

# ImproMed® Release Notes

## Version 20.11.0

### WHAT'S NEW

We've updated the Message Center module by adding a lot of improvements to boost the daily functionality and allow your practice to efficiently use it as a hub for many clinic communications.

#### ▶ Message Center

- ✓ Quickly filter, sort, and/or expand messages to see a preview on the screen without opening it.
- ✓ We added a history view which only displays closed or deleted messages. Closing messages can be done by staff or automatically by ImproMed. \*Configuration required
- ✓ Provided easier ways to add messages and other details quickly.
- ✓ Notify users (non-mobile workstations only) of unread messages assigned to them so they can easily see what is waiting for their attention right from the Home ribbon. \*Configuration required
- ✓ To ease the workflow with the new Message Center module, we added a few additional setup screens for Canned Messages, Message Resources, and Message Center Settings.
- ✓ Visually see messages that need attention based on the status assigned.
- ✓ Now you can print an Active Messages report from either the Message Center or Enhanced Reports. \*Configuration required

The screenshot displays the Message Center interface within a web browser. The top navigation bar includes options like Home, Invoicing, Customers, Medical Records, Scheduling, Communications, Business, Tools, Help, and Group Chat. The main content area shows a list of messages with the following columns: Client, Patients, Phone, Type, Assigned Employee, Create Date, and Modified Date. The messages are as follows:

Client	Patients	Phone	Type	Assigned Employee	Create Date	Modified Date
Boone Thrasher (Riple...)	Pabst Thrasher #56A	(920) 255-1111	Phone	Dr. Jenn Graham	06/16/2020 9:01 AM	06/16/2020 9:01 AM
Rhett Hennessy (Eliza...)	Oli Hennessy #29C (Re...	(920) 685-7138	Email	Dr. Dan Bonnett	06/16/2020 8:38 AM	06/16/2020 8:38 AM
Garret Daniels (Emma)	Harley Daniels #36A (...)	(920) 651-3210	Lab Results	Dr. Dan Bonnett	06/16/2020 8:13 AM	06/16/2020 8:13 AM
Kyle Pearce (Eile)	Teddy Pearce #55A	(920) 984-6513	Phone	Dr. Jenn Graham	06/16/2020 8:08 AM	06/16/2020 8:12 AM
Brooke Cabot (Brody)	Cleo Cabot #50A	(920) 648-2019	Lab Results	Dr. Todd Cooper	06/15/2020 6:48 PM	06/16/2020 8:12 AM
Looking for lab results details from the tests that were run at their last appointment						
Gavin McBride (Baylor)	Bear McBride #53A (...)	(920) 241-3564	Email	Dr. Dan Bonnett	06/16/2020 8:12 AM	06/16/2020 8:12 AM
Looking for food recommendations so they can feed Bear and Pixie the same food.						
Landon Mikels	Ace Mikels #31B (Rem...	(920) 865-7465	Request Med Refill	Dr. Jenn Graham	06/16/2020 8:07 AM	06/16/2020 8:09 AM
Landon called asking to get a medication refill for Ace.						
Wyatt Hammer	Lucy Hammer #46A	(987) 351-6549	Email	Dr. Jenn Graham	06/15/2020 6:49 PM	06/16/2020 8:08 AM
Caleb A Montgomery...	Bix Montgomery #39...	(920) 986-5416	General Calls	Dr. Todd Cooper	06/15/2020 6:47 PM	06/16/2020 8:08 AM

