Prime Clinical Systems, Inc.
3675 E. Huntington Drive
Pasadena, CA 91107

September 09, 2011

Dear Client,

Patient Chart Manager Update 5.5.900 is now available

This information includes some the most recent changes with PCM version 5.5.900. Full documentation to cover all of the recent changes from versions 5.5.644 to 5.5.900 is also available; a separate e-mail with a link to that information will soon follow.

The main functionality of PCM remains the same with this update. This update has the latest changes necessary to meet the "Meaningful Use" criteria along with many more features and updates. Please review the attached changes.

This version of PCM has been continuously updated and changed in order to keep up with the advanced e-Rx and Meaningful Use requirements; it has been installed at a very busy, high patient volume beta site for a several months during these changes. Please be advised that as with any other system update errors may still occur and if they do, subsequent updates may be necessary.

If your server is on PCM version 5.5 or higher, the update process is simple and the update requirements remain unchanged; the server will be updated by PCS Support, at initial PCM log in each work station will get an update prompt, and each user must accept the update prompt and proceed with the update until it is finished. All work stations must be updated.

The Operating System, Display, and Optional Third Party Component Requirements remain unchanged since PCM Version 5.5.600 release

If your PCM server version is 5.4 or lower, there will be special instructions for this update, please make sure that you review the information which will be provided by PCS Support Department.

Please be advised that your server will be updated as time permits. If you would like to schedule a specific date or time, please contact support@primeclinical.com

Important Information:

If you are using Olympus Dictation, all of the existing text transcription documents will need to be filed prior to this update. Please contact support@primeclinical.com to schedule this update.

For PCM TS Client users; PCM TS Client 5.5.900 or higher is required to use with this update, after this update you should be notified as usual of the TS Client update upon PCM login, proceed as usual with that.

Prime Clinical Systems, Inc
PCM Support and Training Department

Summary of New Changes (See pages 4-20 for complete details)

Preventative Services/ Patient Reminders

- Chart Reviewer user can now edit the Guideline Setup Screen, and can set guidelines for all the providers
- For Education Reminders , the Meaningful Use credit will apply to the provider for whom the guideline is set up for, is recommended that the Chart Reviewer user edit each guidelines and set them all to be for all providers
- Completing Education reminders and printing Education Materials, this can be done by mapping an education type document, a web link to a document, or network path to a document
- Specify the Type of Alert-you can set the type to be anything other than PREVSVC, choose from the existing list of reminder categories, or you can add new categories to choose as the type.
- Reminder Duration there is a new Duration filed, this was requested by an office that does a lot of post operative care, and wants to set up reminders for specific durations.
- Due Next Month option; this new option will show all reminders due next month.
  For example, if the current date is 8/15/2011 using this option will show all reminders due for the month of September: 9/1/2011 to 9/30/2011
- Education Type Reminders that are due or over due will be automatically processed on patient Check out, if the reminder is setup with a web link, the link will open at check out for printing, if a mapped document, the document will be printed on check out, etc…The Meaningful Use table will be updated with the Event Code 6 “Educational Materials Provided”.
- Process reminders By User Preference; Email, Mail, Home, Cell, Patient Portal
  For example, you can process all of the E-mail type reminders first, and this way, you won't get prompted to choose a printer in between, or if only choosing the Mail type, it will not check to see if a user has their e-mail set up, etc…
- Meaningful Use table now stores the Document ID for reminders processed using the Patient Reminder Log
- Inactive Patients, if the patient’s status is marked as Inactive or if a date died is entered in the patient data editor screen, new reminders will not get added to the list, nor will preventive service type items get added to the reminder log.

Filing/Exporting Chart Documents

- Filing from Filing Inboxes, the workflow has slightly changed; it is no longer necessary to right-click to indicate “File Page” or “File Pages”. All you do now is select the document you want to file, then type the patient’s name under the “Patient Search”, the message “File with REQ Log Interface” will come up, and when you click on “NO” you will then get the “Pages to File” dialog at which point you can choose the specific page ranges to be filed.
- The Faxed Docs chart tab stores a copy of faxed and e-mailed documents
- New web filing options, the selected web image can now be saved as a .BMP format to the Filing Inboxes (Image Tab) or as a .JPG directly to the patient’s chart. This was done because some web pages which display pure diagnostic images are encrypted and do not allow capture as TIF/PDF etc…, but using this new “Image Only” option and having the Filing Inboxes open gives users the option to save

the images to the Image inbox as .BMP and having the chart open gives users the option to file the images directly into the chart as .JPG

- Olympus Dictation- the logic for naming and auto-filing text documents has changed; all existing documents must be filed prior to this update

Patient Data Tables

- The new Task view in Patient Data Tables allows users more flexibility, and the ability to sort and to view all of the outstanding tasks for all users.

User Privileges

- Chart Reviewer login now has access to all users' "MyDocs"

Miscellaneous Changes

- Quick clinic switch option, there is a new option for switching clinics which is located on the main toolbar, If a user is logged on to another clinic, they can click on the drop down and choose from the available clinics.

Preventative Services /Patient Reminders

These additions to the Guideline Setup and Alert designer complete the Meaningful Use changes.

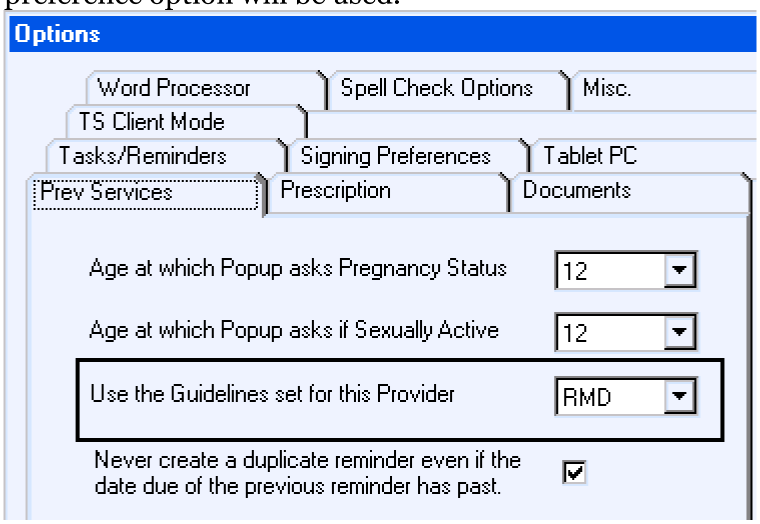
The following system reminder types are system types and cannot be deleted; DECISION, EDUCATION, PRESVC, and APPOINTMENT.

Chart Reviewer user can edit the Guideline Setup Screen- the desired provider is chosen from the combo box which is sorted in alphabetical order. In order to edit for ‘All” providers, first select a provider from the drop-down menu, then select the “All” option for the provider.

