Added Features

- **Appointment List –** A new Appointment List, time filtered option has been created when filtering patients by appointments. See Figure 1. When this option is selected, the appointments will be listed, for the selected provider, based on the current time (on the server), along with those appointments since the beginning of the previous hour. For example, if the current time is 10:50 AM and the Appointment List, time filtered option is selected for a particular provider, the appointment list will begin with appointments with a start time of 9:00 AM (current time, as well as those appointments at the beginning of the previous hour).

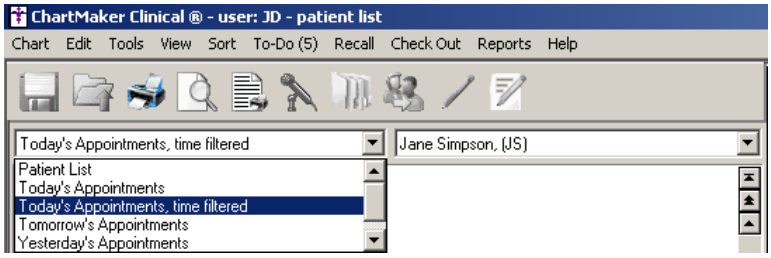


Figure 1– Appointment List, time filtered

- **ChartMaker® Patient Portal –** The system has been updated so that you can send a message from the Clinical application to the ChartMaker® Patient Portal for a patient. When in a patient's chart, click To-Do > New Patient Portal Message. The menu item will be disabled unless the user is in a patient chart, they have at least chart write access, and the patient is registered on the ChartMaker® Patient Portal. On the new message dialog, the save options are disabled/enabled based on user chart permissions. See Figure 2.

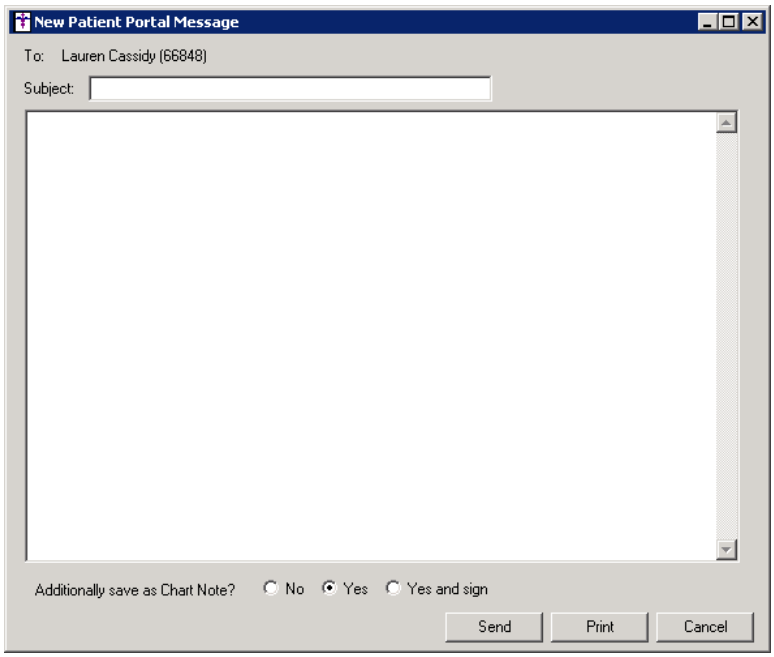


Figure 2 – New Patient Portal Message

- **ChartMaker® Patient Portal –** The system has been updated to track when a patient views, downloads, and transmits their health information to be able to adequately calculate this data for applicable Meaningful Use measures and requirements.

- **ChartMaker® Patient Portal –** The system has been updated to track when a message received is either a Refill Request or Health Question to be able to adequately calculate this data for applicable Meaningful Use Stage 2 measures and requirements. Likewise, if a provider NPI number attached to the message does match any in the system a warning message is sent to the To-Do List of the recipients in the message indicating the mismatch.

Added Features (continued)

- **Doctor's Orders & Procedures – Send Charges –** To allow you to view and process pending charges more efficiently, the program has been updated to include the Insurance IH Code when sending pending charges to the Practice Manager application.

- **The Facesheet –** The program has been updated so that whenever a Facesheet layout changes are made, and the Facesheet preference is set to Personal, those changes will only be saved after the OK button is clicked in the modification dialogs when making an addition, change, or deletion to a face sheet section.

- **Face Sheet – Referrals –** The Facesheet has been updated with Referrals section that will display any referral information pertaining to the patient that was configured via the Referral button. See Figure 3.

