

Release Notes for version 408.6

12th November 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
- Au The feature or fix is only available in the Australian edition

NEW FEATURES

General	Audit Logging of Operator access	
	As part of the closer scrutiny regarding Patient Privacy, automatically logging now occurs against the Operator for every menu option or toolbar button they select. The information recorded includes the Patient, the Provider, the Workstation ID and also the Date & Time. It is important that Operator logins are not shared. A report is available to list all the Operators who have accessed a patient's record.	
Admission	Todays List Cancelled After Admission.	RQ6792
	If a patient is admitted then discharged without surgery and is marked as 'Surgery Cancelled', the surgery will display with CANCELLED AFTER ADMISSION instead of the surgery description.	
	Todays List F3 Patient Information	RQ6245
	F3 or the 'Patient Info' button on the toolbar of Todays List will display the F3-Patient Info pop-up to allow you to view the registration, financial and clinical records for the patient.	
Appointment	Daylist Find First-Free	RQ6743
	The Advanced Search option now has a filter to include either Private or Public sessions. The option needs to be configured for the Session in Setup > Appointments > Session Types. Designed to find time in sessions only for Public funded patients.	
	Daylist Find First-Free	RQ6745
	The Find first-free appointment screen has been rewritten to dynamically filter based on a number of selections.	
	Daylist Print - Form Letters - OK & Send	RQ6717
	If there is no 'From' email address or no 'Reply-To' email address set up for the Provider, the form letter can still be emailed as it will use the Operator's email address.	
	Daylist Print - Session - Operating List	RQ6710
	If the 'Disabled' alert (wheelchair) is enabled, it is now included on the Operating list.	
Messaging	My Mail Automatic import of photos to Patient > Images	ISW
	If a photo has been taken using the inTOUCH app it is given a unique identifier and is then uploaded automatically to an Azure Storage container. When the Message Centre is started the identifier on the photo is linked to the patient and the photo can be automatically inserted to the patient's Images.	
	My Mail Import photos from inTOUCH	RQ6756
	If photos are available from inTOUCH but the auto-import function is turned OFF, the patient ID in the filename will still identify the patient to make it easier to import the photo. This is useful if you want to add Type or Description detail to the photo record.	
	My Mail Importing photos with a Description.	RQ6778
	The inTOUCH application now has the ability to add a description to the photo. The description is being sent as an XML file and it is using the same file name as the photo except that it has a .xml extension. When the photo is being imported can the content of the Description file be inserted automatically as the Description that is viewed with the photo in SPM	
	My Tasks Multiple Tasks for patient made easier.	RQ6756
	If you are making multiple Tasks for the same patient it will reuse patient information.	
Office	Invoices Invoice list showing ACC export status	NZ RQ6771
	An additional column has been added to show if the ACC export was successful. This will now show whether the upload was successful, failed or the status is unknown.	
	Schedule logs Schedules - Claim Status - Schedule logs	Au RQ6686
	An option has been added to show the report log information for individual schedules. This is to assist with troubleshooting issues with online bulk bill claims.	

