

Release Notes for version 406.0

10<sup>th</sup> August 2017

## **Private Hospital Manager**

New Zealand edition

Australia edition

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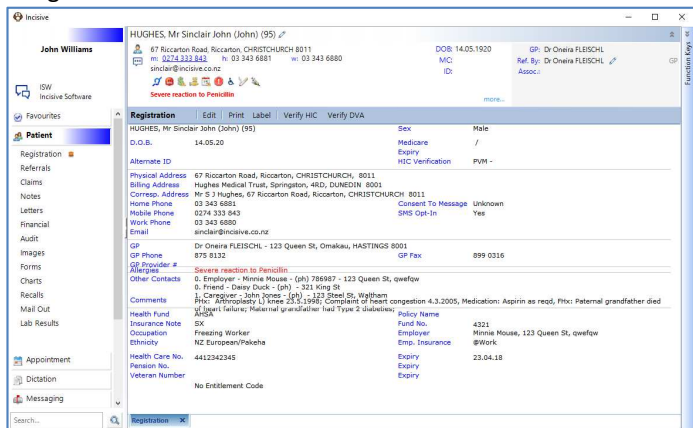
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Integrated edition



Classic edition



Abbreviations used

SPM Specialist Practice Manager

SPMc Classic edition

PHMi 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	New Online Help Manual	Help > PHM Help	PHMi	
	An online help manual that is kept up-to-date with all the latest features and fixes is now available in the Integrated edition. Includes links to relevant topics and 'how-to' articles.			
	Open modules in separate windows		SPMi	
	Right-mouse-click on a module (e.g. Patient, Appointment etc.) to open them in a separate window.			
	Medicare Online & Eclipse Claiming Adapter v612	AU	PHMi	
The latest Online Claiming Adapter from Medicare is now being used for all Medicare Online & Eclipse functions which enables the new features in this v406.0 update.				
Fetal growth charts (GROW) from the Perinatal Institute ( <a href="http://perinatal.org.uk">perinatal.org.uk</a> )				
Fundal height measurements are uploaded to the GROW server and growth charts are displayed. Uses the same online service as is provided in the DHB's				
Appointment	Appointments	Calendar	T' hot-key	PHMi RQ5841
	Pressing the letter 'T' will take you to Today.			
	Appointments	Daylist	Editing appointment with linked SMS	RQ5878
	If you edit or transfer an appointment but remove the option (tick) to queue a new SMS message, the old message was not being deleted, resulting in the original message remaining in the queue. The queued message will now be deleted, regardless of whether a new message is created or not.			
	Appointments	Daylist	F5 now works from F4	PHMi RQ5851
	F5 Daylist is functional from the F4 Patient Search when making an appointment			
	Appointments	New Appointment	Health Fund & Policy number	RQ5903
	The Insurance / Health Fund and Policy number fields have been added for use when making an appointment.			
	Appointments	Operation list printout	Prior Approval number	RQ5898
	The Prior Approval number (if present) is now included under the Insurance details.			
Appointments	Print Daylist	Insurance details added	RQ5231	
The Insurance details have been added (removing ethnicity line).				
Appointments	Quick Appointments SMS Reminders		RQ5895	
If an SMS has already been sent and the time of the appointment is subsequently changed, the field to send an SMS will be ticked to queue a new message. If you do not want to send a further reminder, untick this field. Note that if you do queue another message to be sent, it will only be sent if your scheduled task is set to go more than once a day.				
Appointments	Hot Keys		PHMi RQ5900	
The following Hot Keys have been added (for compatibility with Classic Interface), Alt S to Search, Alt P to Print, Alt F to Transfer				
Waiting Lists	SMS	SMS message added to Patient > MailOut	RQ5959	
If an SMS is sent from the Appointment - On Hold tab, it now displays the details in the Patient - Mail Out tab.				
Waiting Lists	Export of Waiting list data		RQ5974	
The date fields are now being exported as a date and not a number (days from 1/1/1800).				
Waiting Lists	Sending SMS messages		RQ6039	
The behaviour is now similar to the Appointment list functionality. Only the highlighted patient is selected. The Drop down list allows for the selection of All patients or Specific Patients				
Waiting Lists	Additional 'How Long' column		RQ5917	
An extra column has been added to the display for How long (Length of Operation/Appointment).				