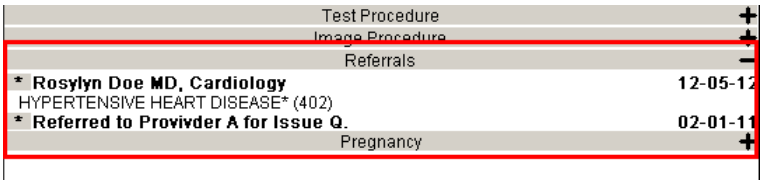


Figure 3 – Face Sheet Buttons

By clicking the* button next to the referral entry you can view detailed referral information as well as print the referral. See Figure 5.

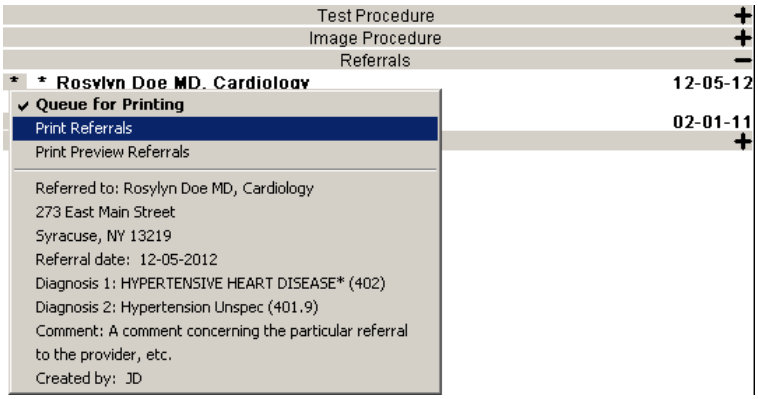


Figure 5 – Face Sheet Buttons

- **Face Sheet – Recalls –** The Facesheet has been updated so that patient recalls, along with physician reminders, will now appear in the Recalls section of their facesheet. See Figure 6.

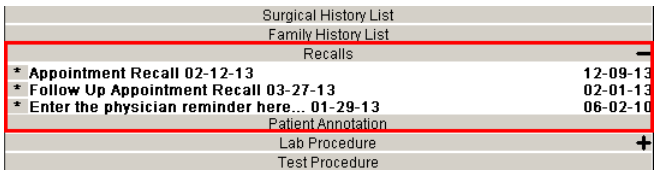


Figure 6 – Facesheet

By clicking the* button next to the recall/physician reminder entry you can view detailed recall/physician reminder information as well as fulfill that recall or physician reminder. See Figure 7.

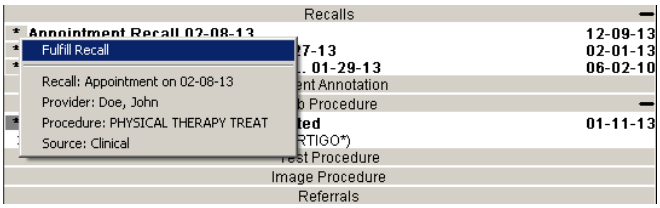
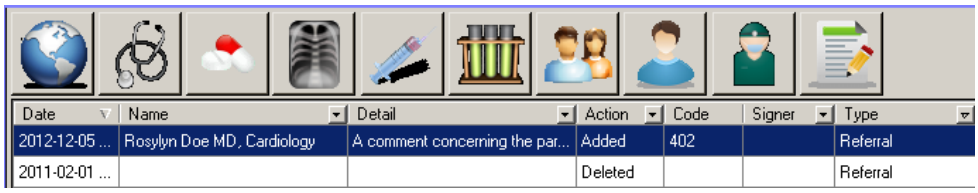


Figure 7 – Facesheet Buttons

- **The Health Portal –** The Health Portal has been updated to Directories 4.4 to support Scripts 10.6 requirements.

Added Features (continued)

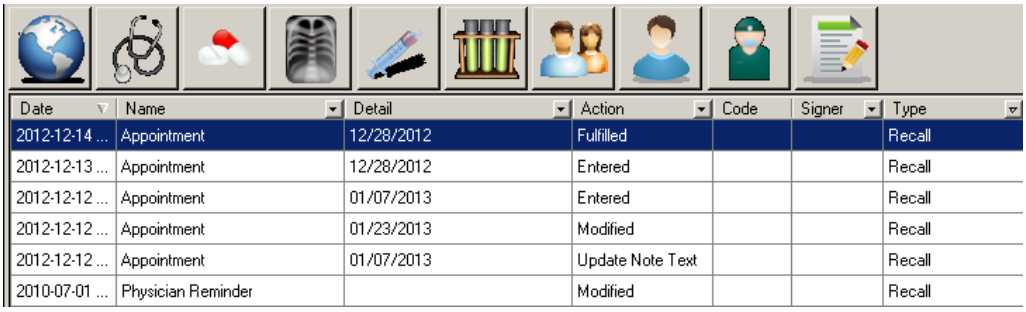
- **The History Tab – Referral –** The History tab has been updated to display referral information whenever a referral is added, modified, deleted, or completed (ended). See Figure 8.