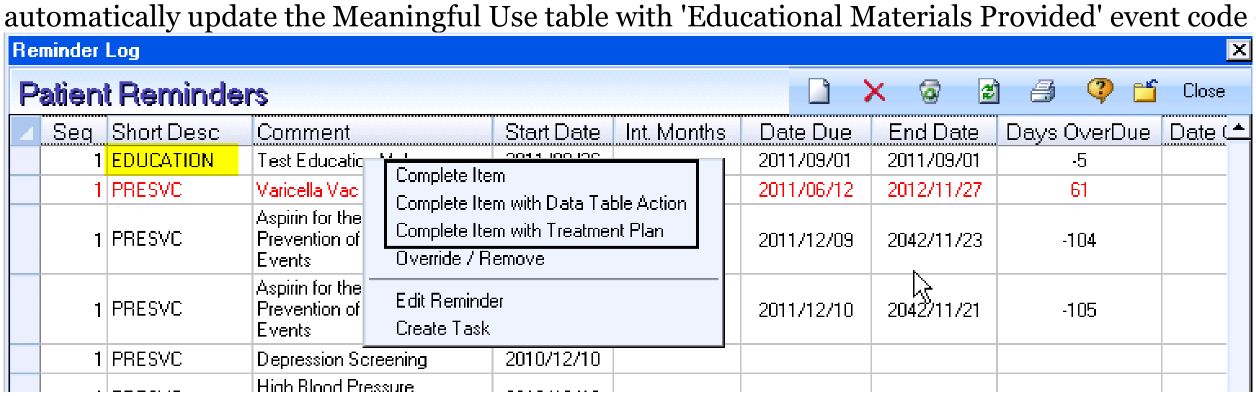
Education Reminders and Meaningful Use-when completing an EDUCATION type reminders from the patient reminder screen, the Meaningful Use credit will apply to the provider for whom the guideline is set up for.
It is recommended that the Chart Reviewer user edit any Education type reminders that need to be shared by all, as that way, all providers will have the same Education guideline in their own list for possible use in the treatment plans, etc…

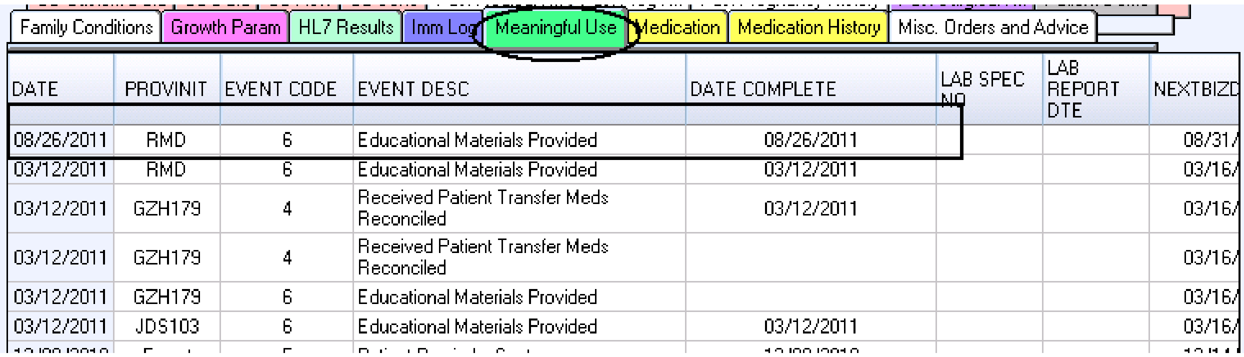
When completing these EDUCATION reminders on patient check-out, the credit goes to the responsible provider for today’s appointment.

If the Provider for this Education reminder is blank, the set provider from the Preventive Services User preference option will be used.



Completing Education reminders and printing Education Materials - When completing these reminders, using Complete, Complete with Data Table Action, or Complete with Treatment Plan, this will automatically update the Meaningful Use table with 'Educational Materials Provided' event code 6





DATE	PROVINIT	EVENT CODE	EVENT DESC	DATE COMPLETE	LAB SPEC NO	LAB REPORT DTE	NEXTBIZD
08/26/2011	RMD	6	Educational Materials Provided	08/26/2011			08/31/
03/12/2011	RMD	6	Educational Materials Provided	03/12/2011			03/16/
03/12/2011	GZH179	4	Received Patient Transfer Meds Reconciled	03/12/2011			03/16/
03/12/2011	GZH179	4	Received Patient Transfer Meds Reconciled				03/16/
03/12/2011	GZH179	6	Educational Materials Provided				03/16/
03/12/2011	JDS103	6	Educational Materials Provided	03/12/2011			03/16/

This type of trigger is used when you want to print educational information from the web, or stored link.

If you are using a document path instead of a web link, make sure that the path has the complete path \\computername\sharename\document path; otherwise the document source will not be found.

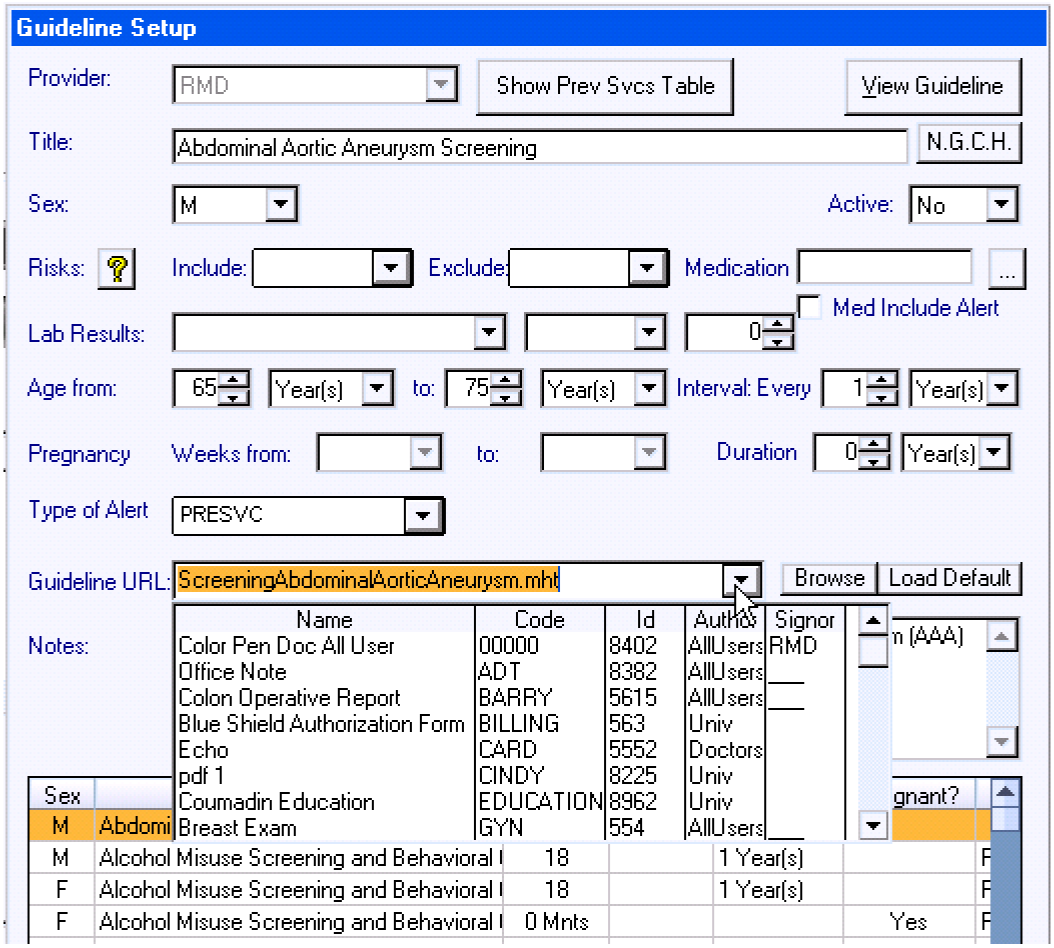
When you use either a web link or a local file system link, the link will be launched on reminder completion and the material has to be manually printed.

