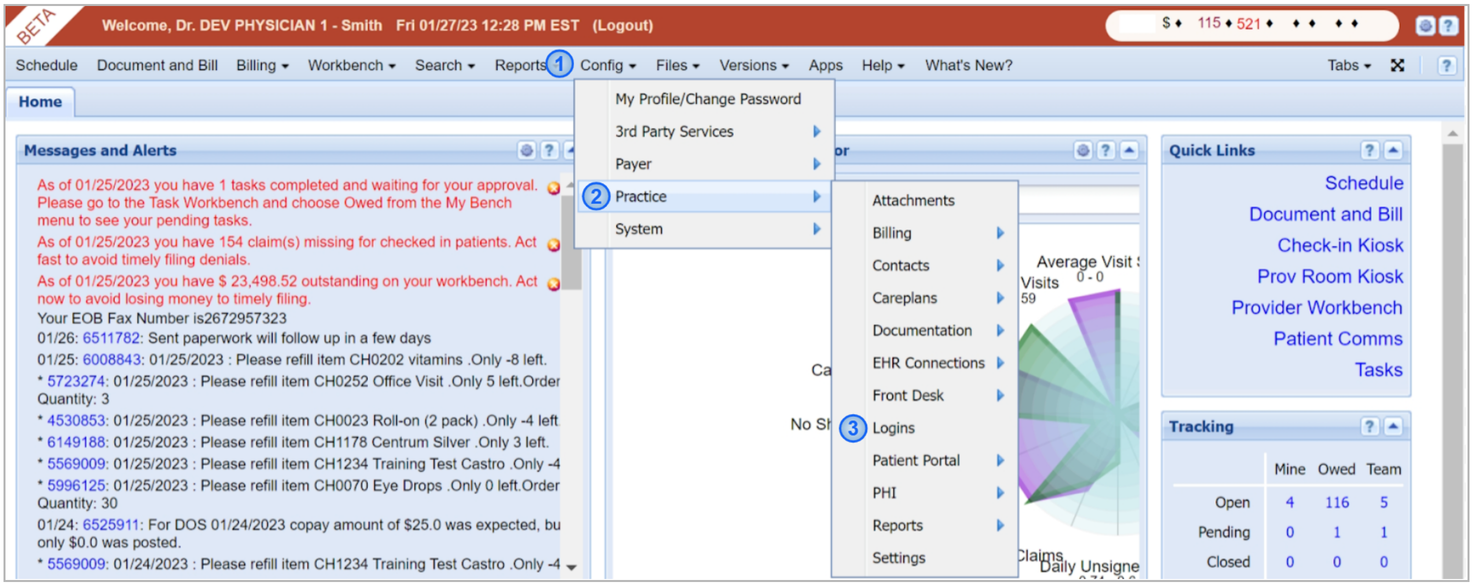
Scroll down to find **MAILBOX_ADMIN_PERMISSION** and select it.



Click on **Save** and it should give the selected user access as a mailbox admin in order to set up and manage mailboxes.

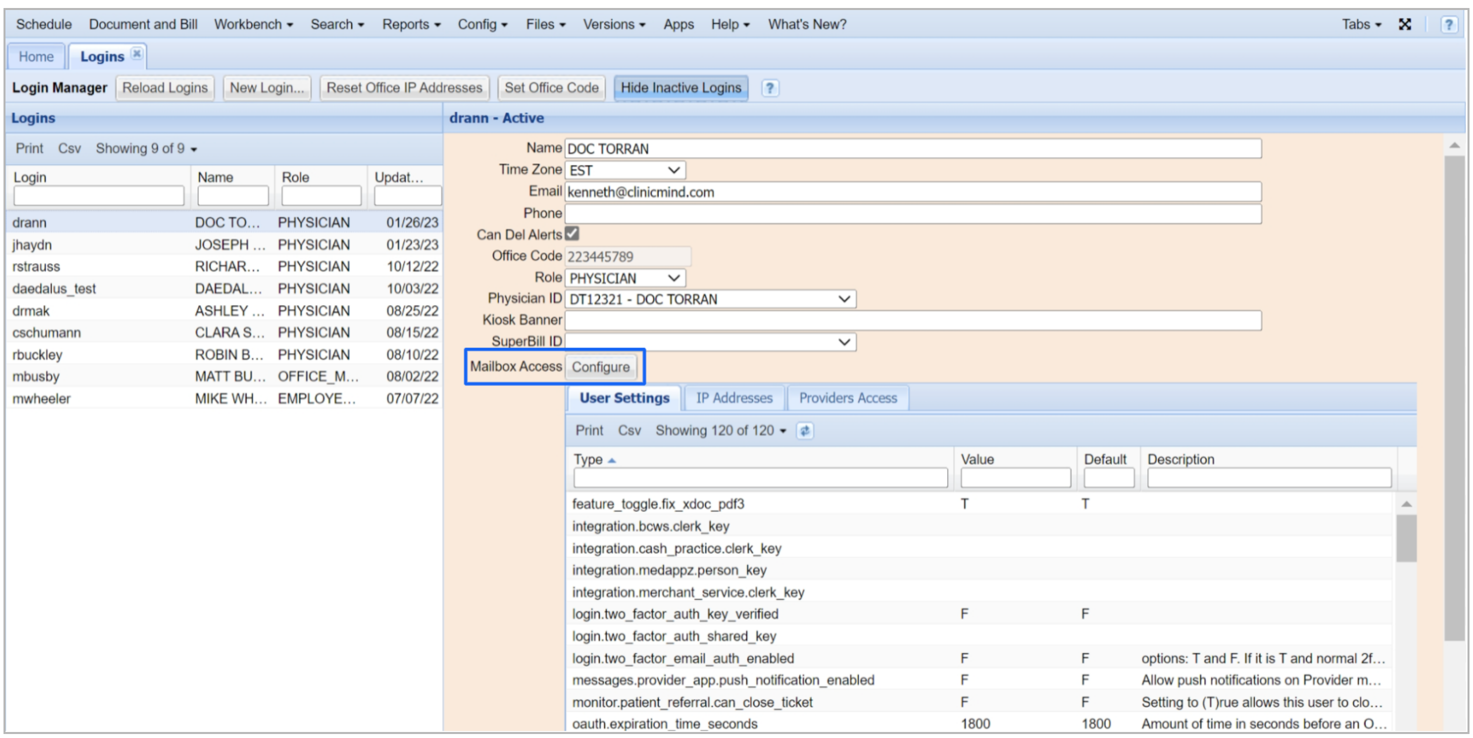
Mailbox Admin Management

Mailbox Admins can configure mailbox subscriptions for all users within the practice from the Logins configuration page.

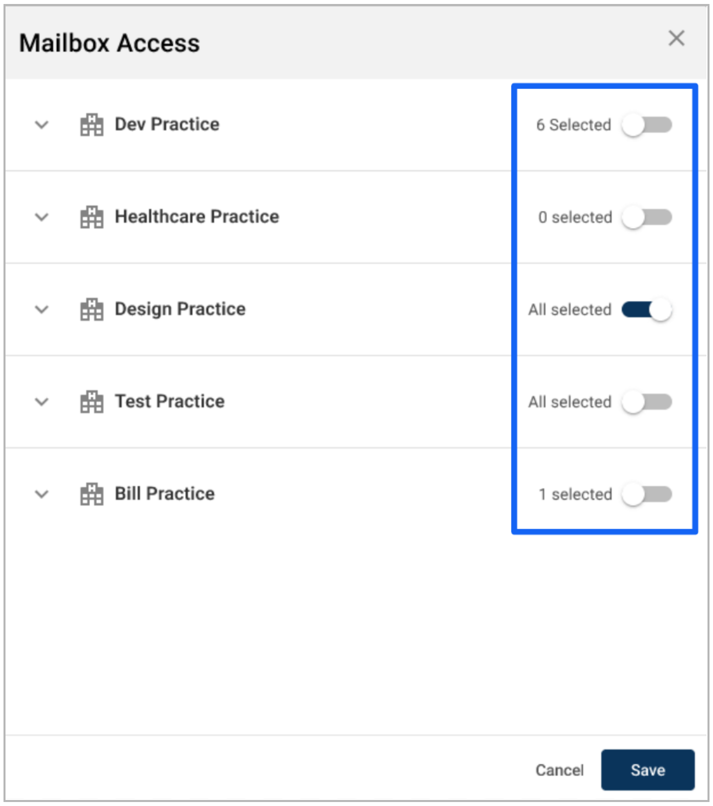


To do so:

1. Click on **Config**
2. Hover over **Practice**
3. Click on **Logins**

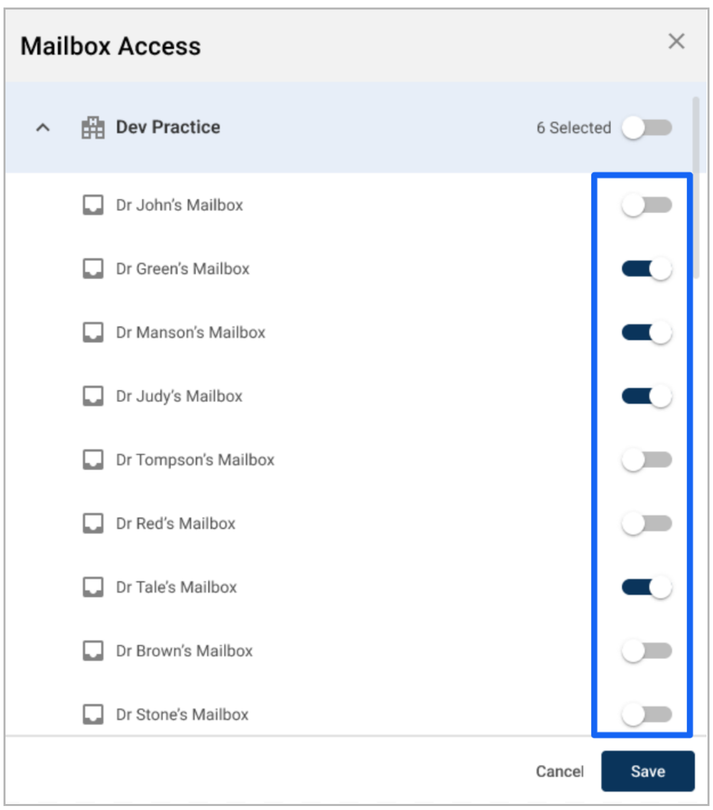


From the Logins page, simply click on the user from the list on the left hand side of the screen, and click on **Configure** beside Mailbox Access.



A list of all practices the user has access to will be shown.

From here Mailbox Admins can subscribe the user to all mailboxes for the desired practice by clicking on the **practice toggle**.