NEW FEATURES

Dictation	Type	Charge	Show a charge has been entered.	RQ5838
	Financial transactions entered in Type Dictation by using the 'Charge' option will now create an 'i' entry that appears in the Item column to indicate the billing has been done.			
	Type	Letter	Comma added after Salutation	RQ6006
	When the Salutation merge code is used in a letter a comma is automatically added after the salutation text is inserted			
	Type	Letter to Patient	Email address	RQ5865
Where there is an email address recorded for the patient, this is now included alongside the address.				
Type	Preview		RQ6001	
The preview no longer displays immediately as this was causing performance issues for some sites. The preview will now display after a couple of seconds if no activity is detected, i.e. up arrow, down arrow etc.				
Type	Date typed and date saved.		RQ5874	
The date is now saved when an item is typed and saved. Previously, the date in Type Dictation was only saved when exiting from the Type Dictation tab.				
Type	Check dictation		RQ5817	
Dictation can now be marked as 'Checked' from Type dictation.				
Messaging	Healthdocs	Claimed & Unclaimed	Printing	RQ6022
	The ability to Print HealthDocs is now available for both Unclaimed and Claimed MailDocs.			
	Healthdocs	Acknowledgements		RQ6003
Normally Healthdocs are XML files, however some PMS systems produce .ack files as acknowledgements. These are now handled as part of the import routine.				
Office	Receipts	Delete	Date deleted is displayed	RQ6030
	If the receipt has been deleted, then the date of deletion is now listed in the the date deleted in the column.			
	Receipts	HIC Receipts	AU	RQ5929
	More information now displays for the 10 most recent payments if no unprinted payments have been found.			
	Receipts	HIC Receipts	Payments only for the Provider	AU RQ6021
	This now only displays payments for the selected Provider. From here, the payments can be selected and automatically receipted (by the program). Payment Advice slips are automatically retrieved from the Eclipse server or can be manually retrieved using Utilities > Import > Eclipse Payments - All Providers.			
	Receipts	HIC Receipts	receipt date/payment date	AU RQ6043
The payment date (received from the fund) can now be manually amended before the receipt is processed. This is to allow the date to be the date the funds were actually deposited (as per the bank statement).				
Schedule	HIC Status		AU RQ5948	
If no fund reason code is available, the Medicare reason is now used.				
Schedules	ACC Export	base37 encoding	NZ RQ5882	
The filename encoding of schedule number has been changed to base37 for the leading digit, to allow much wider range of numbers. This is because the ACC system cannot handle a filename if it is too long.				
Patient	F4 - Search	Advanced Search	Phone number format	PHMi RQ5777
	The advanced search will now find phone numbers regardless of how they are entered, i.e. with spaces, - etc.			
	F4 - Search	Advanced Search	Invoice number	RQ5968
Credit Note numbers are now suppressed from the Invoice number search.				
F5 - Daylist	Show Financials icon		AU RQ5846	
The entry of a HIC Quote for the patient no longer triggers a \$ symbol to appear if the 'Show Financials' option is turned on.				

## NEW FEATURES

Patient	F5 - Daylist	Billing Type code and Appt notes		RQ5334
	The Billing type code and Appointment Notes have been added to the daylist screen.			
	F7 - Send	Combine attachments option remembers last setting.		RQ5831
	The setting 'Combine Attachments' is now saved from one send to another.			
	F10 - Messages	Provider's name displayed		RQ5787
	This now displays the Providers Name that the message will be entered against.			
	F10 - Messages	Message History	Show messages sent to me' option	RQ5849
	The Message History option now has the ability to 'Show messages sent to me'.			
	Financial	Credit	Delete Credit amount	RQ6044
	A new function has been added to allow the deletion of a credit transaction (currently not for Credit Notes or Schedule Credits). Highlight the credit entry and select Delete then confirm the deletion. A new reversal transaction is written to the financial record for the patient and displays as 'Reversal of Credit'			
	Financial	Debt write-off	Reversal of debt write-offs	RQ5980
	A debt previously written off can now be reinstated by deleting the Debt Write-Off entry. Highlight the entry and select Delete. The deletion will be dated with the current date. A reversal entry is created and will appear on the list of transactions as 'Reversal of Debt Written-Off'. The reversal will be listed on the same report as the Debt Write-offs in the period it was reversed.			
	Financial	HIC Status	Codes for status of HIC claim	AU RQ5976
	The status of the claims will now display an 'S' where the claim has been Stored for later transmission and 'R' where the claim has been rejected.			
	Financial	Invoice	Operation Time included on invoice	RQ5888
	The operation time (number of minutes) is now included on the invoice.			
	Financial	Invoice	Anaesthetist name included	RQ5923
	The name of the Anaesthetist is now included on the hospital invoices.			
	Financial	Invoices	Print option changed to 'Process'	RQ5924
	As paper copies of invoices are not required in some instances, the 'Print' option has been changed to 'Process'. If the 'Paper Copy' option is selected, the invoice will print as normal. Remove the tick and the invoice will not print (although a copy of it can be reprinted in the usual way).			
	Financial	Invoices	Service Location	AU RQ5921
	The service location is now included on the invoice along with the Provider Number.			
	Financial	Lodgement Advice	AU	RQ5947
	The wording on the Lodgement Advice has been changed from Hospital Referral to In Hospital Referral to satisfy Medicare test case.			
	Financial	Prepayments		RQ5977
	3rd Parties that have been deleted are now suppressed from the pick list.			
	Financial	Quote	Ranking of highest fee charged	AU RQ5982
	If the quote is OPT IN, then the surgeons fee is ranked by the Medicare ranking, not the surgeons ranking. If not opt in, sort by surgeon ranking (as at present).			
	Financial	Receipts	Format of receipt	AU RQ5868
	The alignment of the text on the receipt has been modified.			
	Financial	Receipts	Unallocate receipt (reverse receipt)	
	The Unallocate Receipt process will convert the Receipt into a Prepayment which will put the value of the receipt as a Credit on the patient's file. This allows you to delete or modify an invoice without deleting the payment (receipt) and possibly altering the banking. <a href="#">View this link</a> for additional information.			
	Financial	Split Invoice	3rd Party	RQ5989
	The split invoice now defaults to the 3rd party as recorded in the referral (the same as for third party invoice).			