When using a document from the list of forms to attach, will automatically print to the document printer at the time the reminder is completed.

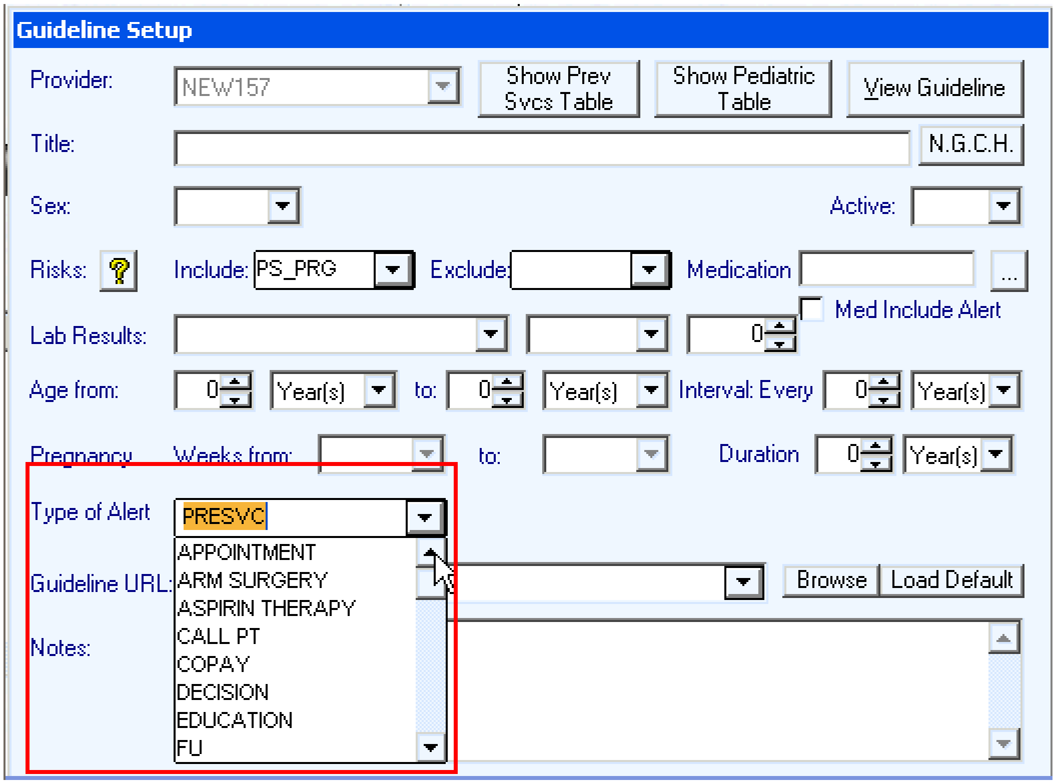
When the document is printed, a copy is also inserted into the chart for the patient, the signor defaults to NOSIG. If document is a Pen Doc, then Author-Signor will be Scan-NOSIG, if text, then Text-NOSIG.

Note: an Education type document cannot be a REQ type document.

The Guideline URL has a combo box for the previous link text, and also holds the list of all the documents in the forms to attach list which are flagged as education type documents, and thus these same documents can be used when completing an education reminder, and count for Meaningful Use.



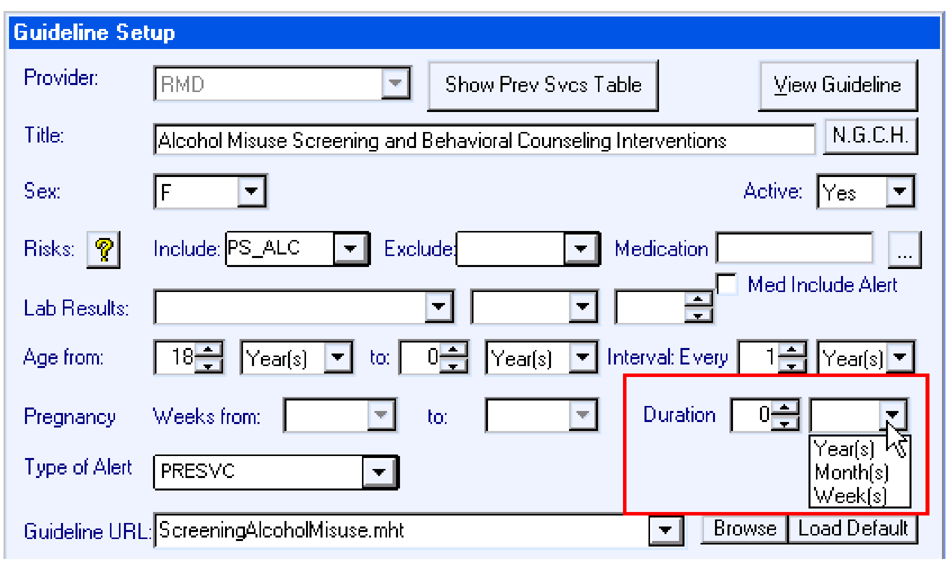
Specify Type of Alert- the Guideline Setup screen now allows you to specify type of alert (this is the same as the reminder short description categories), it is no longer required that the type be "PRESVC", any existing category can be used. New types can be added by adding a new reminder to a patient, and entering s new short description, once that is added, that category type will be available in this screen as well.



