

EHR System Updates

Production Release January 2023

Table of Contents

Patient Messages Mailbox*	1
Automatic Document Publishing	15
Patient Phone Numbers to Barcodes*	18
Patient Statements Option to display Date of Birth.... .	21
XDocs Macro Management.....	23
FlexNote Updates.....	25

***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.

The screenshot shows the 'Mailbox' interface for 'Dev Practice 234'. On the left, there is a 'SELECT MAILBOX' list with a 'Show Subscribed Only' toggle. The list includes: Alex Jones, Arhmand Traller, Bob Brown (selected), Dr Green, Dr Joe, Dr John, Dr Sandy, and Dr Test. The main area is titled 'CONVERSATIONS' and lists several messages from various contacts like Phillip Glare, Mary Clare, Bae Nilson, Fiona Lambert, Marie Clare, Marie Clars, Patient Test, and Nally Tally. The right pane shows a conversation with 'Mary Clare' and 'Bob Brown' on 'Sunday, July 24, 2022'. The message history includes: 'Hello, Dr John' (11:35 AM), 'Document.docx' (11:35 AM), and 'Hello, Mary' (11:31 AM) with a 'Document.docx' attachment (11:31 AM). A response 'See you all then!' is visible at the bottom.

The screenshot shows the 'Workbench' menu in the application. The 'Patient Communications' option is highlighted with a blue circle and a '2' notification badge. Other menu items include: Tasks, Task Manager, Patient Demographics Review, Provider Claims, SOAP Audit Workbench, Group Notes, Document and Bill, Sign Queue, Direct Message Inbox, Billing and EHR, Prov Room Kiosk, and Mailboxes. The top navigation bar shows 'Welcome, Dr. DEV PHYSICIAN 1 - Smith' and 'Fri 01/27/23 04:06 PM EST'. The top right corner has a dashboard ticker with icons for tasks (4), messages (99), and other notifications (295, 0).

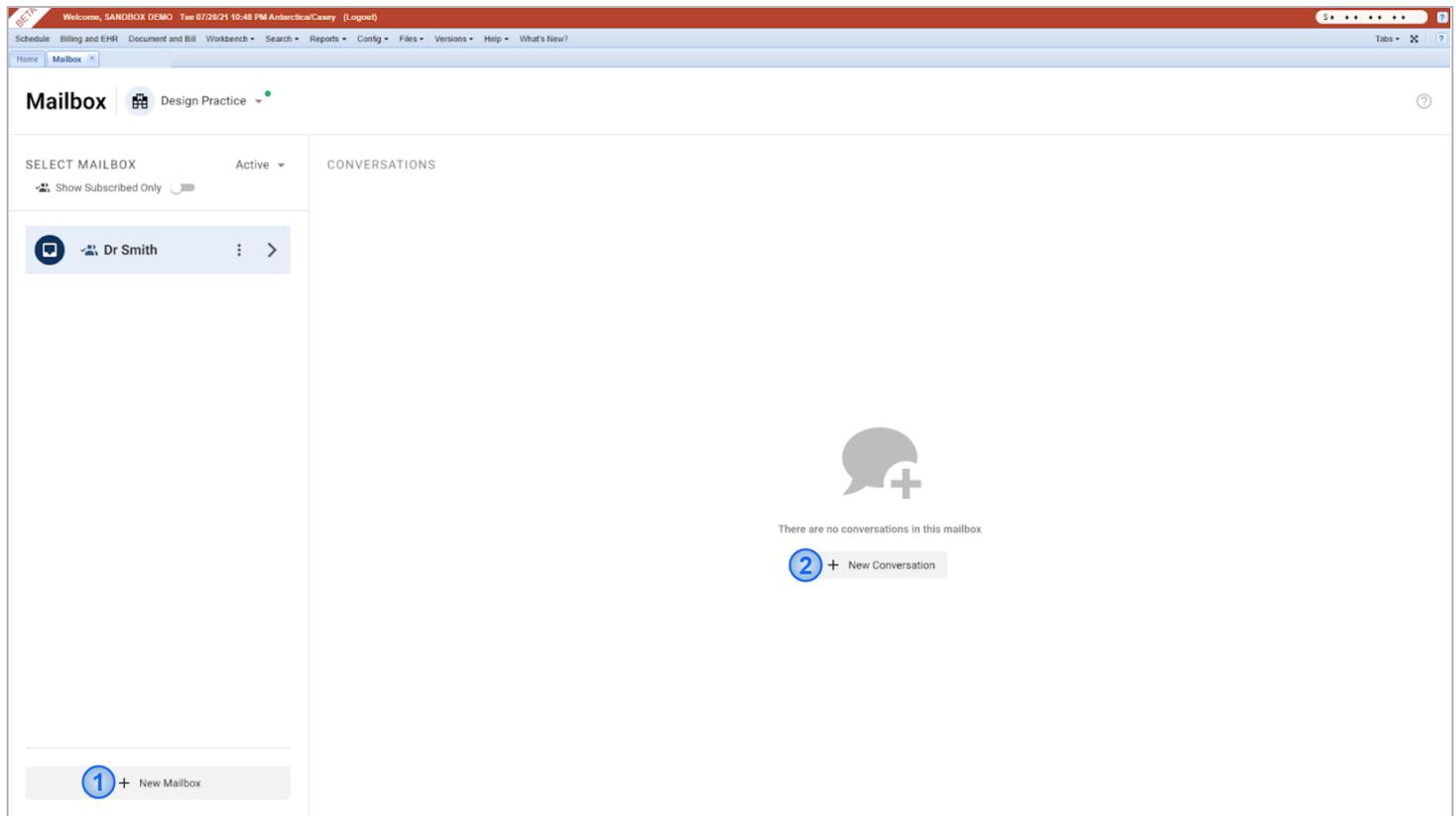
To view the Patient Messages Mailbox:

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



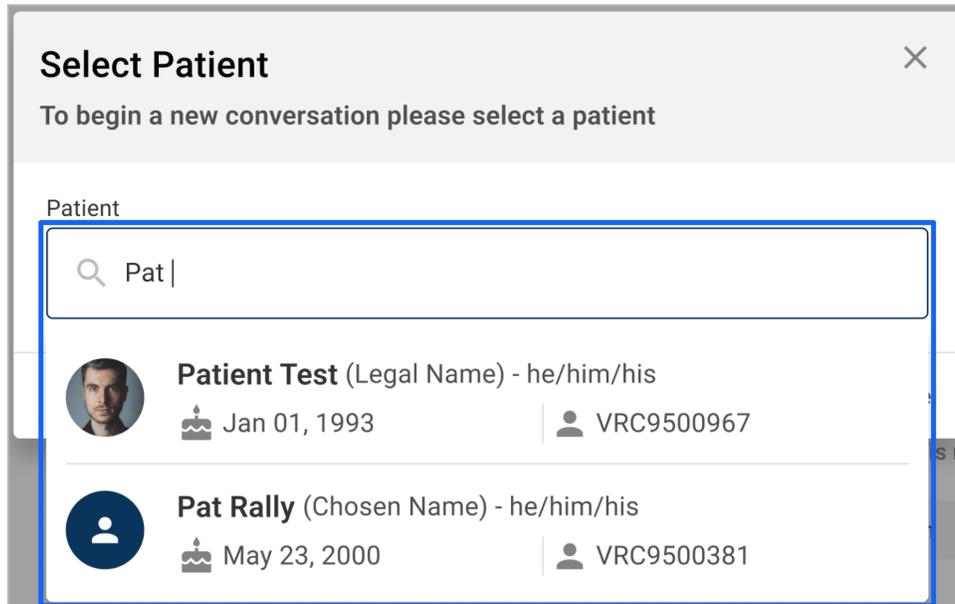
Alternatively, this can also be accessed via the message icon in the dashboard ticker.

Mailbox Usage

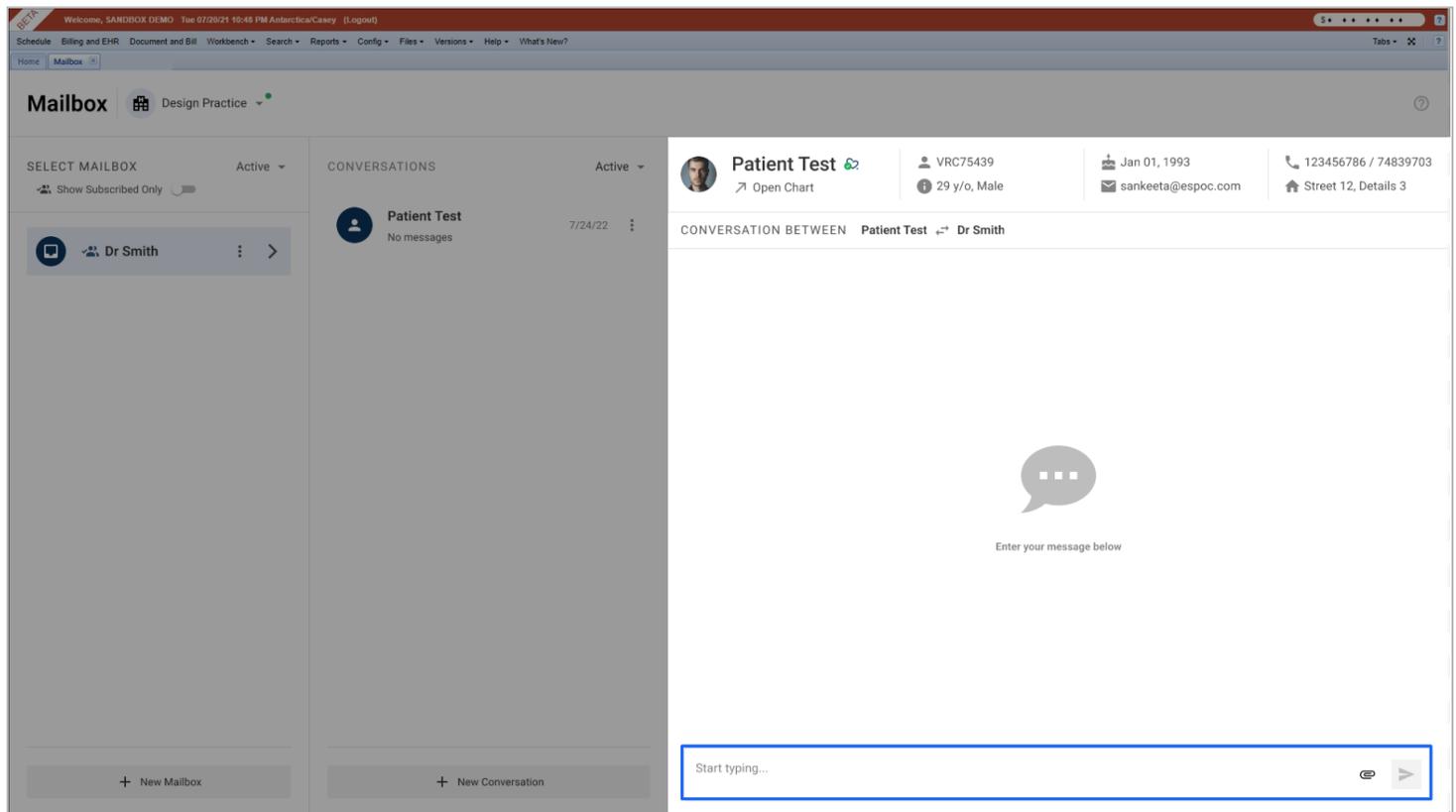


To start a patient conversation within a mailbox:

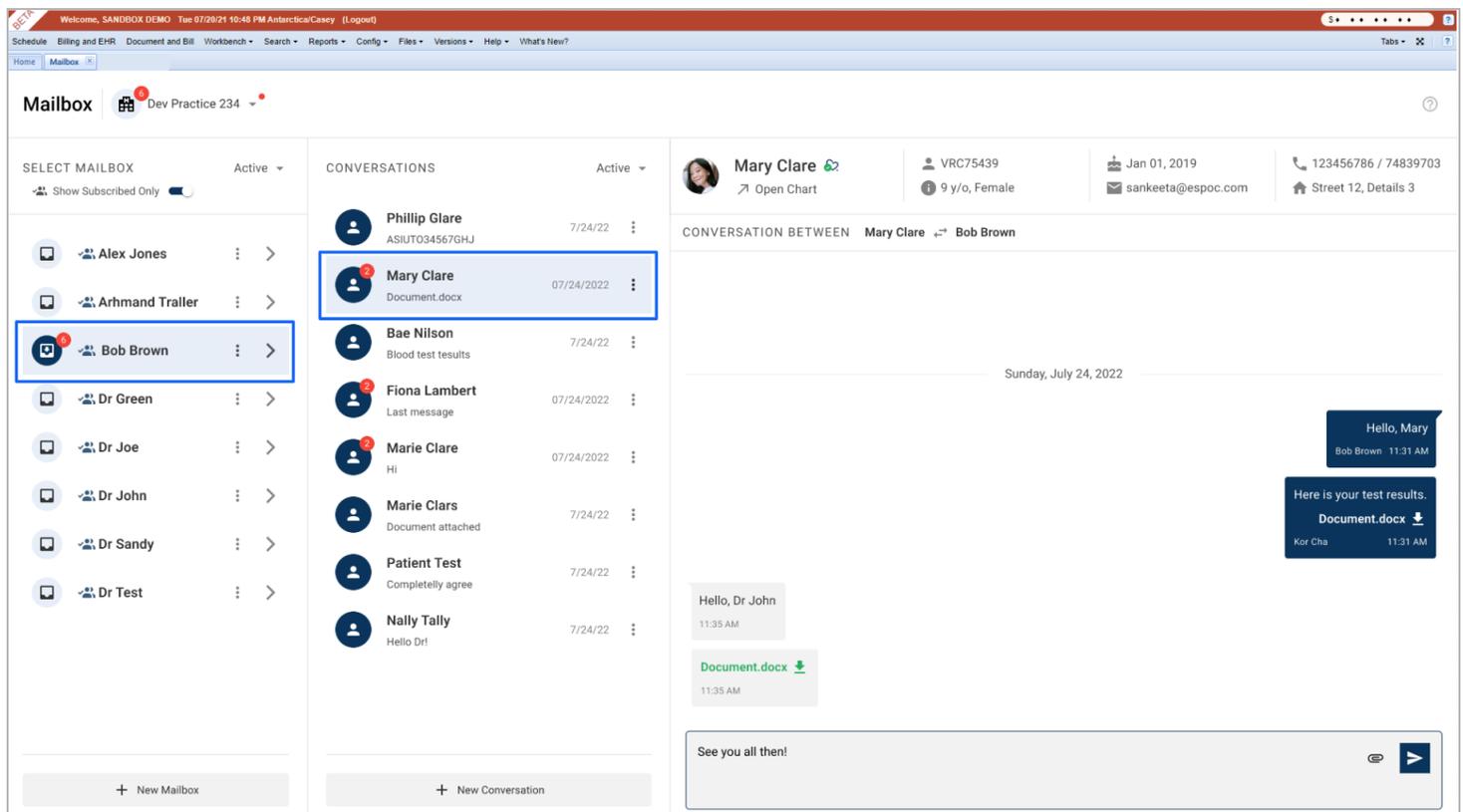
1. Select the **Mailbox**
2. Click on **+ New Conversation**
3. Type in the **Patient's name** on the search box