Date	Name	Detail	Action	Code	Signer	Type
2012-12-05 ...	Rosylyn Doe MD, Cardiology	A comment concerning the par...	Added	402		Referral
2011-02-01 ...			Deleted			Referral

Figure 8 – History Tab – Referrals

- **The History Tab – Recalls –** The History tab has been updated to display recall and physician reminder information whenever a recall/physician reminder is added, modified, deleted, or fulfilled. See Figure 9.



Date	Name	Detail	Action	Code	Signer	Type
2012-12-14 ...	Appointment	12/28/2012	Fulfilled			Recall
2012-12-13 ...	Appointment	12/28/2012	Entered			Recall
2012-12-12 ...	Appointment	01/07/2013	Entered			Recall
2012-12-12 ...	Appointment	01/23/2013	Modified			Recall
2012-12-12 ...	Appointment	01/07/2013	Update Note Text			Recall
2010-07-01 ...	Physician Reminder		Modified			Recall

Figure 9 – History Tab – Recalls

- **Import Documents –** The system has been updated with the ability to import each of the 8 document types of a Consolidated CDA into Clinical (Continuity of Care Document [CCD], Consultation Note, Diagnostic Imaging Report, Discharge Summary, History & Physical Note, Operative Note, Procedure Note, and Progress Note) per ARRA2014 requirements.

- **Meaningful Use – Stage 2 – LOINC Data –** The system has been updated to use Version 2.4.0 LOINC data when updating and when mapping codes via the Code Mapper (Tools >Code Mapper) per Meaningful Use Stage 2 requirements.

- **Meaningful Use Dashboard –** The Meaningful Use Dashboard has been updated so that when calculating meaningful use measures and objectives for 90 days or greater, a dialog will appear providing information and a link to the CMS website about meeting Meaningful Use Objectives, as well as reminding you to print the report if you are using these results for Meaningful Use Attestation. See Figure 10.

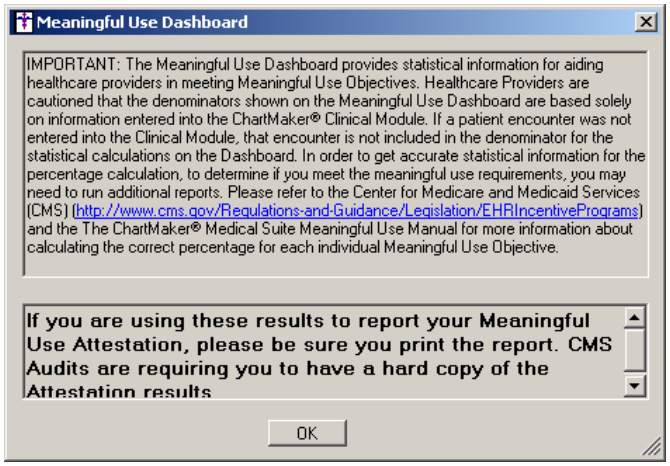


Figure 10 – Meaningful Use Dashboard Warning

- **The Note Tab – Chart Header –** The Chart Header has been updated with a Facility drop-down field. See Figure 11. The Facility drop-down will contain all facilities in the system. If a case is selected using the case field, the facility field will default the facility for that case (if one exists). If a facility exists on the note and the send charge dialog is opened, the facility is set to the facility on the note.

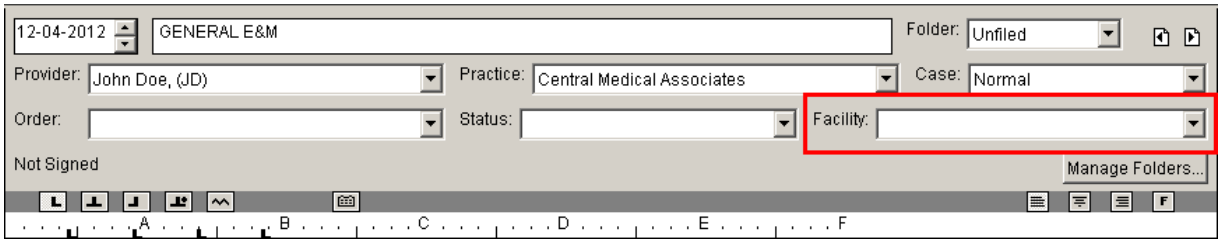


Figure 11 – Note Tab – Chart Header

- **The Note Tab – Recall/Physician Reminders –** The program has been updated with the ability to enter patient recall and physician reminder information for patients via the Recall/Physician Reminders button. See Figure 12.

