Physician Office
Release Notes – Version 41.0

This document provides an overview of the enhancements included in the targeted June 27, 2010 launch of Physician Office. For additional information on a specific feature or screen, click “Help” on the menu bar on any screen in Physician Office or visit the Covisint ProviderLink Support site at: https://portal.covisint.com/web/supporthc/physicianoffice.

Patient Documents – New Features

The *Patient Documents* area is used to view and print patient documents stored in folders conveniently located on the Patient Dashboard for easy access. Two new features included in this release are the ability to drag and drop documents from one folder to another folder and the sort order is now displayed newest to oldest create date.

To move a document from one folder to another:

1. Go to the *Patient Document* area on the *Patient Dashboard*.
2. In the *Name* column, click on the *document* you want to move and drag to the intended folder.
    a. The document will have icon showing that it is not in the selected folder. (see *Figure 1*) When the icon displays you can unclick. The document will now be in that folder. (see *Figure 2*)
    b. The sort order of the documents in the folders is now by newest to oldest create date.

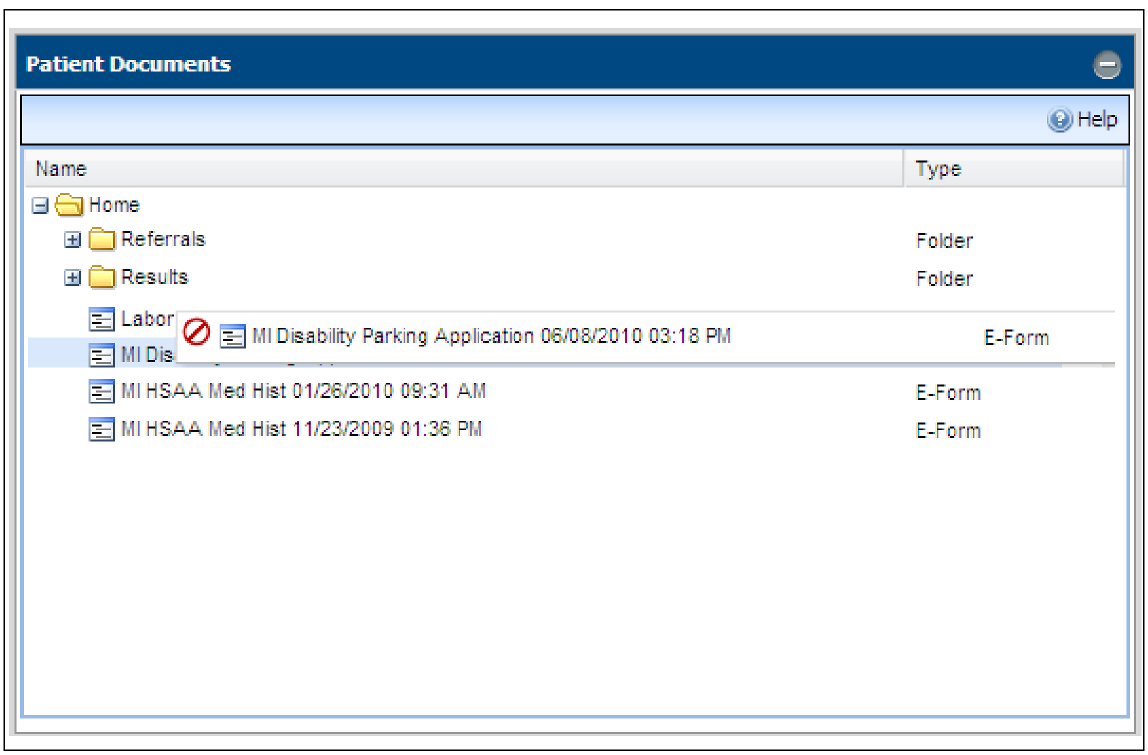

Figure 1– Patient’s Documents option – drag eForm to a folder