MENU CHANGES

	Schedules	DVA & Medicare schedules	Au	RQ6702	Before advancing the schedules a test is now made to see if the Medicare server is online and is available to receive the electronic invoice.	
Patient	Claims	ACC18	NZ	RQ6744	The program now prompts when the ACC issued numbers is down to 20 remaining (changed from 5).	
	Financial	HIC	Resend	Au	ISW	A Resend function has been added to the HIC button on the toolbar, which allows you to resend a claim that has been rejected by Medicare or a Health Fund. Make sure you correct the reason the claim was rejected before using the Resend option.
	Financial	HIC Statement Of Claim	Au	RQ6729	When transmitting an IMC PC or Patient Claim, i.e. the claim is not being paid in full by the fund (IMC AG/SC), there is now an option to email the claim direct to the patient. Select this option (Email Claim to patient) before selecting either 'Process Claim' or 'Receipt and Process Claim'. A PDF attachment will be created and the Email screen will appear. Confirm the attachment to include with the email and enter a cover message if required.	
	Financial	In-Hospital claim - Email Quote	Au	RQ6734	An option has been added to the HIC Claim screen to allow the quote to be emailed to the patient. If this option is selected then after saving the quote a PDF file will be created and a screen will appear to confirm the attachments for the email. Once the attachments are selected a cover message can be included before the email is sent.	
	Financial	In-Hospital claim - Receipt location	Au	RQ6723	The Location that the Receipt was produced (invoice or banking records) can now be selected independently of the Service Location used in the claim.	
	Financial	In-Hospital claims - Patient contribution	Au	RQ6781	An option has been added for IMC PC and Patient Claims (i.e. you have not Opted-in to the Scheme or Agreement). The 'Calculate OPE' icon on the HIC Invoice screen will bring up an option which will allow you to either overwrite the 'Patient Out of Pocket' expenses (resulting in the automatic recalculation of the total price) or alternatively you can overwrite the total price and the OPE will be recalculated. This should only be done after all item numbers have been entered.	
	Financial	Maternity service rates	NZ	RQ6713	New service rates from 1 July 2019 are now available as per https://www.health.govt.nz/system/files/documents/publications/primary-maternity-services-amendment-notice-2019.pdf	
	Financial	Receipts		RQ6758	Where there is an amount still outstanding, the Provider's bank account details are now included on the paper receipt.	
	Financial	Receipts	Au	RQ6757	Receipts now include the data from the Item# column applicable to the Billing Type (if present). If this field is empty then the Medicare Item Number is used in preference to the invoice code.	
	Financial	Reject ACC claim	NZ	RQ6767	The Resend menu option has been renamed 'ACC'. The Reject & Resend functions are available from the ACC button on the toolbar.	

Reject - this is new, to allow you to handle the situation where ACC has cancelled or deleted a claim from their system without processing and rejecting it. Previously, once a file had been uploaded to the ACC Portal it could not be deleted. The ability to Reject and delete the invoice / claim should only be assigned to staff that understand the repercussions. Once rejected and deleted the process cannot be reversed. A day-code from Incisive is also required to perform this task.

Resend - remains unchanged. It allows the XML file to be re-generated to upload to ACC.

MENU CHANGES

- Financial Statement (HIC claims) Au RQ6719
The text of the item number was overwriting the amount in some instances, the text is now truncated to prevent this.
- Patient Financial Invoicing ACC Non-Core Sub-contractor NZ RQ6721
When an ACC Non-Core invoice is being created the selection list of sub-contractors is now alphabetical.
- Financial Invoicing Future-dated invoices RQ6712
Invoices cannot be inadvertently future-dated due to a future admission being selected.
- Patient Header Date deceased RQ6694
The date deceased (if entered) is now included beside the patient's name.
- Prescriptions Patient phone included. NZ RQ6769
Prescriptions now include a phone number alongside the NHI number. (mobile if available, or home or work).
- Emailing RQ6741
Emailing in several areas of the patient file has been modified to bring up the new emailing screen (the same as the one accessed from the patient header). When the option to email is selected for an invoice or receipt at the time of entry, a PDF attachment is created. This can be viewed before confirming it is to be attached to the email and a cover message can be included.
- Stock Cost Centres Stock Allocated to Cost Centres report RQ6746
An option to export (E) button has been added to the following report:; Stock Allocated to Cost Centre(s) in Period (Stock > Cost Centres > Cost Centre Stock)
- Stock Purchases Purchase Order RQ6725
The supplier email address has been moved to the left-hand column.
- Stock Purchases Resized screens RQ6726
The following screens have been changed to resizable windows to enable the maximum amount of data to be viewed: Enter Purchase Order Quantities (Stock - Purchases - Purchase Orders - Purchase Order One); Select Supplier and Record Invoice (Stock - Purchases - Supplier Invoice); Stock Arriving - Purchase Order (Stock - Purchases - Stock In / Packing Slip)
- Stock Purchases Stock Arrived - Variable pricing RQ6773
When recording stock as Arrived, the Stock Pricing screen now has a Variable Pricing button (if the stock item is set to have Variable stock prices). You cannot update the prices at the point of arriving the stock without having to subsequently edit the stock item. This provides more accurate price updates for an Item, based on the Billing Type.
- Stock Purchases Stock repricing / Margin / Variable Pricing RQ6775
Calculation of Price2 and Price3 values (discounts for second and subsequent quantities of the same item) will now only apply for Non-Stock items (procedures, accommodation, services, equipment etc.). For Materials, Price2 and Price3 amounts are not relevant and will have no price calculated.
- Stock Worksheets ISW
To make it easier to have operation or surgeon specific Worksheets for use in theatre, you can create a new Worksheet that includes all the stock items that were on a selected invoice. For example, make a Worksheet specifically for Tonsillectomy use the Invoice number for a standard Tonsillectomy operation that was billed.

