Release Notes for version 408.4

26th June 2019

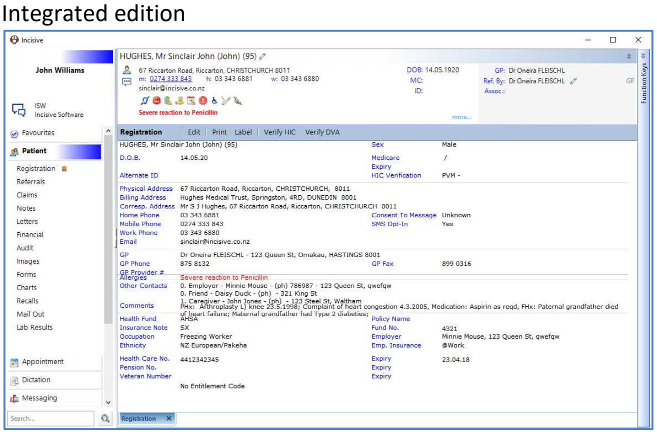
Specialist Practice Manager

New Zealand edition

Australia edition

Contents

Integrated edition



Classic edition

Abbreviations used

SPM Specialist Practice Manager

SPM*c*	Classic edition
SPM*i*	Integrated edition

PHM Private Hospital Manager

PHM*c*	Classic edition
PHM*i*	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

Appointment — Daylist — Daylist printout — RQ6670

The patient's email address (if present) is now included (along with their phone numbers).

Daylist — Send email Subject line — RQ6662

The wording of the Subject line has been changed when sending a list (F7) by email depending on whether it is an Operating list or Clinic list.

Menu — Login — Display of printers — RQ6690

As you login and choose a Location, the Main and Label printers configured for use at the Location, are displayed on the login screen. If you are using the Printers-by-Location option the message that appears has been improved.

Messaging — Internal (F10) messages — Display if Opened/Read — RQ6678

A message is only marked as Opened if the focus is on the message (Shift F10). Previously, all messages in the list were marked as opened as soon as the Read Messages screen was opened. There is now an option to mark a message as Unread on this screen.

Lab results — Formatting of the result. — Au — RQ6691

Lab results that contain formatting using the ~ symbol will now display in bold or colour as applicable (only for new results processed with updated HL7Aus.exe). These will also print in colour / bold and display in the Notes with this formatting.

Message Centre — Faster loading of 'My Tasks'

Improvements have been made to speed the loading of the 'My Tasks' tab where tasks have been linked to a patient's email

Message Centre — Link to Dropbox, OneDrive, Azure Storage drives

The Message Centre can import photo files directly from Dropbox, OneDrive and Azure Storage virtual drives. You don't have to download the files to the workstation then import via Patient > Images. Configure in Setup > Personnel > Operators > Messaging Options. Azure Storage and OneDrive requires Incisive Helpdesk services.

Message Centre — Referrals — RQ6664

A new referral is now created from an incoming HL7 referral message when a new patient is registered. The Billing Type is set to Private but the referral can be then edited from the patient header. While the PDF embedded in the message may contain further information, this is not available to the Message Centre application to do anything with.

Message Centre — Upload video files to patient

Video files (.avi, .mov, .mp3, .mp4, .wmv, .mpeg) can be imported and linked to the patient's Images tab.

Office — Schedules — DVA and Medicare Bulk Bill claims — Au — RQ6628

The Acknowledgement column now displays the success or fail information returned in the Transmission Message.

Schedules — DVA and Medicare Bulk Bill claims — Au — RQ6659

Additional checks are made at the time of processing schedules to ensure that the Service date is still within the Referral period.

Schedules — DVA and Medicare Bulk Bill claims — Au — RQ6692

Before processing a schedule, a check is now made to ensure that the referring & servicing providers are different. If they are the same, an informative message will display. Either delete the claim and re-enter using the correct referral and then process, or place the patient On-Hold and process the remaining claim before attending to the problem.

Schedules — View Stored Claims — Au

This option allows a report to be generated across all providers showing which claims are currently stored and awaiting transmission to Medicare.

Office   Schedules   Send Stored Claims   Au

This function allows claims that have been stored for later transmission to be sent through to Medicare.

Patient   Audit   Episode description   RQ6656

The Description field has been increased in length from 255 to 1,000 characters.

Financial   Allow invoices 60 days in to future   RQ6671

Invoices (Patient, Third Party and Split) can now be pre-dated up to 60 days into the future, as well as the Service date. Our recommendation is still to issue a quote and take a prepayment for services that have not yet been supplied, and an invoice should only be created once the servcie has been provided.

Financial   Check ref/servicing provider numbers   Au   RQ6693

A check is now made to ensure that the Referring provider and the Servicing provider do not have the same Provider number stem. This is to prevent situations where there is an internal referral (to the Group). While the referral can be selected and an Alternate Provider selected, the claim cannot be saved against the currently selected provider.

Financial   Credit of Store & Forward invoice   Au   RQ6683

If a Store & Forward invoice is credited, the claim will no longer appear in the report of HIC Invoices Stored for Transmission.

Financial   Email PDF of invoice with balance owing   RQ6637

When an invoice is selected, the Print/Send > Highlighted Entry function now has the option to Preview then print or email the selected invoice and also include the payments made and the balance owing on the invoice.

Financial   HIC Consult   Au   RQ6674

The HIC Consult screen now allows for an Alternate Provider to be selected, with the Provider number as configured against their Contact record. For example, an Assistant has provided the Service.

Financial   Medicare Bulk Bill claims   Au   RQ6636

If a patient has a Medicare Number that has not been verified in the last 3 months, a verification will be automatically performed before the claim is done.