Figure 12 – Recall/Physician Reminder Button

Once the Recall/Physician Reminders button has been clicked the Patient Recalls and Physician Reminders dialog will appear allowing you to enter and maintain patient recall and/or physician reminders. See Figure 13.

When recall/physician reminder information is entered in the chart note you have the ability to determine if that will information will appear in list or paragraph format in the note. When a new recall or physician reminder is entered in the Clinical application, a new To-Do List entry will be sent to the applicable provider. Likewise, the recall/physician reminder information will also appear in the Face Sheet under the Recalls section, where you have the ability to view and fulfill the recall or physician reminder. All recall and physician reminder entries and modifications are tracked in the History tab as well as in the Audit Trail.

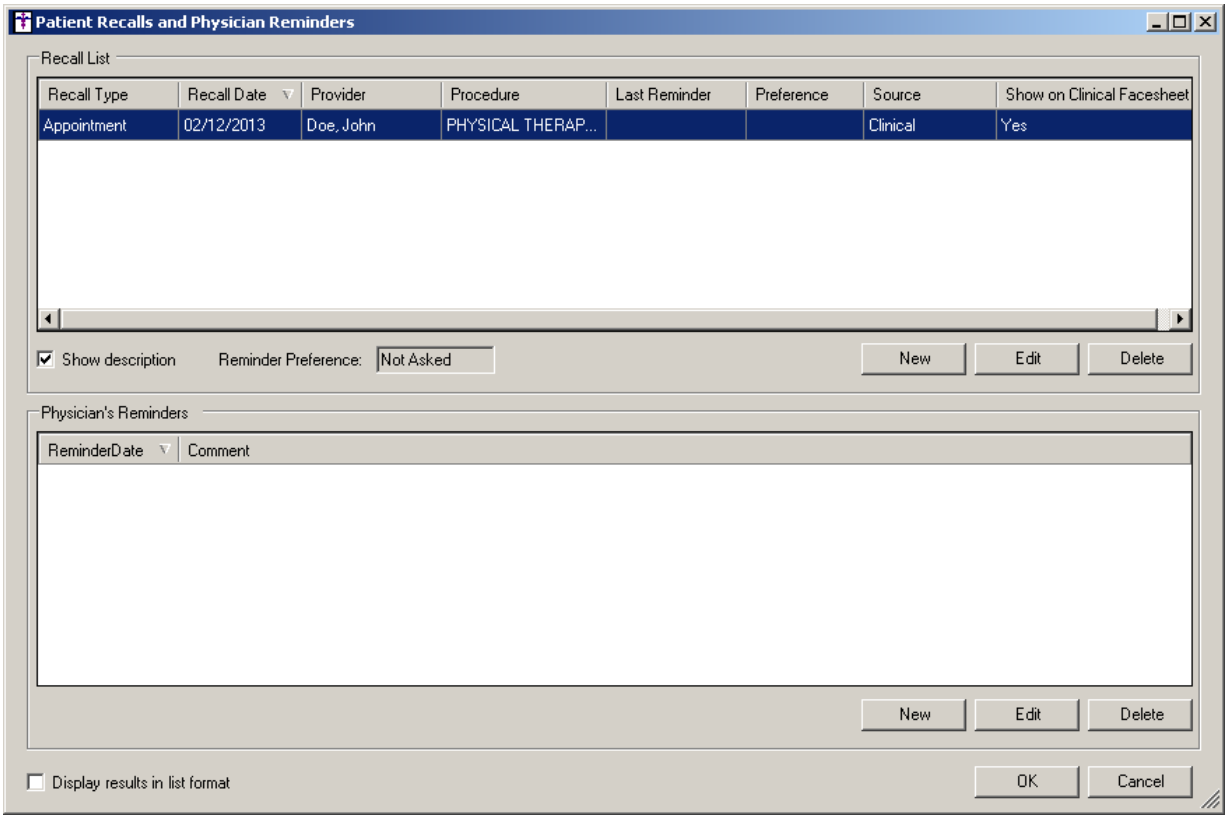


Figure 13 – Patient Recalls and Physician Reminders

- **The Note Tab – Recall/Physician Reminders (continued) –** When entering or editing a recall, the New/Edit Recall dialog will allow you to add or modify Recall Type, Recall Date, Provider, Procedure, Show on Clinical Facesheet, and Fulfilled options. See Figure 14. Likewise, you are able to manually configure how you contacted that patient for a recall reminder in the Reminder Method field. When the Reminder Method field is configured, the system will utilize this information when calculating applicable Meaningful Use objectives and measures. Also, when editing a recall, there is an Update Note Text option, which when checked will update the text in the current note with the information that was modified in the recall.