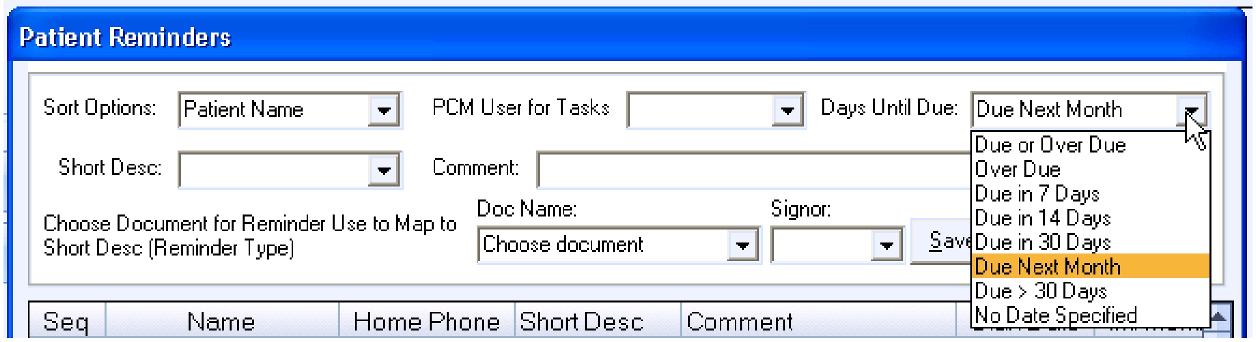
Reminder Duration- there is a new Duration filed, this was requested by an office that does a lot of post operative care, and wants to set up reminders for specific durations.

Note the following when using durations:

a. if a duration is used, it will blank out any age to values
b. if an age to field is used, the duration will be cleared
c. if patient is not pregnant(ps_prg), the reminder applied will calculate an End Date to apply to the reminder



Patient Reminders Due Next Month Option- this new option will show all reminders due next month. For example, if the current date is 8/15/2011 using this option will show all reminders due for the month of September: 9/1/2011 to 9/30/2011



Education Type Reminders will be automatically processed on Check out- Education type reminders that are due or over due will now be automatically completed on patient check-out.

The date due will be reset to today's date plus the reminder interval if any, but never past the end date if any.

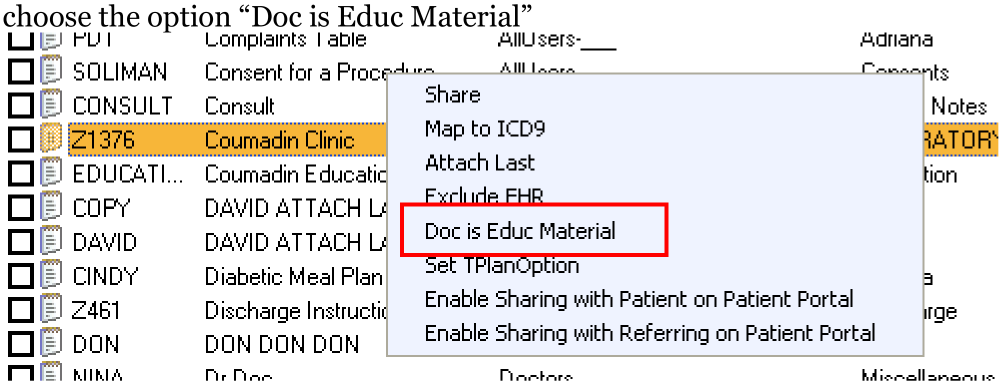
If the reminder has a mapped document or a document path, that will be printed on check out.

If the reminder has a valid link associated with it, the link will open on check out, the user who is doing the check-out can then print the materials at that time.

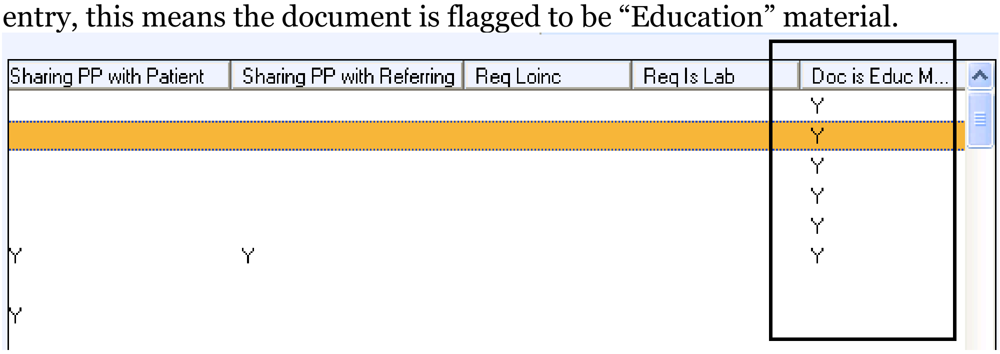
The Meaningful Use table will be updated with the Event Code 6 “Educational Materials Provided”

“Education" type reminders can be setup to be generated on patient check out; the Meaningful Use table will be updated with the Event Code 6 “Educational Materials Provided”

Setup “Education” type documents by going to Doc Set up, just select the document, then right click on it and choose the option “Doc is Educ Material”



On the list of forms to attach, if you scroll to the right, there is a column “Doc is Educ Material” if it has a “Y” entry, this means the document is flagged to be “Education” material.



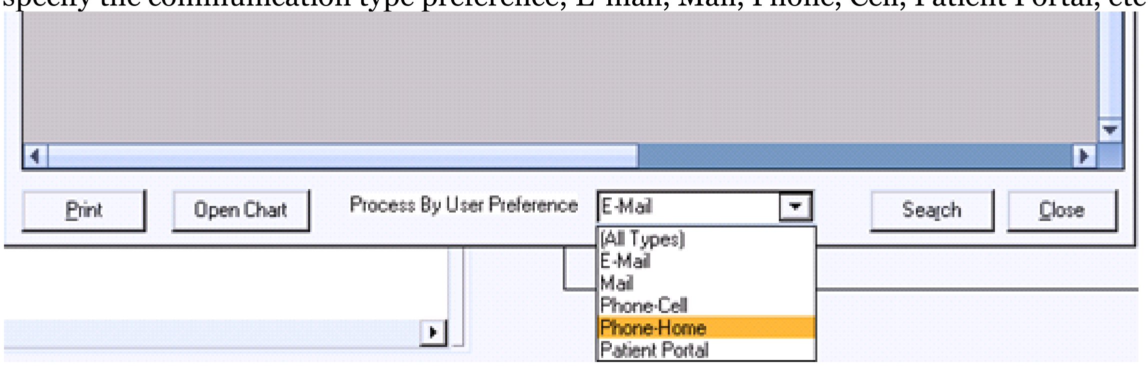
To Map the document, Click on the “Map” button to open the Document Mapping Screen, choose the document you want to map, choose the rest of the criteria, including the appropriate Appt Type.