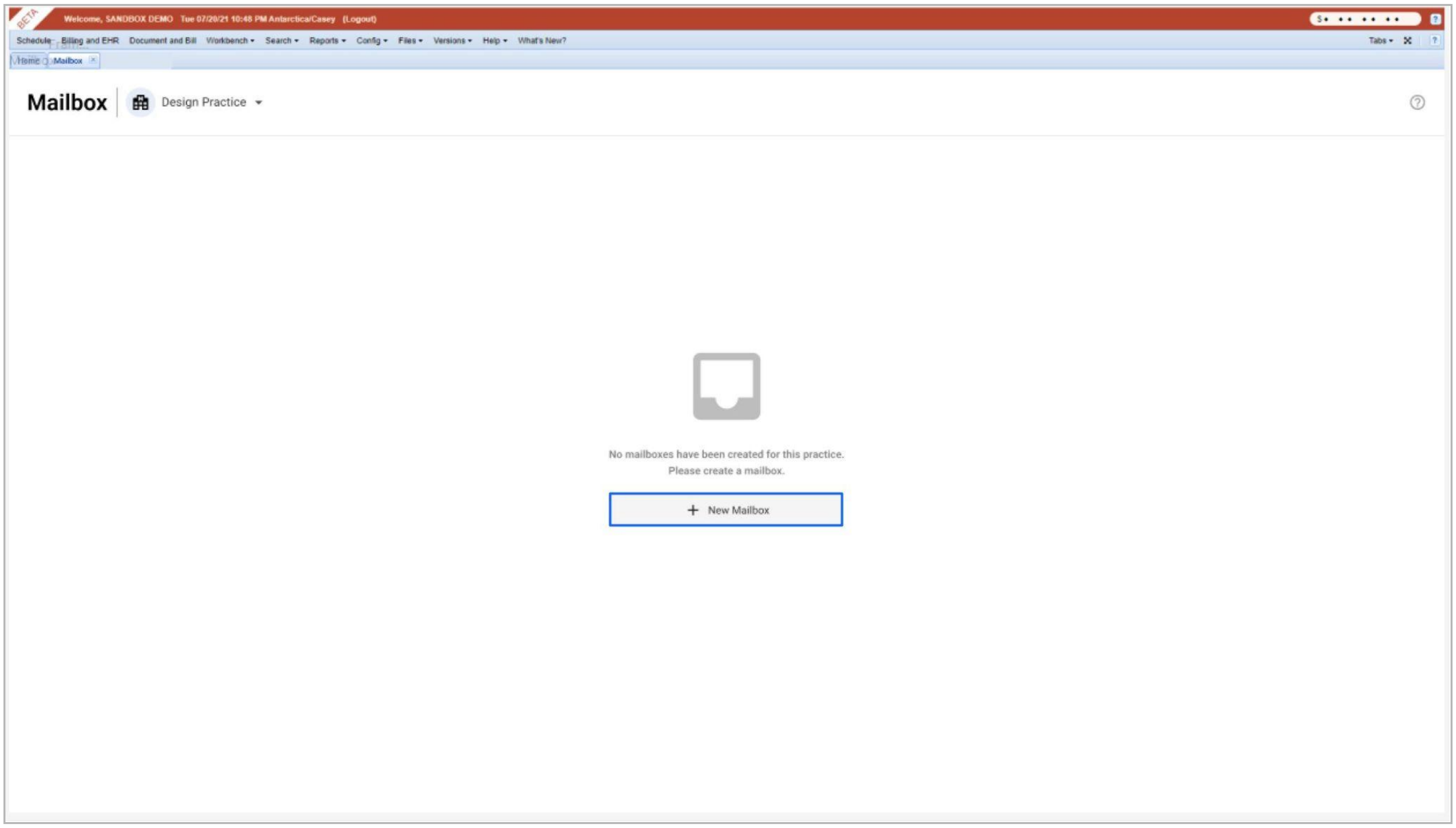
Clicking on a specific practice brings down a list of all mailboxes within the selected practice.

From here, Mailbox Admins can manually toggle specific mailboxes that the current user can be subscribed to when the toggle for the mailbox is turned on.

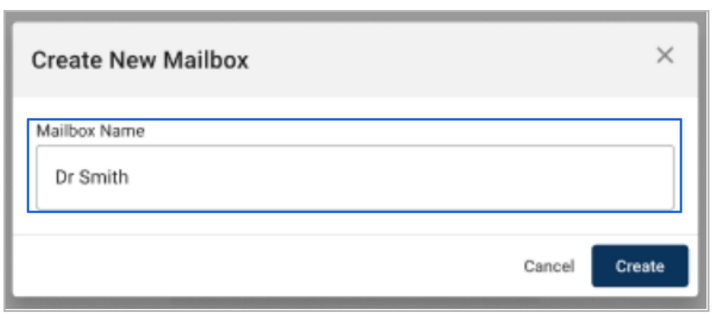
This configuration allows for Mailbox Admins to easily set up user subscriptions to multiple mailboxes at once for new and existing users in the practice.

Creating Mailboxes

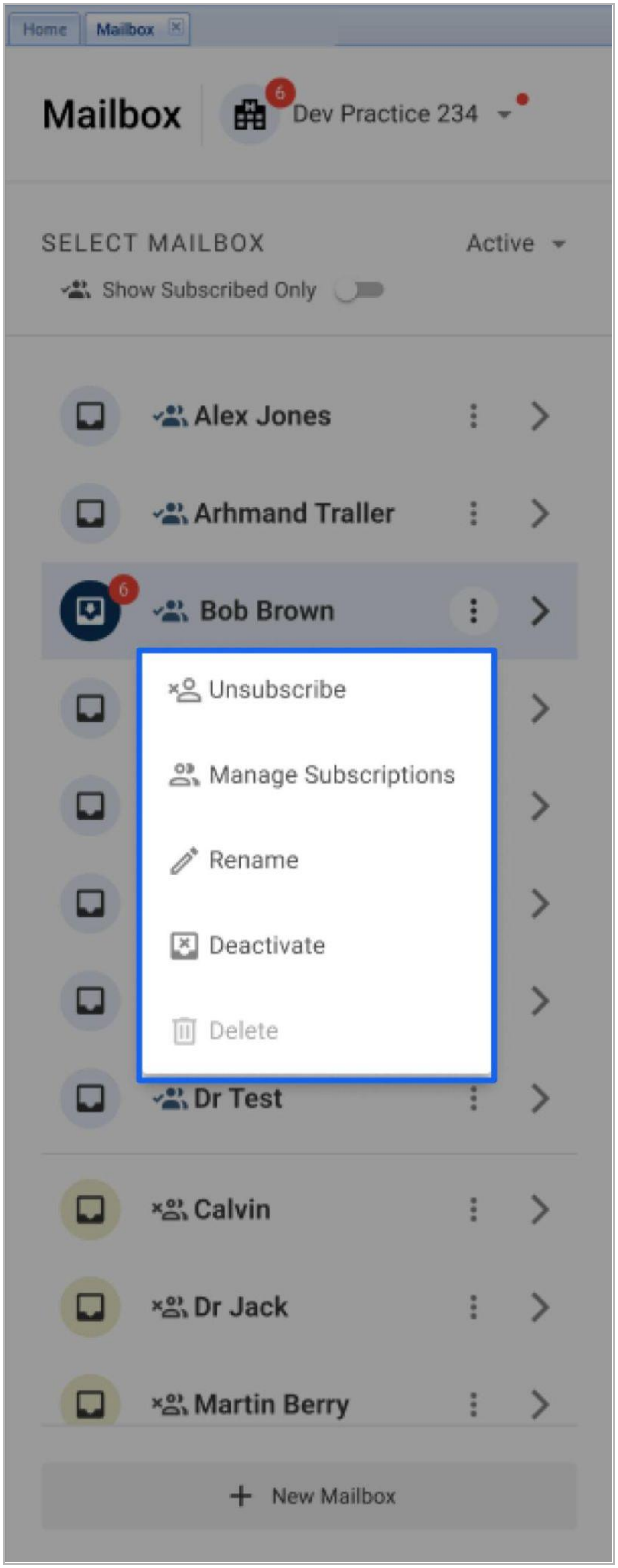
Initially, there are no default mailboxes set up. The Mailbox Admin will be responsible for initially setting up new mailboxes for the practice to use.



To create a new mailbox, click on the **+ New Mailbox** icon.

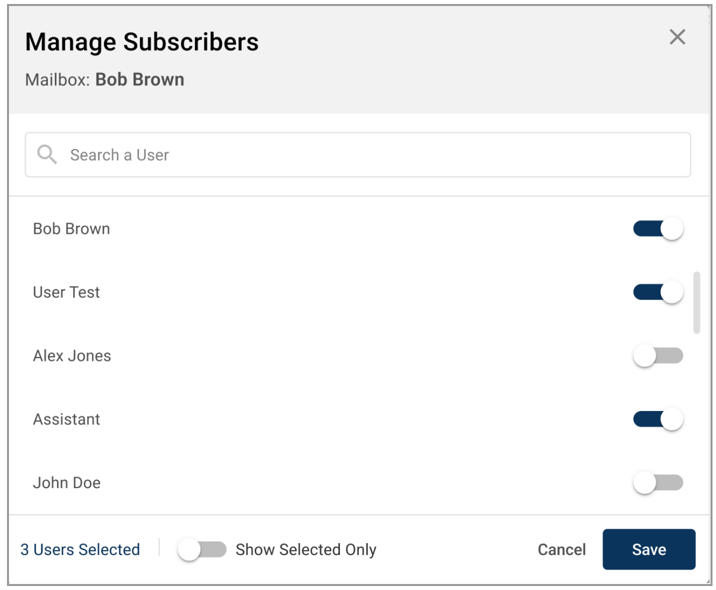


Enter the desired name for the mailbox, this can either be for specific clinicians or workflow specific names that the practice uses.

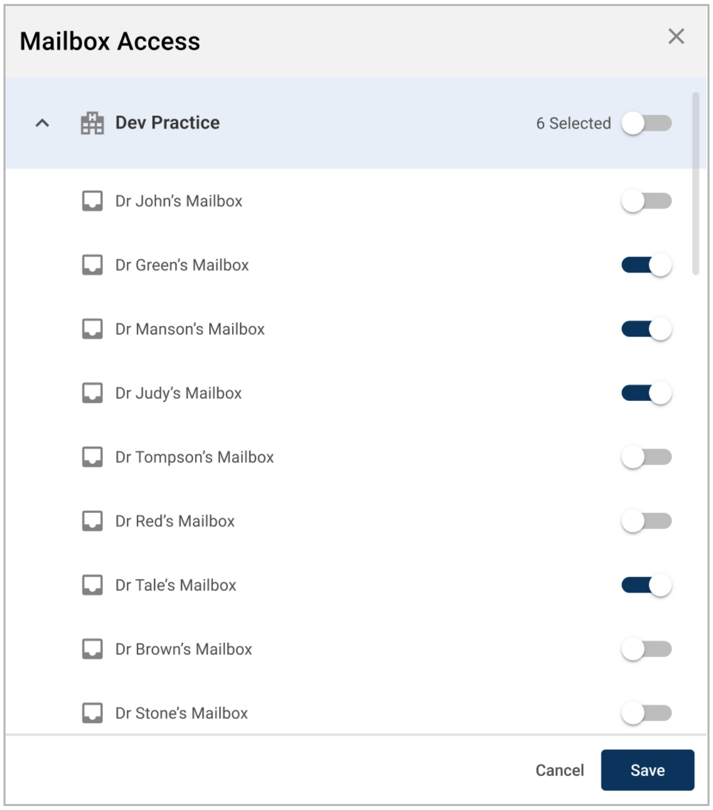


Once the mailbox has been created, there are several options available in the menu:

1. **Subscribe/Unsubscribe** - allows the user to subscribe or unsubscribe to the selected mailbox.
2. **Manage Subscribers** - allows Mailbox Admins to manage the subscribers of the selected mailbox.

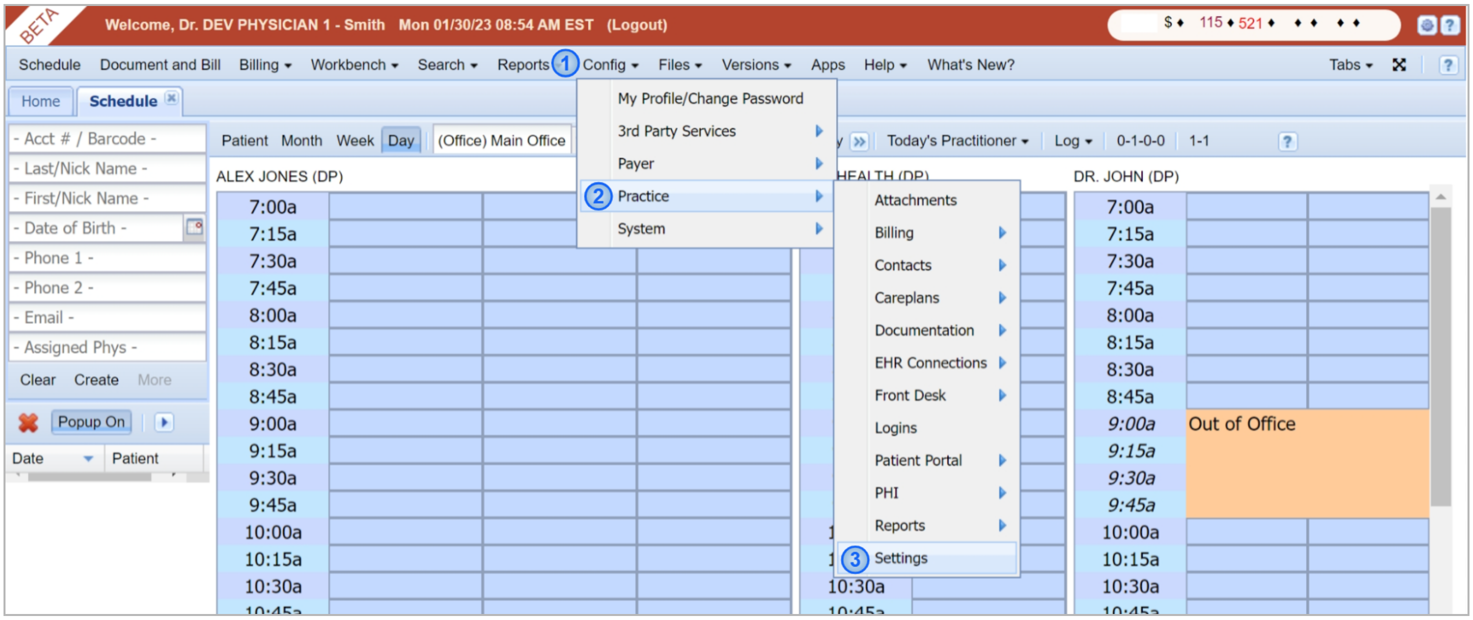


3. **Rename** - allows Mailbox Admins to rename the selected mailbox.
4. **Deactivate** - allows Mailbox Admins to deactivate the selected mailbox.
5. **Delete** - allows Mailbox Admins to delete the selected mailbox.
   Note: Mailboxes can only be deleted if there are no active or archived conversations.