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Patient	Financial	Split Invoice	Option to not print either invoice	RQ6019
	The option to print or not print either the patient invoice and / or third party invoice has been added to the Split Invoice. Remove the tick from either option or both to suppress a printed invoice.			
	Financial	Split Invoice	Balance calculation	RQ6005
	If the patient amount was entered before the 3rd party, the balance for the 3rd party was not automatically calculated. This has now been corrected.			
	Financial	Pended Patient Claims	AU	RQ6051
	If a claim has been 'Pended' then a (P) will now show on the Transaction screen beside the wording Patient Claim. (S) will show if the claim has been stored for later transmission and (R) if the claim has been rejected (by the fund).			
	Financial	Transactions Detail	AU	RQ5979
	Transaction details (press the space-bar on the high-lighted transaction) have been modified to include the ClaimId and TransactionId.			
	Stock Used	Print Stock-Entered	Excluding non-medical categories	RQ5778
	An option has been added to exclude the non medical categories from the Stock Entered report (Stock Used - Display - Print). Any stock category that has been marked as 'Is not medical) will be excluded from the resulting printout if you select Yes to exclude it. This is of particular use for supplying ACC with a list of Medical Supplies used for Non Core Surgery claims.			
	Stock Used	Jump to end of list of Stock entered.		RQ5740
	Ctrl + End will now take you to a blank line (usually the bottom of the stock list) to continue entered Stock Used.			
	Stock Used	Default date of Service		RQ5745
	When entering stock, the default service date (pressing enter on blank service date field) can be set to be the referral (i.e. operation) date rather than today. Contact Incisive to enable.			
	Form Letters	Shift+F6 tag		RQ5827
	Shift F6 will now toggle the tag for all form letters on and off.			
	Letters	Tag options		PHMi RQ5826
	F6 and Shift F6 now work with the Grid.			
	Mail In	External document - more than 1 page		RQ5795
	The program will now display the first page of the external document in the preview rather than the last.			
	Notes	ARTP	New Non-core procedure code	NZ RQ5792
	A new procedure code of NON-CORE has been added to the list of ACC ARTP Procedure Codes. This is because a Procedure Code is a mandatory field for the sending of an ARTP as a HealthDoc. You must ensure that if you are completing a Non Core ARTP, in addition to the segment to record the Non Core Codes (ESR codes), you will also need to select the Non Core code.			
	Notes	ARTP	ESR01 and ESR02 descriptions	NZ RQ5776
	The references to 180 minutes have been changed to 120 minutes.			
	Notes	ARTP	Sending ARTP's as a HealthDoc	NZ RQ5791
	If an ARTP is incomplete, i.e. a Procure Code and Description has not been entered, if you try and send the ARTP, a message will now display stating that it is incomplete and a HealthDoc Message will not be created. This is because the receiving systems cannot correctly process and handle the ARTP if it is missing data. Where the ARTP is for a Non-Core Procedure, select the Non-Core Procedure code where you would normally select the code, i.e. SHU71. This needs to be in addition to selecting the Non-Core Codes, i.e. ESR01 etc.			
	Notes	Prescriptions	Position of screen	NZ RQ5901
	The Structured Prescription screen is now centred.			
	Patient Header	Next Recall and Waiting List dates		PHMi RQ5796
	The patient header has been updated to include Recall and Waiting List entries., The date of the next recall			

## NEW FEATURES

is listed (if present) together with the name of the Waiting List the patient is on. If the patient appears on more than one Waiting List 'Multiple' appears.

