



Release Notes include New Features, Enhancements, and Fixes.

Internal users can use the ISSUE code to view the original Issue in JIRA.

External users can use the menu path in the DESCRIPTION to navigate to the page (screen) of the software application where the change was applied.

NEW FEATURES	
ISSUE	DESCRIPTION OF THE NEW FEATURE
MM-543	<p><b>Vitals - Print.</b> The <b>Print</b> function is available to print Vitals for a selected Client filtered by Date range, and includes the name of each User who made the Vital Signs entries.</p> <p><b>Benefit:</b> This user log enhances the accountability of the Vital Signs recorded for a Client.</p>
MM-93	<p><b>Client General Information - Referrer.</b> An audit log shows the User who added a New Contact Referrer to the General Information recorded for a Client.</p> <p><b>Benefit:</b> This user log enhances the accountability of the Contact Referral recorded for a Client.</p>
MM-212	<p><b>Client Vitals - CIWA Scale.</b> The Client Vital Signs includes a CIWA Scale (Clinical Institute Withdrawal Assessment for Alcohol) that measures and assesses the alcohol withdrawal of a Client.</p> <p><b>Benefit:</b> This enhances the scope of Vital Signs that can be recorded for a Client.</p>
MM-548	<p><b>Calendar.</b> The Schedule and Groups Page have been combined into a single Calendar Page. All the existing features have been retained and new features added such as:</p> <ul style="list-style-type: none"> <li>• Editing recurring appointments</li> <li>• Enhanced Search capabilities</li> <li>• Enhanced Filtering</li> </ul> <p><b>Benefit:</b> This enhances the user’s ability to create/edit/view/print a complete schedule for the facility, Provider or client and eliminates using multiple calendars for scheduling</p>
MM-901	<p><b>Calendar – Recurring Appointments.</b> The implementation of recurring appointments has been greatly improved, including:</p> <ul style="list-style-type: none"> <li>• Complex recurrence patterns (daily, weekly, monthly, yearly)</li> <li>• Batch operations for create, edit, and delete</li> <li>• Consistent behavior across Blocks, individual patient meetings and group sessions</li> <li>• Ability to search, filter, view, create, edit and delete recurring series from one Calendar</li> </ul> <p><b>Benefit:</b> Seamless integration of recurring meetings with Calendar for Practice Management.</p>
MM-551	<p><b>Calendar – Block Schedule.</b> Time slots can be blocked for Providers or groups of providers to indicate non-appointment or non-working hours (i.e. lunch). This blocked time slots will prevent other appointments from overlapping those times.</p> <p><b>Benefit:</b> Prevents booking a provider for at a time when they are not scheduled to be with a client.</p>



## ENHANCEMENTS

ISSUE	DESCRIPTION OF THE ENHANCEMENT
MM-707	<b>Logout Confirmation.</b> When a user clicks the logout button, a confirmation dialog will be displayed <b>Benefit:</b> Reduces accidental logout action by the user
MM-680	<b>Patient Name in Dialogs.</b> The Patient Name appears in the title bar of all dialogs to identify the Patient where the data is being affected. <b>Benefit:</b> This eliminates user error when entering medications for multiple Clients.
MM-866	<b>MAR Patient Medication Log – Status Column.</b> The status if the medication is displayed in the grid when the filter is set to show all statuses <b>Benefit:</b> This allows the user to quickly see the status of a MAR
MM-566	<b>MAR Patient Medication Log - Medication Time Windows.</b> The assigned Time Window allows the user to Administer or Observe and record the medication for a patient within a specific timeframe before or after the designated time without triggering a late or missed alert, and provides a red text highlight to show that the Administration/Observation occurred outside the designated Time Window. <b>Benefit:</b> More flexibility in documenting the MAR when multiple patients are being treated. Better tracking of Administration/Observation times.