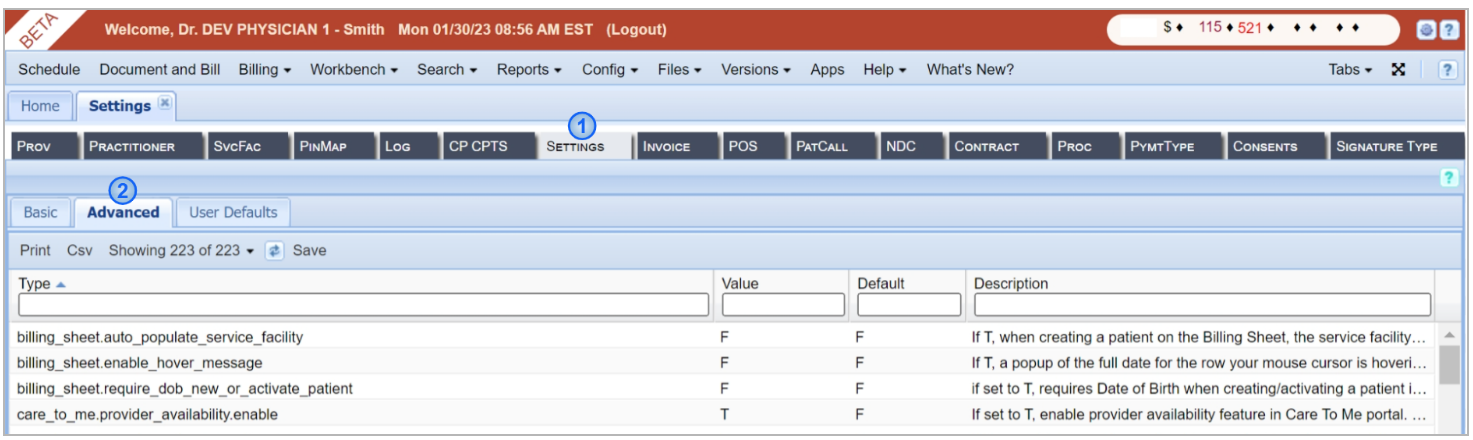
Clicking on the dropdown allows you to toggle access of users to the selected mailbox.

Note: At least one clinician must be configured to have mailboxes to count as patient messaging for Meaningful Use purposes.



To enable this feature:

1. Go to **Config**
2. Hover over **Practice**
3. Then click **Settings**



From within the settings page:

1. Click **Settings**
2. Click **Advanced**

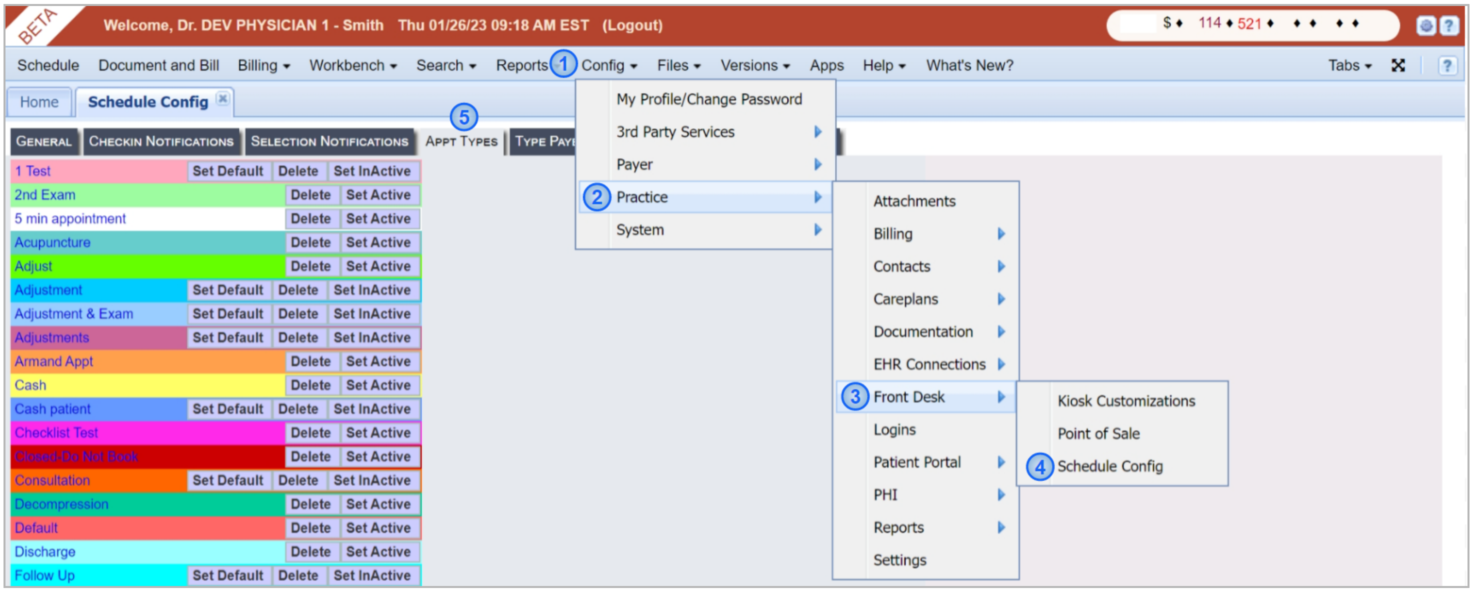
Inside the advanced settings:

1. Type ***patient_portal.use_mailbox_messaging*** on the respective field and hit enter
2. Set the value to **T**
3. Type ***ui.pat_messages_mailbox.enable*** on the respective field and hit enter
4. Set the value to **T**
5. Click on **Save**

Note*: This is a Coach enabled setting.

Automatic Document Publishing

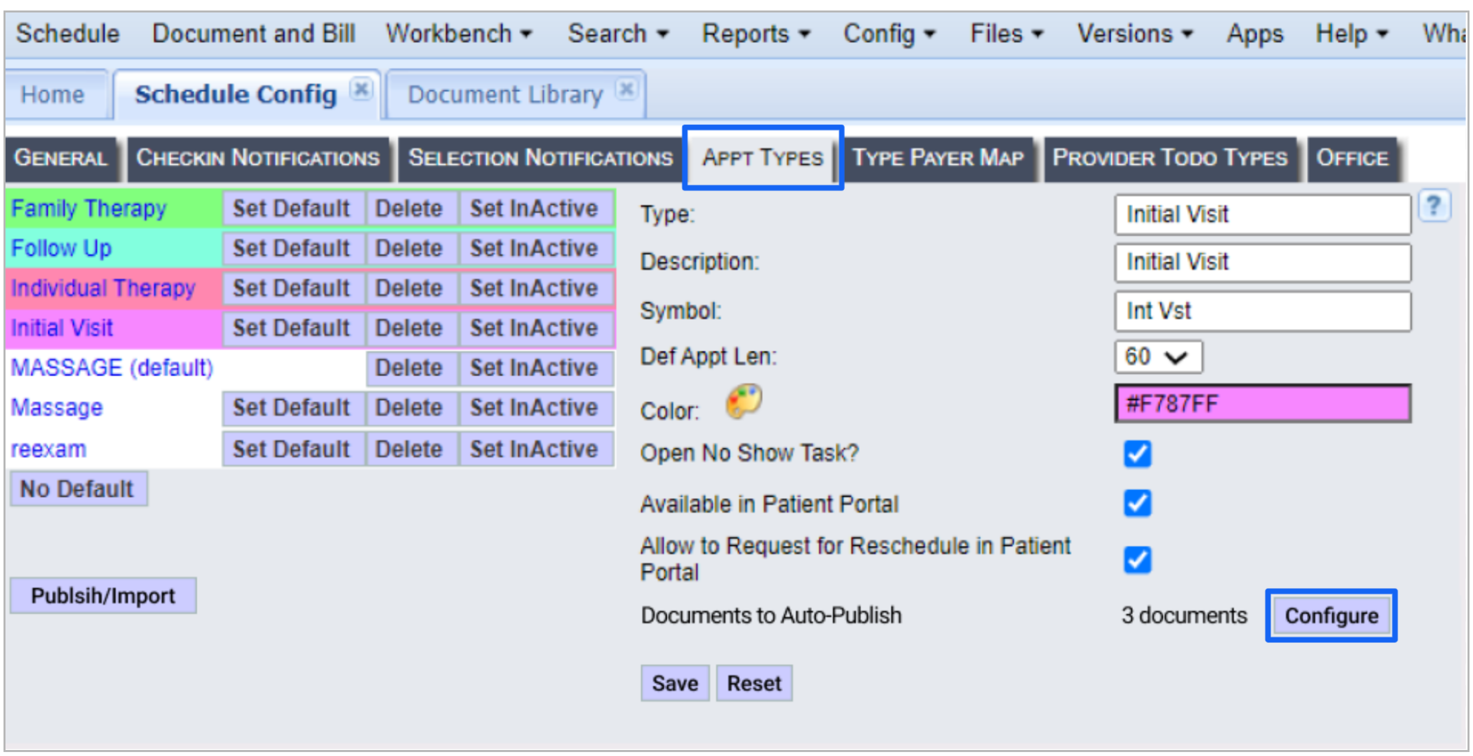
This new feature allows the practice to set up documents that can be automatically published based on the appointment.