Patient	Registration	Alerts		RQ6010
	The Diabetic icon in the Patient Registration screen is now similar to the one that displays in the Patient Header.			
	Registration	Health Funds/Insurers		RQ5993
Health Funds / Insurers now display in alphabetical order (name and not code).				
Patient	Registration	ADF Entitled Personnel	AU	RQ6027
	A new field to record the ADF Entitled Personnel Key Number has been added to the Patient Registration screen (section 7 - Card Numbers).			
	Theatre Register	Re-order		RQ5810
Theatre	You can now change the reporting time where the reporting date is not the same day. This will also (optionally) update the Room Booking as well.			
	Theatre Register	Days ahead or behind today		RQ5829
If you are viewing a list for other than today, the day (and the number of days ahead / behind) now shows above the list.				
Reports	Appointments	Appointments in Period		RQ6028
	The DOB as been added at the end of the Patient name, (dd.mm.yy). When exported, the DOB is recorded in a separate column.			
	Financial	Accruals	Buyer Created Tax Invoices	RQ5925
	Where the sub-contractor is not GST Registered, the Tax Invoice has been modified to say Excl. GST rather than Inc. GST			
	Financial	Analysis	Sales Analysis includes Location	AU RQ5940
	Schedule entries (BB Med and DVA) now include the location of the service.			
	Financial	Cashbook	Financial Year reports	RQ5922
	The financial year dates are now taken from the Config setting for the Provider.			
	Financial	Cashbook	Previous GST report	RQ5803
	The sort order for the Previous GST Reports has been reversed i.e. most recent entry is now at the top. The time and ID Code of the person who advanced the GST return now also listed. This will only apply to GST returns advanced after the update has been applied.			
Financial	Receipts	HIC Payment & HIC Invoice Payment for period	AU RQ5946	
Additional information has been added to these reports to comply with Medicare test cases. Data added includes HIC approval, Remittance Advice, Payee Location, Part No, Part Total, Payment Reference, (detail) Account Reference ID, (detail) Claim ID, (detail) Claim Channel Code.				
Financial	Receipts	HIC Payment report	AU RQ5883	
A new report has been added to generate a payment report for the HIC Payments not yet printed for the current user. This is in Reports - Financial - Receipts - HIC Payments. Permissions will need to be modified to gain access to this report.				
Management	Patient Referral report	Additional export fields	RQ5801	
The following additional fields have been added to the this report when exported: Email Address, First Name, Lastname				
Management	Referral Analysis	Choose the number of referrers	RQ5763	
An option has been added to select the number of referrers. Previously this was hardcoded to the top 30.				
Patient	Patient Referral report		RQ6009	
This report now has an option to select either All Patients, Only Active (referrals) or Only Discharged (referrals).				

## NEW FEATURES

Reports	System	Default Workstation/Printer report	RQ5890
		This report now excludes workstations marked as deleted.	
	System	Workstation Setup report	RQ5891
		If running on a terminal server, then the machine will display the host name.	
Setup	Contacts	Health Fund Fund ID displays on screen	RQ5938
		The Fund ID now displays on screen, along with the Gap Cover Scheme (umbrella fund).	
	Financial	Cashbook Autopayments	PHMi RQ5794
		The screen was not refreshing after deleting an autopayment. The screen now refreshes.	
	Financial	Cashbook Initialise cashbook	RQ5995
		Banking records prior with a date prior to the start date are now marked with a date of deletion as at the day before cashbook start date, not the current date. Previously it was necessary to set the date on the computer back.	
	Financial	Charges Billing Types include ADF AU	RQ6035
		There is now an option to include the ADF (Australian Defence Force) details on invoices (3rd party). If enabled, then the ADF Entitled Personnel PMKeyS Number recorded in the Patient Registration screen (new field) and the DAN recorded in the Reference field on the Registration (existing field) will print on the invoice.	
	Financial	Charges 3rd Party Schedules print styles removed	PHMi RQ5819
		The following Print Styles for schedules have been removed as they are now obsolete: ACC Acute services - A & E Admissions, ACC Acute services - Inpatient Billing, Contract - Community Nursing	
	Financial	Quote New merge code for Total Rebate AU	RQ5824
		The merge codes for Quote Surgeon / Assistant / Total Refund have been removed from the screen as these have been replaced with Quote Surgeon / Assistant / Total Rebate. The old merge codes of <qtsCom>, <qtaCom> and <qttCiom> will still continue to work if these have been used.	
	Template	F9 - Merge codes New merge code for ADF IP AU	RQ6034
		A new merge code has been added ADF Entitled Personnel PMKeyS Number. The ADF information is entered into a new field in the Patient Registration screen.	
	Template	F9 - Merge codes New merge code for Prior Approval	RQ6026
		A new merge code has been added for the Prior Approval number (taken from the Referral). Referral Prior Approval Number - <RefPriorApproval>.	
	Template	F9 - Merge codes Patient notes & letters	RQ5862
		The F9 merge codes can now also be used directly when entering notes, letters etc. for a patient. If editing a patient note/letter/form letter and F9 is used to add a merge code to the document, it automatically expands the merge code with the text applicable for that patient (e.g. '<Age>' => '56')	
	Stock	Category Category - Type	RQ5839
		A new type has been added (Services - Recovery). This allows better reporting options by allowing the data to be sorted and filtered by this category.	
	Stock	Edit Stock Pricing recalculation	RQ5779
		The behaviour of the [Recalc All] and [Recalc Row] buttons has been changed to rebuild prices from the relevant price margins for the Billing Type (rather than just applying multiple-procedure pricing).	
	Template	Letter New merge code for ARTP - Recommended Treatment	RQ5877
		A new F9 merge code for ARTP Recommended Treatment annotation entered when Surgical is entered.	
	Templates	F9 - Merge codes	RQ5858
		New tabs have been created, and the relevant merge codes have been moved to these. A search option has also been added, which will search across all tabs. Typing a letter i.e. 'L' will take you to the first entry starting with that letter on the current tab.	