For example a Diabetic Consult Appt Type, should have Diabetes Educational Material document mapped, etc…

Then route the document, set the routing action to print, choose the printer for the Document Destination and finally choose the routing condition to be “On Check Out”

Note: when processing Patient reminders, if the patient’s preferred method for receiving confidential communication is not set, the preference will default to Mail printed delivery, in order to meet Meaningful Use, the patient communication preference must be set.

Process reminders by communication type- when generating reminders, the logged on user can now specify the communication type preference; E-mail, Mail, Phone, Cell, Patient Portal, etc…



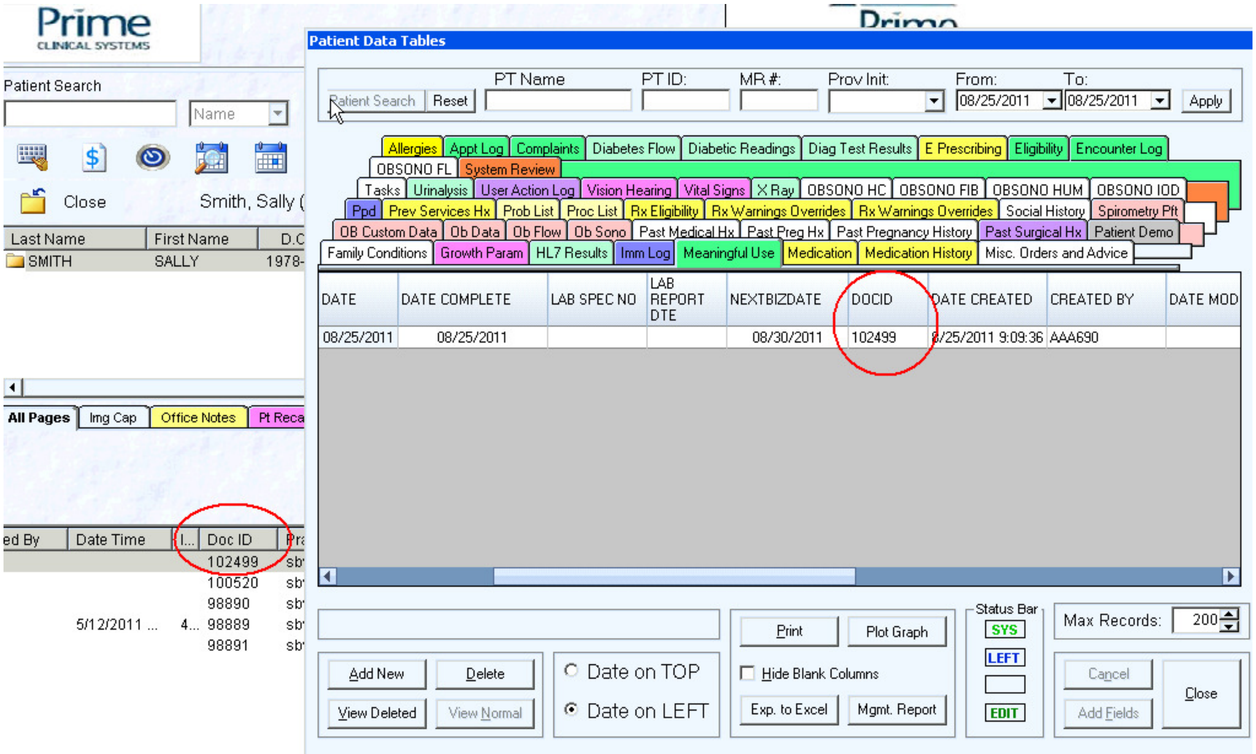
For example, you can process all of the E-mail type reminders first, and this way, you won't get prompted to choose a printer in between, or if only choosing the Mail type, it will not check to see if a user has their e-mail set up, etc.…

Note: we recommend that you use text documents for reminders, because pen type documents cannot be sent to Patient portal, these can only be printed for mailing or converted to PDF for mailing.

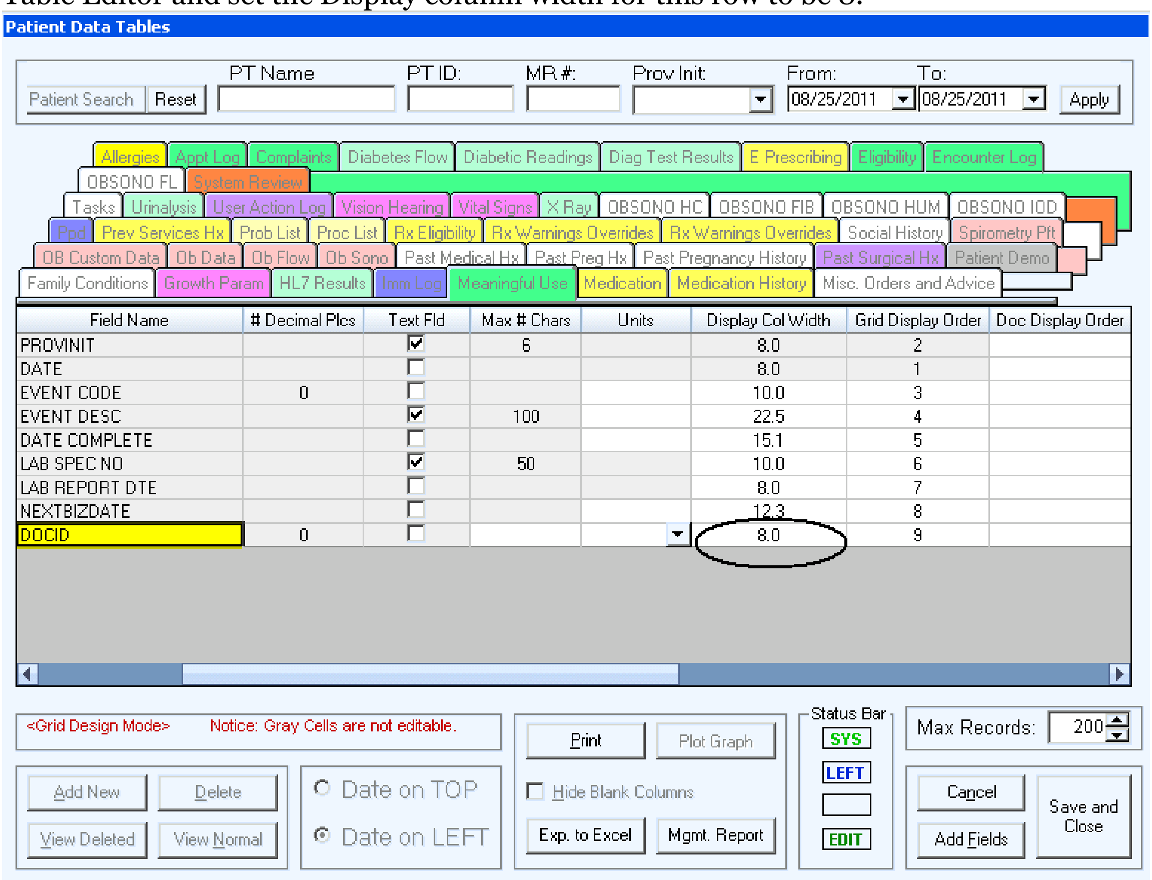
Also, you cannot send reminders when the type is Education, nor when it is Decision (for decision support items), these two are reserved.