Setup Worksheets	
Code	Description
PROC0011	CIRCUMCISION - ADULT/CHILD
PROC0012	CIRCUMCISION - BABY LA.
PROC0013	COLONOSCOPY
PROC0014	COLPOSUSPENSION
PROC0015	DILATATION & CURETTE / DIATHERMY CERVIX
PROC0016	D.C.R.

MENU CHANGES

Reports Admission/Discharge Discharges in Period RQ6791
 A Cancelled column has been added to this report. If the surgery was cancelled after the patient was admitted this is now reported.

Reports Clinical Audit Query Audit entries RQ6797
 An option has been added to the export of the clinical audit Query report to include the booking information. Columns have been added to include: (1) most recent appointment if present; (2) earliest future appointment if present; (3) earliest non-actioned recall; (4) date of death/deceased.

Management Dictation audit for period RQ6790
 Where the User / Provider flag 'Finished Required' is enabled, this report now shows dictation still to be marked as Finished. This allows you to find letters that the typist has forgotten to complete.

Management Personnel > Operator Actions RQ6788
 A new report has been added to show, for a selected patient, the menu options that each Operator has selected. This report allows you to audit which Operator has accessed menu options for a particular patient.

Setup Appointments Appointment Book - Session Types RQ6742
 A checkbox has been added to indicate if a Session is a Public list / session. This is then used in the Find First-Free search function if the patient is DHB or Public-funded

F9 - Merge Codes Time merge code RQ6785
 The seconds have been removed from the <Time> merge code.

Workstation Profiles ISW
 If you are using SPM or PHM on a Terminal Server using Remote Desktop or incisive.inCLOUD.clinic you can create printer templates or profiles for the different locations that you work at – remote office, theatre or even home. Using the computer name and your Remote Desktop login, the correct printers will be selected for you when you log in.

Setup your profiles			
Profiles (7) Search...			
Description	Login	Computer	Location
Downstairs	sinclair		ASCOT
Home	sinclair	HPENVY	<unknown>
Office	sinclair	HPENVY	ASCOT
Reception@Rooms	sinclair	sinclairmsbook	RECEPTION
Remote Clinic	sinclair	sinclairtablet	MAIRANGI BAY

Utilities > Advanced > Workstation Profiles can be used by System Administrators or Technicians to configure multiple Profiles for different Operators.

Utilities Export HL7 Export ADT15 (deleted) from surgery RQ6795
 An ADT15 (deleted) message is now created when the surgery is cancelled post admission. Deletion of the surgery will still create a deleted message as well.

Export HL7 Export SIU^S15 cancelled admission RQ6794
 If the surgery is cancelled after admission, the HL7 message created is now SIU^S15 and not an SIU_S14.

Ward Bed-booking Cancelled surgery RQ6784
 If a patient is admitted but is then discharged before surgery and the surgery is cancelled, the bed booking will now be marked as deleted, therefore will not display.