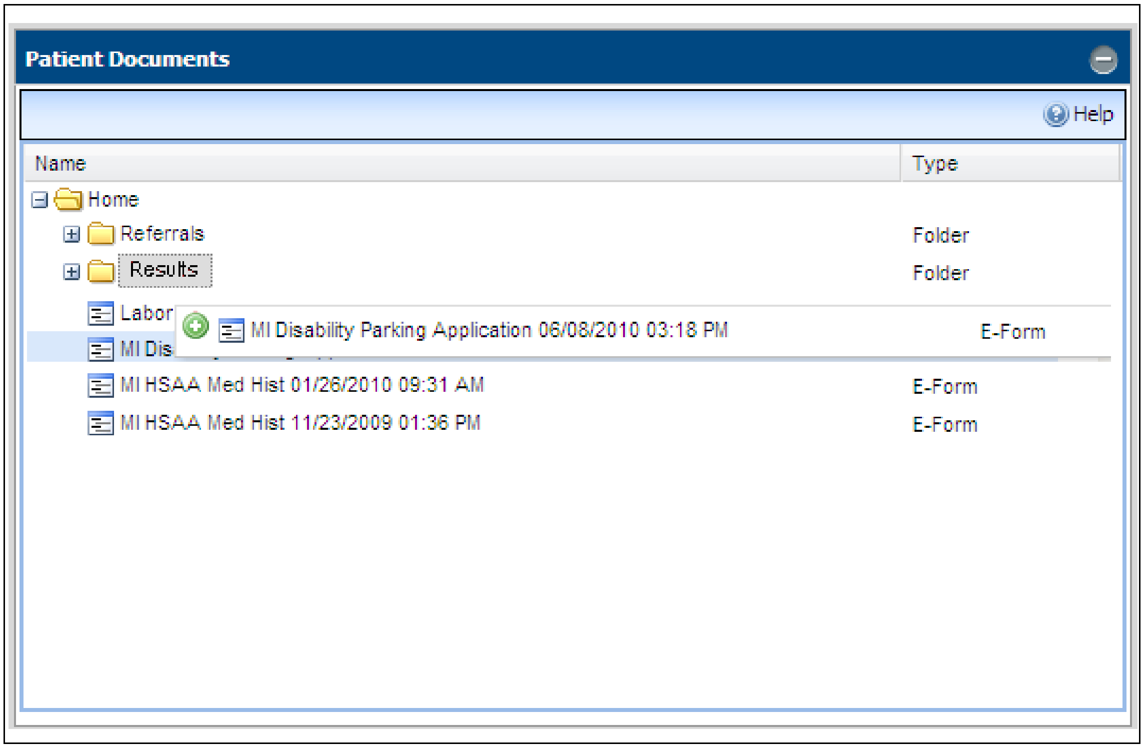

Figure 2 – Patient's Documents – drop eForm into a folder

Complete and Send a Form Wizard: Save form warning message

In this release, when you click **Exit** at any point in the wizard, a warning message will advise you that the form will not be saved if you exit the wizard. The selected eForm will not be saved until you click **Finish** on the *Wizard Summary* screen. This will avoid having incomplete documents stored in *Patient Documents.*

To see the changes:

1. On the *Patient Demographics* portlet, click **Actions** on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click the **Complete a Form to Send** option. The *Choose a Form* screen displays.
    a. On the *Choose a Form* screen, select an e-Form and click **Next** at the bottom of the screen. The *Complete Form* screen displays.
    b. Complete the e-Form and click **Exit** at the bottom of the screen. The confirmation message displays and click **Yes**.
3. On the *Patient Documents*, note that the selected eForm was not added if you exit the Wizard prior to completing the eForm.

Choose Attachment: File Name restriction

In this release, on the *Choose Attachment* screen, if a document or file name is greater than 64 characters; a new error message will be displayed. The file or document name will need to be modified and re-attached.