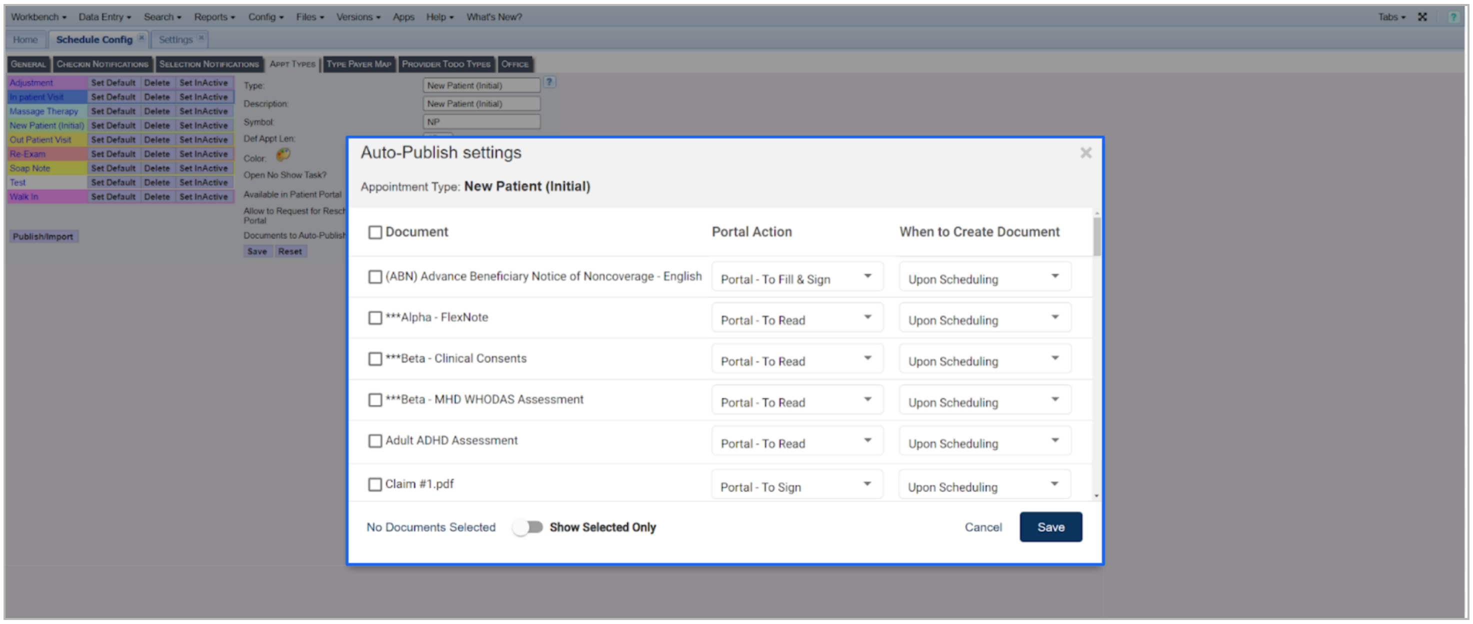
To configure Automatic Document Publishing:

1. Click on **Config**
2. Hover over **Practice**
3. Hover over **Front Desk**
4. Click on **Schedule Config**

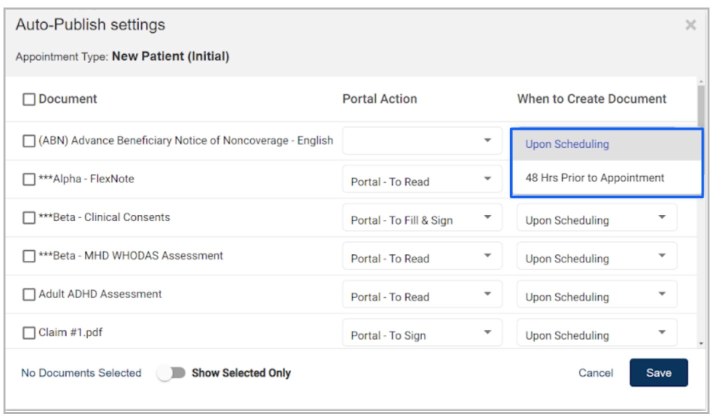
Inside the Schedule Config, click on the **Appt Types** tab.



Once a new appointment type is created, or an existing appointment type is selected, click on **Configure**.



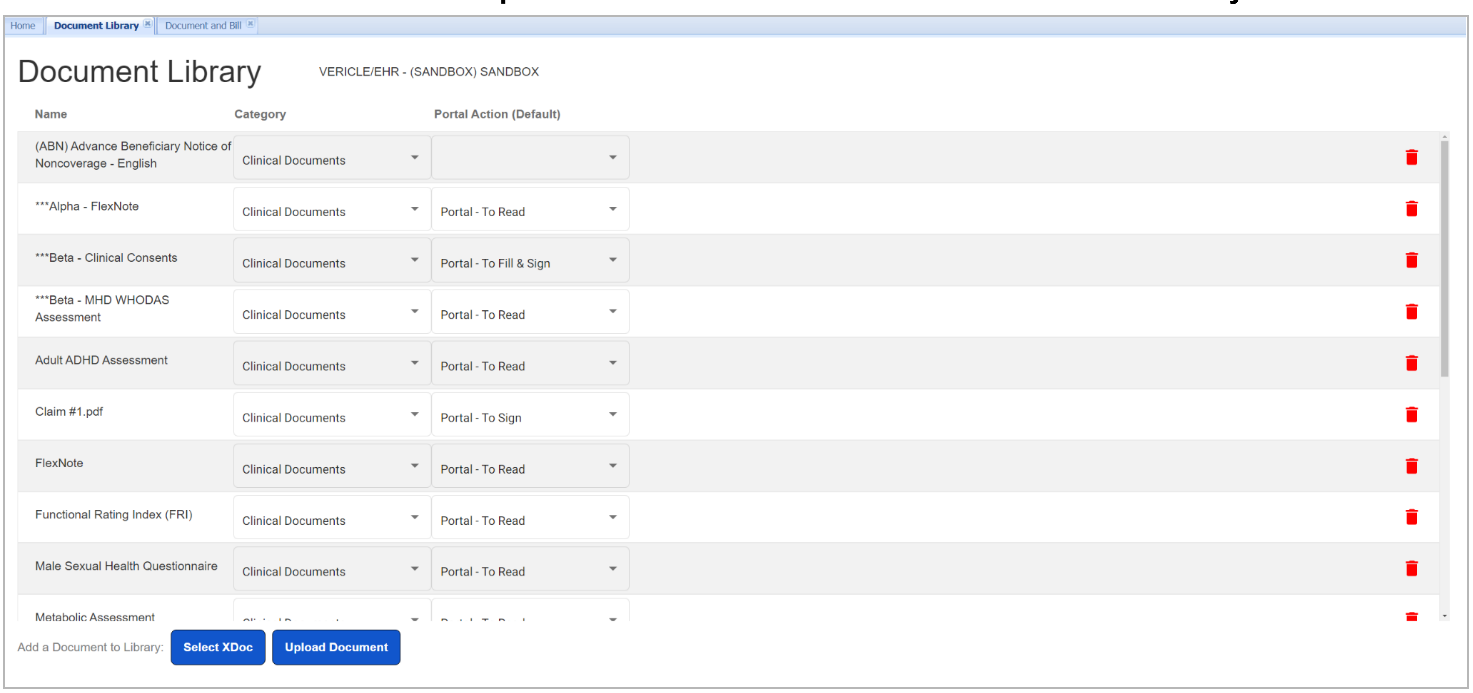
From the Auto-Publish settings popup allows the user to set when the document will be published.

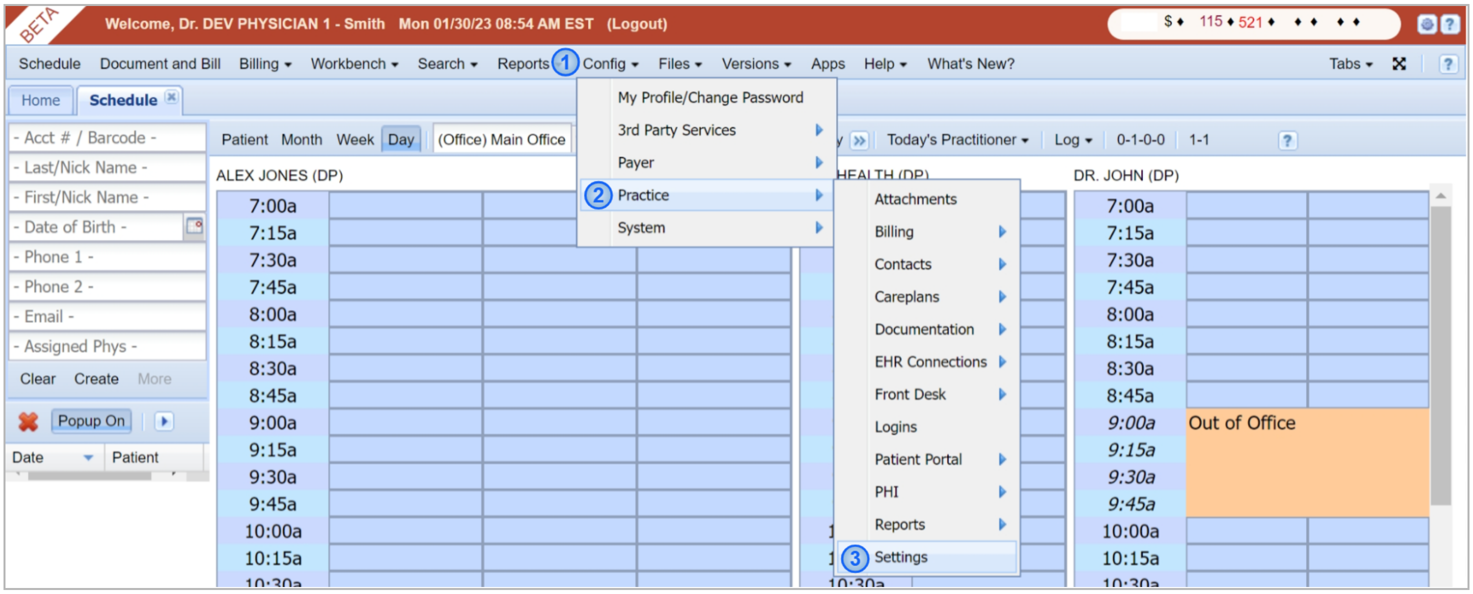


The auto-publish option is based on a preconfigured automated schedule which include:

- **Upon Scheduling** - the selected document will automatically be published to the patient portal upon scheduling.
- **48 Hrs Prior to Appointment** - the selected document will automatically be published at 5pm two(2) days prior to the scheduled appointment.

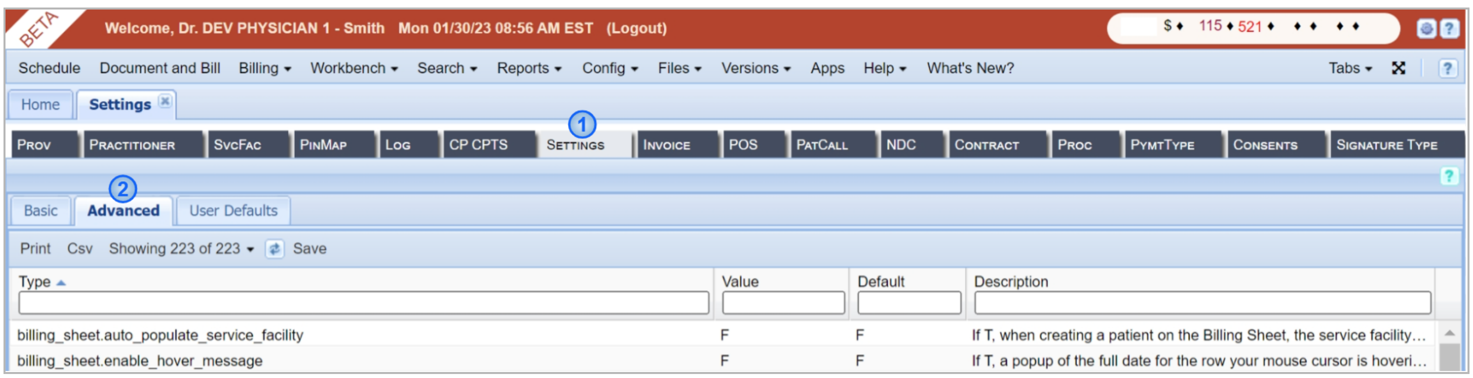
Note: Available documents for auto-publish will be based on the current document library.