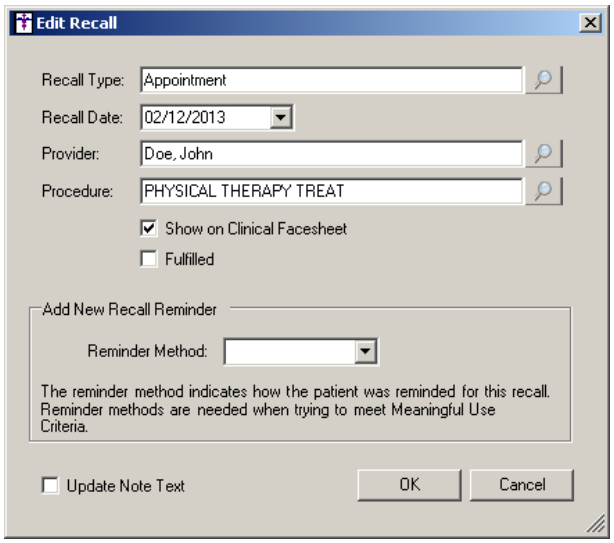


Figure 14 – New/Edit Recall

- **The Note Tab – Unfulfilled Recalls and Physician Reminders –** The program has been updated so that whenever a new note is created for a patient that has outstanding recalls and/or physician reminders, an Unfulfilled Recalls and Physician Reminders dialog will appear allowing you to select the applicable recalls or reminders that will be satisfied by this note. See Figure 15. You have the ability to sort the recall or reminder data by clicking the applicable column heading. Likewise, a Show Descriptions option, when checked, will show applicable descriptions for the applicable recall data instead of the in-house codes.

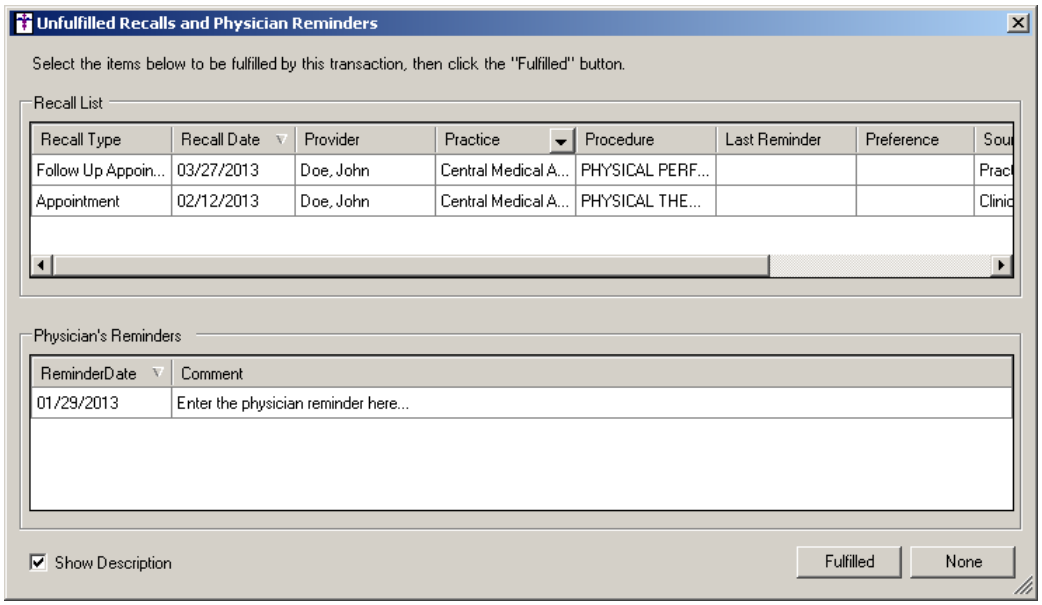


Figure 15 – Unfulfilled Recalls and Physician Reminders

- **The Note Tab – Referral –** The program has been updated the ability to enter referral and transition of care information for applicable patients via the Referral button. See Figure 16. The new Referral button replaces the Transition/Referral Out button from legacy versions of Clinical. The Transition/Referral Out button will automatically replace the Referral button for all new notes. In existing notes the Transition/Referral Out button will be disabled, however, you can instantly add a Referral button to those notes and all of the applicable information from before will be accessible from that new Referral button.