To see the changes:

1. On the *Patient Demographics* portlet, click **Actions** on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click the **Complete a Form to Send** option. The *Choose a Form* screen displays.
    a. On the *Choose a Form* screen, select an eForm and click **Next** at the bottom of the screen. The *Complete Form* screen displays.
    b. Complete the eForm and click **Next** at the bottom of the screen. The *Choose Recipient* screen displays.
    c. Select a **recipient** and click **Next** at the bottom of the screen. The *Choose Attachment* screen displays.
3. On the *Choose Attachment* screen, click the **My Computer** tab.
4. On the *My Computer* screen, click the **upload** icon. The *Choose File* pop-up window displays.
5. Using the *Choose File* window, select the document.
6. Click the **Open** button. The *Choose file* window closes. The selected document displays in the *Attachment* field.
7. Click the **Save** button. The file begins to be loaded, an error message displays. (see *Figure 3*).

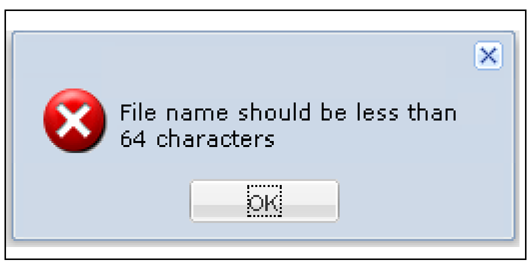

Figure 3 – Choose Attachment – File upload error

Choose Attachment: Patient Documents- new sort order

In this release the *Choose Attachment- Patient's Documents tab*, the sort order of the documents is now in newest to oldest by create date of the document. This allows you to quickly find documents that have been recently received or created.

To see the changes:

1. On the *Patient Demographics* portlet, click **Actions** on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click the **Complete a Form to Send** option. The *Choose a Form* screen displays.

a. On the *Choose a Form* screen, select an e-Form and click **Next** at the bottom of the screen. The *Complete Form* screen displays.

b. Complete the e-Form and click **Next** at the bottom of the screen. The *Choose Recipient* screen displays.

c. Select a **recipient** and click **Next** at the bottom of the screen. The *Choose Attachment* screen displays.

