incisive
medical systems

Release Notes for version 406.0

10th August 2017

Specialist Practice Manager

New Zealand edition

Australia edition

Contents

Integrated edition
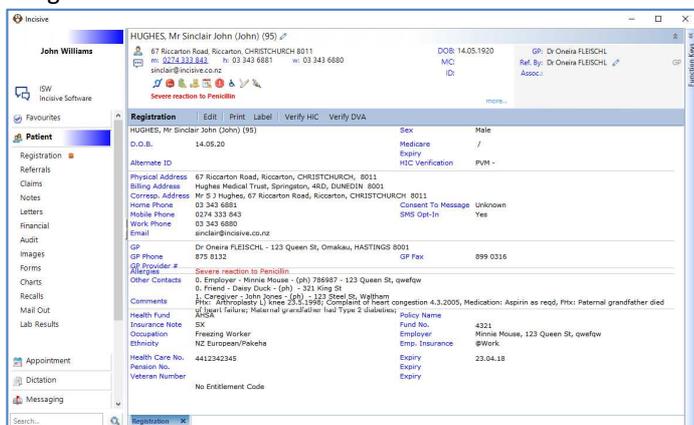
Classic edition

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

General   New Online Help Manual   Help > SPM Help   SPMi

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 SPMi

The latest Online Claiming Adapter from Medicare is now being used for all Medicare Online functions which enables the new features in this v406.0 update.

Fetal growth charts (GROW) from the Perinatal Institute (perinatal.org.uk)

Fundal height measurements are uploaded to the GROW server and growth charts are displayed. Uses the same service as is provided in the DHB's

Appointment Appointments Calendar T' hot-key   SPMi 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   SPMi 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   SPMi 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 to Patient | Email address | | RQ5865
Where there is an email address recorded for the patient, this is now included alongside the address.

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 | 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 | SPMi | 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.

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   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. View this link 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).

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.

Patient   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.

Form Letters   Shift+F6 tag   RQ5827
Shift F6 will now toggle the tag for all form letters on and off.

Letters   Tag options   SPMi   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   SPMi   RQ5796
The patient header has been updated to include Recall and Waiting List entries., The date of the next recall 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.

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).

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).

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.

Reports   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).

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   SPMi   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   SPMi   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.

| Setup | 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')

| | 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.

| 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.
Click here 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 | SPMi | 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		SPMi	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		SPMi	BU5807

Alt-S now activates the 'Search' option in keeping with the Classic interface.

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.

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	SPMi	BU5762

This is now working correctly in SPMi, 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	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	SPMi	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.

	Notes	Display	Provider's Notes permission to view	SPMi	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.

BUG FIXES

Patient   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.

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.

Registration   Refresh if editing with a digital pen   SPMi   BU5800
If the Registration was edited using a digital pen and the address was changed the details did not change on screen.

Reports   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
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.

Setup   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.

Personnel   Operator   Clear Password   SPMi   BU5860
Administrator' functions such as 'Clear password' and permission options for 'Alerts' were not visible unless classic 'practice manager' status was set.

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)

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 (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.

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.
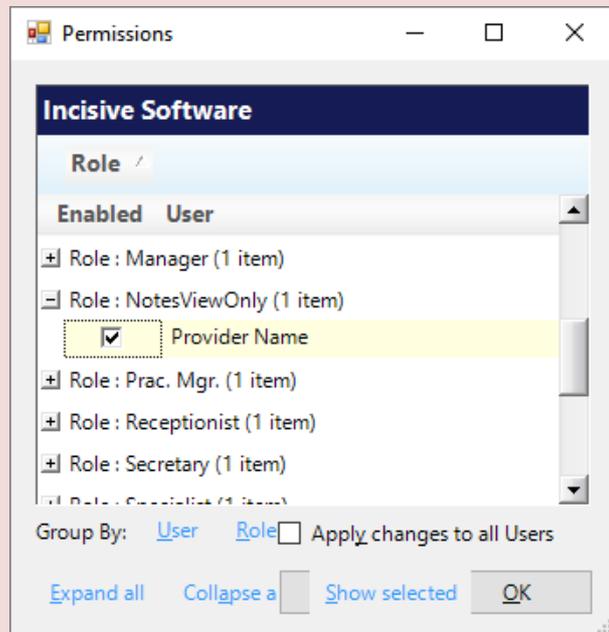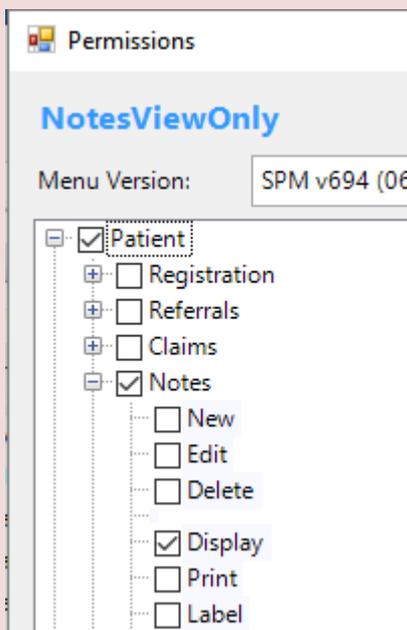
Update Instructions

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.