## NEW FEATURES

Utilities	Export	Export Doctors to CSV	All Contact fields are exported	RQ5912
			All the fields in the Contact have been added to the export function (Including all of the Identifier fields and the preferred methods).	
	Import	ACC codes	Importing of ACC CSV file	NZ RQ6037
			Map any em-dash to hyphen. I.e. map chr(150) to chr(45).	
	Import	Importing ECLIPSE ERA Payments	AU	RQ5975 & RQ6029
			The importing of the payment information from HIC has been separated out from the Office - Receipts function. This process needs to be completed for all Providers as Medicare only allows for querying based on the Minor ID (site wide).	
			Once the payments have been pulled back and saved in the database, these are then available to be receipted by Provider in Office > Receipts > HIC Receipts.	
			Permissions to the menu option will need to be enabled (Utilities > Import > Eclipse Payments - All Providers) but should be limited to the Manager role.	
			A Scheduled Task can be created in Windows to automatically run the HICGetERA.exe file to retrieve the Eclipse ERA payment advice for all the Providers.	
			<a href="#">Click here</a> for further information.	
	Logs	Fax Log		RQ5786
			By default, the date range will now display the current month. Other date ranges can be selected by selecting Date Range.	
	Logs	HIC Logs	AU PHMi	RQ5767
			A menu option to allow access to the HIC Receipt logs has been added to assist with analysis.	

**BUG FIXES**

Appointment	Appointments	Day list	Display of SMS status	BU5817
	The 'p' or 's' for the SMS Message status was affected by any SMS on the day being linked to an old appointment.			
	Appointments	Day list	Daylist and SMS	BU5812
	The SMS status now displays correctly where a patient has been put on a waiting list first, then transferred to an appointment.			
	Appointments	Edit Appointment	Queued SMS	BU5783
	The queued SMS message was being cancelled when the appointment was edited.			
	Appointments	First-free	Find first free appointment	BU5774
	After selecting a target date, the appointment is being made on the current date.			
	Appointments	Labels	Print entire session	BU5808
	Intermittently prints the same (incorrect) GP details for each label. Other details (name, dob, etc) are correct for patient label.			
	Appointments	Multiple SMS	Immediate SMS - edit and change of appt time	BU5765
	The original database record was being overwritten even though it had been sent. Now, if the SMS Message has been sent, and the time of the appointment is then changed, a new database record is written. This is then correctly reflected in the Mail Out tab showing both entries whereas previously it only showed the one even though two messages were sent.			
	Appointments	Quick Appointments	Queued SMS	BU5819
	If the time is changed when editing a quick appointment with a queued SMS, the program will now tick the box to queue a new SMS and cancel the previously queued SMS message.			
	Appointments	Session cancelled.	Queued SMS not sent for cancelled session	BU5745
	If a session has been cancelled and appointments have not been transferred to another date, the SMS Sender will no longer send the SMS Messages for the cancelled clinic.			
	Appointments	Status	SMS Message Sent	BU5856
	When Left Phone message is ticked and SMS message is sent, the Status was displaying as 'No SMS message sent. This is now displaying SMS Message Sent.			
	Appointments	Transfer		BU5820
	After transferring a Session to another day, a Program is busy .... message was displaying			
	Appointments	Transfer Session	Queued SMS for transferred session	BU5700
	The Appointment link is now being updated to point to the new session. This was affecting the timing of the sending of SMS messages.			
	Appointments	Refresh of the Appointment list		PHMi BU5728
	The appointment screen was not refreshing, therefore the status was not updating. This screen now refreshes in the same way as it does in the classic interface.			
	Notify	Transfer	SMS message for transferred appt.	BU5822
	If an appointment was moved to another day via the Notify > Transfer mechanism, the queued SMS entry was not being cancelled and a new entry queued. A prompt will now ask whether a new message is to be queued.			
	Resources in Use			BU5816
	The grid display was displaying part way down the screen.			
	Search	Alt-S hot-key to Search		PHMi BU5807
	Alt-S now activates the 'Search' option in keeping with the Classic interface.			
	Theatre books	Print 'TheatreList'		BU5707
	The book (theatre) name is now included on the Theatre List.			