Figure 16 – Referral Button

Once the Referral button has been clicked the Referrals dialog will appear allowing you to enter a new referral via the New button, as well as check the Received Response option for previous referrals indicating that the patient was sent to another provider and a report was received back from that provider. See Figure 17. To edit or delete referral information, you must access the chart in which the original note was entered. All referral entry and modifications are tracked in the History tab as well as in the Audit Trail.

When referral information is entered in the chart note you have the ability to determine if that will information will appear in list or paragraph format in the note. Likewise, the referral information will also appear in the Face Sheet under the Referrals section, where you have the ability to view and print the referral order. The referral entry will also be counted toward any applicable Meaningful Use objectives or measures.

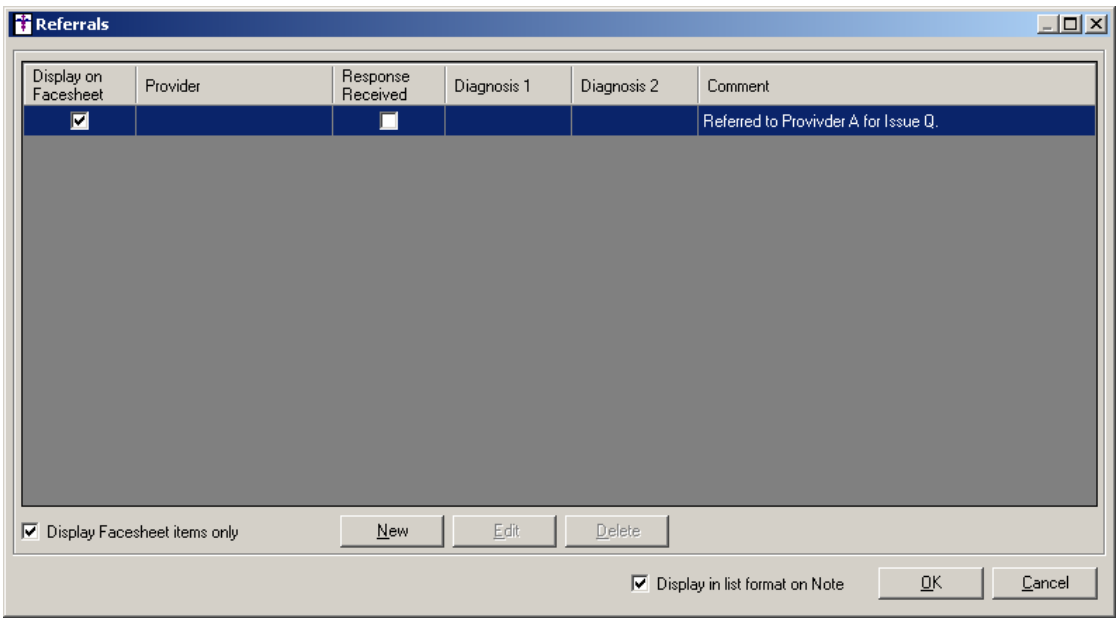


Figure 17 – Referrals

- **The Note Tab – Referral (continued) –** When entering or editing referral information, you can select the provider to whom you are referring the patient, select up to two diagnosis codes, and enter any explanatory comments, as needed. See Figure 18.

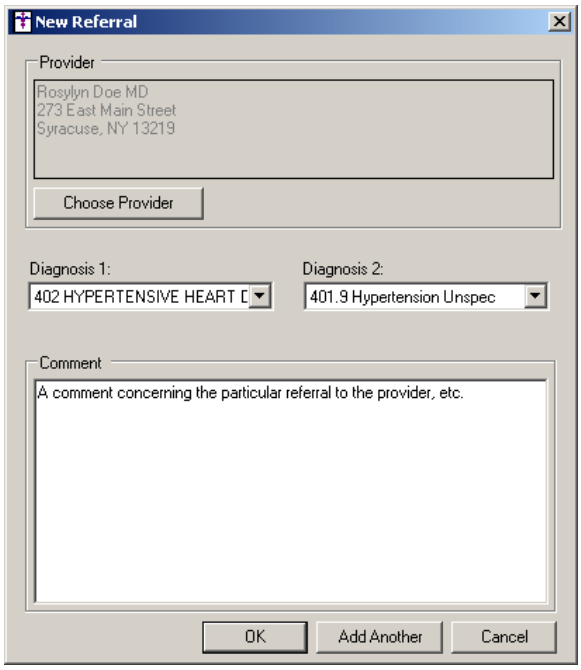


Figure 18 – New/Edit Referral

- **Preferences – General –** The General tab of the Preferences dialog has been updated with a two new preference options that can be set for individual users: Display unfilled Recalls when chart note is created, and Display unfilled Physician Reminders when chart note is created. See Figure 19.