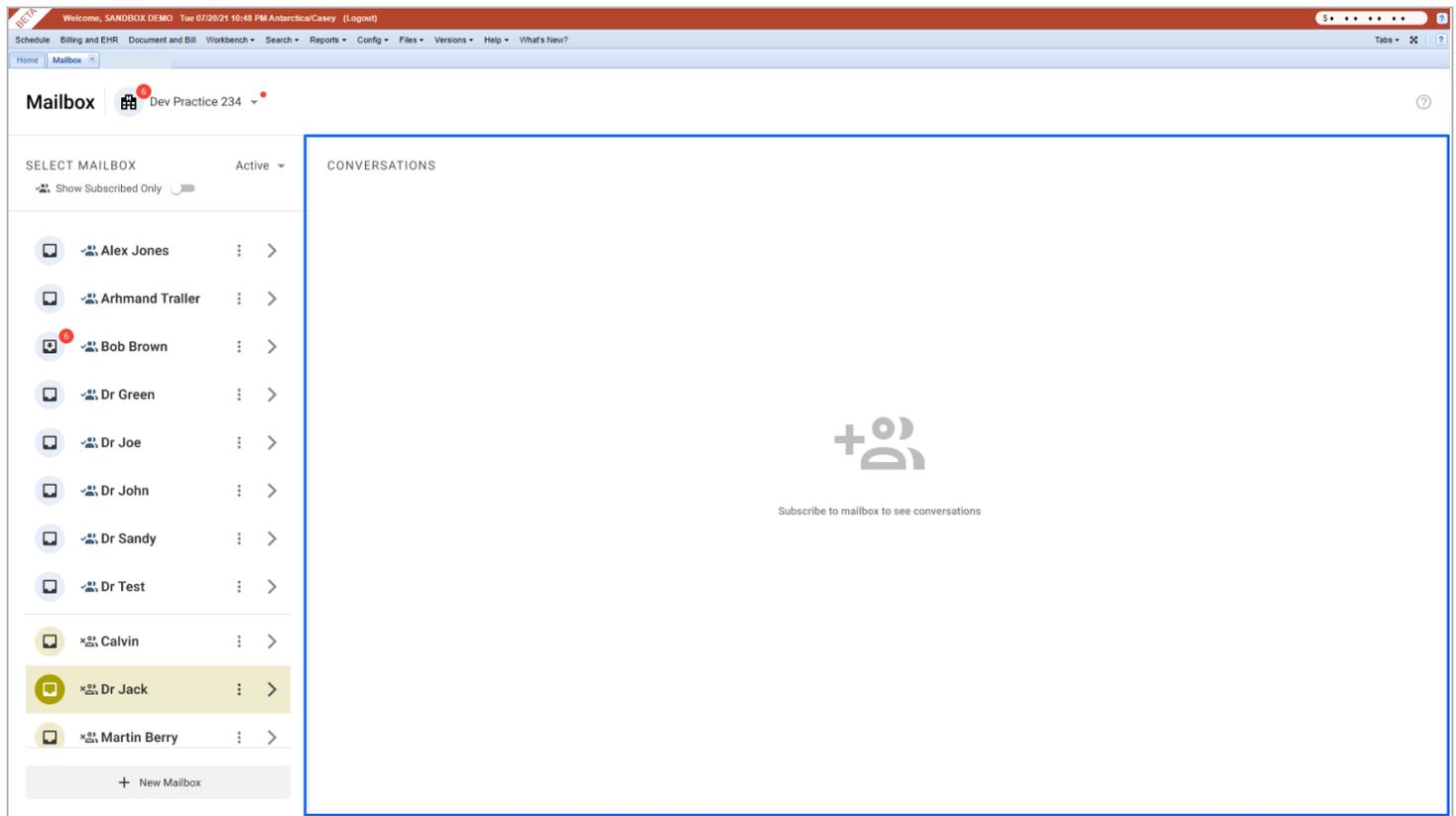
4. **Select the Patient** from the list
 - a. The search box will display relevant accounts that show the **Patient's Full name, Preferred pronoun, Date of Birth, and Account number** to ensure that the correct Patient is selected.



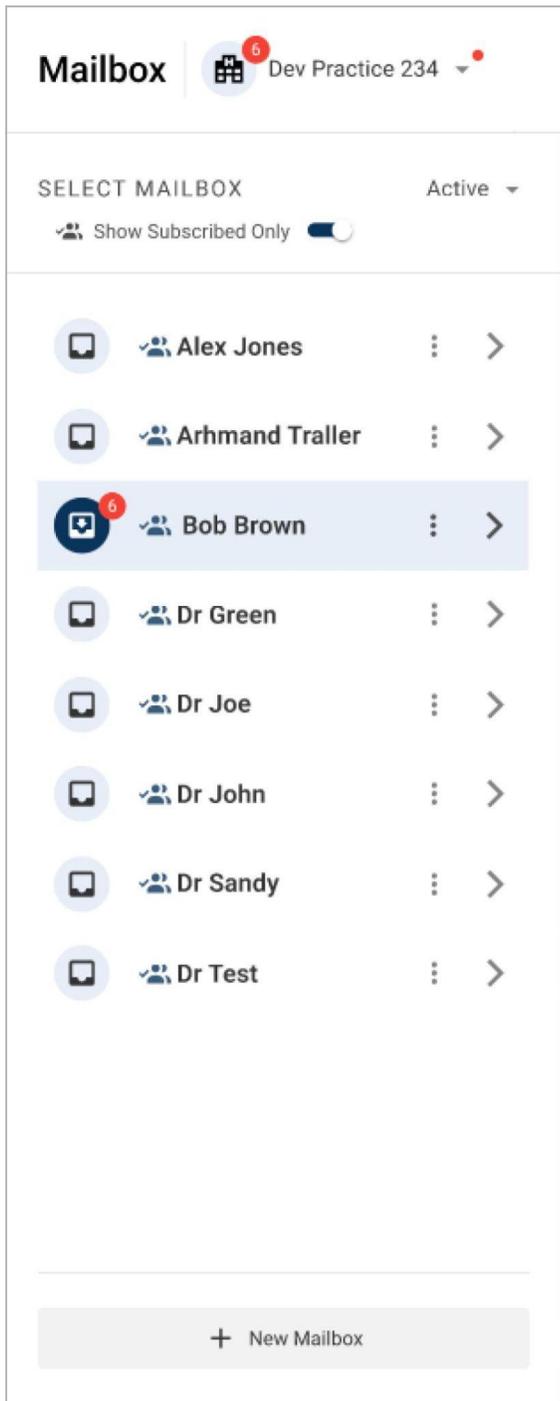
Once selected, the user can send a message to the patient by typing in the **empty textbox** at the bottom of the page. Messages can either be via text format, or users can also send attachments when needed.



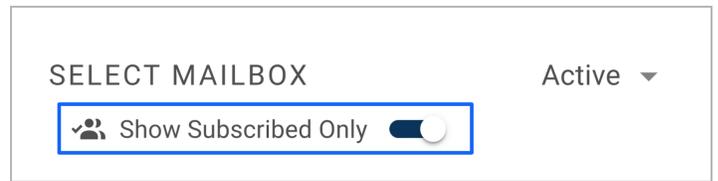
When several mailboxes are set up, a **blue shading** will indicate the currently selected conversation.



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.

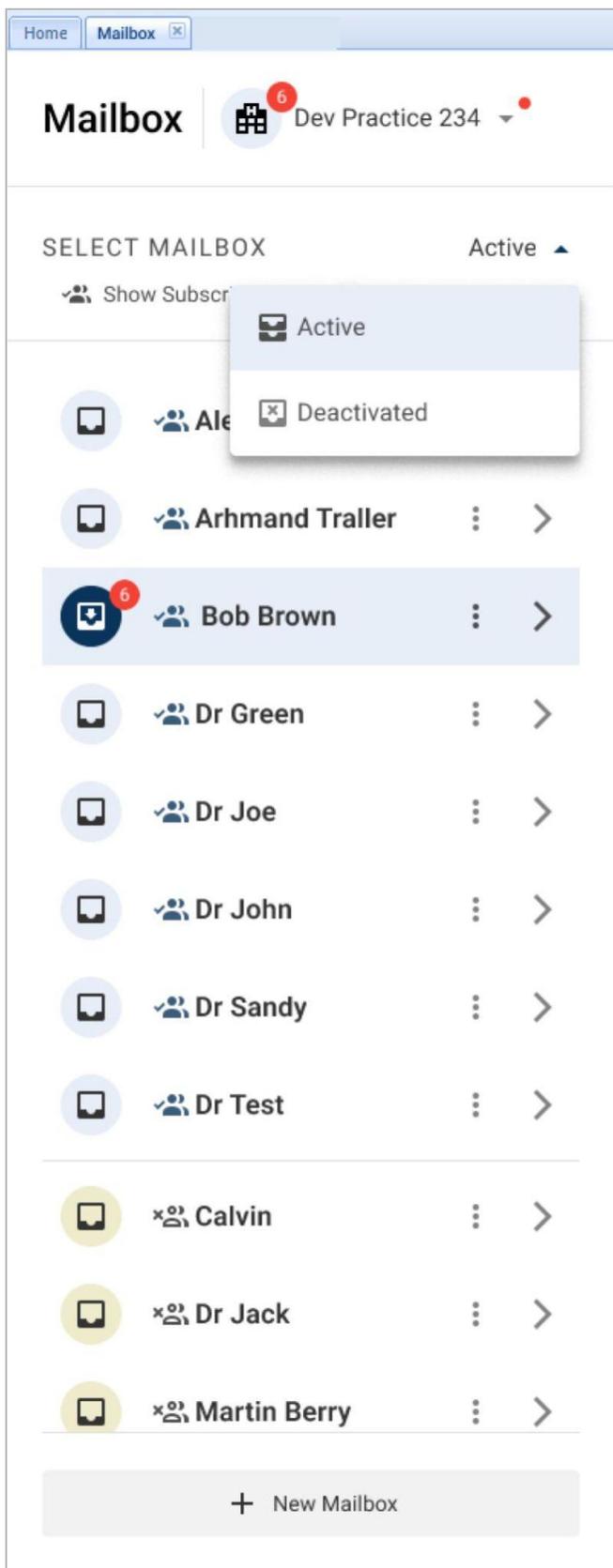


This allows for less mailbox clutter and provides the option to view unsubscribed mailboxes only when necessary.

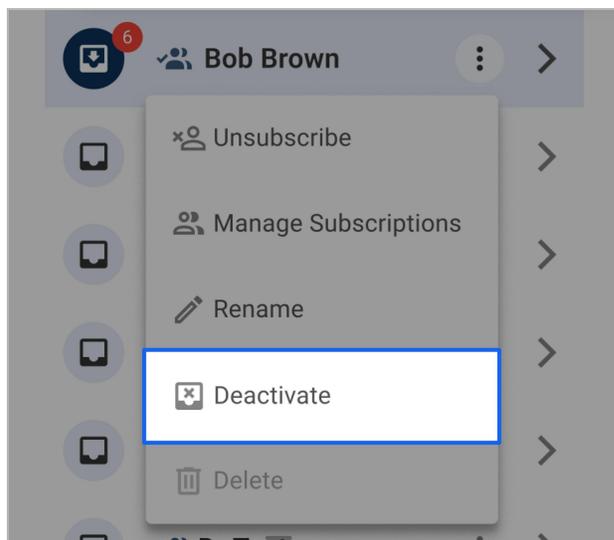
Note: In the Patient's Chart summary, users will be able to view and send patient messages even if they are not subscribed to the mailbox.

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.



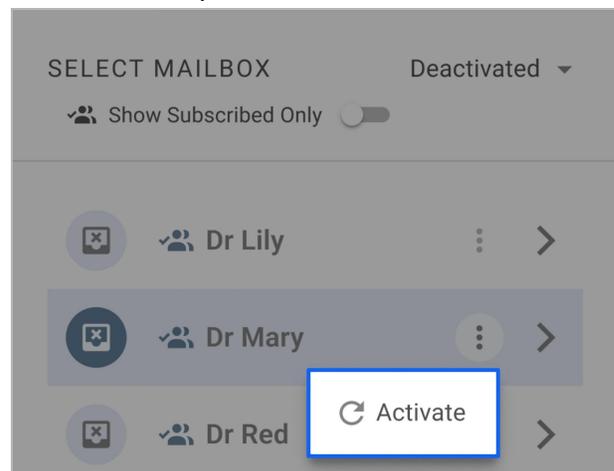
1. Only Mailbox Admins can Deactivate a mailbox by clicking on the **Deactivate** option from the three-dot menu.

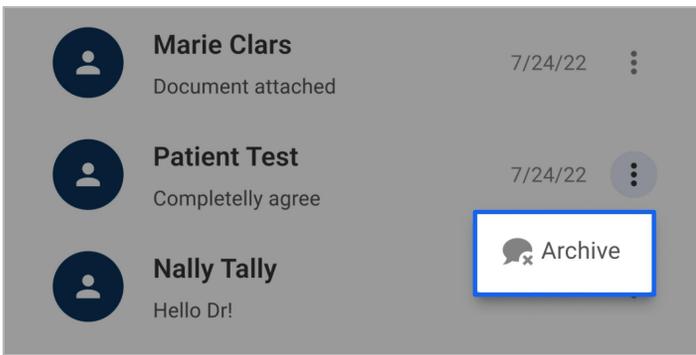


When a mailbox is deactivated:

- 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.