## FIXES

ISSUE	DESCRIPTION OF THE FIX
MM-996	<b>General Display improvements.</b> Some fields have been resized to display more data that is entered by the user; in some cases, very long comments had led to issues with fields running over or dialog boxes not properly resizing.
MM-1041	<b>General Performance improvements.</b> The performance of the software has been improved in the area of Calendar functionality to resolve ad hoc freezing.
MM-427	<b>Schedule - Edit Recurring Appointment.</b> Path: Calendar > Appointment > Recurrence (button) > Recurrence (dialog). A user has the option to edit a single instance of a recurring appointment or the



FIXES	
ISSUE	DESCRIPTION OF THE FIX
	entire series. Note: This edit does not change appointments that have already occurred, which require manual editing.
MM-391	<b>Client Current Diagnosis.</b> Path: Client (selected) > Dashboard > Current Diagnosis (panel) > Display History (link) > Edit Diagnosis (dialog) > Status (Active/Inactive). Changing the Status (Active/Inactive) of a Current Diagnosis no longer requires a search and selection.
MM-439	<b>Labs/Imaging - Results.</b> Path: Client (selected) > Labs/Imaging. Lab results from another laboratory can be imported using the <b>Import Lab Results</b> button.
MM-497	<b>Client Insurance.</b> Path: Client (selected) > Insurance. The <b>Insurance Provider</b> field is now labeled <b>Insurance</b> on the <b>Primary, Secondary</b> and <b>Tertiary</b> view.
MM-554	<b>Insurance - Edit Primary.</b> Path: Groups > Group Session (selected) > Edit Group Session (dialog). The user can select a different <b>Plan Type</b> ; e.g. change <b>Private</b> to <b>Self Pay</b> without an error.
MM-583	<b>Groups - Edit Group Session.</b> Path: Calendar > Group Session (selected) > Edit Group Session (dialog). Misspelled words in Group Notes and Client Notes appear with a red underline. A right-click opens a list of suggested words for selection.
MM-623	<b>Schedule - New Appointment.</b> Path: Calendar > New Appointment (button) > Appointment (dialog) > Minimize (button). The user can minimize the New Appointment dialog and the secondary (slide-out) window that displays Client details also minimizes.
MM-624	<b>Patient Search.</b> Path: Clients > Search (Patient Name, Record Number, DOB, SSN) Types, Facilities, Status (Current, Pre-Ad, Discharged). From the Clients page, the user can search for a Client by Patient Name, Record Number, DOB, SSN, Level of Care Type, Facility, and/or Status (Current, Pre-Ad, Discharged).
MM-626	<b>Groups - Group Session Signature.</b> Path: Calendar - New Group Session. The <b>Signature</b> box for a Group Session closes after the signature is entered.
MM-627	<b>New Group Session - Recurrence Options.</b> Path: Calendar - New Group Session > Recurrence (button) > Recurrence Options (dialog). A red circle indicates a required field. Once an entry is made, the indicator then disappears.
MM-640	<b>New Data Report.</b> Path: Reporting > New Data Report (button) > New Data Report (dialog). Archived clients are not included in reports and data from archived clients are not available in a New Data Report with selected Tables and SQL Views.
MM-710	<b>Recurrence Pattern.</b> Path: Calendar. The misspelled dropdown <b>Day</b> option (Forth) is now corrected (Fourth).



#### FIXES

ISSUE	DESCRIPTION OF THE FIX
MM-329	<b>Calendar.</b> When toggling between sections of the calendar, the system will remember the last filters that were set by the user.
MM-850	<b>Schedule.</b> Path: Calendar > Appointment (Calendar). Appointment status on a scheduled appointment appears only after the appointment is saved and the page is refreshed.
MM-878	<b>Group Leader.</b> The Group leader filter now displays only those users with associated schedules
MM-1013	<b>Calendar Time-Out.</b> Selecting All Providers on the calendar will no longer time out the system

#### KNOWN ISSUES

ISSUE	DESCRIPTION OF THE KNOWN ISSUE
MM-584	<b>Labs/Imaging - Results.</b> Path: Client (selected) > Labs/Imaging. Uploaded Lab Results and Forms should be editable. (Related to MM-439 Importing Lab Results)
MM-687	<b>Schedule - Recurring Block.</b> Path: Calendar > New Block > Recurrence (button) > Recurrence Options (dialog). An office can block multiple recurring schedules for a selected time for one or more days in a row.
MM-881	<b>MAR Log.</b> Path: Client (selected) > Medications > MAR Log (button) > MAR Patient Medication Log for <Selected Client>. The Status color highlight on an entry shows only on the <b>Schedule Date</b> and <b>Time</b> cell of the most recent entries if the user switches the <b>Status</b> filters ( <b>Complete, Incomplete</b> and <b>All Status</b> ) for the current view.
MM-313	<b>Schedule - Print.</b> Printing weekly schedules are available for individual Providers only.