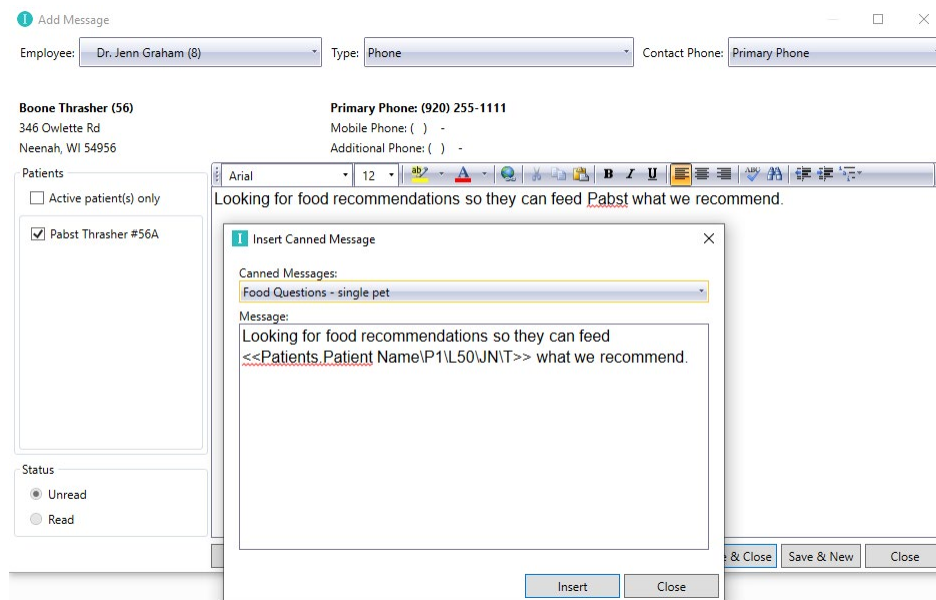
#### Message Center

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### WHAT'S NEW

- ▶ **Message Center continued** ✓ Easily insert canned messages created by your practice into messages added by your staff and use F7 to toggle between the ~~ to edit from any of the message screens.



#### Insert Canned Messages

- ✓ Quickly add a Date / Time stamp within the message content itself using the CTRL+D shortcut key.
- ✓ Added security for new features and functions. *\*Configuration required*
- ✓ Added a new product attachment, called Messages, to easily create new messages during your invoicing workflow.
  - o Any existing product attachments of the 'Create Medical Record - Call' type have been converted to the new Message type.  
*\*Additional configuration is optional*
- ✓ Medical Records Call was replaced with Messages and is using the updated screens.
- ✓ We added a right-click menu to Message Center to make updating messages even easier.
- ✓ Does your client want you to call a number not stored in the database? Now you can easily choose to enter another phone into each message.

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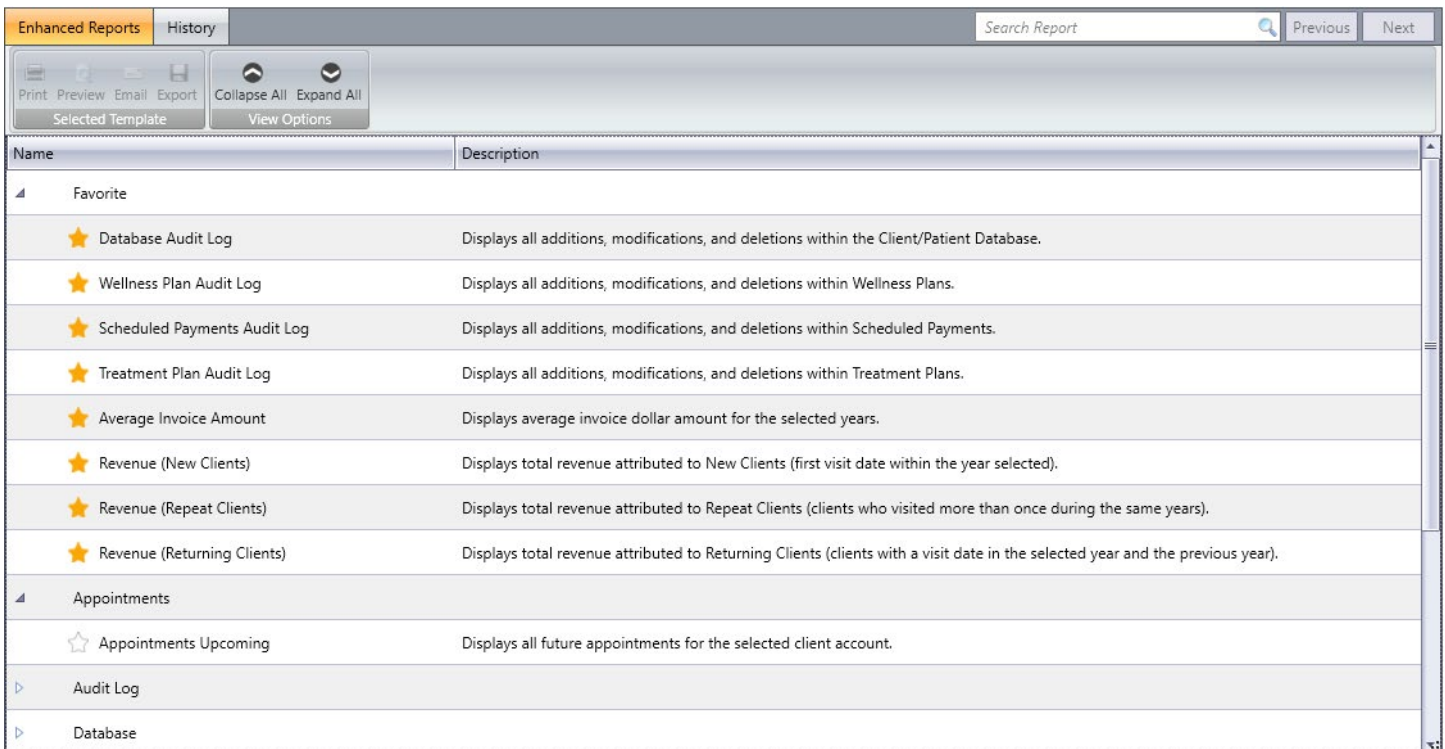
## Version 20.11.0

### WHAT'S NEW

With over 40 Enhanced Reports available, and we have found that almost everyone has a few favorites they focus on for their job, but not everyone uses the same reports.