BUG FIXES

Dictation	Check	Print		BU5714
	Selecting Print from Check Dictation was printing out letters that were not displayed on the screen. Only letters currently on the screen will now print.			
	Check	Print	Not marked as Finished	BU5742
	Where 'Finished' is required, the Print option is no longer printing entries that are not marked as finished.			
	Check	Process	Printing patient letters	BU5729
	If the patient does not have an email address, regardless of the option selected when processing dictation, the letter will print out.			
	Check	Process	Operation Note margins incorrect	BU5821
	The margins saved in the document are now reflected at the time of processing dictation, rather than being printed with the default settings.			
	Check	Sort By Session display		BU5764
	The tab is now showing the correct appointment books when 'Display->Sort by: Session' is selected.			
Type	HIC In-Hospital claims		BU5839	
These no longer produce 'The following Error occurred! Type mismatch.'				
Type	New	Unrelated Letter	BU5845	
The message Missing Form letter no longer displays when saving an Unrelated Letter.				
Type	Quick Code - Letter	F8 Codes	BU5841	
The text in the Quick-code retains the formatting when inserted into a letter.				
Type	Spellcheck	Autosave timing	BU5740	
When a letter autosaves (once per minute), it can cause a slowdown/pause in keystroke handling. If an operator is typing at the time, this can interrupt the auto-correction feature of the spellchecker. This sometimes causes it to misplace the text cursor, leaving it within a word instead of after the word. The autosave now takes place when a pause is detected in the typing.				
Type	Addition of Letter To recipients		BU5883	
If the Letter To recipient is added after the letter has been created, the existing recipients are left. Manually remove if required.				
Office	Expenses	Paid To		BU5726
	Selecting to add an item to the 'Paid To' field was bringing up the prompt a second time, resulting in the entry being added twice if Yes was selected a second time. The prompt will now only appear once.			
	Receipts	HIC Receipts	DVA payments with the same run number	AU BU5866
	The second payment was being ignored if the run number was the same (but a separate payment).			
	Schedule	Receipts	Deleting a previous deletion!	BU5900
If you delete a schedule receipt, your deletion can no longer be deleted.				
Schedule	Reconciliation	Mark All function	BU5736	
Where a schedule had been underpaid, if Mark All was selected and then a value removed and Enter was not pressed, the item was being included in the reconciliation. Enter no longer needs to be keyed to ensure the item is not paid off.				
Patient	F10 - Messages	Change of Sender details		BU5904
	If you Edit a message and add something to it, the Sender details no longer change.			
	F3 - View patient details	Notes	Escape key	BU5888
Escape now works from the notes tab of F3.				
F4 - Search	New Patient		BU5815	
If the 'New Patient' button was clicked without entering any search text, the default 'example' text was being entered instead of leaving it empty.				