3. On the *Choose Attachment* screen, click the **Patient's Document** tab.

4. On the *Patient's Document* screen, click the **sign** to display the documents within a folder. (see *Figure 4*).

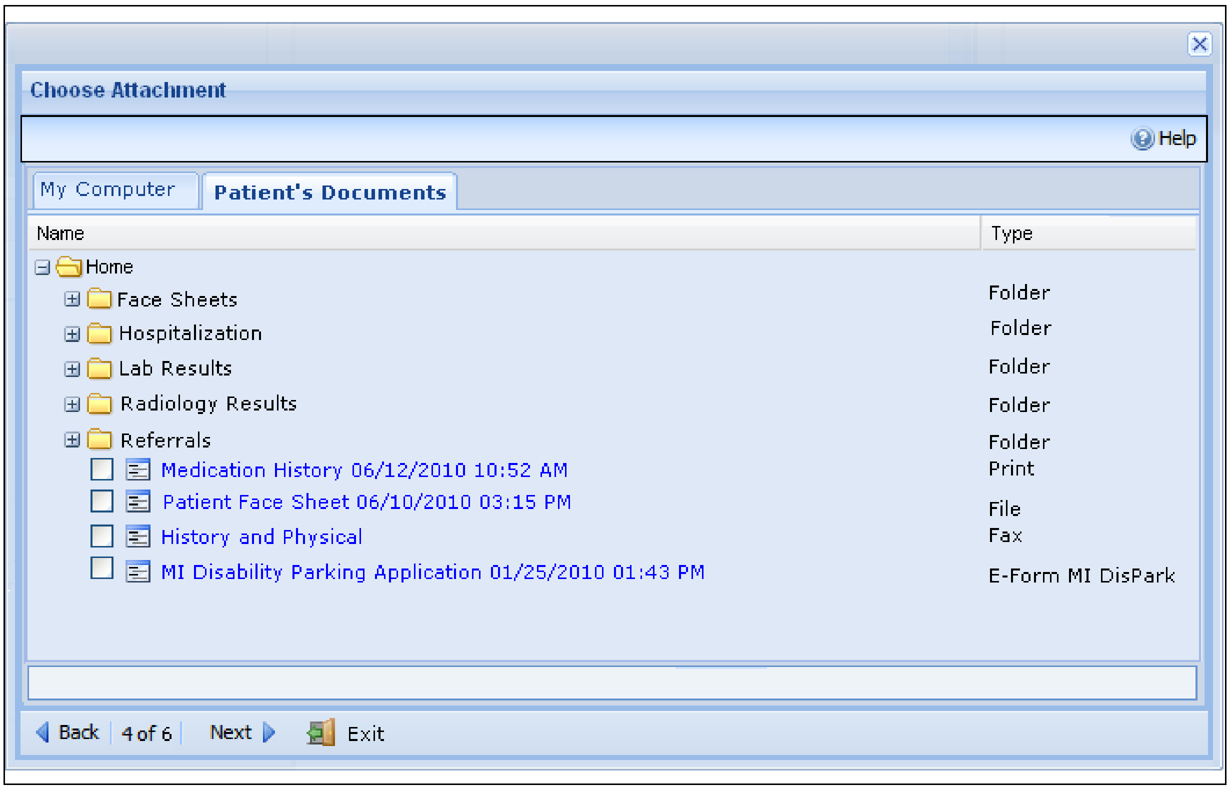

Figure 4 – Choose Attachments - Patient's Documents

Summary : Finish Button moved

In this release, on the *Summary* screen, the **Finish** button has been moved from the top menu bar to the bottom menu bar to the right of the **Next** button.

To see the changes:

1. On the *Patient Demographics* portlet, click **Actions** on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click the **Complete a Form to Send** option. The *Choose a Form* screen

displays.

a. On the *Choose a Form* screen, select an e-Form and click **Next** at the bottom of the screen. The *Complete Form* screen displays.

b. Complete the eForm and click **Next** at the bottom of the screen. The *Choose Recipient* screen displays.

c. Select a **recipient** and click **Next** at the bottom of the screen. The *Choose Attachment* screen displays.

d. Attach a document and click **Next** at the bottom of the screen. The *Summary* screen displays.

3. On the *Summary* screen, note the new placement of the **Finish** button at the bottom of the screen just to the right of the **Next** button. (see *Figure 5*).