#### ▶ Enhanced reports

- ✓ We've added a new Favorite category that is saved per operator, so you can simplify your reporting routine.
- ✓ Lose a report or need to reprint? We've moved history from Communication History into Enhanced Reports to make access locating past reports quickly.
- ✓ Have a report you run sometimes but not often enough to Favorite? We've made it easier to find by adding in a search.
- ✓ The filter panel was added to the History tab for ease of finding reports previously printed, saved, or emailed for the last two years.
- ✓ Reports have been grouped for a cleaner display with additional view options to keep your views clear.
- ✓ Added security for new features and functions. \*Configuration required
- ✓ The Setup Database Audit Log report was created for operators to see changes/additions made to database setup screens. \*Configuration required



The screenshot shows the 'Enhanced Reports' interface. At the top, there are tabs for 'Enhanced Reports' and 'History'. A search bar labeled 'Search Report' is on the right, with 'Previous' and 'Next' buttons. Below the tabs is a toolbar with 'Print', 'Preview', 'Email', 'Export', 'Selected Template', 'Collapse All', 'Expand All', and 'View Options' buttons. The main area is a table with two columns: 'Name' and 'Description'. The table is organized into groups: 'Favorite' (with a star icon), 'Appointments' (with a star icon), and 'Audit Log' (with a star icon). The 'Database' group is partially visible at the bottom.

Name	Description
Favorite	
★ Database Audit Log	Displays all additions, modifications, and deletions within the Client/Patient Database.
★ Wellness Plan Audit Log	Displays all additions, modifications, and deletions within Wellness Plans.
★ Scheduled Payments Audit Log	Displays all additions, modifications, and deletions within Scheduled Payments.
★ Treatment Plan Audit Log	Displays all additions, modifications, and deletions within Treatment Plans.
★ Average Invoice Amount	Displays average invoice dollar amount for the selected years.
★ Revenue (New Clients)	Displays total revenue attributed to New Clients (first visit date within the year selected).
★ Revenue (Repeat Clients)	Displays total revenue attributed to Repeat Clients (clients who visited more than once during the same years).
★ Revenue (Returning Clients)	Displays total revenue attributed to Returning Clients (clients with a visit date in the selected year and the previous year).
Appointments	
☆ Appointments Upcoming	Displays all future appointments for the selected client account.
Audit Log	
Database	

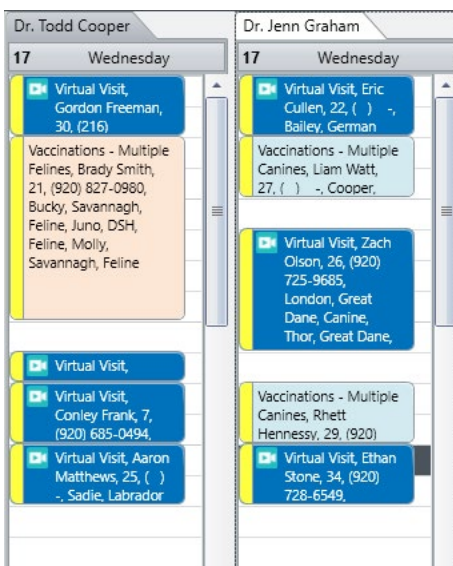
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### What's New

Virtual visit workflows have been improved to assist in your day-to-day workflows along with a few additional feature requests.

#### ▶ Virtual visits



- ✓ We added an icon for any virtual visit so staff can quickly see your full schedule at a glance.
- ✓ Enhanced the display within the appointment window in EasyTime Appointment Scheduler to provide more space to read the notes for the summary and patient tabs.
- ✓ Launching the virtual visit can now also update the status of the appointment when configured. *\*Configuration required*
- ✓ Easily make the patient in the appointment the active patient in the Desktop once the virtual appointment is launched. *\*Configuration required*
  - If the appointment doesn't have a patient selected, the client is made active.
  - If the appointment has multiple patients selected, the first patient in the list is made active.
- ✓ Quickly email or copy the host/resource link to staff or to another browser session.
- ✓ Provided new options within the right-click menu relieving the need to open the appointment window.
- ✓ Updating the client's email address when sending a virtual visit reminder is now tracked in the Database Audit Log.
- ✓ Grid views (from Dashboard and/or Recent List) shows virtual visits.
- ✓ Episodes of Care appointment views show virtual visits so operators don't have to guess on the appointment type.
- ✓ Upon saving a virtual visit appointment, client emails are automatically brought up to send quickly.
- ✓ Added a new category type for Email Topics specific to appointments so you can create your own customized email topic for virtual visits. By default, we added a prepared topic to assist you immediately following your upgrade. *\*Configuration may be required*