BUG FIXES

Patient	F4 - Search	Search by Invoice Number		BU5865
	This will now find all invoice numbers, not just the first entry.			
	F4+Shift	Shift-F4 referred patient only	PHMi	BU5762
	This is now working correctly in PHMi, i.e. filtering the referred patients.			
	Faxes, Mail Out / Copy to	Mail Out		BU5830
	The Mail Out tab now correctly displays the name of the Copy To recipient where a fax has been sent.			
	Financial	Accrual allocation for invoices partially paid		BU5850
	Improved calculation of accrual amounts where there is a partial payment of an invoice.			
	Financial	HIC Claims	Claiming for an Assistant	AU
	BU5836 If a claim has been paid by the patient and the service has been provided by an Assistant (Alternative Provider) , a Payee Provider is no longer submitted in the claim as the money isn't coming to the provider - it is going to the patient.			
	Financial	HIC Claims	DVA item description missing	AU
	BU5814 When entering a DVA item the description was not showing on the claim.			
	Financial	HIC Consult	Verify	AU
	BU5894 The HIC Consult now recognises a PVM or an OPV therefore a verification is no longer required in this screen if one or other of these has already been done.			
	Financial	HIC In-Hospital	Verification	AU
	BU5876 If the claim is either an IMC SC or an IMC AG, then the verification for both the fund and medicare will be checked.			
	Financial	HIC In-Hospital	Claiming for Assistant	AU
	BU5685 If the claim is an IMC AG or SC, then the party of billing will now show as the fund rather than the patient.			
	Financial	Maternity	Services after birth claims	NZ
	BU5877 The Services after birth claim no longer requires fields to be completed if a Neonatal death date is entered. Data is still required if no Neonatal death date entered.			
	Financial	Print/Send	Emailing receipt	
	BU5861 Emailed receipt sometimes mixed the letterhead into the address			
	Financial	Split Invoice	Separately email the invoices	
	BU5897 Print - Highlighted entry - Email now allows the patient portion of Split Invoice to be emailed. A copy of the 3rd party portion of the invoice can also be emailed.			
	Financial	Split Invoice	On-Hold	
	BU5895 If a Split Invoice has been put On-Hold, when edited the Send option becomes available.			
	Images	Browse	.JPEG file type	
	BU5880 After selecting a directory to browse, images with a 'JPEG' extension were not being displayed. The non standard JPEG files will now display (this is an Apple format not a Microsoft format).			
	Images	Scan	Assigning images to a patient	
	BU5758 Sometimes the Image Type was being changed to 'Document' instead of 'Image', resulting in images being assigned as Scanned Documents by mistake. Changes have been made to try and prevent this from occurring.			
	Lab Results	Layout of lab result after editing		
	BU5727 Editing a lab result and entering a sub-type will no longer alter the layout of the display of the lab result.			
	Letters	New	Invalid character	PHMi
	BU5795 If Shift+Enter was used instead of Enter when entering/editing letter recipients an 'Invalid Character' error was generated when the XML data was read by the SPM menu program. This has now been resolved.			

BUG FIXES

Patient	Notes	Display	Provider's Notes permission to view	PHMi	BU5837
	When running the Integrated version of SPM, the display options of Group and All in Notes > Display, will now only allow access to a Provider's notes where there are permissions set for the Operator or Role.				
	Notes	ARTP	Attached notes		BU5885
	Scanned documents and External Documents are now being included in the creation of the PDF file.				
	Notes	Prescriptions	Incorrect format	AU	BU5785
	The prescriptions were printing in NZ format due to a flag not being correctly set. This has now been corrected.				
Theatre	Order Test	Comments			BU5768
	The text written into the Comments field, now displays without the need to scroll across.				
	Registration	Verify	Screen going behind	AU	BU5788
	Changes have been made to try and prevent the verification screen from going behind				
	Registration	Apostrophes in surnames			BU5863
	While the Billing and Correspondence addresses look correct, on saving the capitalisation was lost. This has now been corrected.				
Reports	Registration	Refresh if editing with a digital pen		PHMi	BU5800
	If the Registration was edited using a digital pen and the address was changed the details did not change on screen.				
	Theatre Register	In Theatre	Patient not requiring Admission		BU5757
	For Medical bookings you can bypass the requirement for the patient to be admitted. Surgical bookings still require admission.				
	Theatre Register & Recovery		Problem changing date		BU5767
	If the date was changed in the theatre list by clicking on menu's calendar control, the program was locking up and flickering. If the Jump option was used, there was not a problem. This has now been resolved.				
Setup	Appointments	Appointments in Period report			BU5704
	This report has been split into two menu options, Appointments in Period (Current Provider) and Appointments in Period. The latter allows for reporting across the Group.				
	Financial	Receipts	HIC Invoice Payments	AU	BU5840
Setup	The page length for this report is now correctly set as portrait. The Payer name has also been added and the report is now sorted by bank account.				
	Management	Referral Analysis	Export		BU5698
	The Export option now exports the detail along with the column headings.				
	Appointments	Appointment Types	Multiple resources selected		BU5750
	If an Appointment Type uses more than one Resource, these now all display in the Resource column.				
	Operator	Setting	Favourite operators		BU5743
Where 'Favourite Operators' have been selected (Setup - Operator - Settings), when creating a new message (F10) these operators are now selected by default.					
Setup	Personnel	Operator	Clear Password	PHMi	BU5860
	Administrator' functions such as 'Clear password' and permission options for 'Alerts' were not visible unless classic 'practice manager' status was set.				
	Stock	Packs	Deleted Packs in worksheet		BU5763
	If a pack has been deleted (but previously included on a Worksheet), this will no longer print out on the Worksheet.				
	Template	Form Letter & Letter Merge code for Provider Number			BU5766
The 'Provider number' merge code now returns the number for the current location (selected at login)					