Meaningful Use Table stores Document ID- when processing patient reminders using the Patient Reminder Log, the document ID (From the Chart Docs table) will now be stored in this field, this way we can tell if a document was actually generated.

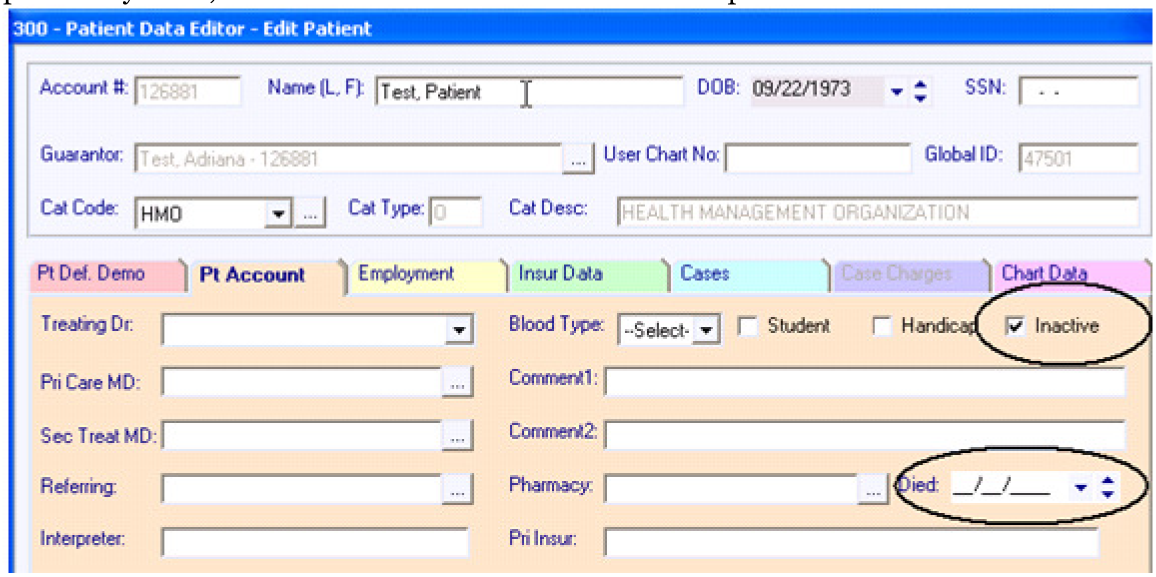
Note: if user manually updates the Meaningful Use table for the reminder, and does not manually enter the DOC ID as well, this will not count for Meaningful Use next year, this field must be updated.



Note: if the column “DOCID” is not visible, you can right click on the Meaningful Use Tab, and choose Data Table Editor and set the Display column width for this row to be 8.



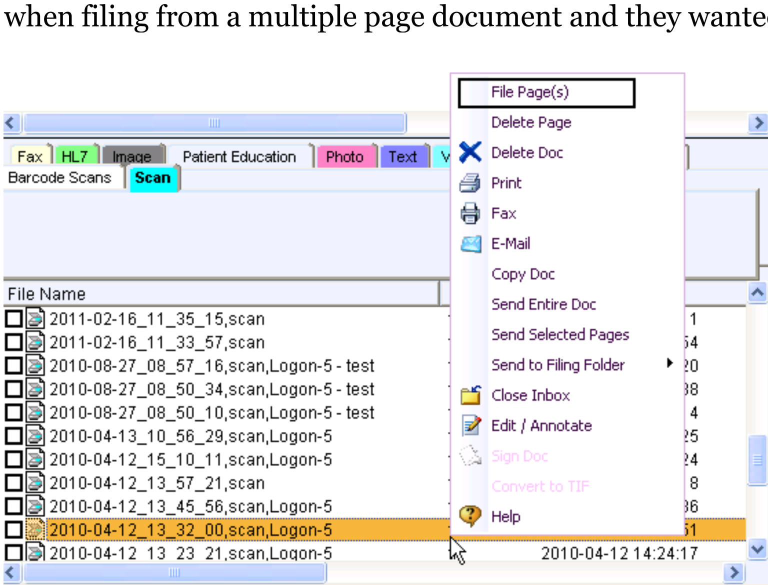
Inactive patients- If the patient status is marked as Inactive or if a date died is entered in the patient data editor, new reminders will not get added to the list, nor will preventive service type items get added to the reminder log.
If a patient dies and you set the date died in the editor, when the chart is opened, the inactive state will be assumed, although actual flag for inactive is not updated.
Also, you cannot add new tasks from patient screen (sending document to task is still fine), nor create new prescriptions from medications pane, updating the list is still fine, as may want to document meds taken previously. Also, cannot edit a medication that is not Seq of 0.



Filing/Exporting Chart Documents

Filing from Filing Inboxes, the workflow has slightly changed; it is no longer necessary to right-click to indicate “File Page” or “File Pages”. All you do now is select the document you want to file, then type the patient’s name under the “Patient Search”, the message “File with REQ Log Interface” will come up, and when you click on “NO” you will then get the “Pages to File” dialog at which point you can choose the specific page ranges to be filed.

There is only one option now in the right click menu “File Page (s)”, but there is no longer the need to right click first, the only reason a user had to right click and choose either “File Page” or “File Pages” in the past was when filing from a multiple page document and they wanted to choose specific page ranges to file.

