

Release Notes for version 408.0

26th March 2019

Private Hospital Manager

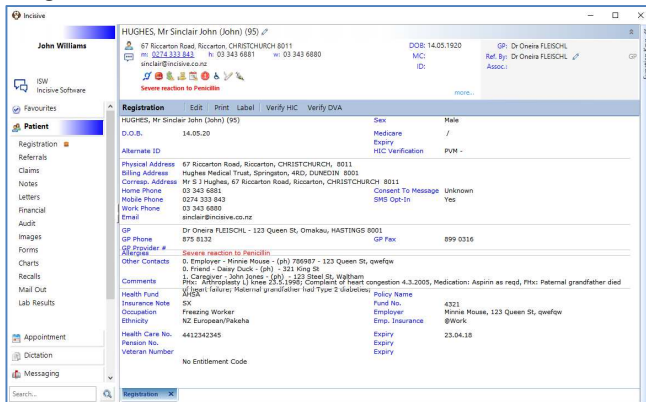
New Zealand edition

Australia edition

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Integrated edition



Classic edition



Abbreviations used

- SPM Specialist Practice Manager
- SPMc Classic edition
- SPMi Integrated edition
- PHM Private Hospital Manager
- PHMc Classic edition
- PHMi Integrated edition
- NZ The feature or fix is only available in the New Zealand edition
- AUS The feature or fix is only available in the Australian edition

NEW FEATURES

Patient	Financials	Quote - print to PDF	Au	RQ6615
		All three pages of the quote are now included in the PDF file created.		
	Financials	Quote converted to Claim	Au	RQ6598
		The location selected for the quote is now saved and when converted to a claim, the saved location will be selected (rather than the default location).		
	Financials > Invoice	Reprint of invoice (balance owing)		RQ5920
		If an invoice is reprinted and there is a balance owing (Print > Highlighted Entry) then this will now automatically print in the 'Balance for Tax Invoice' format which includes the remittance advice.		
	Financials > Receipt	Direct Credit payments		RQ6525
		When creating a receipt, after selecting the payment type, the mouse cursor now goes to the Details column so that additional information can be recorded.		
	Forms	Editing Custom Forms		RQ6522
		You can now edit a Custom Form that was created for a patient.		
	Forms	Form Letters		RQ6520
		The Forms tab now displays the time the form was created and also the Operator ID.		
	Notes	Deleting scanned documents		RQ6470
		If a scanned document is now deleted, the file is no longer moved to the Unallocated folder, it will remain in the current location.		
	Notes	Display of Note types		RQ6624
		The recipient of a Letter is now displayed in the Notes type list. It can be turned off (List view only) in Patient > Notes > Display > Hide Letter Recipients. This setting is for each Operator.		
	Notes	Loading time		
		A significant improvement has been made to the speed of displaying notes if the patient has a substantial number of them.		
	Notes	Printing Notes		RQ6565
		The phone number for the primary contact is now included in the header (where present).		
	Notes	Sending an ARTP (with attachments)	NZ	RQ6627
		The listed number of attached documents now matches the actual attachments sent via Healthlink		
	Notes	Test Orders		RQ6632
		The layout of the printout has been adjusted to try and provide more space if there are a large number of tests ordered, or if the comments section goes over multiple lines. Order for Investigation has been moved up and the line between Claim Details and Claim number has been removed.		
	Patient Header	Inactive GP or Referring Dr		RQ6631
		If either the GP or the referring doctor has been marked as INACTIVE then this will display against the relevant entry in the patient header. The GP or Referring doctor name will also appear in red text to alert you to this.		
	Patient Header		Au	RQ6456
		Additional information has been added to the patient header. This includes:		
		- Medicare number (in green font colour if verified)		
		- Referral End date (RED if not valid, ORANGE if expires within 1 month and GREEN if expires in more than one month.		
		- Health Fund/Insurer code and Policy Name (green tick if H/F is verified)		
	Patient Header	Sending SMS messages		RQ6585
		All SMS messages sent from the Patient Header are now sent immediately.		

