Release Notes for version 408.6

12th November 2019

Specialist Practice Manager

New Zealand edition

Australia edition

incisive
medical systems

Contents

Integrated edition
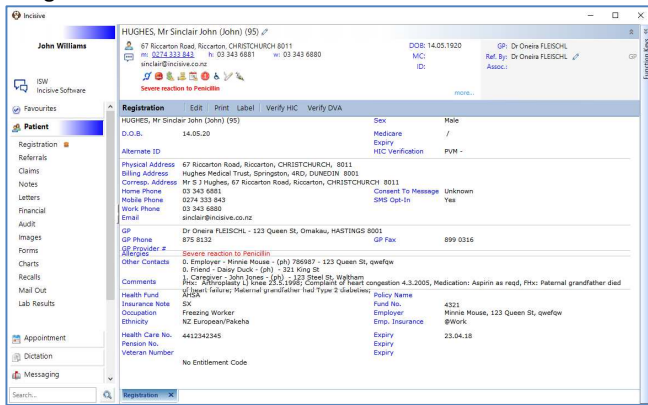
Classic edition

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

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.

| 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.

| | 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.

| Patient | 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.

| | 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.

| | Financial | Invoicing | Future-dated invoices | RQ6712 |

Invoices cannot be inadvertently future-dated due to a future admission being selected.

Patient   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.

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.

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.

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.

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.

> 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

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.