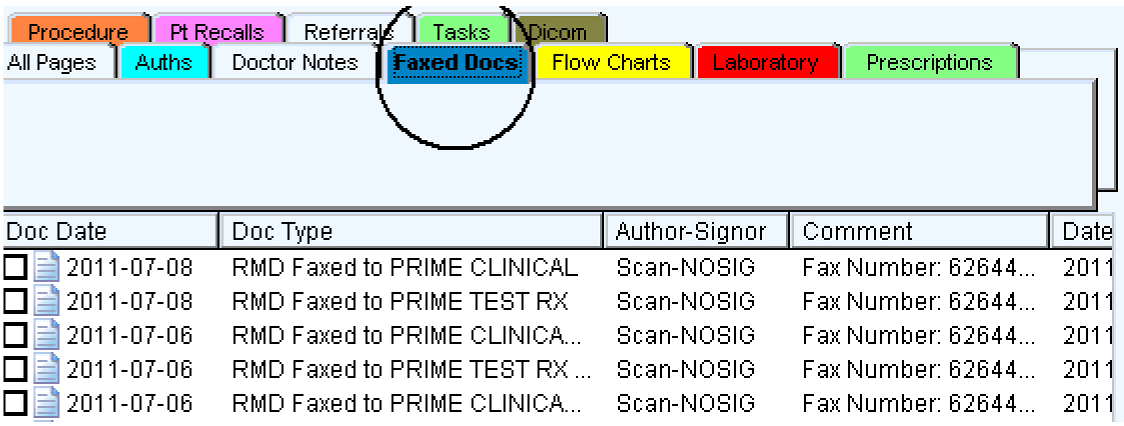


You will also no longer receive a message confirming if you really want to file the document.

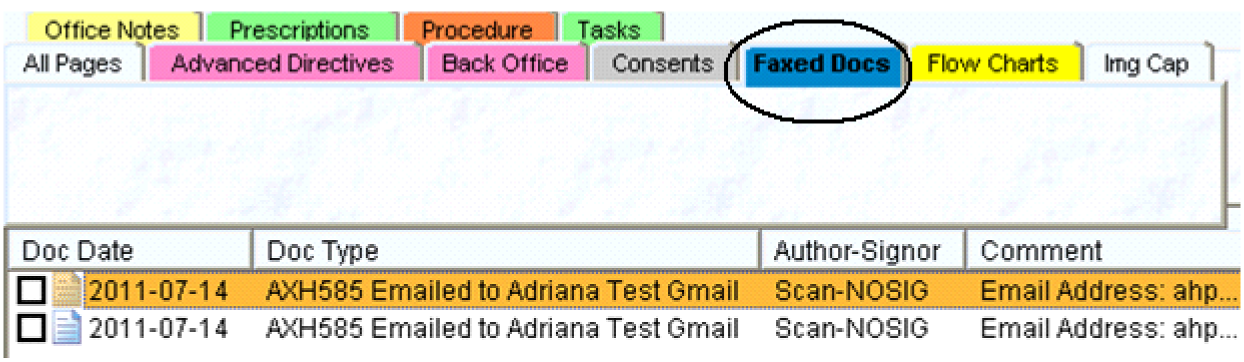
Note: When filing .PDF, .MHT, or single page images, or from the Hl7 inbox, users will not be prompted for the page selection dialog box, these will be filed as one document, cannot file individual pages for these types.

“Faxed Docs” chart tab stores a copy of faxed and e-mailed documents- each time a fax or an e-mail is sent from the patient’s chart, a copy of the faxed/e-mailed document is now stored in a new system chart tab called "Faxed Docs".

For Faxes; the ‘Doc Type” will contain information on who sent the fax, and the recipient’s name "RMD Faxed to PRIME CLINICAL” (PCM user ID, followed by “faxed to” and the recipient’s name), the “Comment” will contain the recipient’s Fax Number, and an attempt will be made to store the final fax status as well in the comments field, as obtained from the Fax Events Service if sent using Microsoft Fax.



For e-mails; the ‘Doc Type” will contain information on who sent the e-mail, and the recipient’s name "AXH585 Emailed to PRIME CLINICAL” (PCM user ID, followed by “Emailed to” and the recipient’s name), the “Comment” will contain the recipient’s e-mail address.

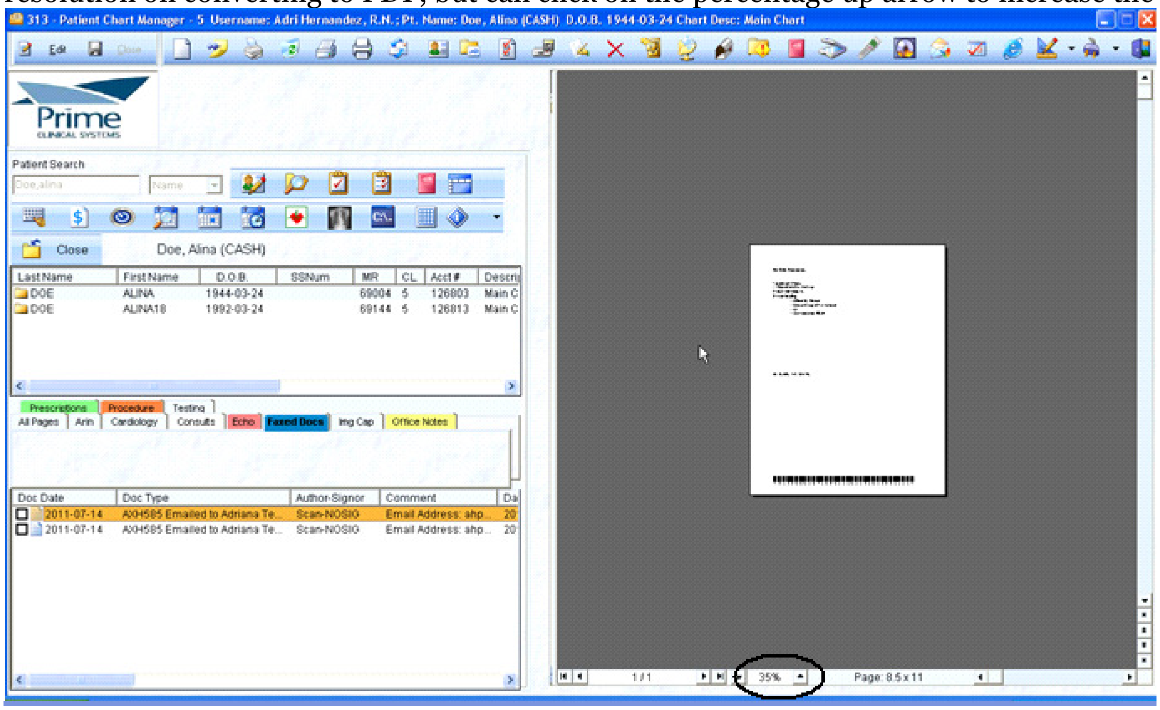


Important Notes:

a. This will be a copy of the document as it was submitted to the fax service or e-mail recipient, it is NOT a confirmation that the fax was successfully sent/received.
b. Checking off multiple documents for fax/print/email is not supported for these documents, you must click on each document entry individually from the “Faxed Docs” chart tab in order to fax/print/email these
c. These documents will not show in the “All Pages” chart tab view, these are only visible when clicking on the “Faxed Docs” Chart tab.