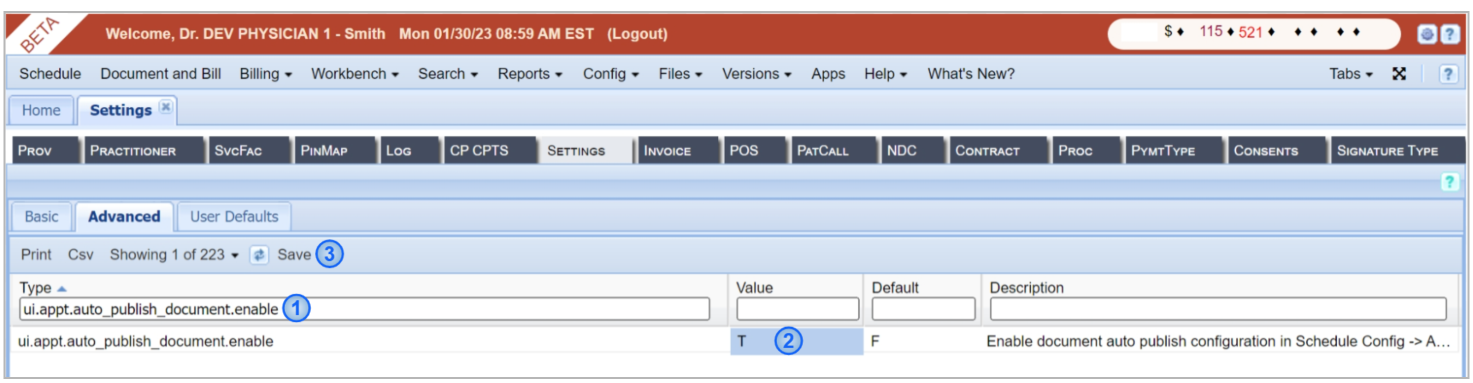
To enable this feature:

1. Go to **Config**
2. Hover over **Practice**
3. Then click **Settings**



From within the settings page

1. Click **Settings**
2. Click **Advanced**

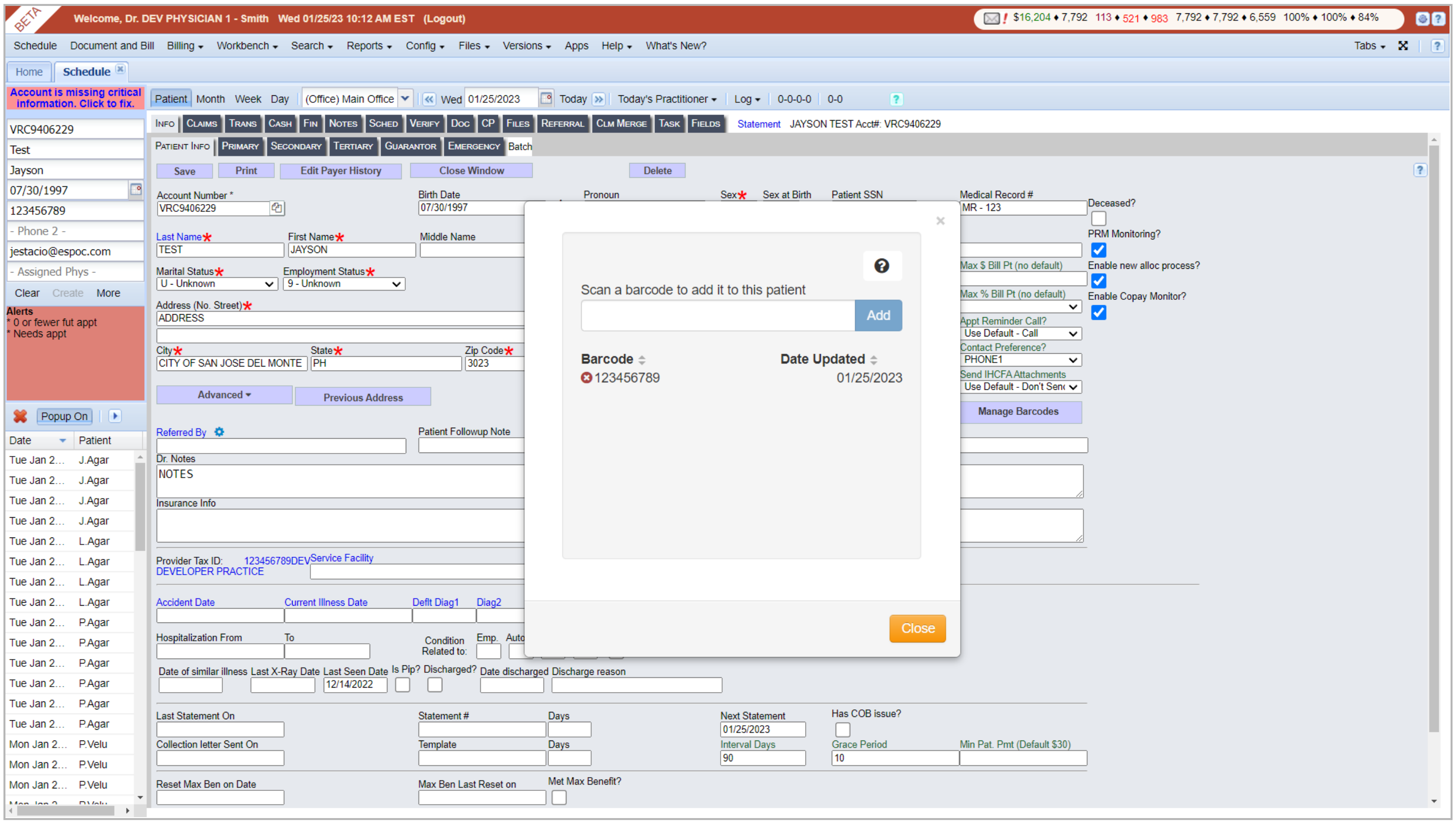


Inside the advanced settings:

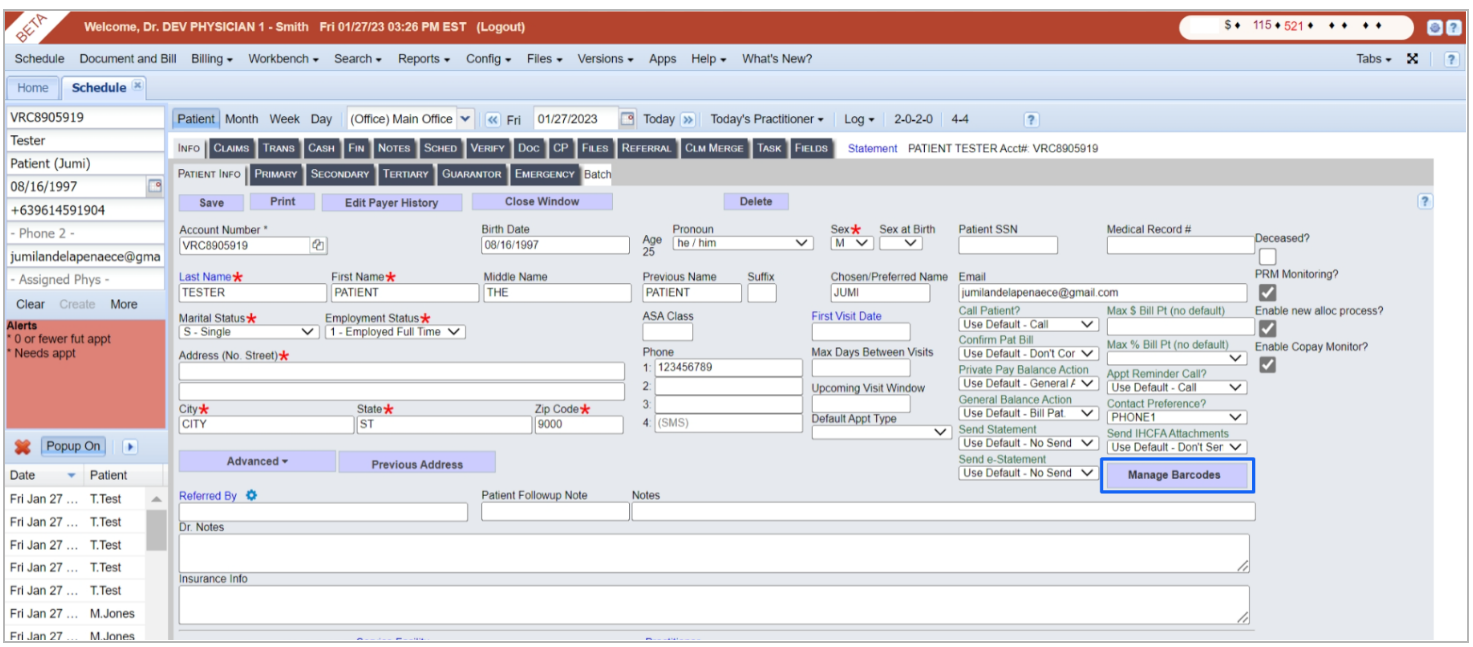
1. Type ***ui.appt.auto_publish_document.enable*** on the respective field and hit enter
2. Set the value to **T**
3. Click on **Save**

Patient Phone Numbers to Barcodes

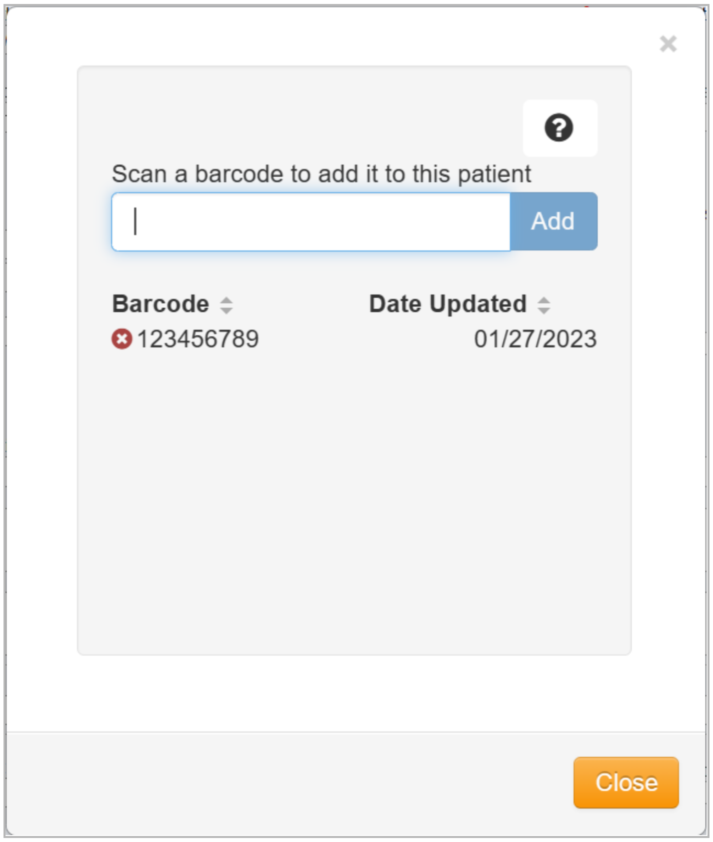
This new feature allows the practice to automatically add the patient's phone number as a barcode. This feature helps patients to easily remember their barcode when using check-in kiosks.



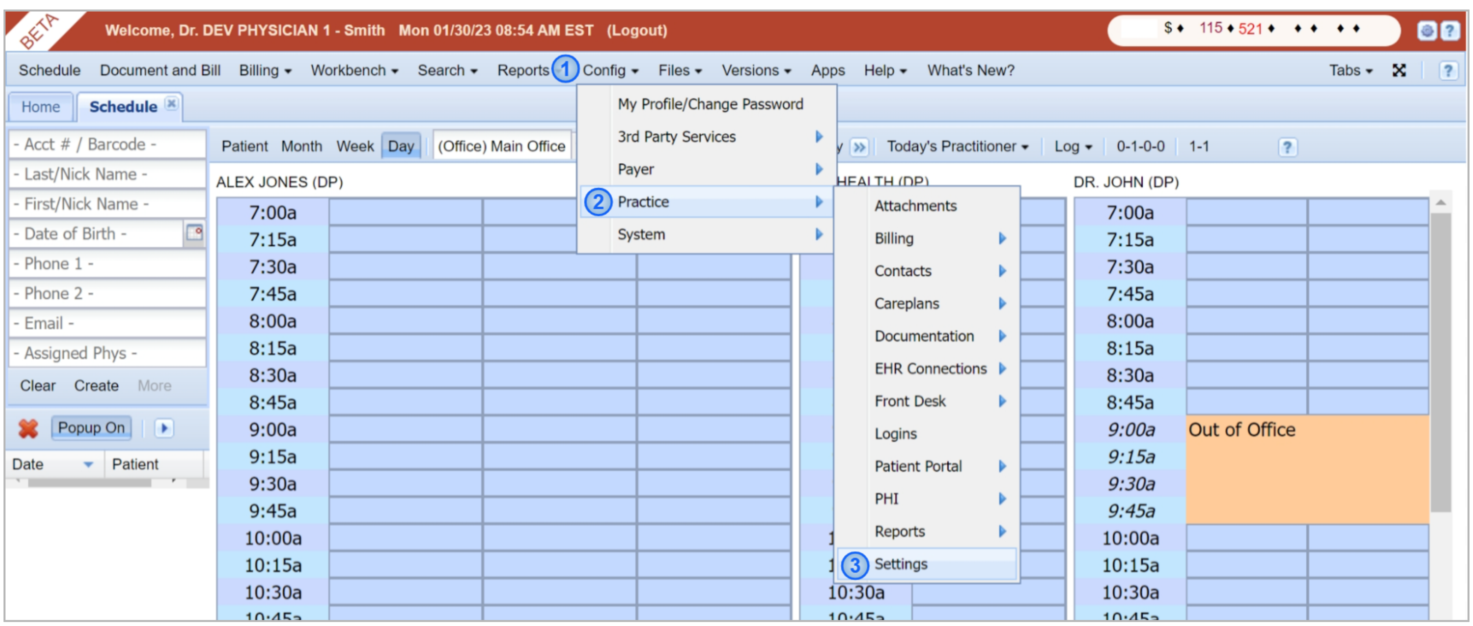
Enabling this new feature automatically adds the **Phone 1** from the patient's demographics into their barcode.