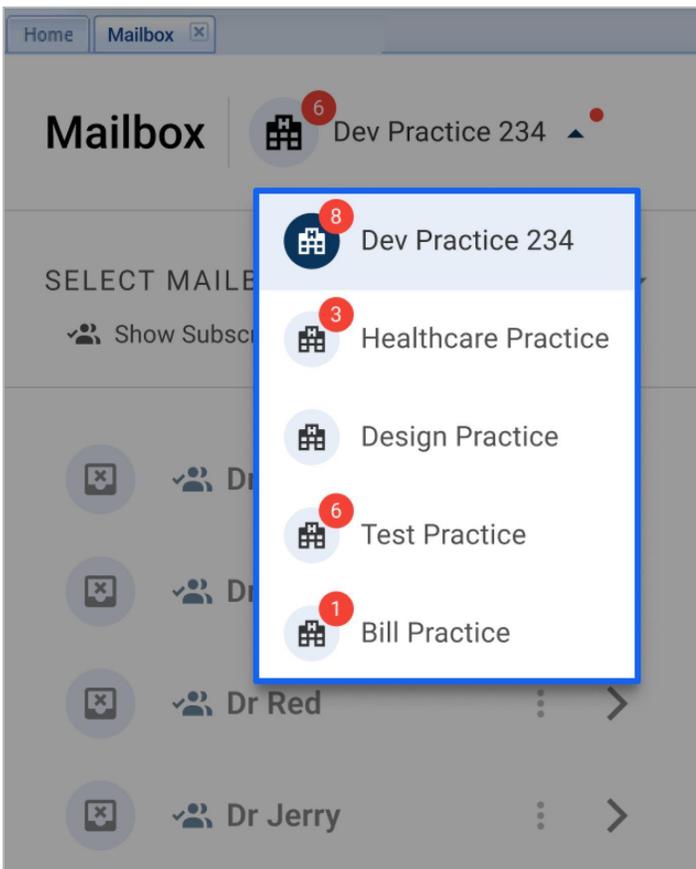




All subscribers have the option to **Archive** a conversation.

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.

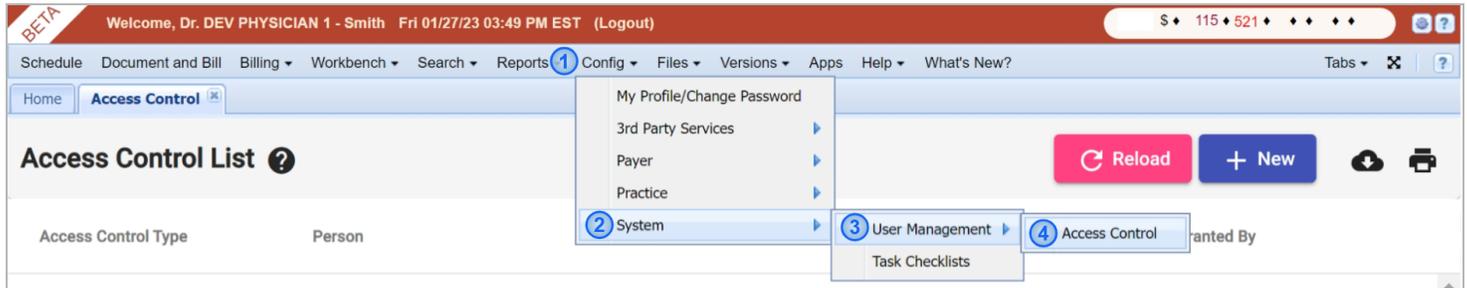


If the user has access to multiple practices, they can easily switch mailbox views by clicking on the current practice. A dropdown will display all the available practices to easily switch between practice mailboxes.

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.

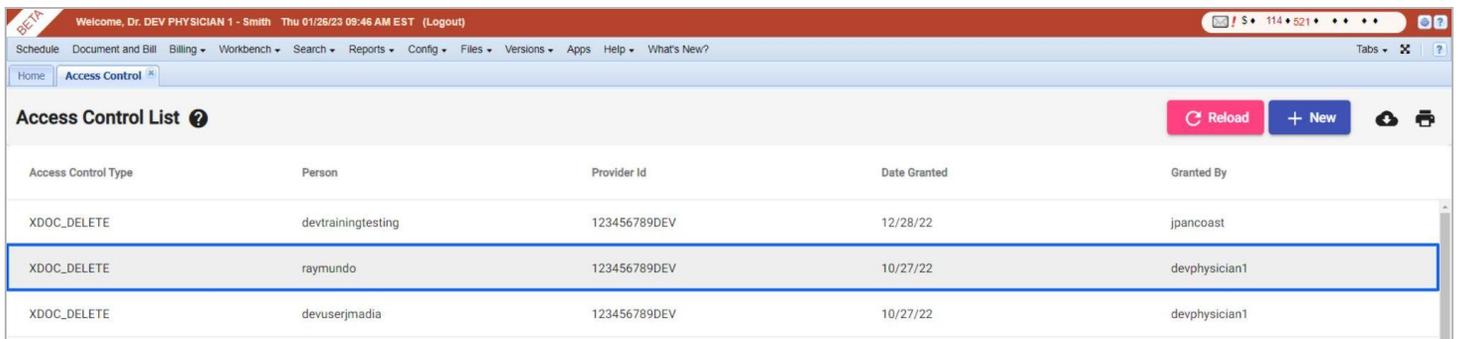
Practice Owners or Administrators are able to give account permissions to users.



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.

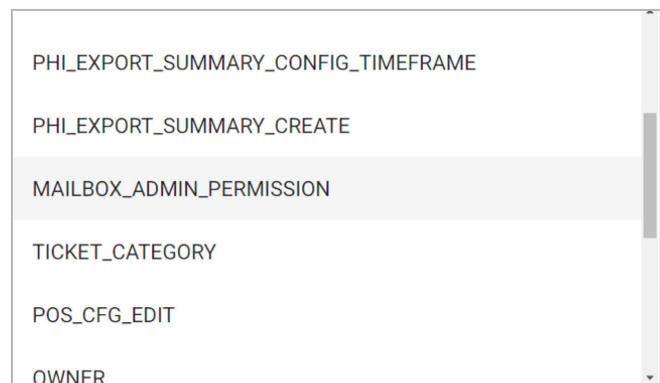


Select the user that you wish to grant access as Mailbox Admin.

Click on the dropdown below the username.

The screenshot shows a form for selecting a user. The 'Person' field is set to 'sandboxdemo'. Below it, there is a dropdown menu labeled 'Access Control Types *'. The form also includes a 'Description' field and three buttons: 'Save', 'Revoke Access', and 'Close'.

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.

The screenshot shows the application home page for Dr. DEV PHYSICIAN 1 - Smith. The navigation menu includes Schedule, Document and Bill, Billing, Workbench, Search, Reports, Config, Files, Versions, Apps, Help, and What's New?. The Config menu is open, showing options like My Profile/Change Password, 3rd Party Services, Payer, Practice, and System. The Practice option is selected, and the Logins option is highlighted. A red circle '3' is placed over the Logins option. The main content area displays Messages and Alerts, Quick Links, and Tracking. The Tracking table shows the following data:

	Mine	Owed	Team
Open	4	116	5
Pending	0	1	1
Closed	0	0	0

To do so:

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

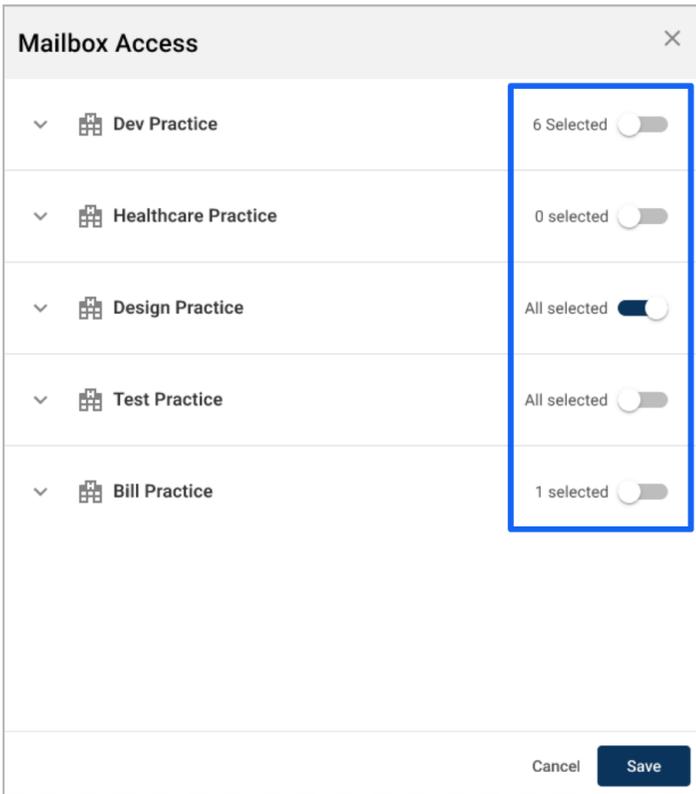
The screenshot shows the Logins configuration page. The Login Manager section includes buttons for Reload Logins, New Login..., Reset Office IP Addresses, Set Office Code, and Hide Inactive Logins. The Logins table shows the following data:

Login	Name	Role	Updat...
drann	DOC TO...	PHYSICIAN	01/26/23
jhaydn	JOSEPH ...	PHYSICIAN	01/23/23
rstrauss	RICHAR...	PHYSICIAN	10/12/22
daedalus_test	DAEDAL...	PHYSICIAN	10/03/22
drmak	ASHLEY ...	PHYSICIAN	08/25/22
cschumann	CLARA S...	PHYSICIAN	08/15/22
rbuckley	ROBIN B...	PHYSICIAN	08/10/22
mbusby	MATT BU...	OFFICE_M...	08/02/22
mwheeler	MIKE WH...	EMPLOYE...	07/07/22

The drann - Active user is selected, and the Mailbox Access configuration options are shown. The Mailbox Access configuration table shows the following data:

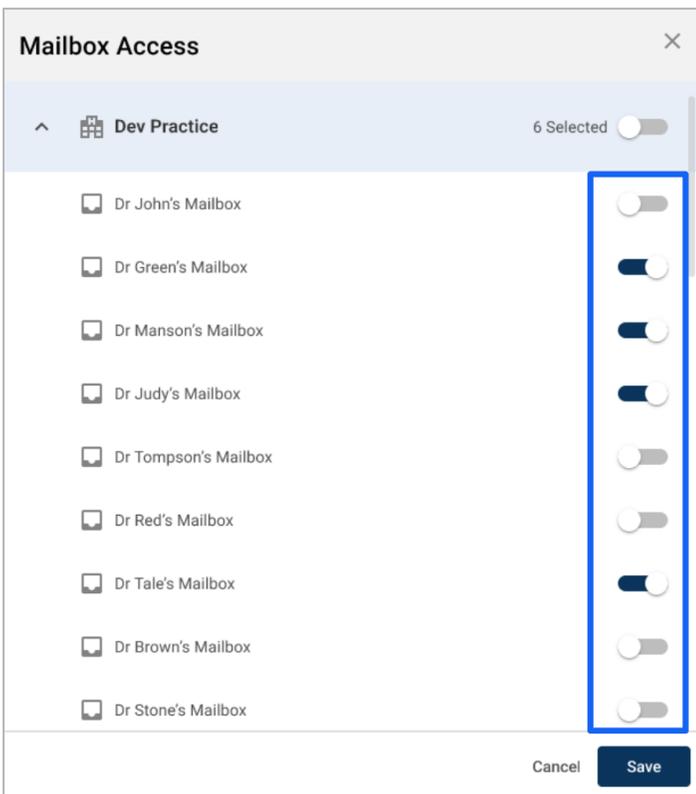
Type	Value	Default	Description
feature_toggle.fix_xdoc_pdf3	T	T	
integration.bcws.clerk_key			
integration.cash_practice.clerk_key			
integration.medappz.person_key			
integration.merchant_service.clerk_key			
login.two_factor_auth_key_verified	F	F	
login.two_factor_auth_shared_key			
login.two_factor_email_auth_enabled	F	F	options: T and F. If it is T and normal 2f...
messages.provider_app.push_notification_enabled	F	F	Allow push notifications on Provider m...
monitor.patient_referral.can_close_ticket	F	F	Setting to (T)true allows this user to clo...
oauth.expiration_time_seconds	1800	1800	Amount of time in seconds before an O...

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**.



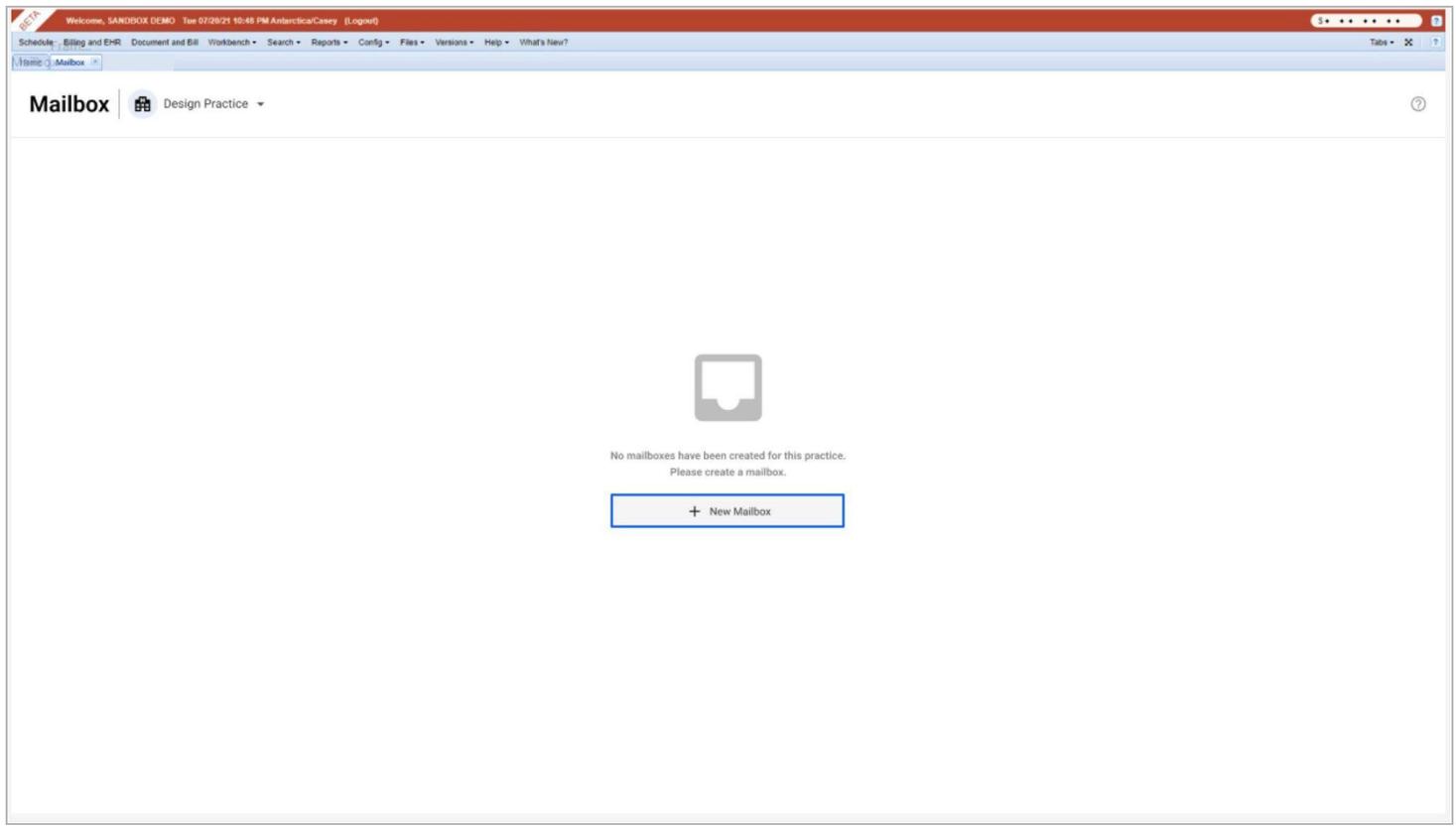
Clicking on a specific practice brings down a list of all mailboxes within the selected practice.