MENU CHANGES

BUG FIXES

Appointment	Reorder Session		BU6381
	The Reorder Session now works without a path set for the Event Export.		
Messaging	My Mail	Saving photos with the correct Title	BU6404
	When you choose to save a photo (from Azure) the option to enter a new Title appears but when it is saved the new Title was not being displayed in SPM.		
	My Mail	Display images using EXIF metadata	BU6389
	Photos, Scanned documents and External documents that are imported and linked to a Patient, will now use the EXIF metadata included in the image file to automatically rotate it to the correct orientation.		
Office	Maternity Schedules	Maternity Schedules	NZ BU6410
	The format of the HL7 output file was incorrect where the referrer was a Midwife. The ZSO-4- Referring Practitioner Type will now use a value of W provided the Nurse/Midwife flag in the contact information has been set. If not, a value of M will be used. The Referring Practitioner ID (ZSO-5) will use the information recorded in the Medical Council Registration No. field. For Midwifery Council numbers, ensure this is recorded in full, including hyphens e.g. 15-12345.		
	Schedules	Medicare Bulk Bill and DVA schedules	Au BU6356
	Schedules were being advanced even if there was a communication error. This should now be caught earlier and should prevent the schedule from being advanced.		
Patient	Financial	In-Hospital Claims - No Max. limit quote	Au BU6367
	Where the fund is set to Gap Cover but with no maximum limit, i.e. Frank Health, you can select an option 'Gap based on billing type' and then select a Billing Type, i.e. AMA or Private fees. Alternatively a fixed OPE can be set which will be added to the amount published by the fund in their Gap Cover fee schedule.		
	Financial	Email copy of invoice / receipt etc.	BU6362
	If there is no From or Reply-To email address configured, the Operator's email address will be used instead.		
	Financial	In-Hospital Claim - Assistant fee calculation	Au BU6370
	Assistant fee calculation was showing a fund amount when the patient is self-funded, i.e. no Health Fund. Now, only 75% of the MBS fee will show for the rebate calculation.		
	Financial	Quoting (Non HIC) - Apply Discount	Au BU6374
	If the fee was being discounted then the discount was being applied across all items which could result in some items ending up with a negative value. Code has been added to prevent items from becoming negative. Items number that are not subject to the MPR rule are excluded from the discount.		
	Forms	Field Forms with image	BU6393
	An image, i.e. a signature, that is incorporated into the field form was not being saved when printed or saved to the patient file.		
	Images	Import log from Azure	BU6387
	Additional logging added to AzureStorage.log to show connection status and file processing.		
	Notes	Printing Test Orders	Au BU6353
	These were not always printing out in the correct format, i.e. Dorevitch format.		
	Registration	New Patient registration	BU6402
	When adding a new patient, if a prompt appears suggesting a possible duplicated patient, OK will now cancel the addition of the new patient registration, whereas Cancel will proceed.		
	Sending SMS messages		BU6354
	Some computers have been getting Internet access is required for this function to work messages when trying to send SMS messages. Tests are now made to HTTPS, and not just HTTP.		

MENU CHANGES

Reports

Financial

Assistant buyer-created invoices

BU6352

The serial numbers were not incrementing correctly. The first invoice of a new batch was getting the same number as the last invoice of the previous batch.

MENU CHANGES

In the Integrated edition (SPM*i*) 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 SPM*i* 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.

- v832 - Added 'Make from Invoice' button. Added to Setup > Stock > Worksheets > New and also Stock > Worksheets
- v836 - NZ - Renamed Patient > Financial > Resend button to ACC. Added Reject button under ACC option. Aust. - Added Resend button to Patient > Financials > HIC
- v839 - Changed Setup > HIC to Setup > Medicare Online - Eclipse. Also removed HIC from menu in the sub-items.
- v840 - Changed Office > Receipts > HIC Receipts to Office > Receipts > ERA Payments
- v843 - Removed obsolete 'Pending Buyer Created Invoice Balance' report from Reports > Financial > Accruals
- v848 - Added 'Operator Actions (Patient)' report to Reports > Management > Personnel
- v850 - Added 'Profiles' menu to Setup > Workstation.
- v849 - Added 'Workstation Profiles' menu to Utilities > Advanced. Permissions should only be given to SysAdmins or Technicians.
- v851 - Added New > Workstation button to Utilities > Advanced > Workstation Profiles

FIELD FORMS

There are now about 80 different Field Forms available. This list is being added to regularly and also existing forms are often updated.

Browse the forms that might be suitable for you to use and also check that you have the most recent version of the forms. Setup > Templates > Forms > Field Forms