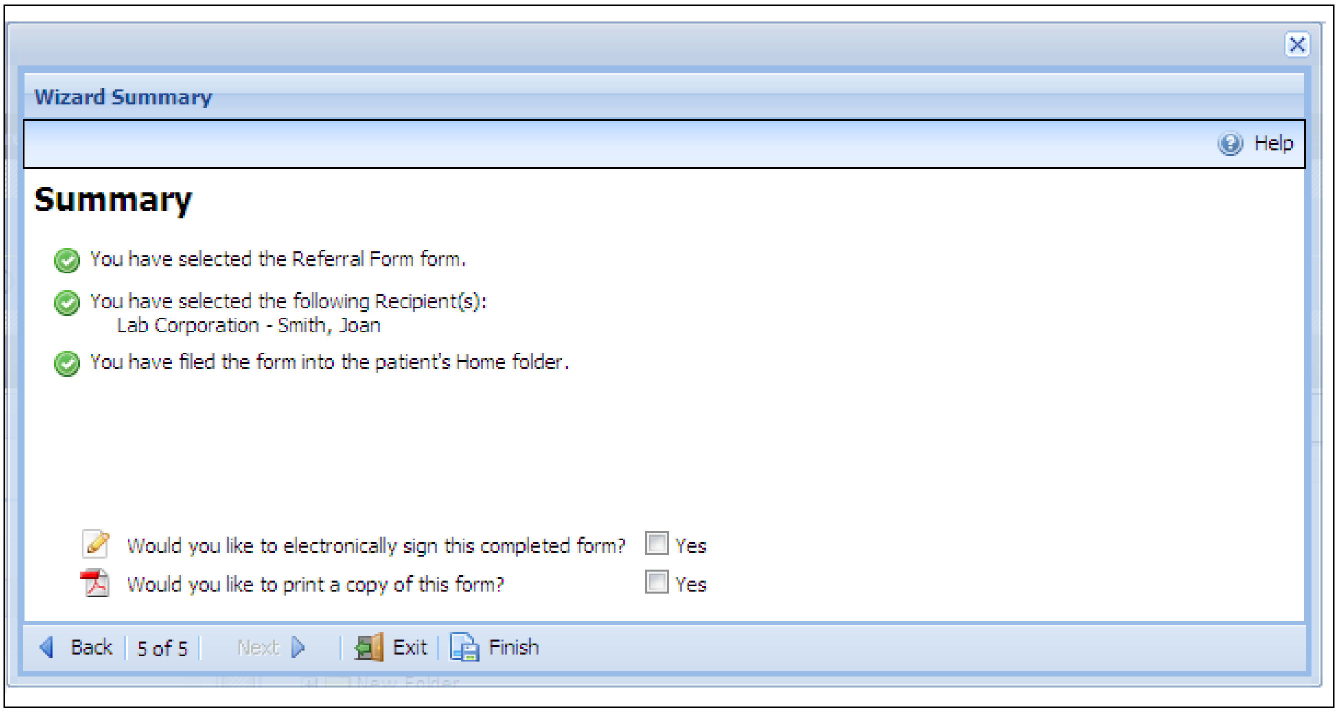

Figure 5 – Wizard Summary – Finish button

eForms Folders: New sorting order

In this release, the eForm Folders are now sorted in alphabetical order. This allows you to quick locate and access the type of eForm you need to complete.

eForm Folders are accessed from the following:

- **Actions > Print a Blank Form > Choose a Form**
- **Actions > Complete a Form > Choose a Form**

- **Actions > Complete a Form To Send > Choose a Form**
- **Actions > Administration > Forms > Forms Administration (Administrators ONLY)**

eForms – Save Default feature

Administrators have access to the Save Default option, which is used to enter and save default field values on an eForm or to change the values in auto populated fields. For example, the feature can be used to create a default office phone number or address on an eForm. Entering default values can save time and reduce entry errors.

In this release, when the administrator clicks on *Save Defaults* the window will close instead of having a blank screen.

To create default field values on an eForm (Administrators ONLY):

1. On the *Patient Demographics* portlet, click **Actions** on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click **Administration > Forms**. The *Forms Administration* screen displays.
3. On the *Forms Administration* screen, select the eForm by clicking on the **name** of the eForm. The *Form Viewer* screen displays.
4. On the *Form Viewer* screen, enter a **default value** in the fields to be auto populated when a user completes the eForm.
5. Click **Save Defaults** on the top left of the *Form Viewer* screen.
    a. The eForm with the changes will be saved and the window will close automatically.