  When the Display unfilled Recalls when chart note is created preference is selected, when creating a new note for a patient an Unfulfilled Recalls and Patient Reminders dialog will appear if that patient has outstanding recalls, allowing you to fulfill any applicable recalls that this new note satisfies.

  Likewise, when the Display unfilled Physician Reminders when chart note is created preference is selected, when creating a new note for a patient an Unfulfilled Recalls and Patient Reminders dialog will appear if that patient has outstanding physician reminders, allowing you to fulfill any applicable reminders that this new note satisfies.

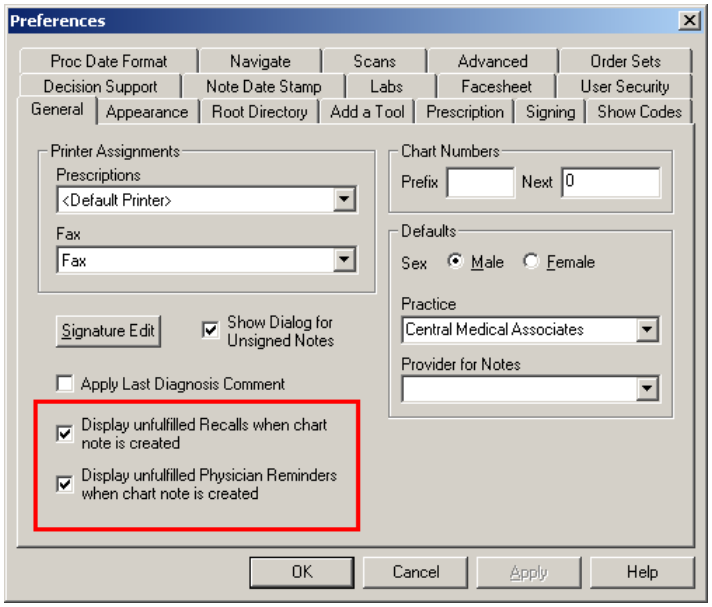


Figure 19 – Preferences – General

Added Features (continued)

- **Template Editing – Referral –** The Template Editor has been updated with the ability to add a Referral button to a template. The Referral button replaces the Transition/Referral Out button, while providing a more robust set of options when configuring transition of care and/or referring out information. The new Referral button allows you to access the Referrals dialog in a chart note where you can add and maintain transition of care and/or referring out information for a patient, along with the applicable provider and diagnosis information. Do note that the legacy Transition of Care/Referring Out information will be automatically migrated to the new Referral functionality in the face sheet as well as in the new Referral buttons. The Transition/Referral Out buttons will be replaced with the new Referral buttons in new notes. Old notes will have the legacy button but will have a popup prompting you to add a Referral button to a chart instantly by dragging from the Referrals facesheet.

- **Template Editing – Recall/Physician Reminder –** The Template Editor has been updated with the ability to add a Recall/Physician Reminder button to a template. The Recall/Physician Reminder button allows you to access the Patient Recalls and Physician Reminders dialog in a chart note where you can add and maintain patient recall and/or physician reminder information. The physician reminders functionality works in the same manner as the legacy recall functionality from previous versions of clinical. The new patient recall functionality works in combination with the patient recall functionality in Practice Manager (shared components).

- **The To-Do List (4.5.1) –** To increase performance and ease of use, the To-Do List has been updated to list 25 to-do items at a time and allow you to page through the entire To-Do items at this interval using the arrow buttons at the bottom left of the To-Do List. See Figure 20. Likewise, you also have the ability to page to the first and last page of To-Do items by clicking the leftmost arrow button or the rightmost arrow button respectively.

  Do note, however, that with this new pagination feature, when selecting a specific To-Do List item by From, Priority, Type, or Patient column type, the applicable drop-down list will only contain an (All) option and any other options for From, Priority, Type, or Patient that are on the current page you are viewing; therefore, other options for these columns may be available on other pages. Once a particular column type is selected it will show all of the items for that column type, allowing you sort and page through those items that have the selected column type. If you then select the (All) type, the system will resort back to the default page of the To-Do List.