Incisive Forms

- [-] Blood/Tissue Request
 - [-] Blood Bank request (v10)
 - [-] Tissue Bank request (v7)
- [-] Consent
 - [-] St. George's - Transfusion consent (v6)
- [-] ConsultSlips
 - [-] OphthalmConsult (v10)
- [-] Histo/Path
 - [-] Auckland Hospital (v2)
 - [-] Clinical Labs Australia (v3)
 - [-] DHM Pathology (v11)
 - [-] Dorevitch Pathology (v3)
 - [-] Douglass Hanly Moir Pathology (v3)
 - [-] Labtests Auckland (v4)
 - [-] San Pathology (v2)
 - [-] SCL-Bloods (v31)
- [-] Imaging
 - [-] Ascot @ Mauranui (v4)
 - [-] Ascot Radiology (v1)
 - [-] Auckland Radiology Group (v14)
 - [-] Bay Radiology MRI (v7)
 - [-] Broadway Radiology (v2)
 - [-] Castlereagh A4 Imaging (v7)
 - [-] Castlereagh Imaging (2019) (v4)
 - [-] Healthcare Imaging Referral (v4)

Update Instructions

Once Incisive have notified you that a new version is available you can choose when it would be most convenient for you to have the update applied.

These instructions are only to be used for **Minor-Updates**, as specified by Incisive.

There are three parts to the update process, which can be run independently.

1. Downloading the update file to the 'server' and preparing the files for deployment to the workstations
2. Updating the program files in the \SPMWIN directory on the server and updating the database structure
3. Deploying the updated program files to the application terminal servers, workstations and laptops

Downloading to the Server

This process should only be performed by either Incisive staff or IT technicians who are familiar with the Incisive update process.

1. Notify Incisive of when you wish to apply an update.
2. Go to <http://www.incisive.co.nz/support> and download the correct update installation file. Check that the file size is correct.
3. Find the \Spmwin directory on the server.
4. Rename the Updates directory to **PrevUpdates**
5. Delete any existing folder called **NxtUpdate**
6. Temporarily disable the virus-checker
7. Right-mouse-click on the downloaded updates installation file and choose 'Run As Administrator'.
 - a. Ensure the location of the \Spmwin directory on the server is correct
 - b. Complete the installation process to the **NxtUpdate** directory

Updating the Server

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

This process should only be performed by either Incisive staff or IT technicians who are familiar with the Incisive update process.

1. Backup the databases and all of the associated image and document files.
2. Create a Restore Point on the server.
3. If possible, restart the 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*.*
4. On the server, login using local admin or domain administrator rights.
5. Rename the directory called **NxtUpdate** to **Updates**
6. Copy all the files from the Updates directory to the \Spmwin program directory on the server. Overwrite the existing files.
7. 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.
It can be performed ahead of the workstation update process and even if staff are still using the SPM/PHM database.
8. Find the files newlogin.exe (if using the Classic edition) or XPMMenu.exe (if using the Integrated edition). Right-mouse-click on these files and choose Run As Administrator.
This will unregister any file entries in the Windows Registry and re-register the new files.
9. Log into 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.

Deploying & updating Application servers, Workstations & Laptops

If the Workstation has been setup correctly then updating to the latest Version should only take two easy steps. Incisive staff may assist with the updating of a single application server, workstation or laptop. Thereafter it is your responsibility to perform the task on the other devices.

1. Restart the application server or workstation/laptop
2. Temporarily disable the virus-checker (if possible)
3. Login using either a Local Administrator login or the Domain Administrator login
4. If installing to an application Terminal Server
 - a. Create a Restore Point
 - b. Exit to a Command Prompt and execute the following command
Change User /install
 - c. Use Task Manager and make sure that newlogin.exe or xpmmenu.exe are not running nor any other processes that start with spm*.*
5. Find the Incisive folder on the Desktop and double-click on the 'Update Program Files' icon. This should cause a command window to appear and display the files that are being copied from the Updates directory on the server to the \Spmwin directory on the local device.
Note: If the command window flashes up quickly and disappears, then something is not quite right with your setup and you will need to rectify the batch-file instruction or remedy the network connection. Call the Incisive Helpdesk for assistance.
6. Once the file copy has completed, Right-mouse-click on the 'Private Hospital Manager' icon in the Incisive folder and choose the Run As Administrator option.
This will unregister any file entries in the Windows Registry and re-register the new files.
7. Log into PHM and test that it has updated correctly.
 - a. Check the version numbers at the login screen.
 - b. Go to Patient → Notes and check that you can display the Notes for a patient.
 - c. Go to Appointment Book and display the appointment list for a specialist.
8. If updating an application terminal server, go to the command prompt and execute the following command:
Change User /execute
10. Enable the virus-checker
11. Make sure all of the workstations and laptops have been 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.