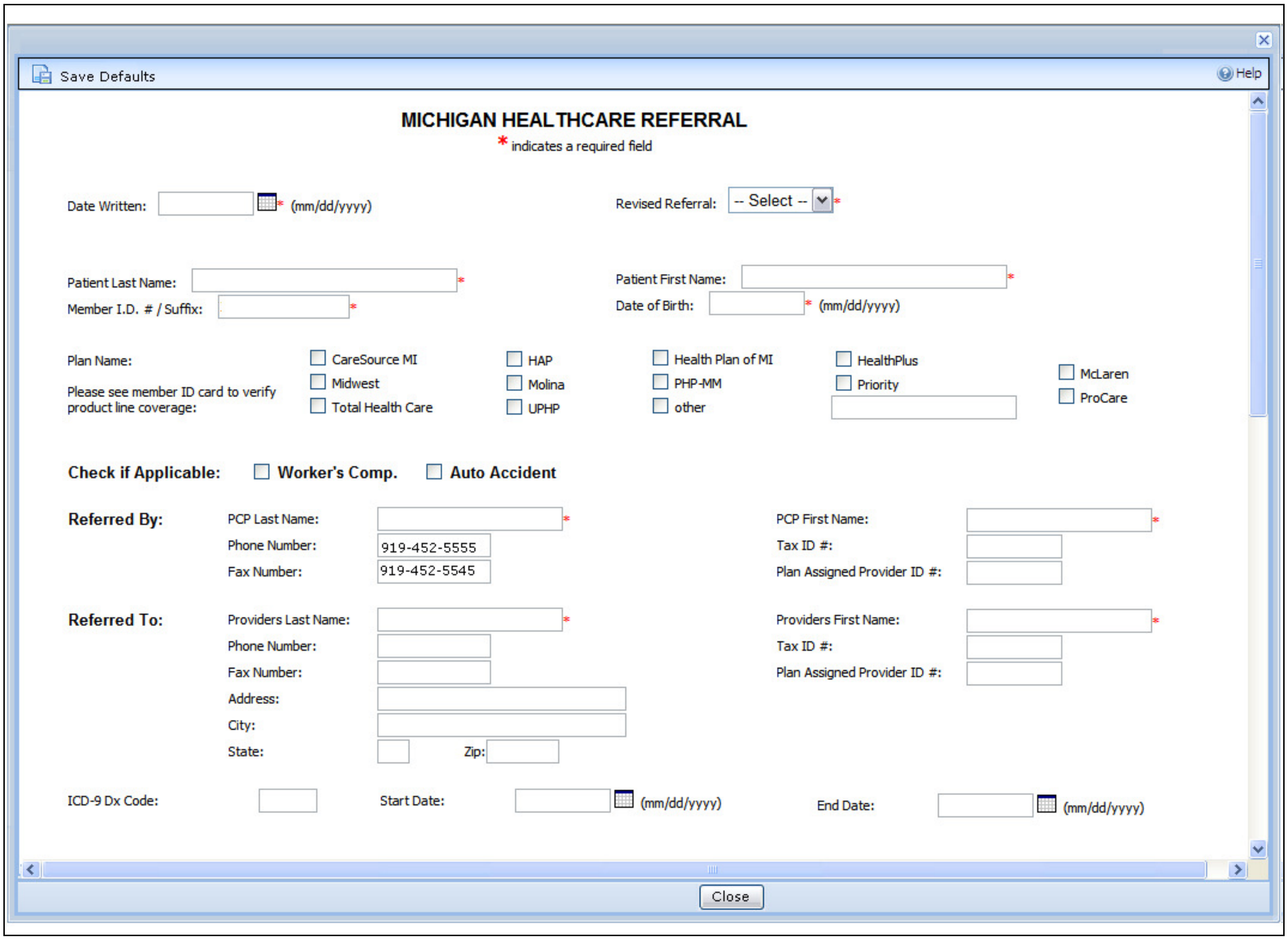

Figure 6 – Administration – Save Defaults

Forms & Contact Searches: New error message

Administrators have access to the Forms Administration and Contact Administration options. Administrators can search for eForms to add to Folders or Contacts to add to Groups. The search fields have a new error message when { } [ ] \ " ~ ' | % are entered in any field. These characters are not allowed.