Once the patient's **Phone 1** is filled in and saved, users can view the patient barcodes by clicking the **Manage Barcode** button.

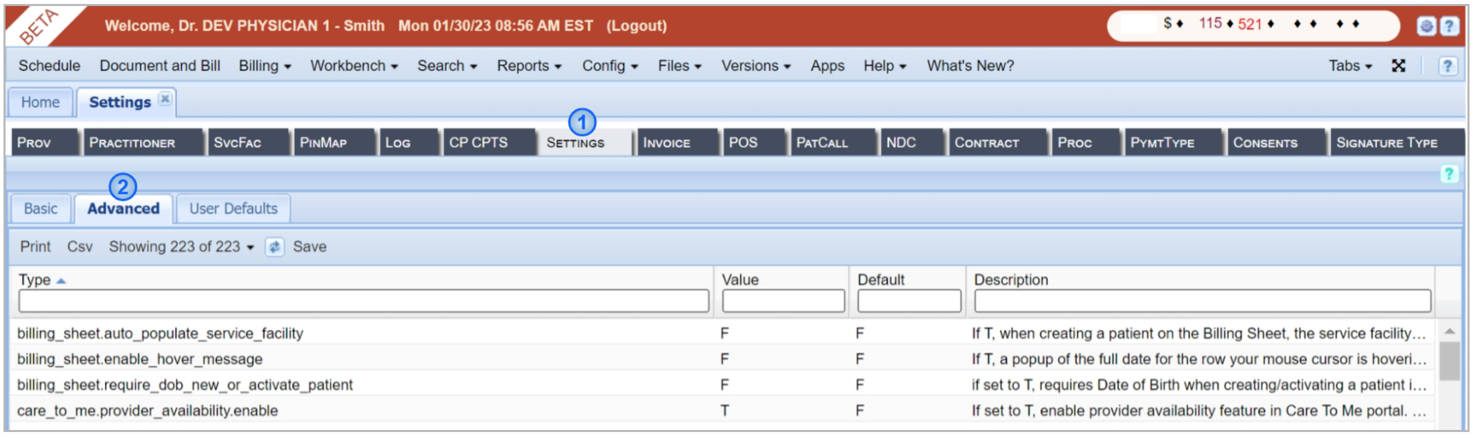


The phone number will now be added into the patient's barcode.



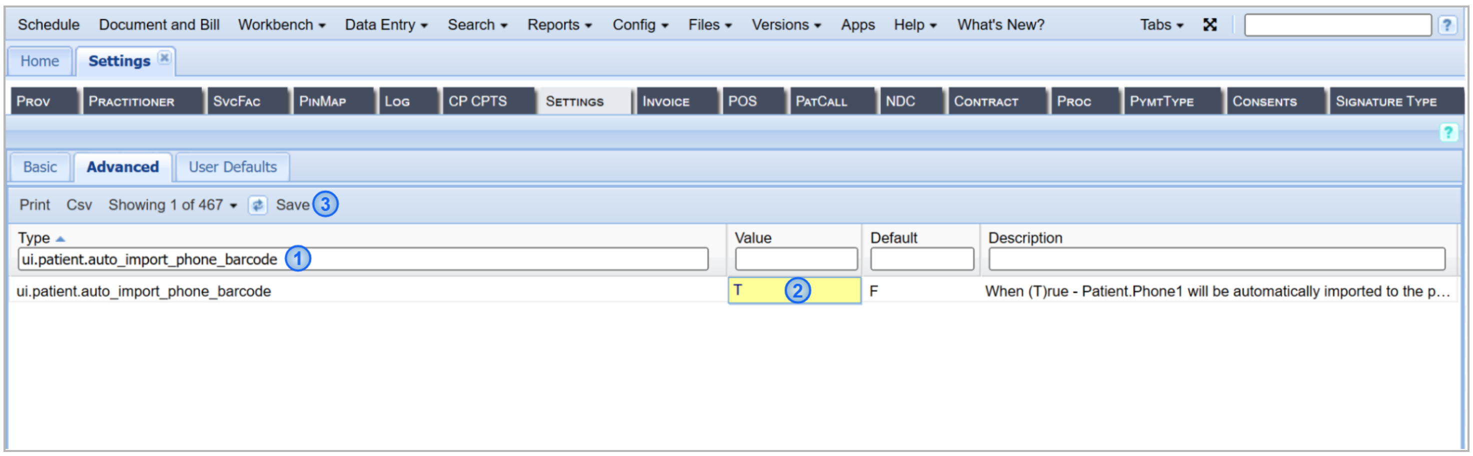
To enable this feature:

4. Go to **Config**
5. Hover over **Practice**
6. Then click **Settings**



From within the settings page:

3. Click **Settings**
4. Click **Advanced**



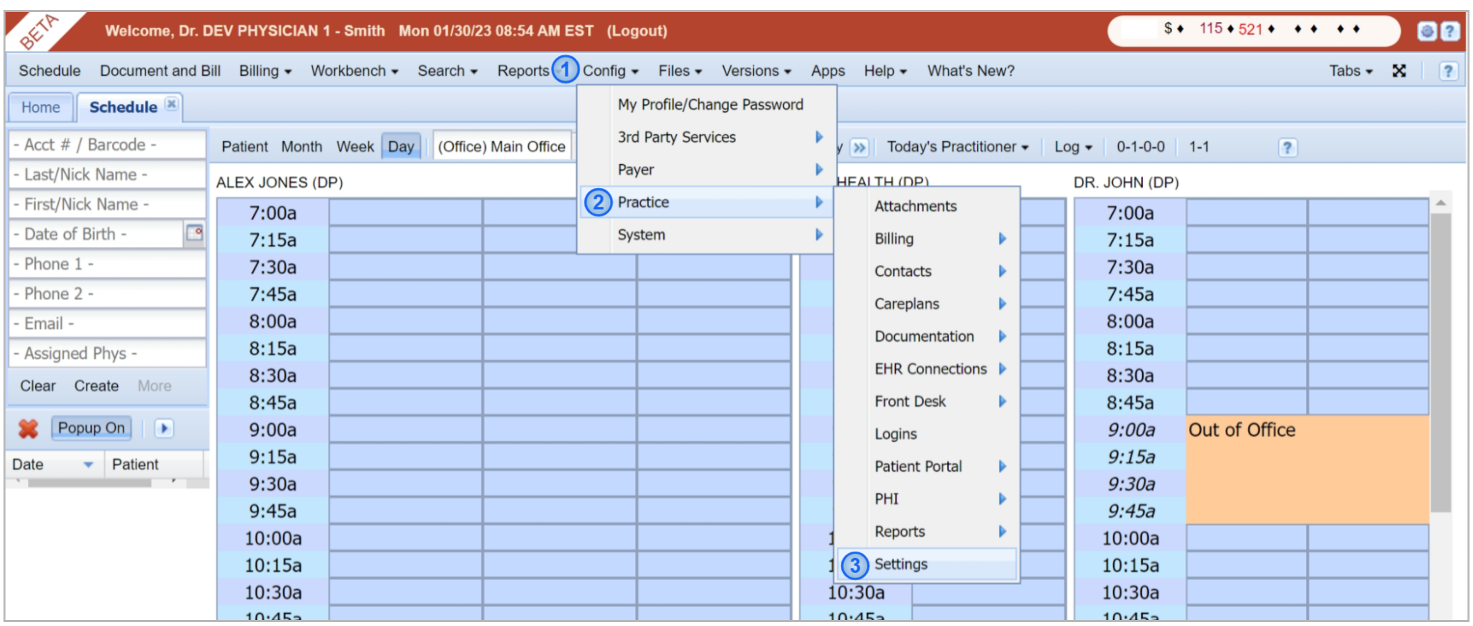
Inside the advanced settings:

6. Type ***ui.patient.auto_import_phone_barcode*** on the respective field and hit enter
7. Set the value to **T**
8. Click on **Save**

Note*: This is a Coach enabled setting.

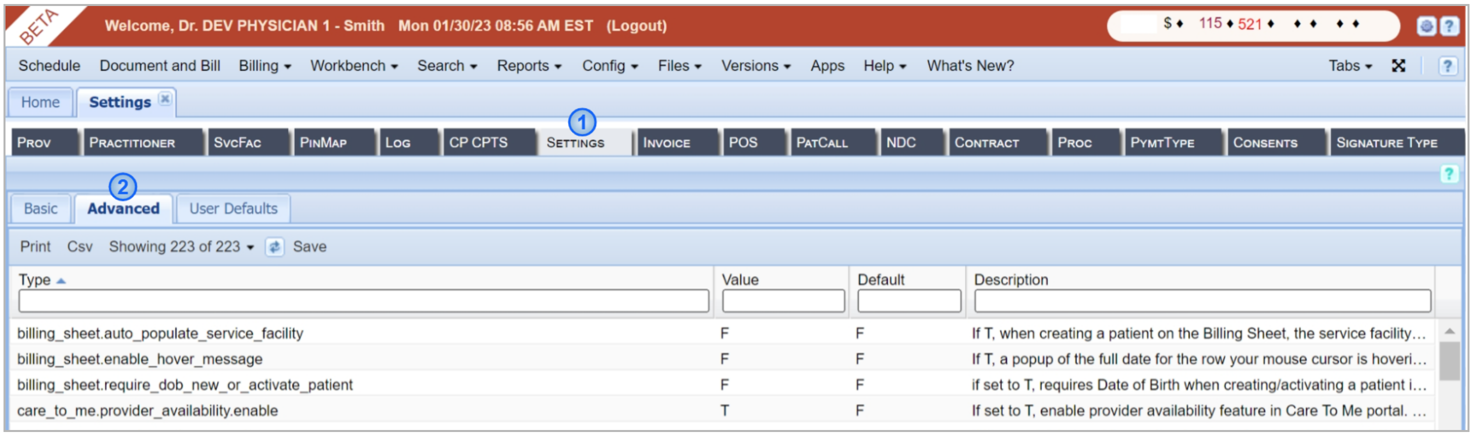
Patient Statement Option to display Date of Birth

This new feature displays the patient’s DoB or date of birth on the patient statement.