	Registration	Cautions / Warnings	RQ6475
	The ability to create Cautions and Warnings from the Alerts section of the patient's registration form has been added (dependant on permissions). Previously it could only be performed in Patient > Notes.		
	Registration	Editing the Veteran Number	Au RQ6523
	It is no longer possible to change the DVA number while there is an unadvanced DVA schedule. A message will appear if you attempt to change these details.		
	Registration		RQ6491
	The [X] Close button has been enabled on the patient registration form.		
Reports	Clinical Audit	Clinical Audit Query	RQ6554
	The text from the Audit Episode 'Description' field is now included on the report.		
		Custom printer selection - [P] button	RQ6564
	The (Windows) printer dialog screen now applies any DUPLEX and TRAY settings that were set by operator and uses them for the print job.		
	Financial	Receipts	Au RQ6613
	Where a payment is entered as a prepayment and it is to be applied to one or more invoices, the program now attempts to compute the assistant fee component on the derived Prepayment Taken record(s). This is to allow getting a sensible \$ amount if the Prepayment Applied should be reversed.		
	Financial > Accruals	Non-inventory subcontractor accrual (draft)	RQ6569
	If there are equal positive and negative amounts for same invoice and subcontractor these are now suppressed them from the report, i.e. where there is a credit note / credit entry.		
	Hospital > Ward	Food / diet reports	RQ6508
	An option has been added to sort the report by room number (otherwise the report is alphabetical)		
	Hospital > Ward	Formatting of room/bed	RQ6514
	Bed numbers are now shown as /a, /b (and not /1, /2). If there is only one bed in the room, only the room number is shown.		
	Hospital > Ward	Ward Handover Report	RQ6513
	Where there are shared rooms, the bed numbers (/a, /b etc.) are included with room number.		
	Hospital > Ward	Ward Handover Report	RQ6509
	An option has been added to print Wards on separate pages.		
	System	System Summary	RQ6622
	A new report has been added to give a summary of the site. This includes database sizes, log size, size of scanned document and images folders, number of providers and operators etc.		
Setup	Hospital	Export ADT	RQ6500
	The codes required for exporting the ADF96 data are now all available in this one area (specifically HAFCode (4 chars) and HAFName (9 chars)). Previously these values could only be entered by Incisive.		
	Provider > Dictation	Provider / User dictation	RQ6499
	A new checkbox for 'Letterhead on electronic transmission of operation notes' has been added. If selected, correspondence sent electronically via Healthlink EDI will add a letterhead.		
	Stock	Edit Material stock items	RQ6495
	You are now unable to change pack-size (Items/Pack) or Doses/Item fields if the stock item is included in an outstanding purchase order (not closed or deleted) and which has an outstanding quantity (not delivered or cancelled). This will take effect for any new purchase orders created after updating to v408.0. Changing pack-sizes with outstanding orders caused significant problems reconciling stock purchases and usage.		
	Templates	Merge codes (F9)	RQ6532
	The merge codes for <ApHistory> and <ApFuture> are now available from F9. <ApHistory> will list all past appointments for the patient and <ApFuture> will list all future appointments for the patient. These are ideal for Funders who require you to provide the patient with a history and a future plan of their appointments (like ACC)		

Stock	Purchases	Edit Draft Purchase	RQ6563
	An 'autosave' function with recovery has been added, to ensure data isn't lost.		
Utilities	Advanced	Fax Log	RQ6574
	An addition column for 'Date Sent' has been added.		
	Export	ADF96 Discharge file	RQ6528
	The Purchaser Code field is now automatically inserted from the relevant Billing Type when the patient is marked as Admitted. Note, the Principal Purchaser codes need to be added to the Billing Types.		
Ward	Bed Planner	Actual discharge time	RQ6504
	The expected discharge date/time is recorded at the time of the booking. If the patient is discharged early, then the discharge time is trimmed back to match (so the bed planner shows a free bed).		