## BUG FIXES

Utilities	Consolidate patient	BU5719
	Some patients were failing to consolidate if there was data in WorkLabMessage linked to the patient. This has now been resolved.	
	HL7 (Healthlink) messages	BU5882
	Some Acknowledgment messages were not being created depending on the type / sequence of files to be processed. The processing of files now creates files for all messages.	
	Lab & RSD Mail      Match patients	BU5784
	The list of 'matches' for unknown patients has been limited.	
	Spell Check                      Edit Correct List	BU5702
	The program now looks to the path configured in Setup - workstation - workstation configuration and not the default path c:\spmwin.	

## 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.

v699 - Added GROW Chart to Patient module. Requires licence to enable. Contact Incisive

v707 - Added Undo Admission to Utilities > Bookings

v713 - Added 'Submit ACC Invoices Online' to Utilities > Advanced (connects to the ACC eBusiness online application)

v716 - Changed Office > HIC Payments to HIC Receipts. This provides receipting of Eclipse payments for a specific Provider.

v717 - Add Utilities/logs/ACC Export for NZ AND removed NZ from Utilities/logs/HIC logs

v722 - Added new Toolbar button of Adjust > Unallocate Receipt to Patient > Financial

v724 - Removed 'Re-referral' item from Patient > Referral

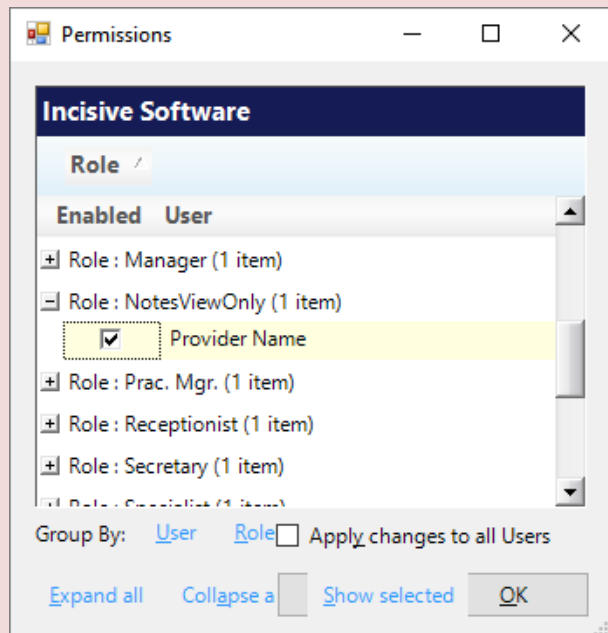
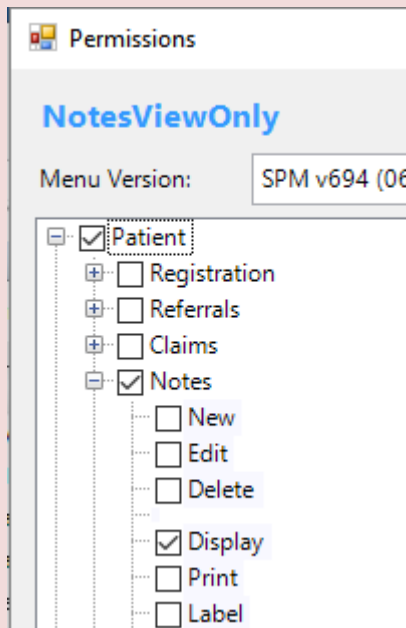
v727 - Removed 'Clinical Ink' item from Setup > Provider.

v731 - Changed Help > Support to Help > Support Ticket and changed https to http to remove warning messages

If doctors or staff are able to view a patient's notes from other doctors, in the Notes tab for their patient, this display configuration was not subject to Permission based rules. The omission has been corrected in this update (405.6)

It now means that to continue with this display option they will have to belong to a Role that does have the permission to view another doctor's Notes. Allocation of this Permission should be completed before the Update is applied to provide workflow continuity.

We suggest you make a new Role called NotesViewOnly and have a tick only in the Patient > Notes checkbox (no sub menu items), then assign this new Role to the specialists or staff that require the option to view another doctor's notes.



## 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 Appointments 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 Appointments 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.