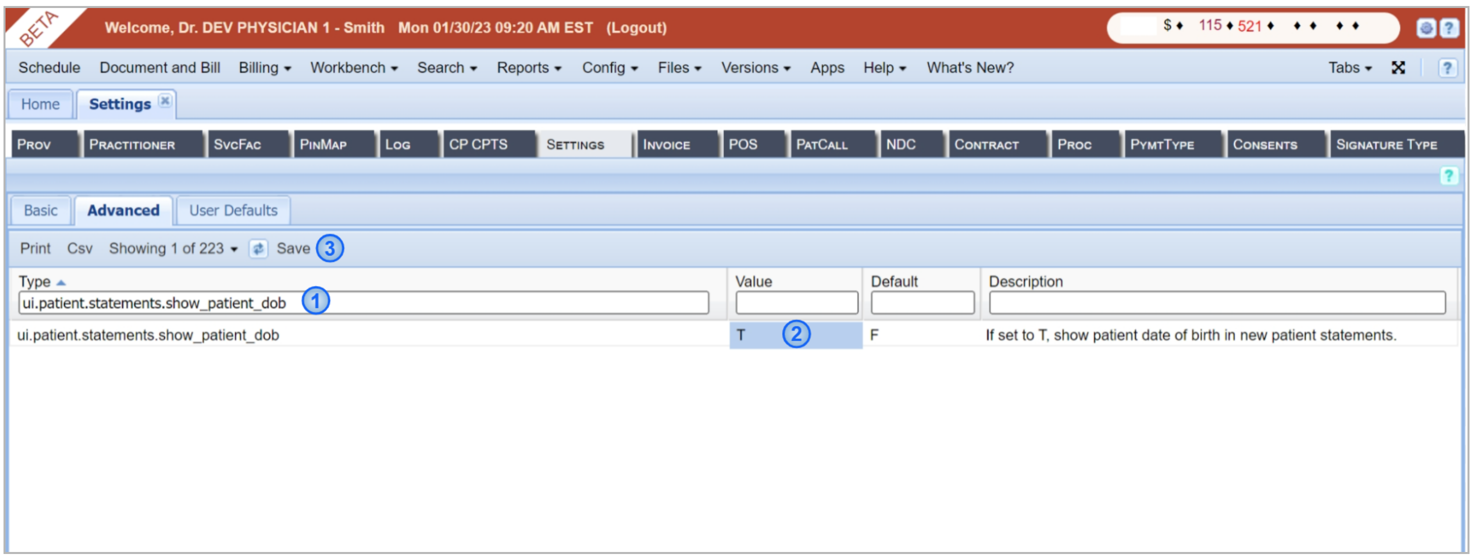
To enable this feature:

1. Go to **Config**
2. Hover over **Practice**
3. Then click **Settings**



From within the settings page:

1. Click **Settings**
2. Click **Advanced**

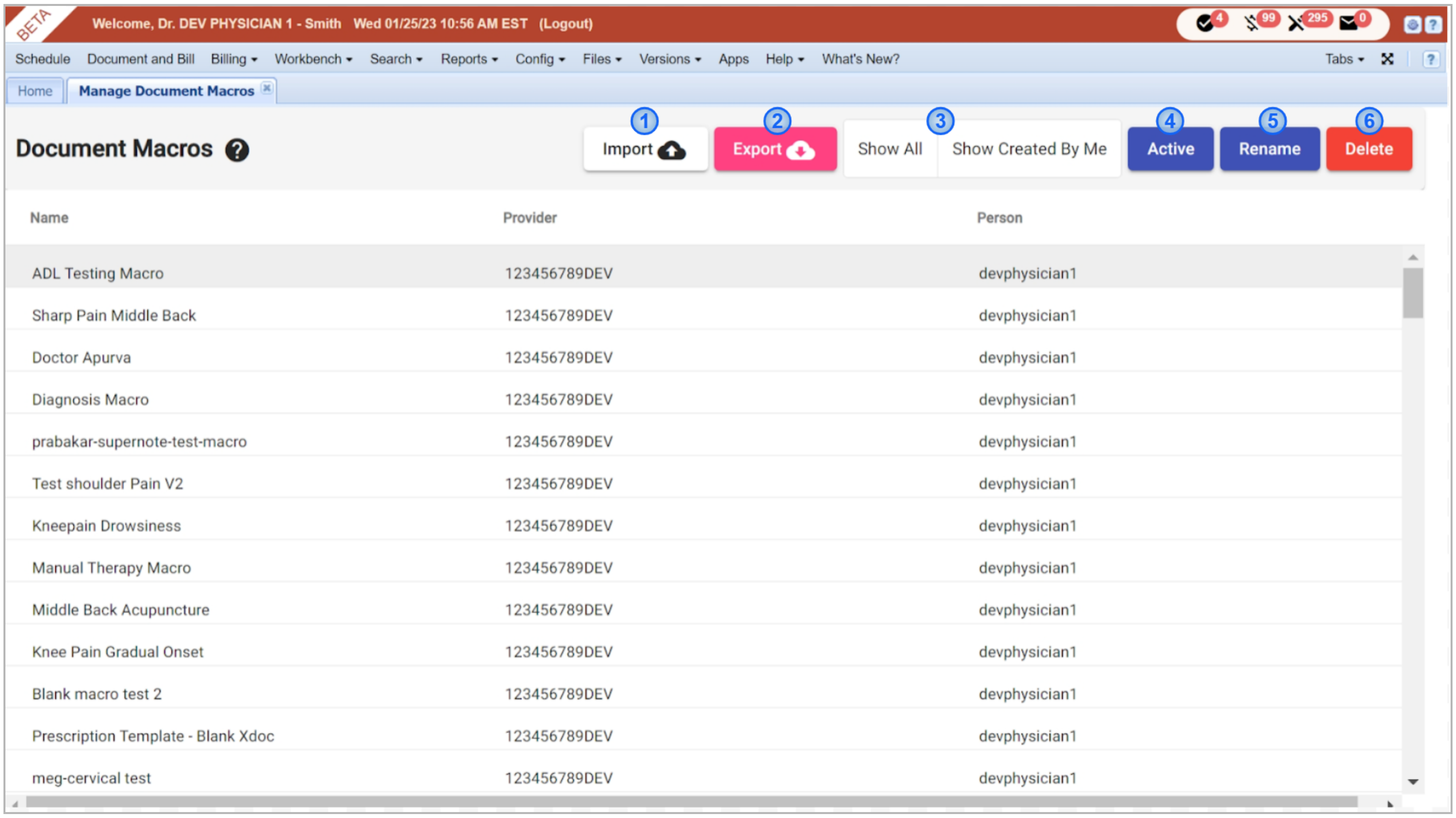


Inside the advanced settings:

1. Type ***ui.patient.statements.show_patient_dob*** on the respective field and hit enter
2. Set the value to **T**
3. Click on **Save**

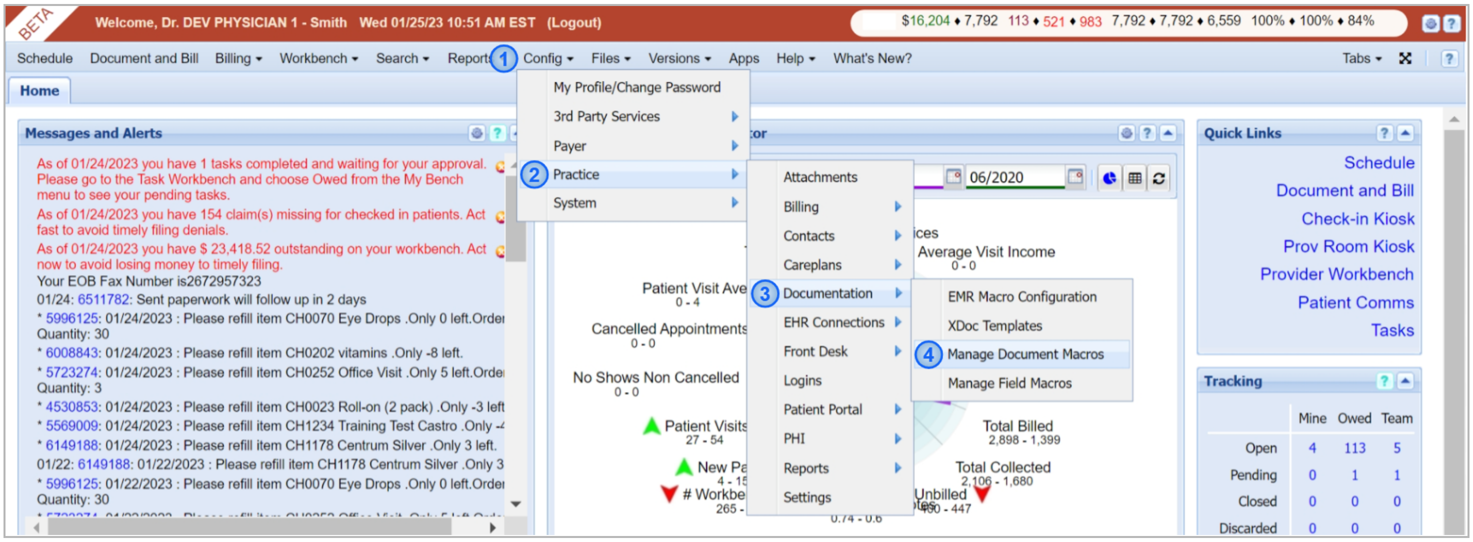
XDocs Macro Management

Previously, macros could only be managed by opening a document and going to the Macros tab. Now, Macros can be managed without opening existing documents.



Within the Manage Document Macros, users have several options in managing their macros such as:

1. **Import** - allows users to import macros for use.
2. **Export** - allows users to export existing macros for others to use.
3. **Show All / Show Created By Me** - allows users to toggle between displaying all available macros or macros created by the user.
4. **Active/Inactive** - allows users to toggle between viewing active or inactive macros.
5. **Rename** - allows users to rename the selected macro.
6. **Delete** - allows users to delete the selected macro.



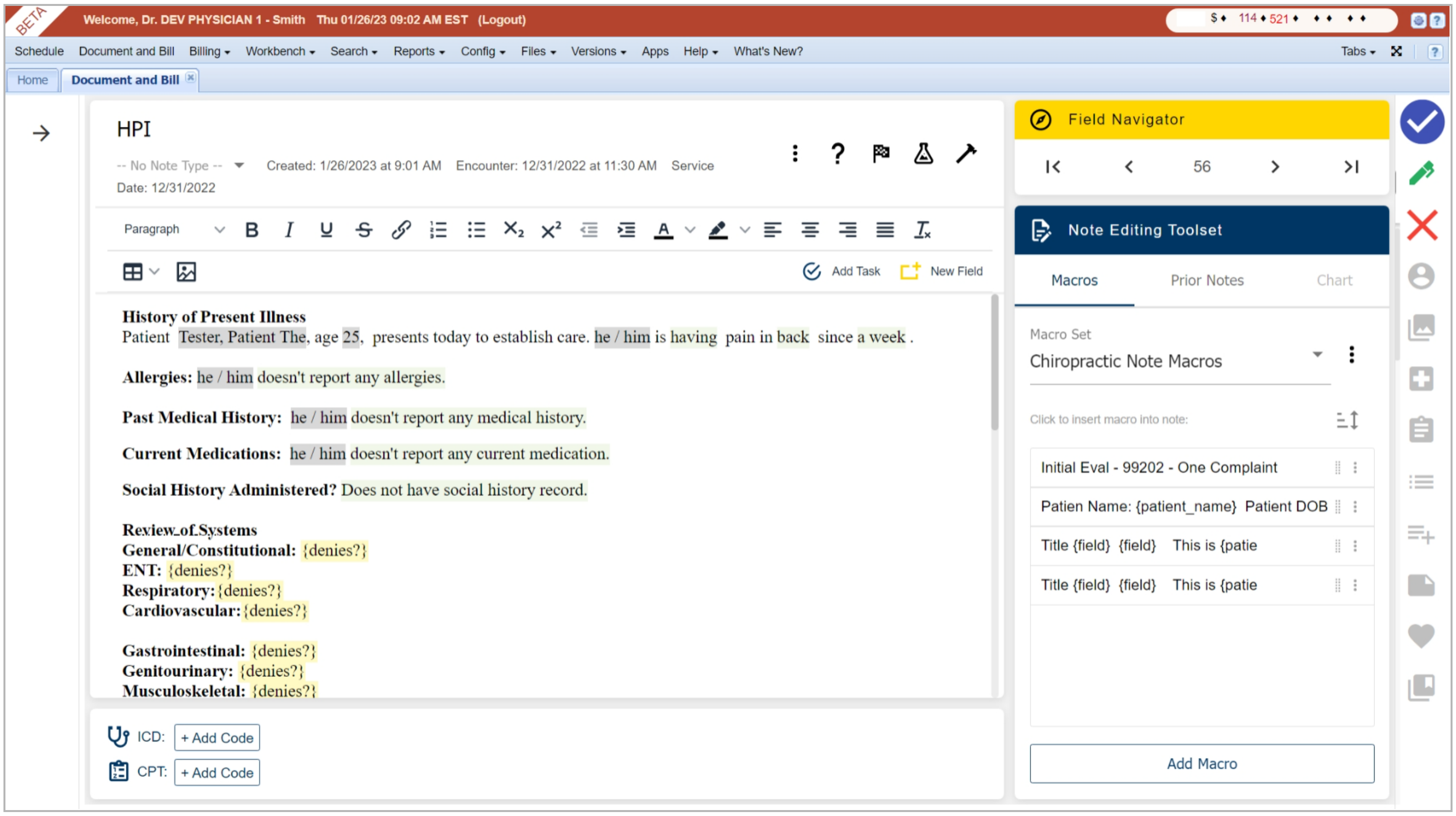
This new feature can be found by:

1. Clicking **Config**
2. Hovering over **Practice**
3. Hovering over **Documentation**
4. Clicking **Manage Document Macros**

FlexNote Updates

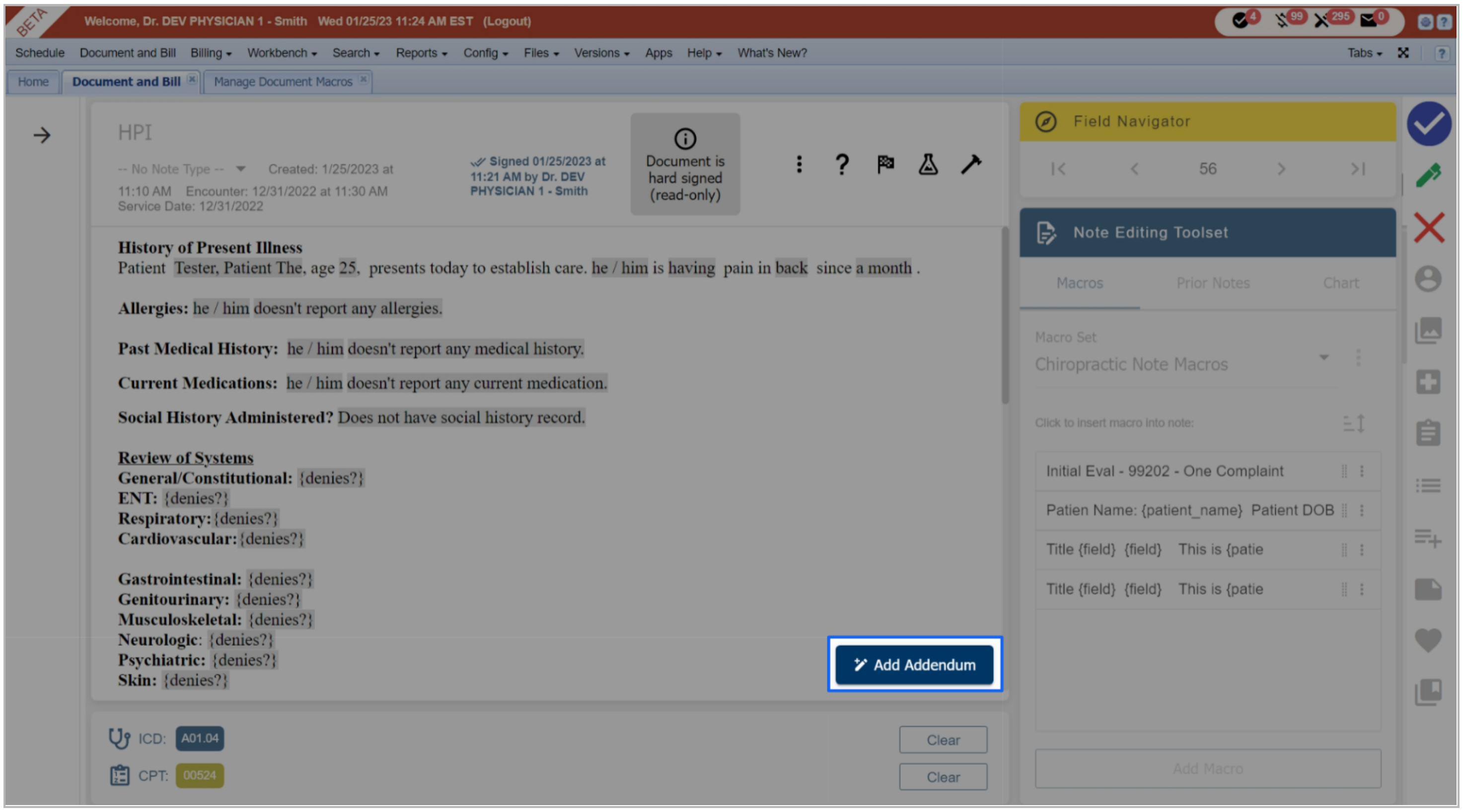
Updated Salted Value Highlights

Salted Values (values that are pulled in from the previous notes) are **highlighted** for visibility and **automatically de-highlighted** once the value is updated.

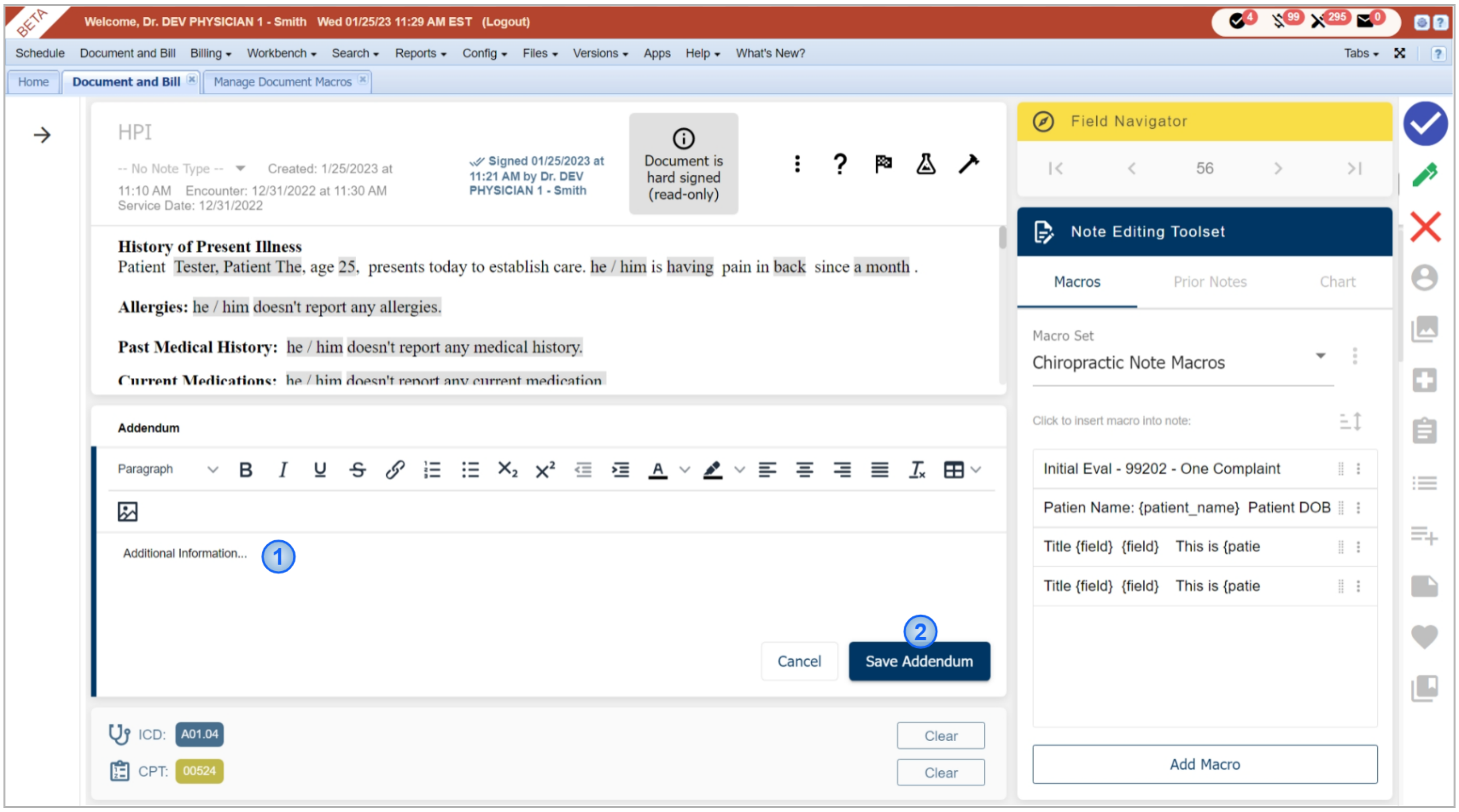


New Add Addendum Option

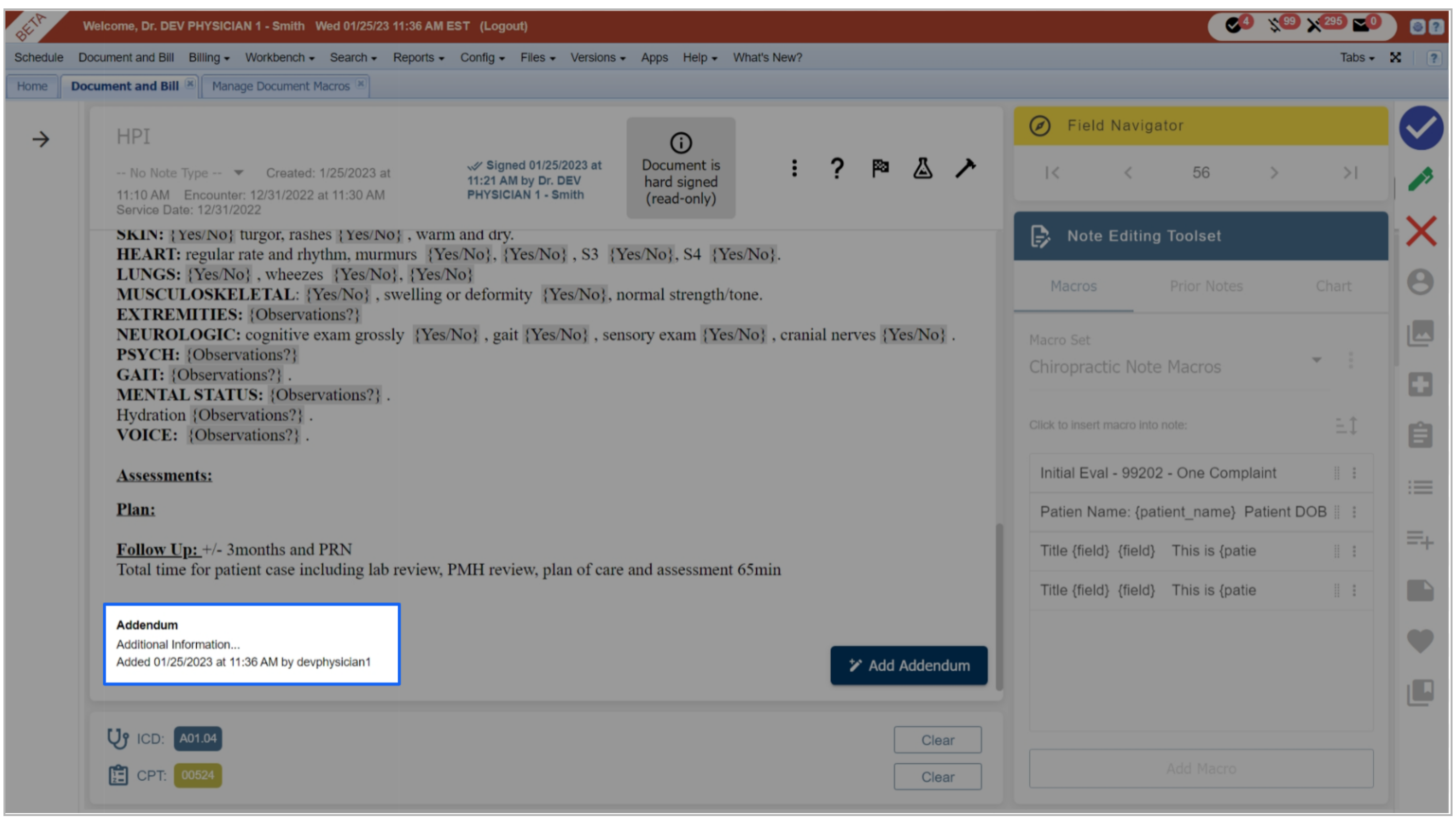
A new option is available at the bottom of the signed-off note, which is the **Add Addendum** button, this allows the provider to add additional information to be added without un-signing the original note.



To do so, click the **Add Addendum** button at the bottom of part of the signed note.



From here, clinicians can add additional information that has been missed out on the original note. Once the information has been added, simply click on the **Save Addendum** button to update the note.



The Addendum will be shown on the bottom part of the updated note.