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.

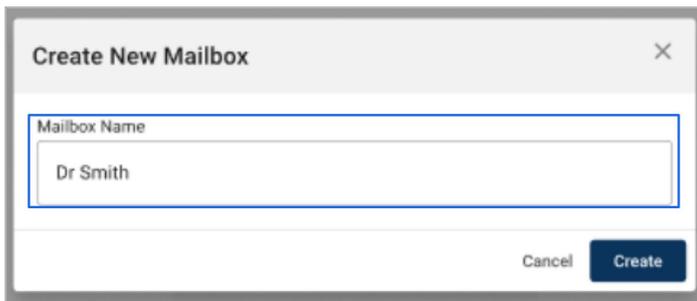
This configuration allows for Mailbox Admins to easily set up user subscriptions to multiple mailboxes at once for new and existing users in the practice.

Creating Mailboxes

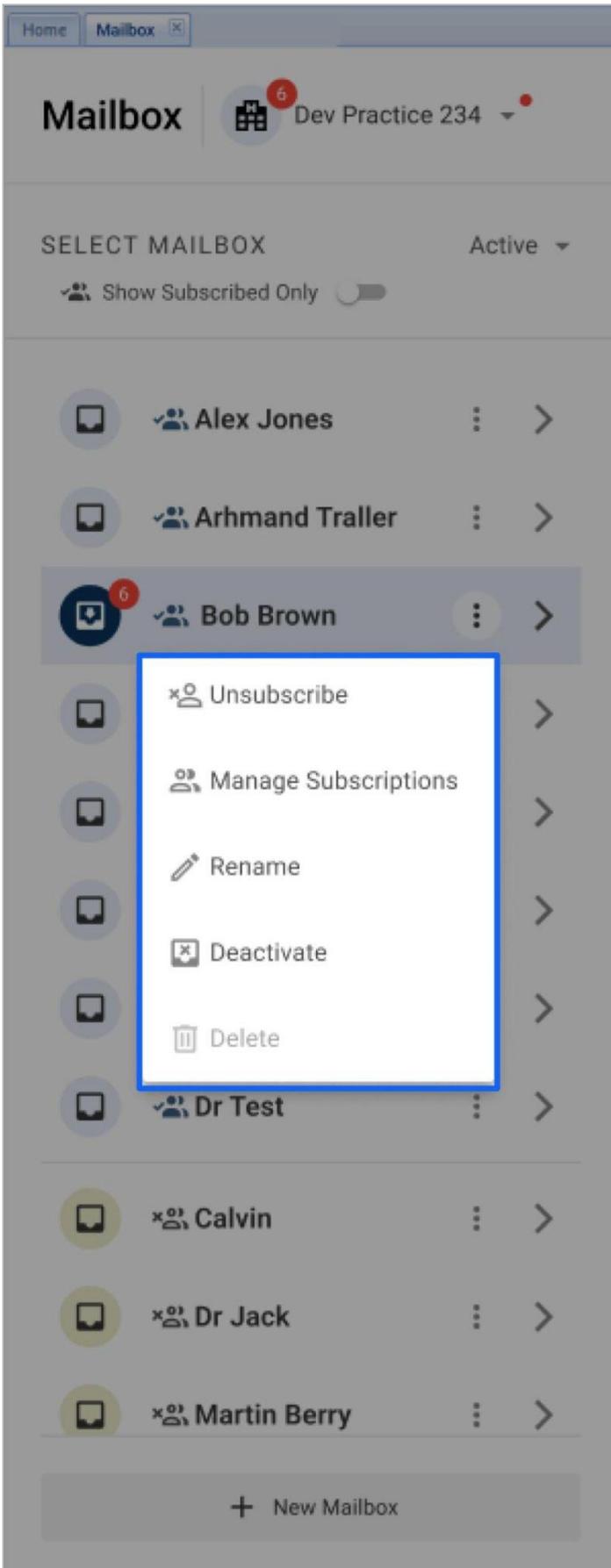
Initially, there are no default mailboxes set up. The Mailbox Admin will be responsible for initially setting up new mailboxes for the practice to use.



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

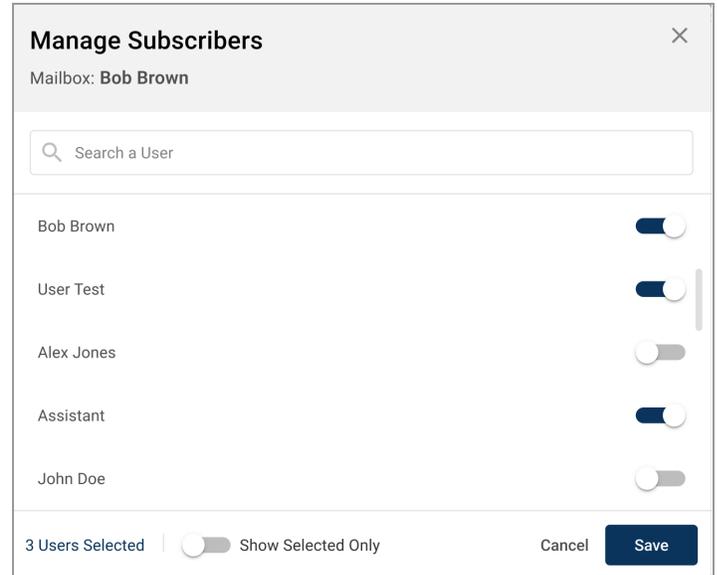
A screenshot of a dialog box titled 'Create New Mailbox'. The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled 'Mailbox Name' which contains the text 'Dr Smith'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Create'.

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.

Mailbox Access ✕

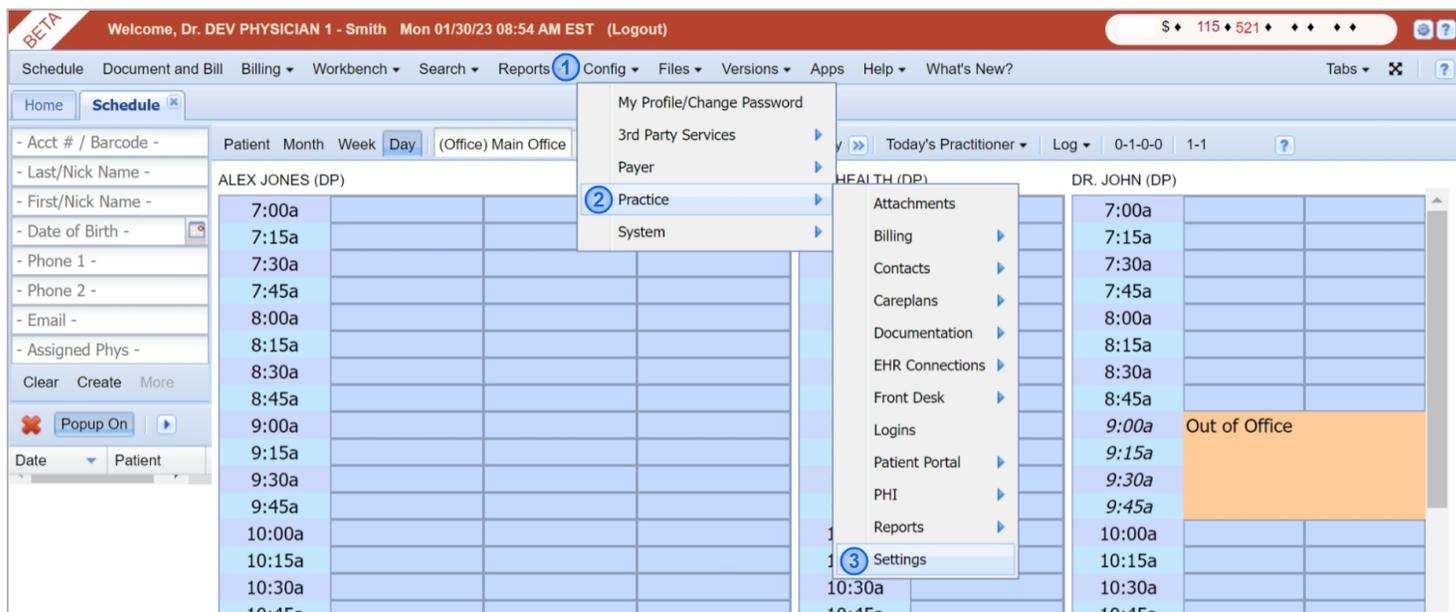
^ **Dev Practice** 6 Selected

<input type="checkbox"/> Dr John's Mailbox	<input type="checkbox"/>
<input type="checkbox"/> Dr Green's Mailbox	<input checked="" type="checkbox"/>
<input type="checkbox"/> Dr Manson's Mailbox	<input checked="" type="checkbox"/>
<input type="checkbox"/> Dr Judy's Mailbox	<input checked="" type="checkbox"/>
<input type="checkbox"/> Dr Tompson's Mailbox	<input type="checkbox"/>
<input type="checkbox"/> Dr Red's Mailbox	<input type="checkbox"/>
<input type="checkbox"/> Dr Tale's Mailbox	<input checked="" type="checkbox"/>
<input type="checkbox"/> Dr Brown's Mailbox	<input type="checkbox"/>
<input type="checkbox"/> Dr Stone's Mailbox	<input type="checkbox"/>

Cancel **Save**

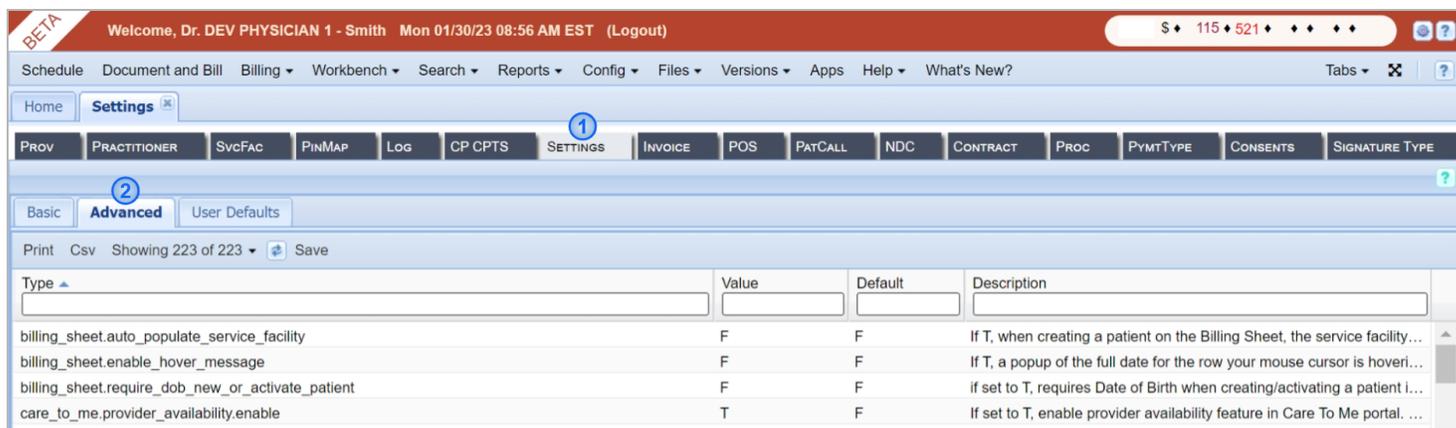
Clicking on the dropdown allows you to toggle access of users to the selected mailbox.