Financial   Medicare Online claims   Au   RQ6649

The following wording has been added to Statement of Claim & Benefit and Lodgement Advice forms as per the notification from the Australian Government Department of Human Services: This form cannot be used to make a claim for Medicare payments. This claim has already been submitted to Medicare on your behalf.

Notes   Messages   RQ6679

The date and time the message was created is now included beside the operator who created the message.

Referral   Presenting Problem   RQ6655

The field length in the Referral for the Presenting Problem (Description) has been increased from 255 to 1,000 characters.

Setup   Appointments   Book name changes   RQ6646

If the name of an appointment Book is changed, the menu permissions are now also adjusted.

Appointments   Waiting Lists   RQ6647

If the name of a Waiting list is changed, the permissions are now also adjusted.

Provider > Email   From: uses Operator email address   RQ6669

If the 'Allow Operator email address as Reply-To address' is selected and there is no 'From:' address configured (for those practices where there are multiple email addresses in use), then the Operator's email address will be used as the From: address.

Utilities   Logs   RSD Message Logs   RQ6561

HealthDocs and HL7 2.4 messages are now included on this report.

BUG FIXES

Appointment

Form letters — Saving Form letters — BU6338
If a form letter began with a timestamp populated by the <ApptTime> merge code, when the form letter was saved / printed a Not a Valid Date message appeared.

Dictation

Letterhead/Footer — Letter Preview — BU6349
The Preview was displaying the footer and not the header. If there was no footer then nothing was displayed.

Type — Attaching PDF documents to ARTP — NZ — BU6327
If an ARTP, with an attached PDF External Docs, is processed, the attached PDF files were not being included.

Type — Hot key for Form Letters — BU6336
'F' has been reinstated as the hot key for form letters.

Type — Search and Replace — BU6346
The Search and replace option no longer brings up a TX4-OLE error.

Patient

Financial — HIC Consult — Au — BU6341
There was a problem sending claims using the HIC Consult option if the Location chosen was not the default Location (at the time of logging in). An alternate location can now be selected in the HIC Consult screen and the correct location based Provider number details are transmitted in the claim.

Financial — Credit note — Au — BU6343
The annotation of the item number was overwriting the text amount. The annotation now wraps.

Financial — HIC Fully Paid Claims Au — BU6330
If a Patient Claim is transmitted as Fully-Paid, then a new flag in the database is set indicating that it was fully paid. Subsequent deletion of the receipt will not alter this flag. If an HIC Status Report is run after the deletion of the receipt, the Fully-Paid indicator will still show as 'Yes'.

Financial — Send email — BU6333
Invoices were being sent with a Reply-To address taken from the From address field.

Financial — Sub-contractor accrual reversal — BU6347
When a prepayment is applied and then deleted, a corresponding reversal entry is now made to the sub-contractor accrual entries.

Forms — Printing Chinese characters — BU6332
If a form letter contains characters in a Chinese font (SimSun), when processed and printed the characters were replaced with question marks.

Notes — Get Notes — BU6340
If the GetNotes function was used the External Document files were not being copied to the correct folder and could not then display.

Patient Header — Emailing — BU6311
When sending an email from the patient header, if you selected a recipient and a BCC, under some circumstances it was changing the BCC to a CC.

Reports

Financial > Analysis — Sales Analysis — BU6317
The reversal/deletion of Credit Note was incorrectly being reported as a negative quantity when it should have been positive. The amount was correctly recorded.

Print preview — Saving PDFs from print preview — BU6342
When the PDF button on the print preview form is used, if the PDF file directory was a UNC network path, the default path of 'c:\spmwin\pdf_files' was sometimes being used instead.

Setup

Consolidate Billing Types — Financial - Billing Types — BU6313
The deletion / consolidate routine now correctly moves the records before deleting the record.

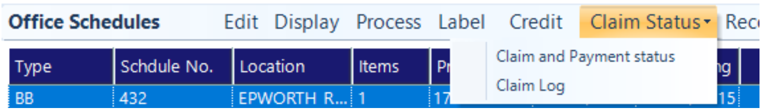
MENU CHANGES

In the Integrated edition (SPM*i*) there have been a few additions and changes to the items in the menu.

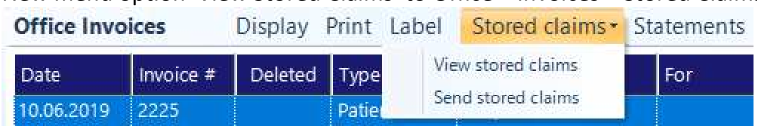
Any new, modified or moved menu items will be disabled (dimmed) for all Operators in SPM*i* until you have updated the relevant Roles.

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.

v824 - Changed the button 'HIC Status' to 'Claim Status' in Office > Schedules.
New menu option 'Claims Log' button to Office > Schedules > Claims Status



Changed the button 'Forward HIC Claims' to 'Send Stored Claims'.
New menu option 'View Stored Claims' to Office > Invoices > Stored Claims.



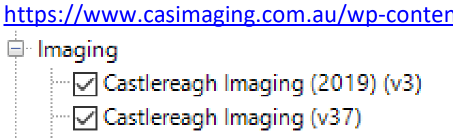
> Note – you will need to reassign Permissions to the relevant Roles for the changes made to the 'Forward HIC Claims' and 'HIC Status' buttons.

FIELD FORMS

Field Forms provide a replica of pro-forma documents you use and provide to patients. Examples are Test Orders and Admission forms.
A library of Field Forms that have been created by Incisive is available for you to use or modify.
These are available in Setup > Templates > Forms > Field Forms. Use 'Refresh Incisive Forms' to update your list.

New Field Forms:

- Castlereagh Imaging (2019) – matches their new format
  https://www.casimaging.com.au/wp-content/uploads/2019/03/Handwritten-Request-11.3.19.pdf



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.