BUG FIXES

Appointment	Bookings	Remarks		
	When importing theatre lists from the surgeon's rooms, the Remarks they send now displays on the initial booking screen. This is to assist with determining daystay/inpatient selections. The remarks will also appear in the existing field on the second booking screen.			
	Transfer			BU5478
If an appointment is linked to a hospital booking (Surgery) record then these can now only be moved via the hospital booking option. A message will display as follows if this is done elsewhere. These appointments are hospital bookings, and must be transferred via Hospital Bookings - Operating List (Maintain Operations) or similar.				
Waiting Lists				
A Waiting List can now handle an ampersand (&) in the name. Previously even if permissions were enabled, the entry was still dimmed. Please note, do not change the name of your existing Waiting Lists as this will result in the entries currently on the Waiting List to disappear.				BU6241
Dictation	ARTP	Cursor position with F8 codes	NZ	BU6310
	The position of the cursor was jumping back when an F8 code was used in the ARTP.			
	Letters	'Copy To' font size		BU6226
If multiple 'Copy To' recipients are added to a letter, separately, and those recipients have EDI/email, etc. the font size sometimes changed.				
Letters Faxing				
Modifications have been made to the way faxes are created during the processing of dictation as there was no guarantee that the Incisive program had 'exclusive' access to the SPM Fax Driver.				BU6295
Messaging	Message Centre	RSD Mail		BU5694
	The screen was not refreshing if a message was deleted.			
Message Centre RSD Mail				
When an incoming RSD mail item was edited, to add a Type, it was not keeping the selection when processing the message to the patient file.				BU6252
Office	Receipts	Group receipt		BU6223
	Where there had been a receipt and a receipt reversal for the same invoice number, the group receipt was not correctly calculating the amount owing which prevented the receipt from being saved.			
	Schedules	DVA Schedules with MT12	Au	BU6251
	Where a DVA schedule contained non Medicare item numbers (i.e. MT12), there was a problem on processing where the program was trying to re-order by item number.			
Schedules DVA with KM				
Claims with KM recorded are now handled correctly.				Au BU6240
Schedules Reconciling Schedules				
In some circumstances, only one item on a Medicare or DVA schedule invoice was being credited even though other item numbers for the same patient / claim also should have had items credited off.				Au BU6247
Patient	Financials	HIC Consult > Receipt	Au	BU6243
	If the payment was made into a different Provider's bank account, the Transaction created was not writing the payment details record correctly ('Patient' rather than 'PatOther').			
Financials HIC In Hospital Claim - Opt out				
The scaling was being incorrectly applied to the surgeon's fee where the order, based on Medicare item numbers, differed from surgeon's fee order. The Medicare rules now only apply to the rebate amounts but the scaling for the surgeon's fee should be based on surgeon's fees and not Medicare (when opting out).				Au BU6255

	Financials	Inventory Invoice to 3rd party	BU6308
	Where the prepayment is from the patient but the invoice is to the third party and the prepayment is applied at the time of creating the invoice, the Prepayment Balance record was being incorrectly recorded as from the 3rd party resulting in a negative amount displaying.		
	Notes	Scanned documents	BU6258
	Incorrect text was being displayed for scanned documents that didn't have a populated sub-type field.		
	Referral	Associated Provider details	BU6266
	Changes in the Contacts area (Shift-F7 or Setup>Contacts) will now produce a prompt on editing the referral to update the changes to any Associated Provider entry.		
Reports	Financial > Accruals	Sub-contractor Accrual	BU6298
	When emailing Buyer-Generated-Invoices to the assistant or sub-contractor, if the email address appearing in the 'Email Recipients' form is altered, the email will now be sent correctly to the updated address.		
Stock	Purchases	Print / email of Purchase Orders	BU6230
	The ability to double-click on buttons has been disabled.		
	Purchases	Supplier Invoices	BU6219
	Where stock items are exempt from GST (i.e. purchased from overseas), the screen Enter a Supplier Invoice was incorrectly including GST in the 'Inc GST' field.		
Utilities	Import	HIC Payment Import Au	BU6242
	This was showing very old and cancelled entries as not having processing reports retrieved. As processing reports are not available for claims older than 2 years old, these are now filtered out along with claims with a transmission message.		
Ward	Bed Planner	Sort order	BU6228
	Changes made to handle room names like W1.12, where there are multiple numeric numbers.		

MENU CHANGES

In the new Integrated edition (PHMi) there have been a few additions and changes to the items in the menu.