To view the error messages when adding an eForm to Form Folder (Administrators ONLY):

1. On the *Patient Demographics* portlet, click Actions on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click **Administration > Forms**. The *Forms Administration* screen displays.
3. On the *Forms Administration* screen, select the Icon. The *Add Forms* screen displays.
4. Enter into Form Name field **LA Medicaid {CF02.** The error icon will display at the end of the field.
    a. If you place your curser over the to see the " { } [ ] \ " ~ ' | % are not allowed" message. (see

Figure 7)

5. Re-enter into *Form Name* field **LA Medicaid PCF02.** Click **Find** and the search results will appear.
6. Click **checkbox** to select one or more contacts to add to the group. Click **Save** and the *Add Contacts* screen will close.

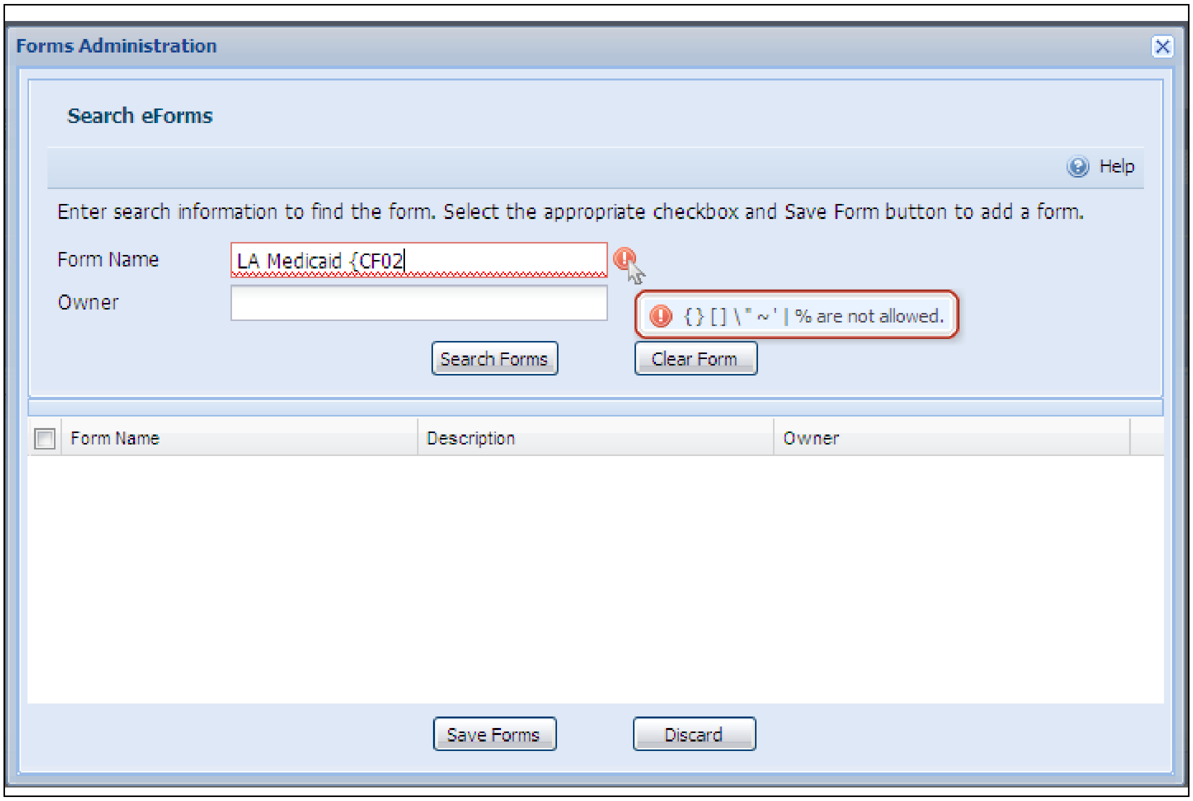

Figure 7 – Form Administration – Add Form error message

To view the error messages when adding a Contact to a Group (Administrators ONLY):

1. On the *Patient Demographics* portlet, click Actions on the menu bar. A drop-down list displays.
2. On the *Actions* drop-down list, click **Administration > Contacts**. The *Contact Administration* screen displays.
3. On the *Contact Administration* screen, select the Icon. The *Add Contacts* screen displays.
4. Enter into *Facility Name* field **Pep[ers.** The error icon will display at the end of the field.
   a. If you place your curser over the to see the "{ } [ ] \ " ~ ' | % are not allowed" message. (see *Figure 8*)
5. Re-enter into *Facility Name* field **Peppers.** Click **Find** and the search results will appear.
6. Click **checkbox** to select one or more contacts to add to the group. Click **Save** and the *Add Contacts* screen will close.