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**

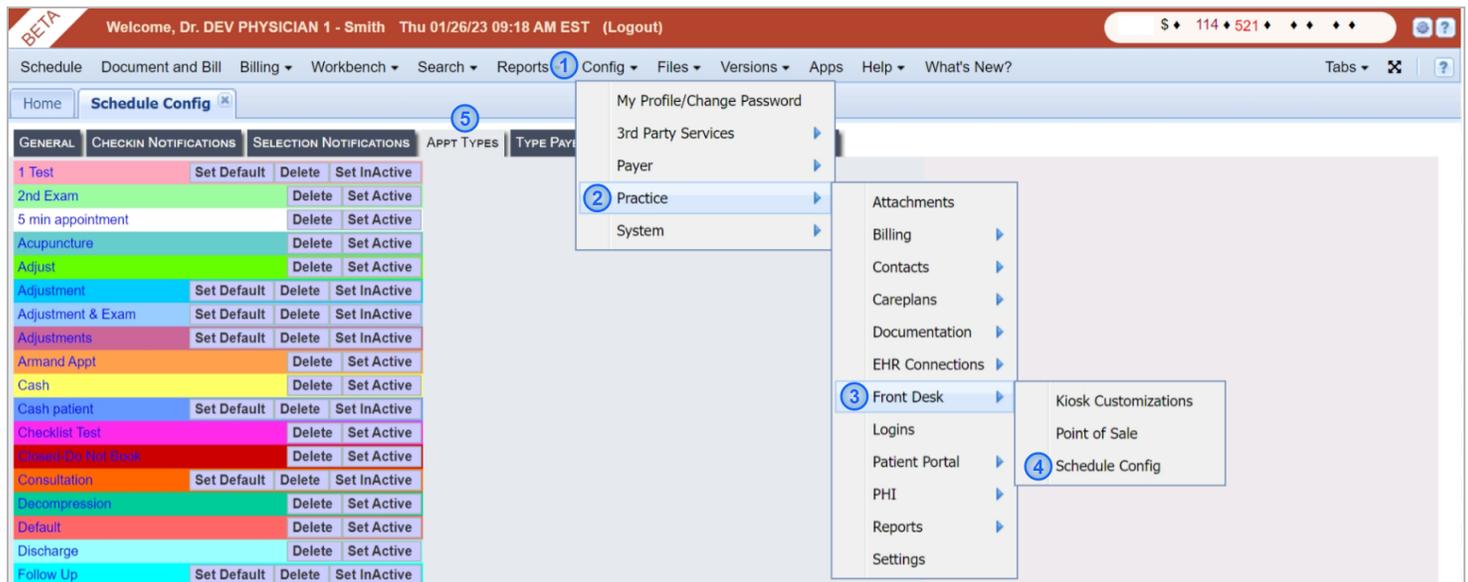
Inside the advanced settings:

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

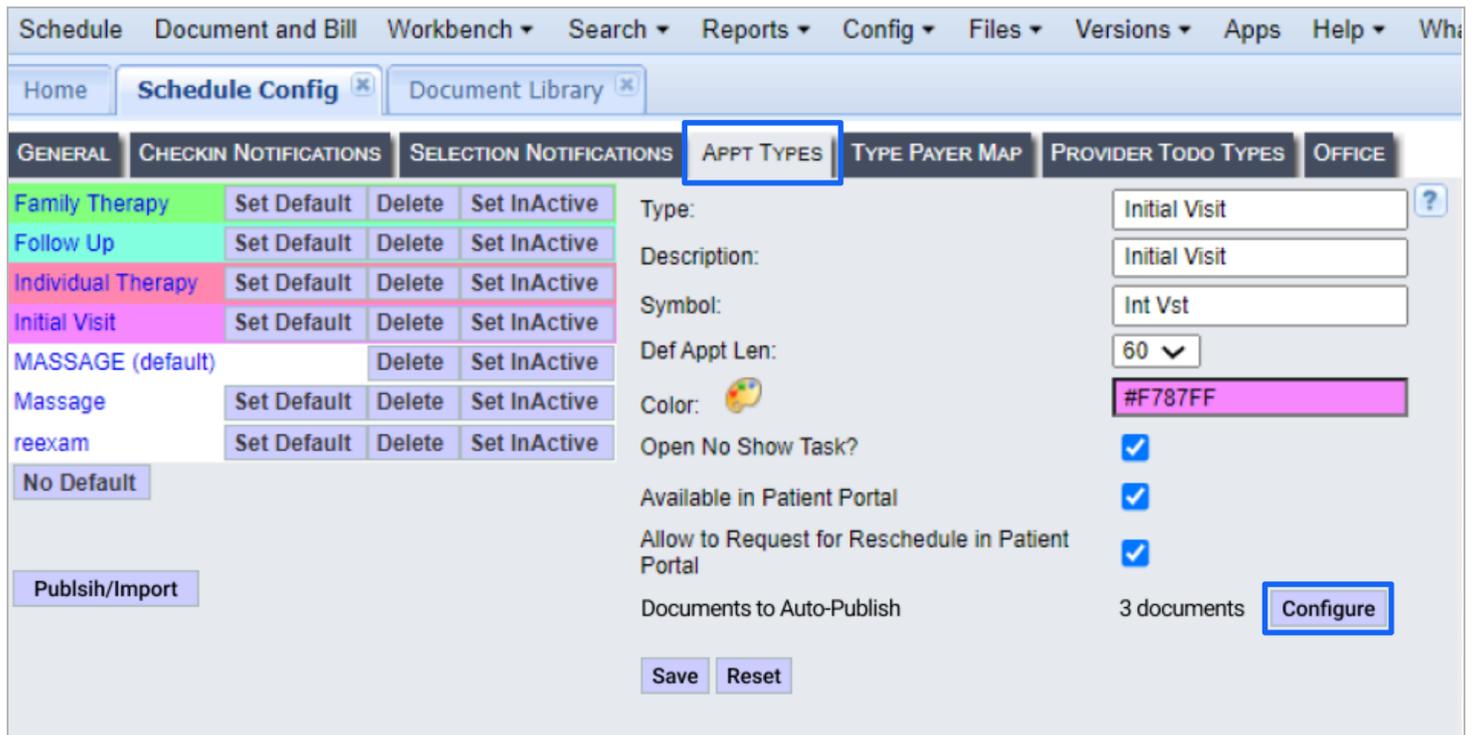
This new feature allows the practice to set up documents that can be automatically published based on the appointment.



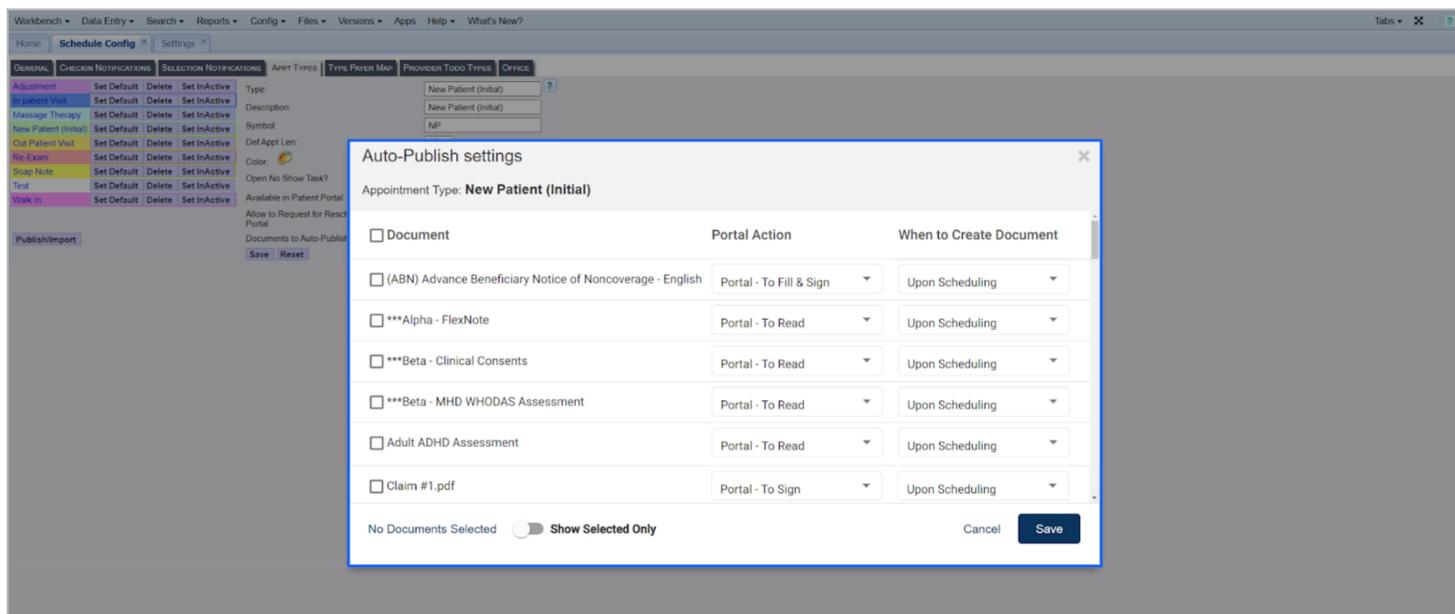
To configure Automatic Document Publishing:

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

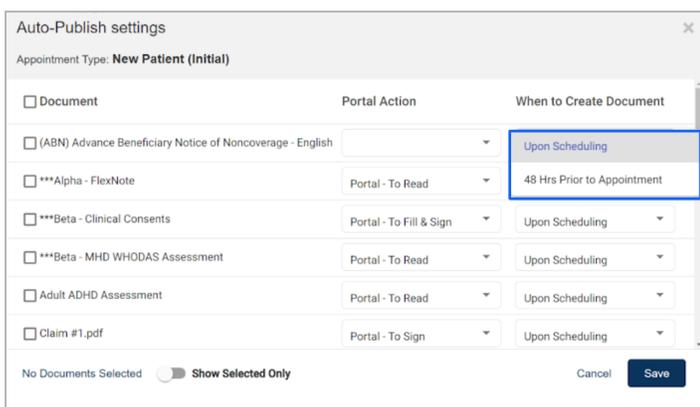
Inside the Schedule Config, click on the **Appt Types** tab.



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



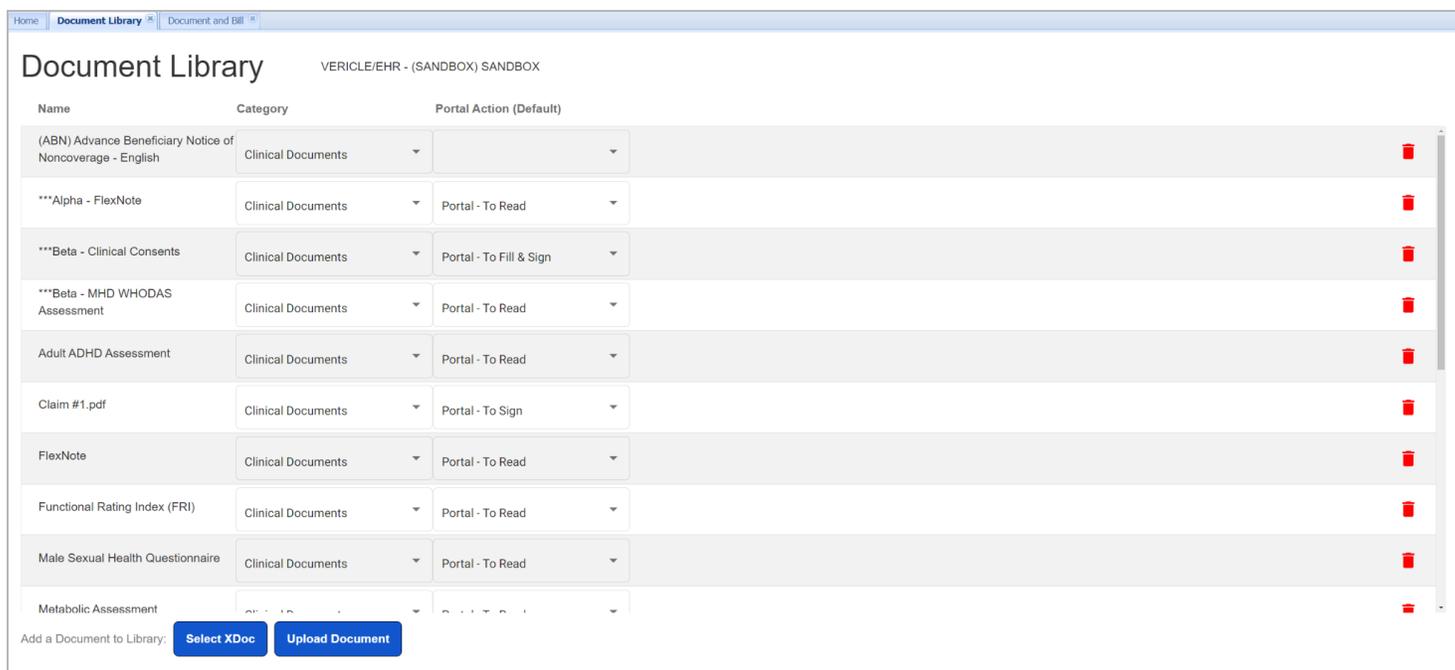
From the Auto-Publish settings popup allows the user to set when the document will be published.

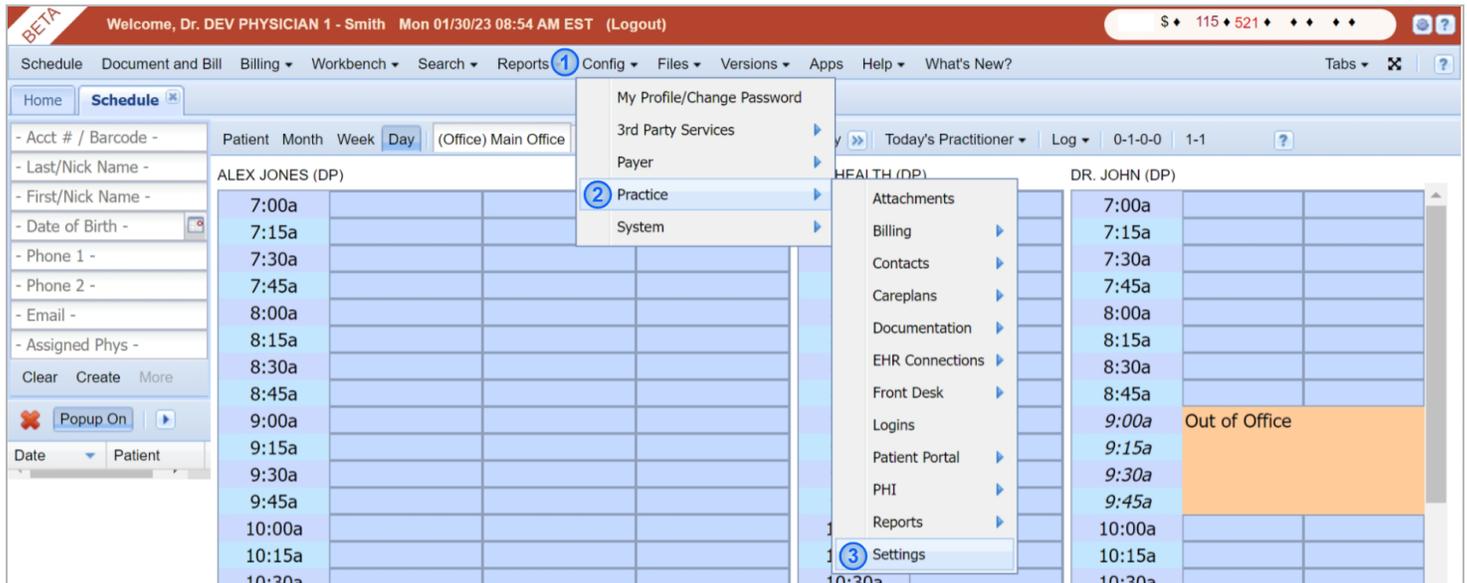


The auto-publish option is based on a preconfigured automated schedule which include:

- **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.