Any new, modified or moved menu items will be disabled (dimmed) for all Operators in PHMi until you have updated the relevant Roles.

You will need to import the new menu xml file and assign Permissions to the Roles that will be allowed to use the new and changed menu items. Both of these tasks are completed through Setup → Personnel → Permissions. Select the Role you want to update then click on the Permissions button.

v804 - Modified Description text in Utilities > Export > ADT Discharge

v805 - Added 'Undo Theatre Time' to Utilities > Repair

v806 - Added 'ACC Schedule' to Appointment > Appointments > New > Financial, and to Appointment > Overview > New > Financial

v808 - Changed 'Suppliers' in Setup > Contacts to enable New, Edit etc. as toolbar buttons

v809 - Enabled 'New' & 'Delete' Message Carriers in Setup > System > Message Carriers for New Zealand

v810 - Added 'Track' menu item to Appointments > Appointment. Allows for tracking of submitted online forms.

v813 - Added new 'Operations by Surgery Procedure set' report to Reports > Operation/Procedures. Lists the operations performed grouped by Procedure Set.

v814 - Added About to Help menu. Informs you of the login name, session ID, computer name and other related information.

v817 - Added 'System Summary' report to Reports > System

v818 - Modified 'Edit Correct List' in Utilities > Spelling-Checker so that it now loads the dictionary editor.

Update Instructions

These instructions are for updating of **ALL** workstations or servers that have PHM installed.

Updating the Workstations/Servers

Before the server/workstation update process is about to be performed, the following steps need to be conducted. It is preferable that the computer is restarted before this process is performed.

This should only be performed by either Incisive staff or IT technicians who are familiar with the Incisive update process. If Incisive staff are asked to perform the update, sufficient rights will need to be given to their login to be there will be a fixed fee payable for each computer we update.

1. Go to <http://www.incisive.co.nz/support> and download the installation file. Check that the file size is correct.
2. Prepare the workstation/server for installation
 - a. Backup the databases and all of the associated image and document files.
 - b. Optionally, create a Restore Point.
 - c. If possible, restart the workstation/server. If a restart is not feasible, use Task Manager and make sure that newlogin.exe or xpmmenu.exe are not running nor any other processes that start with **spm*.***
 - d. Login using local admin or domain administrator rights.
 - e. Temporarily disable the virus-checker
 - f. Ensure User Account Control (UAC) settings are turned **off**
3. Run the installation application.
 - a. Choose to 'Update existing installation' (this will retain your existing SPM/PHM configuration)
 - b. Choose to update to v408.0
 - c. Enter today's DayCode (from Incisive) when prompted.
4. Right-mouse-click on the file called mdbUpdate.exe in the \spmwin directory and choose Run As Administrator. This process will update the data structure of the database. This only needs to be performed once.
5. In the Incisive folder on the Desktop, right-mouse-click on the SPM or PHM shortcut files and choose Run As Administrator. This will register the new files.
6. Log into SPM/PHM and test that it has updated correctly.
 - a. Check the version numbers at the login screen.
 - b. Go to Setup -> Personnel -> Permissions and modify the menu permissions for each of the Roles
 - c. Go to Patient -> Notes and check that you can display the Notes for a patient.
 - d. Go to Appointment Book and display the appointment list for a specialist.
 - e. Complete any other acceptance testing you require.
7. Enable the virus-checker
8. Reset the UAC to the previous setting
9. Make sure all of the workstations and laptops have updated to the correct version.

Troubleshooting

If you are unsure at any stage during the update process, please call the Incisive helpdesk for assistance.

If you have tried to register files without using the Run As Administrator option and are getting errors during the file registration process, you may need to perform the following:

1. Exit to a Command Prompt window
2. Change to the SPMWIN directory
3. Type in and execute the following command (which deletes three text files)
DEL spm_*.txt
4. Exit from the Command prompt window.
5. Right-mouse-click on either the newlogin.exe (classic) or XPMmenu.exe (integrated) applications and run using the Run As Administrator option

If serious problems with the deployment and updating of the program files to the applications servers, workstations or laptops is encountered, you may need to perform a roll-back to the previous version. Contact the Incisive Helpdesk.