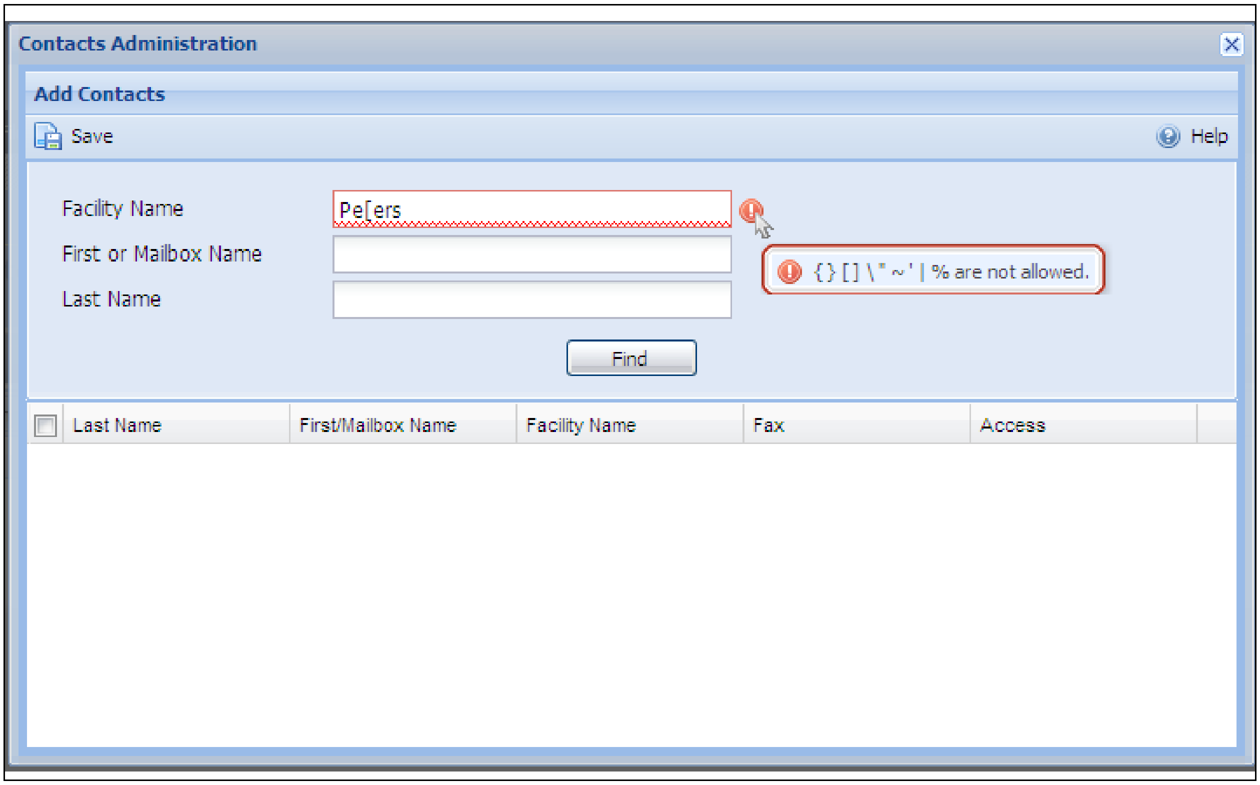

Figure 8 – Contact Administration – Add Contact error message