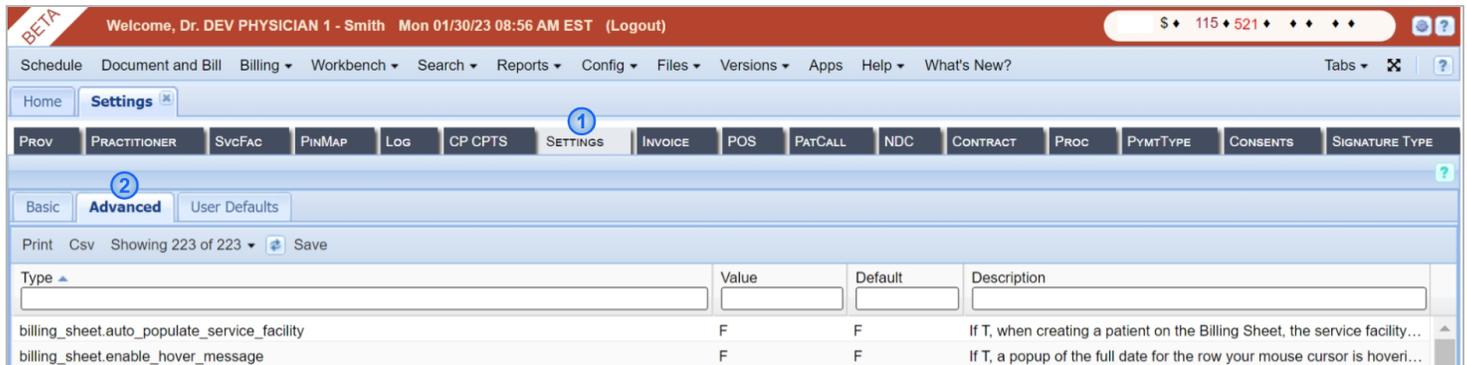
Note: Available documents for auto-publish will be based on the current document library.





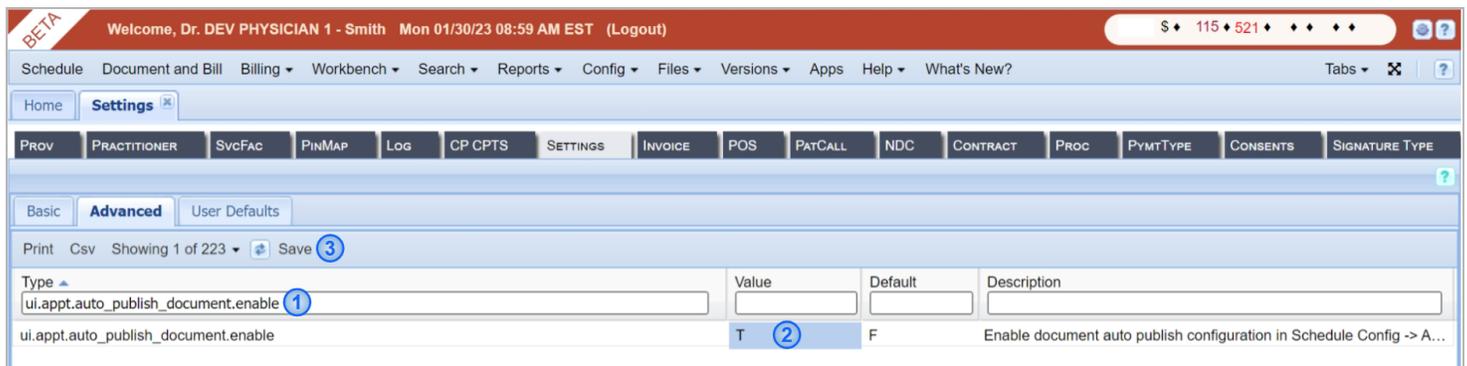
To enable this feature:

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



From within the settings page

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

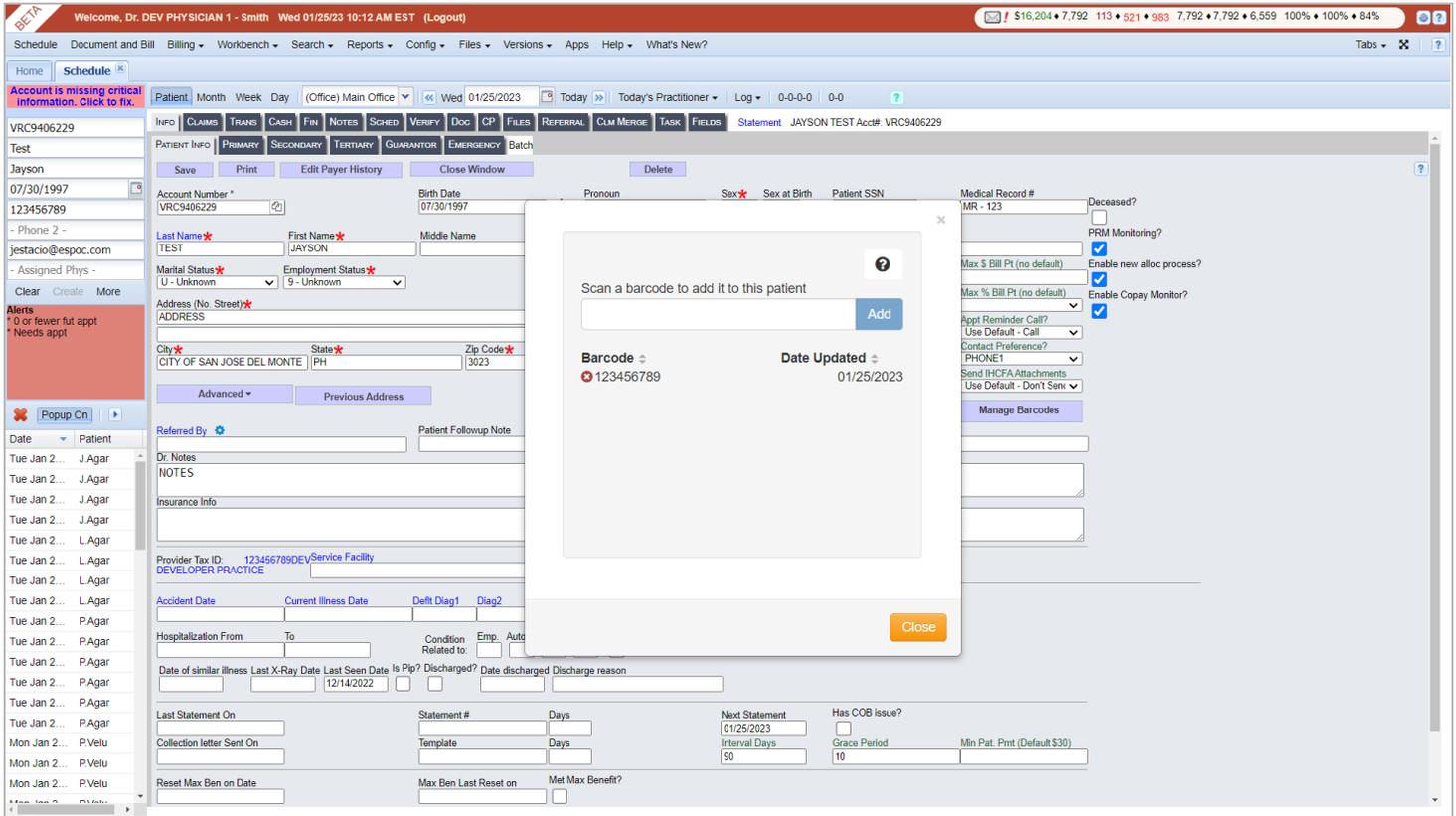


Inside the advanced settings:

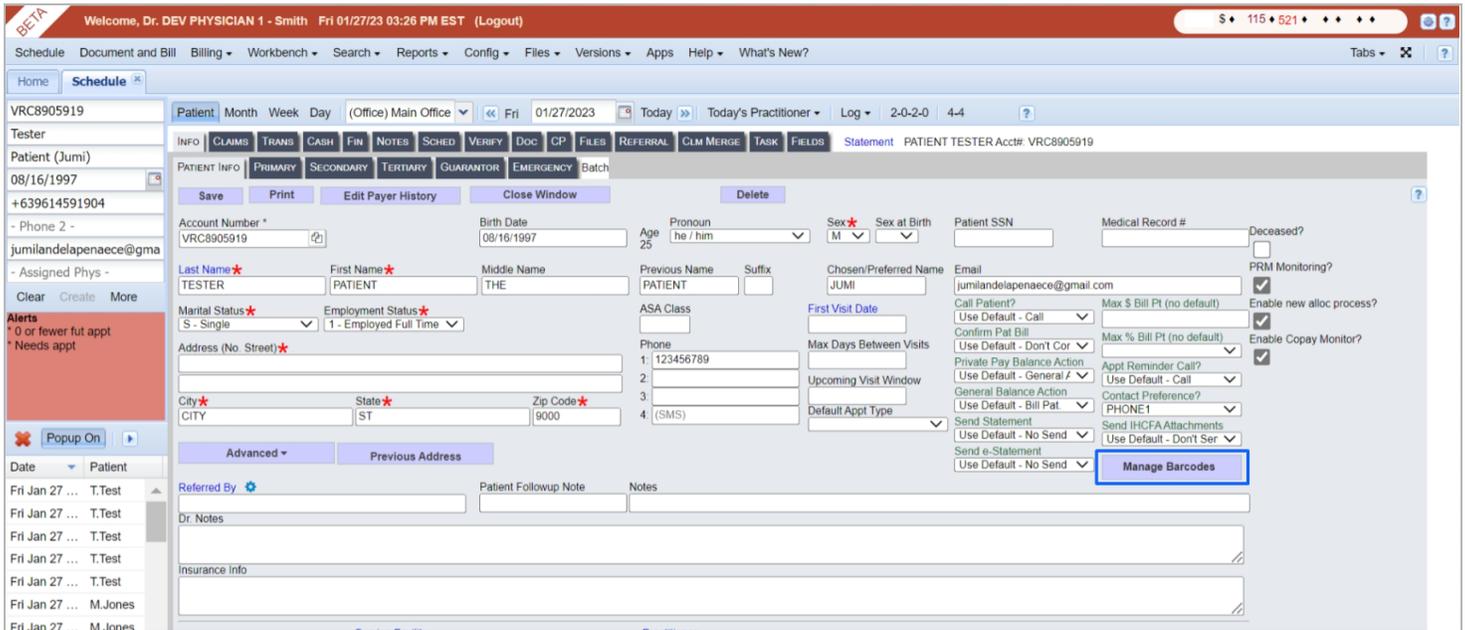
1. Type **ui.appt.auto_publish_document.enable** on the respective field and hit enter
2. Set the value to **T**
3. Click on **Save**

Patient Phone Numbers to Barcodes

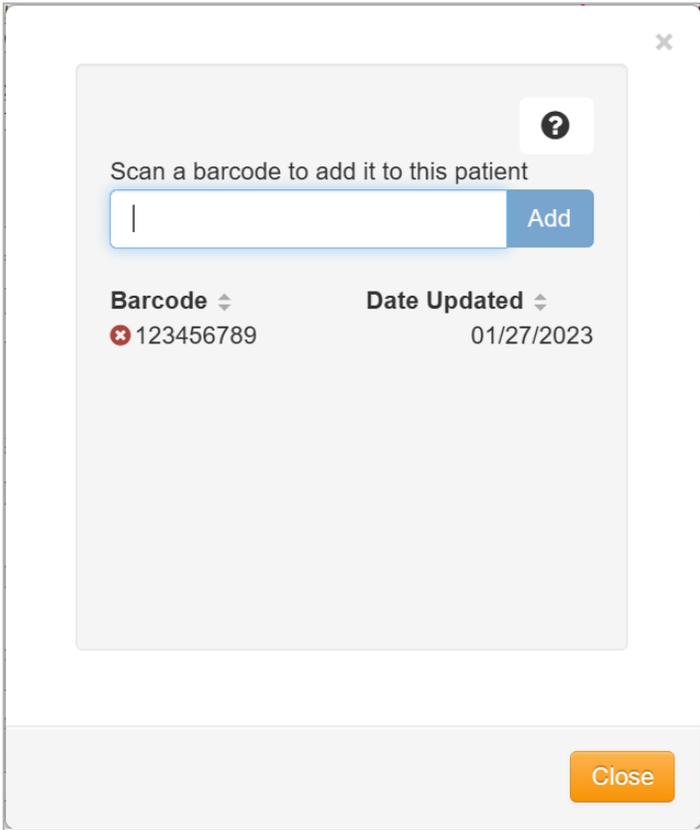
This new feature allows the practice to automatically add the patient's phone number as a barcode. This feature helps patients to easily remember their barcode when using check-in kiosks.



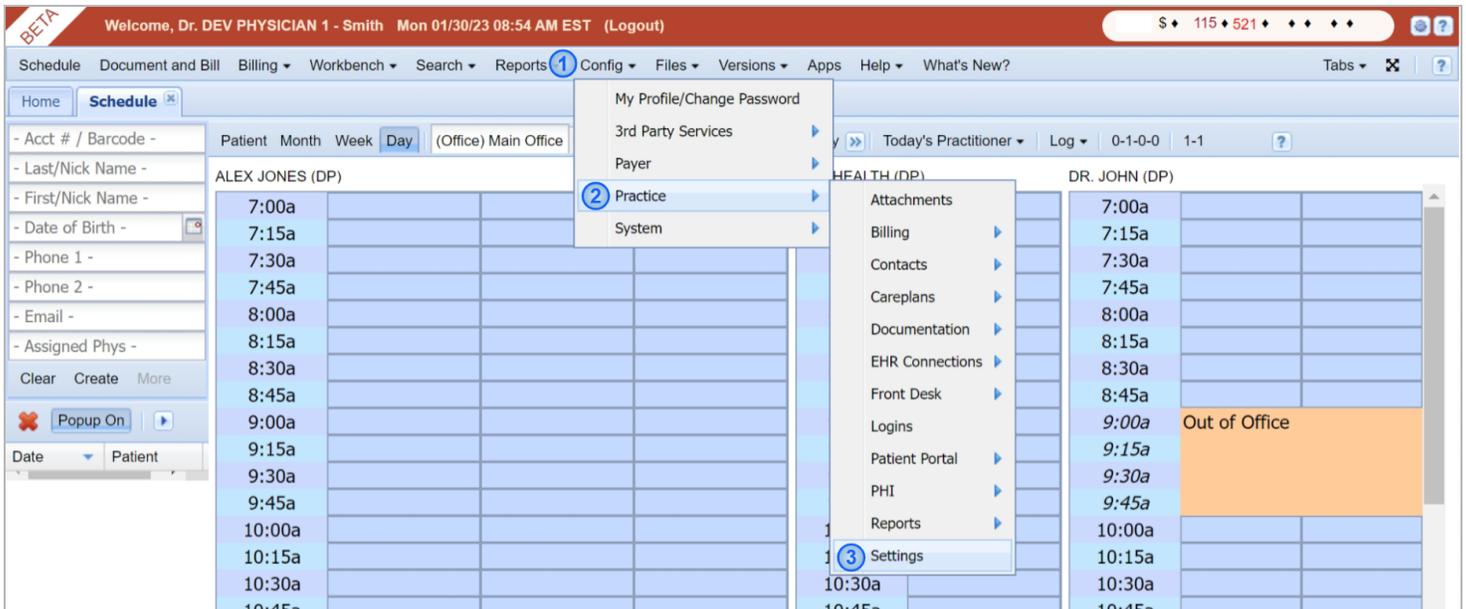
Enabling this new feature automatically adds the **Phone 1** from the patient's demographics into their barcode.