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### What's New

#### A new address block option was added to Statement Templates and XML Export.

- ▶ **Accounts receivable**
  - ✓ Include the new Company Name field in the print or XML export of your Statement Templates as part of the address block. \*Configuration required

#### Improved performance has been made to EasyTime Appointment window.

- ▶ **EasyTime**
  - ✓ Improved performance of the Add/Edit Appointment window to only load 20 patients for those accounts with more. Additional pages will load the remaining patients, saving the time it takes to load that window.
  - ✓ The 'Show Active Patients Only' or the 'Show Deceased Patients' settings are saved per operator for the appointment window.
  - ✓ Filter views were updated to include the new Virtual appointment type within EasyTime.
  - ✓ Enhanced the display within the appointment window in EasyTime Appointment Scheduler to provide more space to read the notes for the summary and patient tabs.
  - ✓ Updated the appointment window button labels to be more descriptive.

#### Print the product attachments by attachment type so operators can easily know what products generate messages

- ▶ **Reports module**
  - ✓ When operators print the Product Attachment by Attachment Type, the report options include the new message attachment type.
  - ✓ Added Company Name to the Invoice Referral Activity, Referral Activity, Referral Activity by Category, and Referral Activity by Employee report export.

#### Worldpay configurations are easier and not dependent upon ImproMed versions when updating devices and settings.

- ▶ **Workstation preferences**
  - ✓ All necessary settings were removed from Workstation Preferences within ImproMed specific to the Worldpay devices themselves. Signature capture will still be present.
  - ✓ Updated the triPOS service version and installation to have a new configuration tool and allow for updates to happen automatically as they are released by Covetrus.

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### Additional Release Items

#### Accounts Receivable

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- 49501 Print statements using "Print using Current..." option prints correctly with the proper data.
- 81653 Invoices with negative products followed by removed invoices will not cause A/R mismatch.

#### Communications

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- 49904 Email Topics are now global throughout a database.
- 51665 Email topics have been updated to properly print various medical record objects.
- 187125 Updated the client/patient association when emailing items to an external provider or source to associate with the client/patient on the desktop.

#### Dashboard

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- 70283 Deleting a user-defined field from the database removes it from Dashboard reports.
- 169305 Improved the Dashboard to show field changes after they are saved in the Client/Patient Database setup screens.

#### Database

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- 169305 The Dashboard reflects Setup Database Screen changes.
- 181466 Updated the prompts when adding new clients so the AR address is updated automatically.

#### Desktop

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- 180040 Changing operators with passwords no longer causes issues when the Cancel button is clicked.
- 181001 Added the Referral Source - Company Name into the various templates to print the new field.
- 182696 Improved upgrades to allow multiple practices to keep their existing email topics.
- 182786 Enhanced the upgrade process to add missing items which can cause further complications.

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### Desktop (continued)

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191290 Revised the upgrade process to allow for the prescriptions written into ImproMed from integrations to stay.

### EasyTime

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160301 The check-in report will print using the Print button on the EasyTime Ribbon.

168395 Saving a blank appointment from the Add Appointment window will now save when Save & Close is clicked.

### Episodes of Care

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49247 When removing patients, any open episode is automatically closed.

### Inventory

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54138 Updated how inventory adjustments are handled when concluded invoice quantities are increased.

80524 Return from vendor now pulls quantities from the default storage location.

### Invoicing

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46391 Improved how column options are handled in modify mode of Invoicing.

53140 Enhanced how client only products are handled during the invoice process.

77890 When the option is turned on when adding items to an invoice via linked products using vet notes, the yellow highlight will appear as a warning.

149460 Credit card receipts no longer print invalid information with the latest version of triPOS available.

### Labs

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182837 Revised lab request product attachments to allow multiple products to be on the same request.

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### Medical Records

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- 55876 Custom dictionary will now add words when doing spell check and clicking the Add button.
- 190605 Added the Assigned Employee and Status into the Revision History for Messages to see those changes.

### Mobile

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- 69705 Sync will not fail because of Client/Patient Conflicts during mobile sync when Host reuses Client/Patient Account ID.
- 69774 On Mobile, transferring controlled substance products from the Deferred List will not cause Event Log errors.
- 183678 Improved possible sync conflicts between the new database setup screens from the mobile to host units.
- 183763 Revised the mobile capabilities for clients and patients which could cause sync conflicts.

### Reports

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- 165580 Updated the Database Audit Log to not include the time in the Date Due and Date Performed column values.