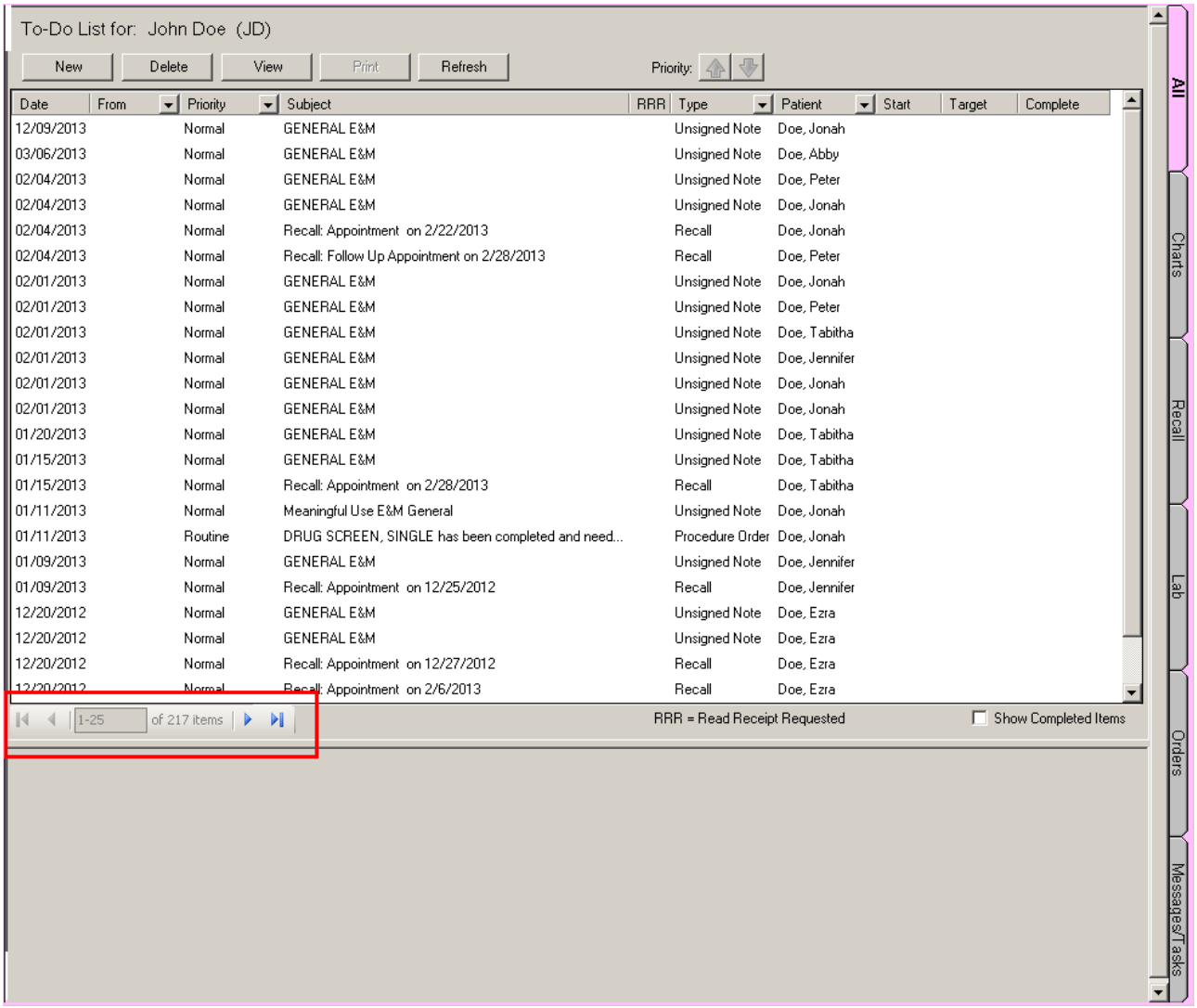


Figure 20 – To-Do List (Embedded)

Some icons are from the Silk icon set by Mark James (http://www.famfamfam.com/). All rights reserved. Licensed under a Creative Commons Attribution 2.5 License (http://creativecommons.org/licenses/by/2.5/).

Some icons are from the Fugue icon set by Yusuke Kamiyamane (http://p.yusukekamiyamane.com/). All rights reserved. Licensed under a Creative Commons Attribution 3.0 License (http://creativecommons.org/licenses/by/3.0/).