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**

BETA Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout) \$ 115 521

Schedule Document and Bill Billing Workbench Search Reports Config Files Versions Apps Help What's New? Tabs

Home Settings

PROV PRACTITIONER SvcFAC PINMAP Log CP CPTS SETTINGS INVOICE POS PATCALL NDC CONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE

Basic Advanced User Defaults

Print Csv Showing 223 of 223 Save

Type	Value	Default	Description
billing_sheet.auto_populate_service_facility	F	F	If T, when creating a patient on the Billing Sheet, the service facility...
billing_sheet.enable_hover_message	F	F	If T, a popup of the full date for the row your mouse cursor is hoveri...
billing_sheet.require_dob_new_or_activate_patient	F	F	If set to T, requires Date of Birth when creating/activating a patient i...
care_to_me.provider_availability.enable	T	F	If set to T, enable provider availability feature in Care To Me portal. ...

From within the settings page:

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

Schedule Document and Bill Workbench Data Entry Search Reports Config Files Versions Apps Help What's New? Tabs

Home Settings

PROV PRACTITIONER SvcFAC PINMAP Log CP CPTS SETTINGS INVOICE POS PATCALL NDC CONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE

Basic Advanced User Defaults

Print Csv Showing 1 of 467 Save

Type	Value	Default	Description
ui.patient.auto_import_phone_barcode	T	F	When (T)rue - Patient.Phone1 will be automatically imported to the p...

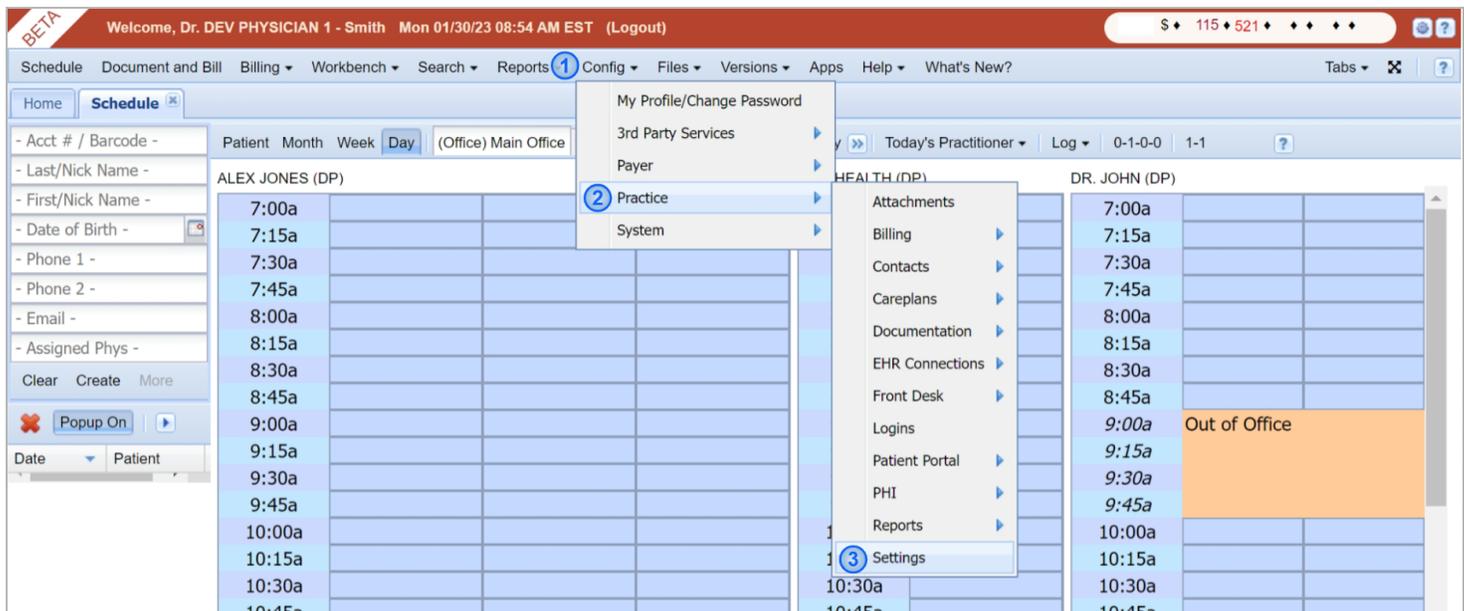
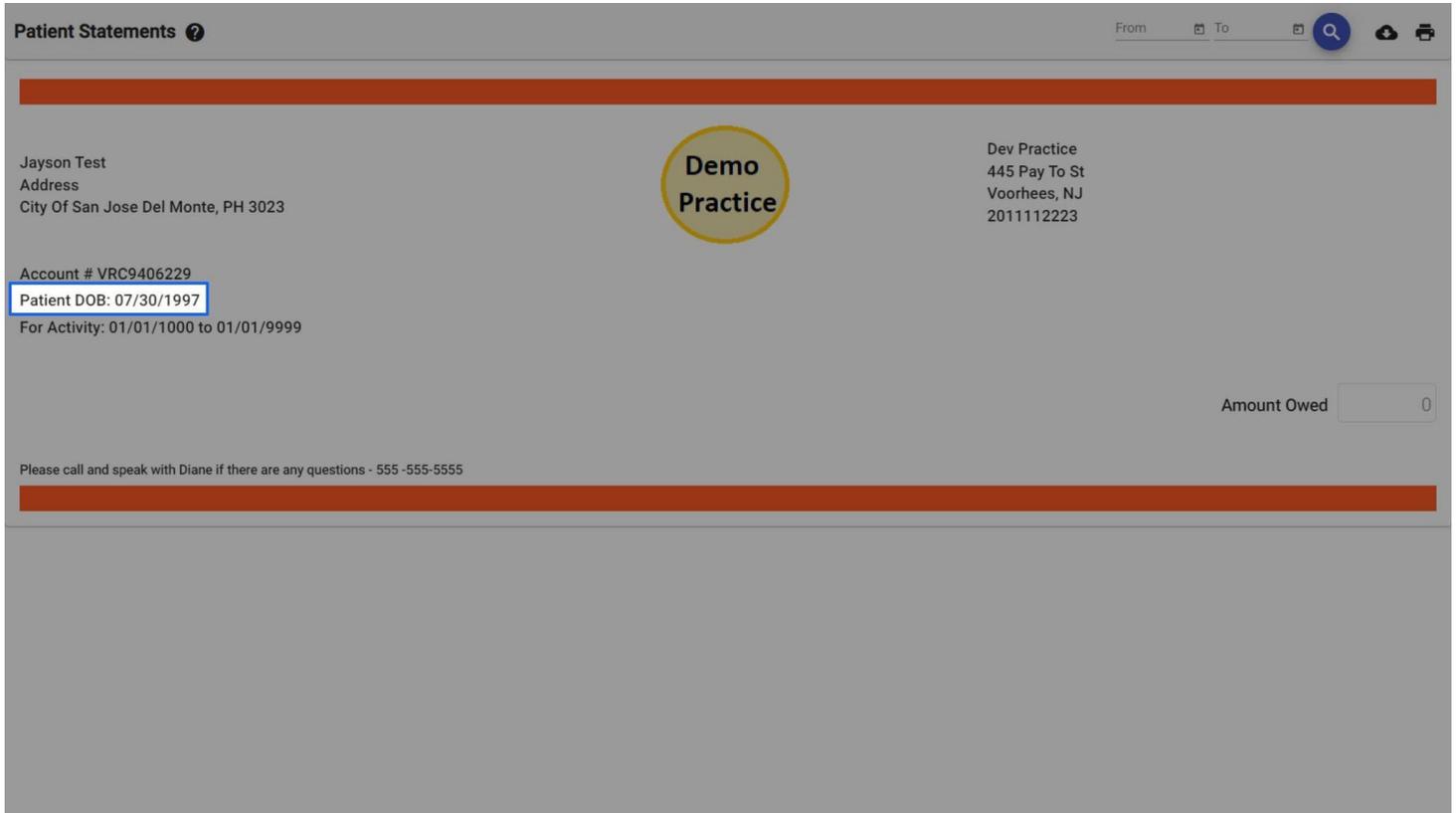
Inside the advanced settings:

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**

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout) \$ 115 521

Schedule Document and Bill Billing Workbench Search Reports Config Files Versions Apps Help What's New?

Home Settings

PROV PRACTITIONER SvcFAC PINMAP Log CP CPTS **SETTINGS** INVOICE POS PATCALL NDC CONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE

Basic **Advanced** User Defaults

Print Csv Showing 223 of 223 Save

Type	Value	Default	Description
billing_sheet.auto_populate_service_facility	F	F	If T, when creating a patient on the Billing Sheet, the service facility...
billing_sheet.enable_hover_message	F	F	If T, a popup of the full date for the row your mouse cursor is hoveri...
billing_sheet.require_dob_new_or_activate_patient	F	F	If set to T, requires Date of Birth when creating/activating a patient i...
care_to_me.provider_availability.enable	T	F	If set to T, enable provider availability feature in Care To Me portal. ...

From within the settings page:

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

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 09:20 AM EST (Logout) \$ 115 521

Schedule Document and Bill Billing Workbench Search Reports Config Files Versions Apps Help What's New?

Home Settings

PROV PRACTITIONER SvcFAC PINMAP Log CP CPTS SETTINGS INVOICE POS PATCALL NDC CONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE

Basic **Advanced** User Defaults

Print Csv Showing 1 of 223 Save

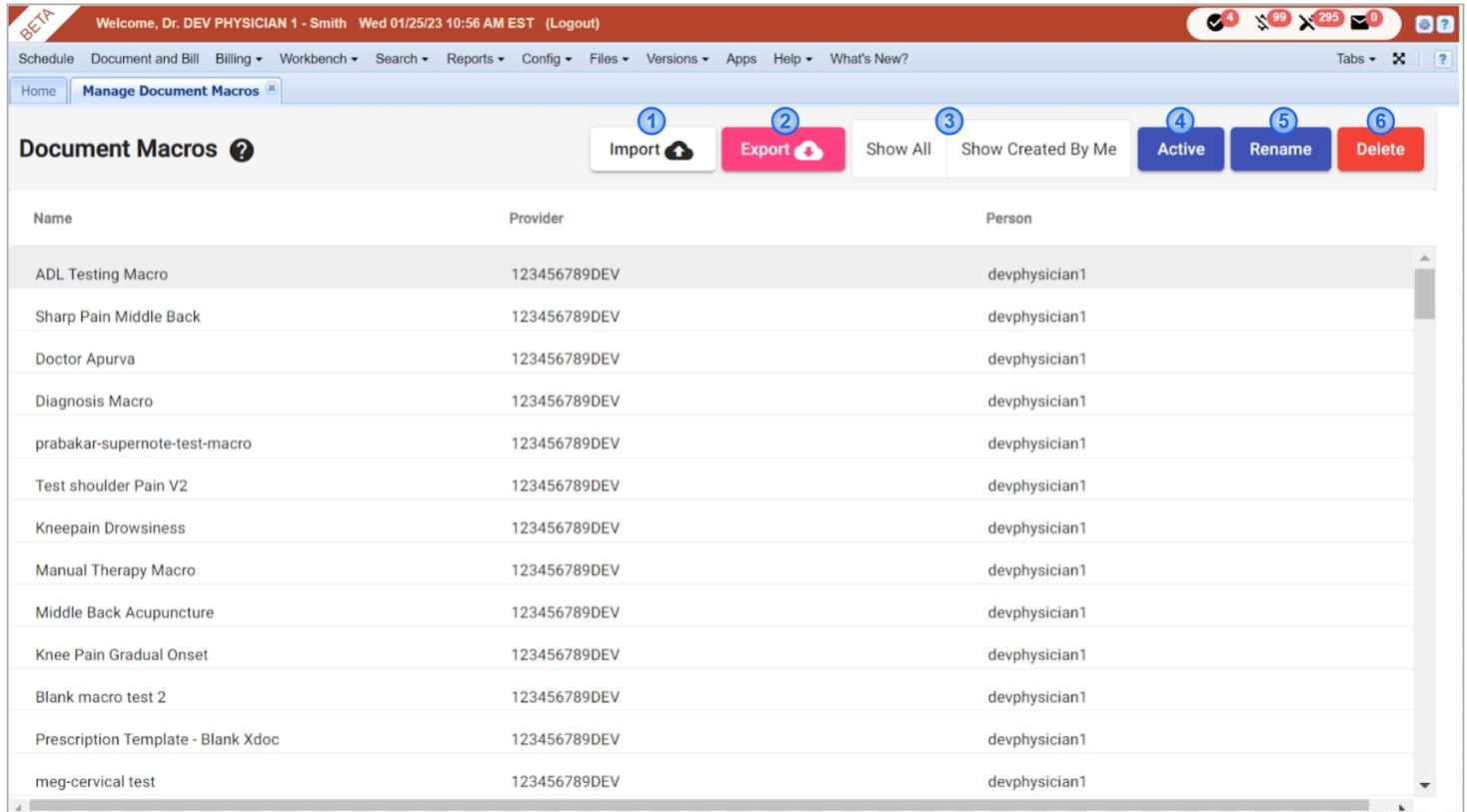
Type	Value	Default	Description
ui.patient.statements.show_patient_dob	T	F	If set to T, show patient date of birth in new patient statements.

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.



Name	Provider	Person
ADL Testing Macro	123456789DEV	devphysician1
Sharp Pain Middle Back	123456789DEV	devphysician1
Doctor Apurva	123456789DEV	devphysician1
Diagnosis Macro	123456789DEV	devphysician1
prabakar-supernote-test-macro	123456789DEV	devphysician1
Test shoulder Pain V2	123456789DEV	devphysician1
Kneepain Drowsiness	123456789DEV	devphysician1
Manual Therapy Macro	123456789DEV	devphysician1
Middle Back Acupuncture	123456789DEV	devphysician1
Knee Pain Gradual Onset	123456789DEV	devphysician1
Blank macro test 2	123456789DEV	devphysician1
Prescription Template - Blank Xdoc	123456789DEV	devphysician1
meg-cervical test	123456789DEV	devphysician1

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.

The screenshot shows a medical software interface with a navigation menu. The menu is open, and the 'Documentation' option is selected, which has opened a sub-menu. In this sub-menu, 'Manage Document Macros' is highlighted. The interface also displays various data points and a tracking table.

Messages and Alerts:

- As of 01/24/2023 you have 1 tasks completed and waiting for your approval. Please go to the Task Workbench and choose Owed from the My Bench menu to see your pending tasks.
- As of 01/24/2023 you have 154 claim(s) missing for checked in patients. Act fast to avoid timely filing denials.
- As of 01/24/2023 you have \$ 23,418.52 outstanding on your workbench. Act now to avoid losing money to timely filing.
- Your EOB Fax Number is 2672957323
- 01/24: 6511782: Sent paperwork will follow up in 2 days
- * 5996125: 01/24/2023 : Please refill item CH0070 Eye Drops .Only 0 left.Order Quantity: 30
- * 6008843: 01/24/2023 : Please refill item CH0202 vitamins .Only -8 left.
- * 5723274: 01/24/2023 : Please refill item CH0252 Office Visit .Only 5 left.Order Quantity: 3
- * 4530853: 01/24/2023 : Please refill item CH0023 Roll-on (2 pack) .Only -3 left
- * 5569009: 01/24/2023 : Please refill item CH1234 Training Test Castro .Only -4
- * 6149188: 01/24/2023 : Please refill item CH1178 Centrum Silver .Only 3 left.
- 01/22: 6149188: 01/22/2023 : Please refill item CH1178 Centrum Silver .Only 3
- * 5996125: 01/22/2023 : Please refill item CH0070 Eye Drops .Only 0 left.Order Quantity: 30

Quick Links:

- Schedule
- Document and Bill
- Check-in Kiosk
- Prov Room Kiosk
- Provider Workbench
- Patient Comms
- Tasks

Tracking Table:

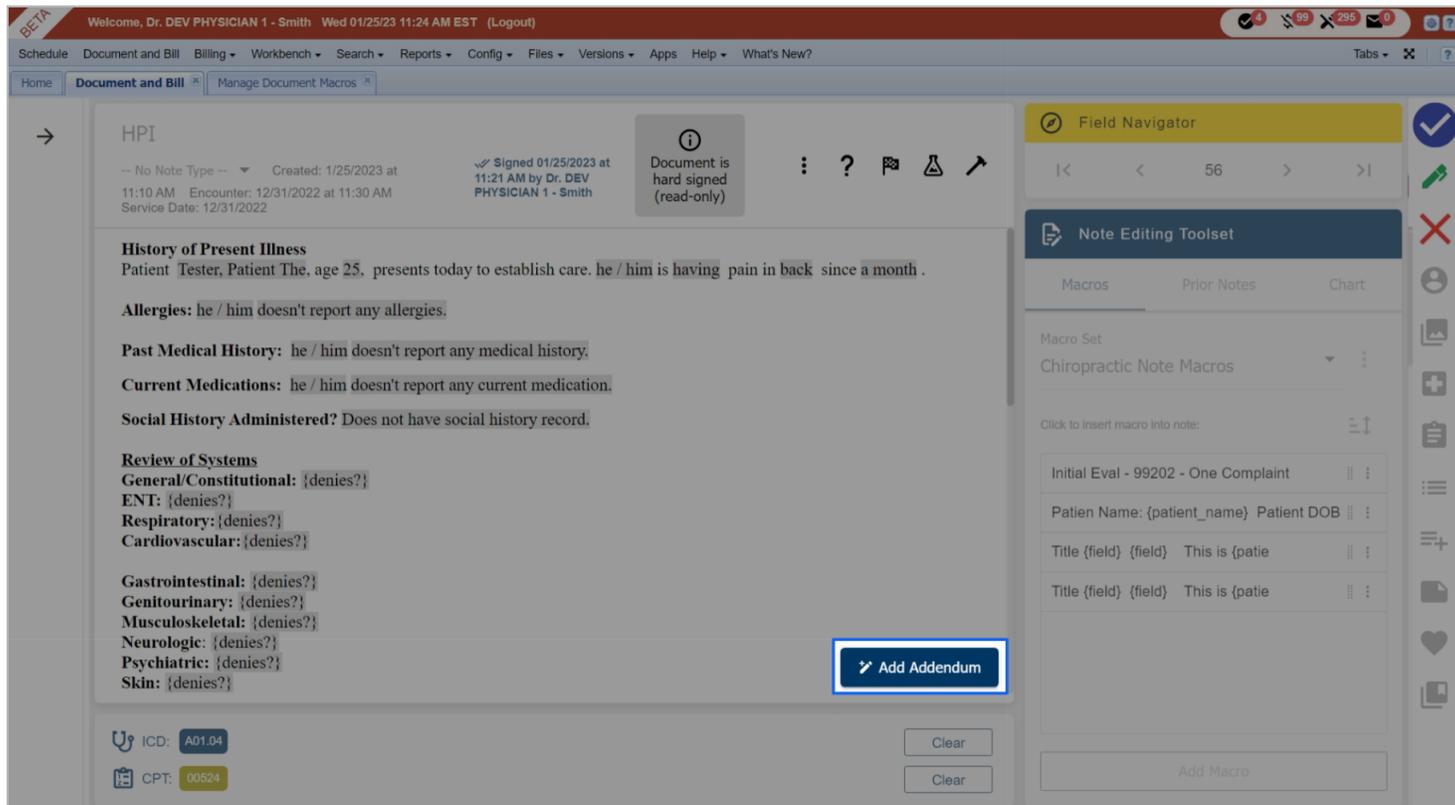
	Mine	Owed	Team
Open	4	113	5
Pending	0	1	1
Closed	0	0	0
Discarded	0	0	0

This new feature can be found by:

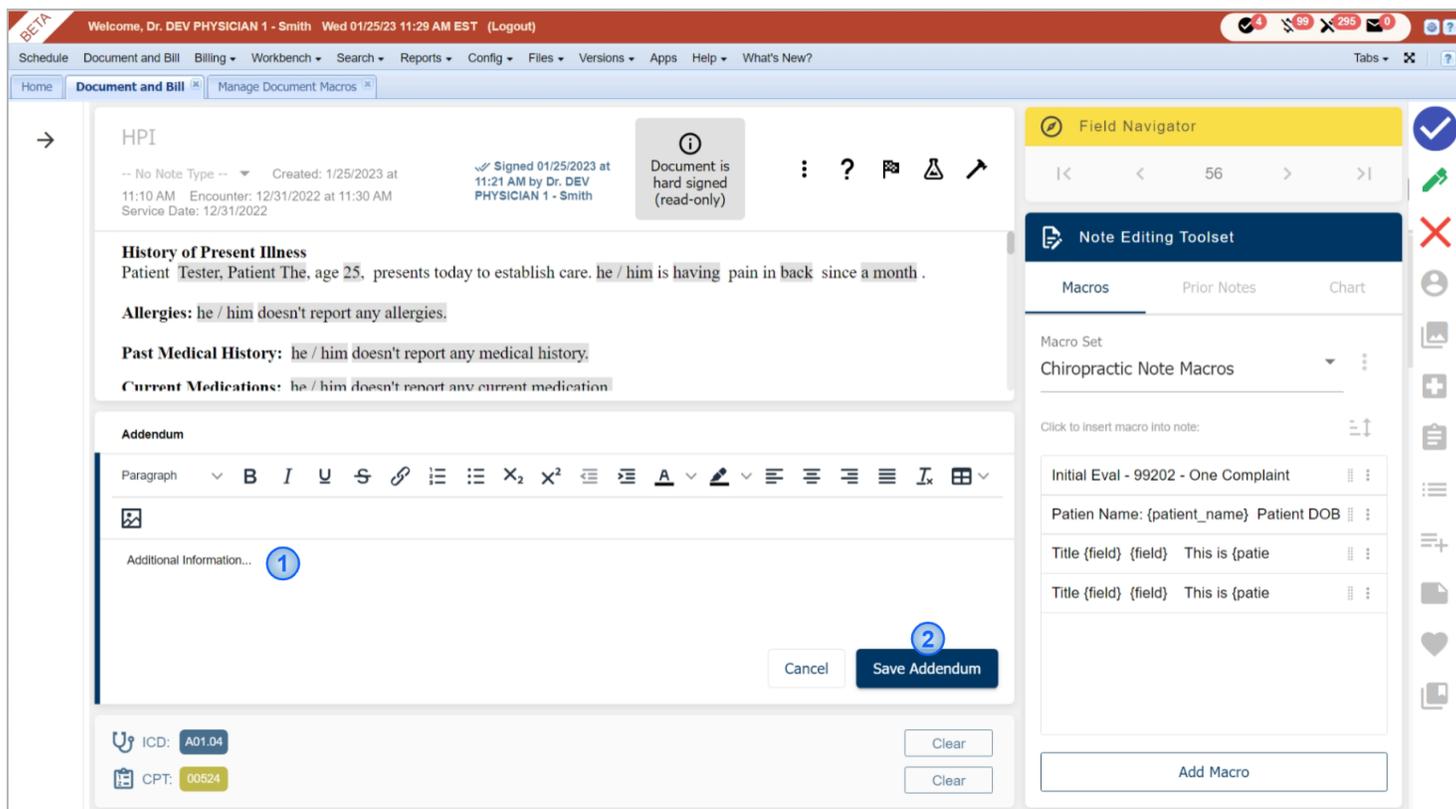
1. Clicking **Config**
2. Hovering over **Practice**
3. Hovering over **Documentation**
4. Clicking **Manage Document Macros**

New Add Addendum Option

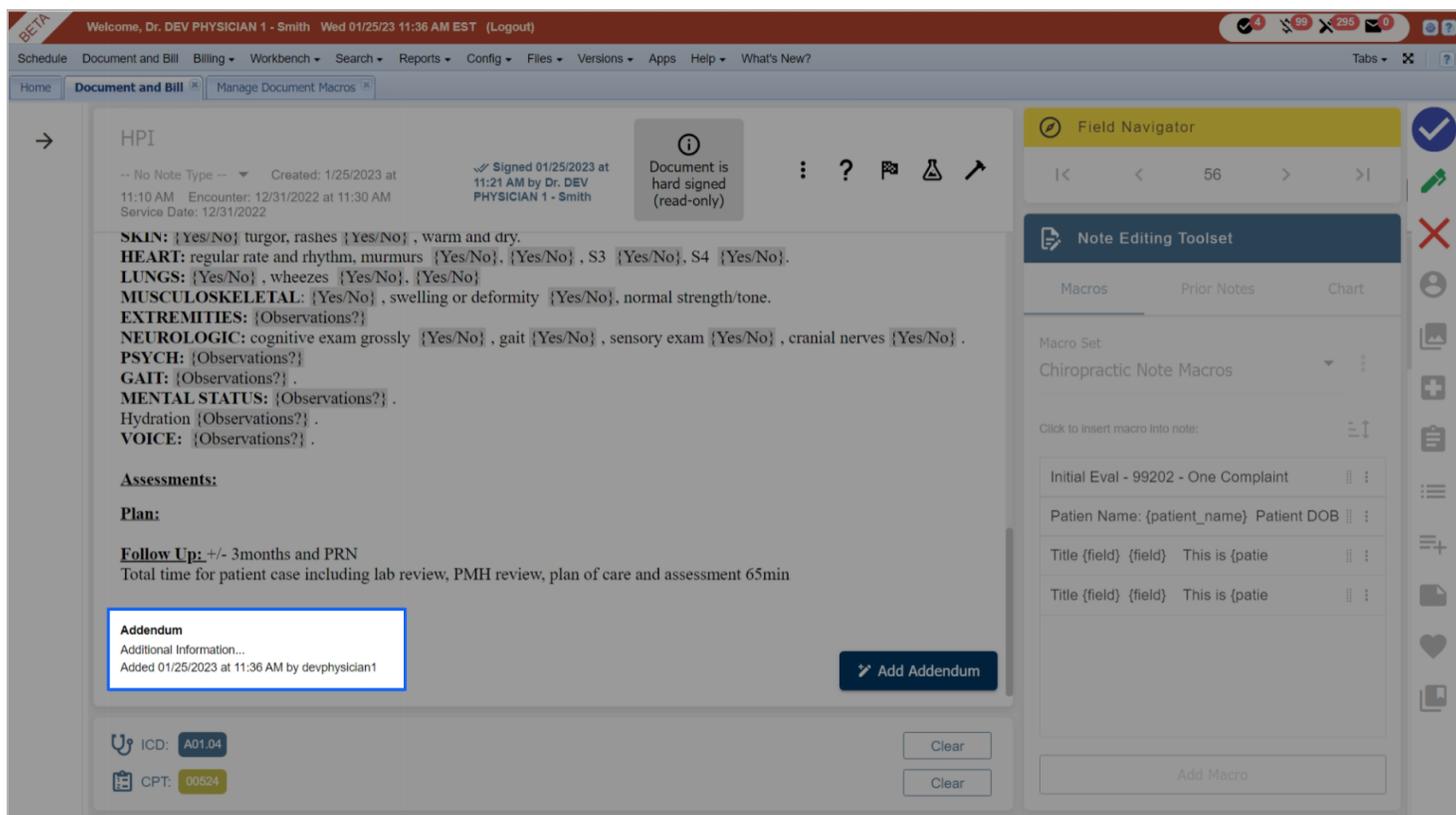
A new option is available at the bottom of the signed-off note, which is the **Add Addendum** button, this allows the provider to add additional information to be added without un-signing the original note.



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.