d. You cannot resend these documents, if the fax or e-mail must be resent that must be done from the original chart copy.
e. These documents are saved as PDF, the size is much smaller, it takes up less disk space, and ensures that the documents are a permanent record
f. These documents cannot be edited because this is a copy of what submitted to be sent.
g. The system name “Faxed Docs” cannot be used in Doc Setup to be use as a document name
h. The “Chart Docs” Patient Data Table now includes a “FAXID” column, which is used by the “faxevents” service to update the comment with the status.
i. For e-mailed documents, there are some scenarios in which users get the option to e-mail text documents in “word” format, if the user chooses to send in “word” (text) format, a copy of the email will NOT be saved in the Faxed Docs tab, this option only applies for when e-mailing PDF attachments (most documents are sent as PDF, unless the user otherwise chooses to send in word format)

Some documents may be shown in the preview in a smaller size, this is due to the individual document’s resolution on converting to PDF, but can click on the percentage up arrow to increase the size



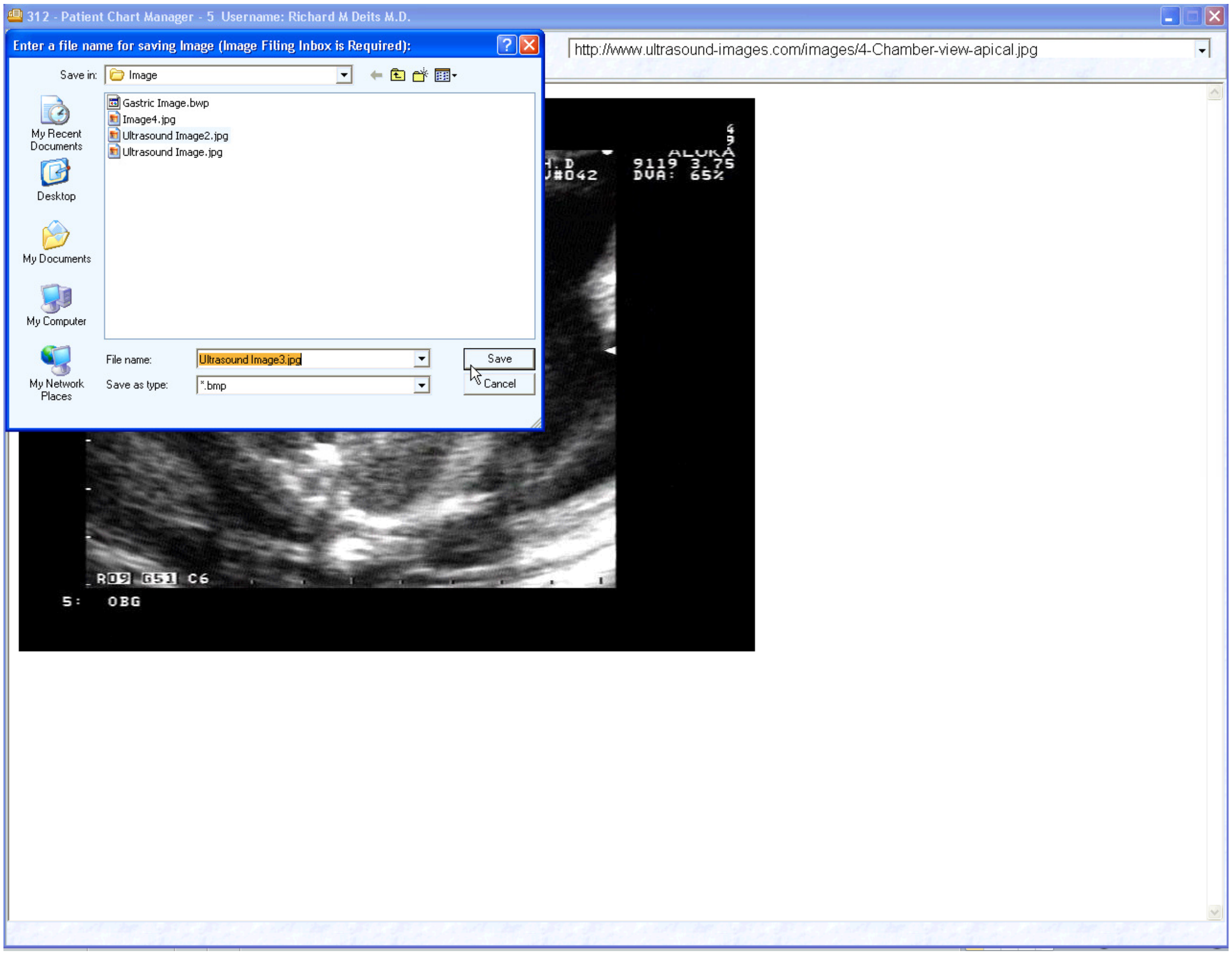
Filing Images- there is a new option for saving images from a web page. The selected image can now be saved as a .BMP format to the Filing Inboxes (Image Tab) or as a .JPG directly to the patient’s chart.

This was done because some web pages which display pure diagnostic images are encrypted and do not allow capture as TIF/PDF etc…, but using this new “Image Only” option and having the Filing Inboxes open gives users the option to save the images to the Image inbox as .BMP and having the chart open gives users the option to file the images directly into the chart as .JPG

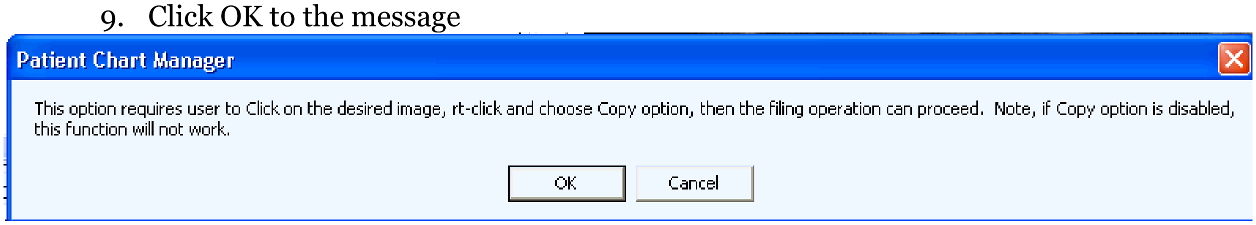
a. Saving the image to the Image Filing Inbox (to be filed later)

1. Click on “File from Inboxes” button from the main toolbar  , this will save the image inside the Image tab in the Filing Inboxes
2. Click on the Browse Internet 
3. Enter the Website
4. (Optional) Click on the Edit button located on the upper left of the screen to view in Full screen

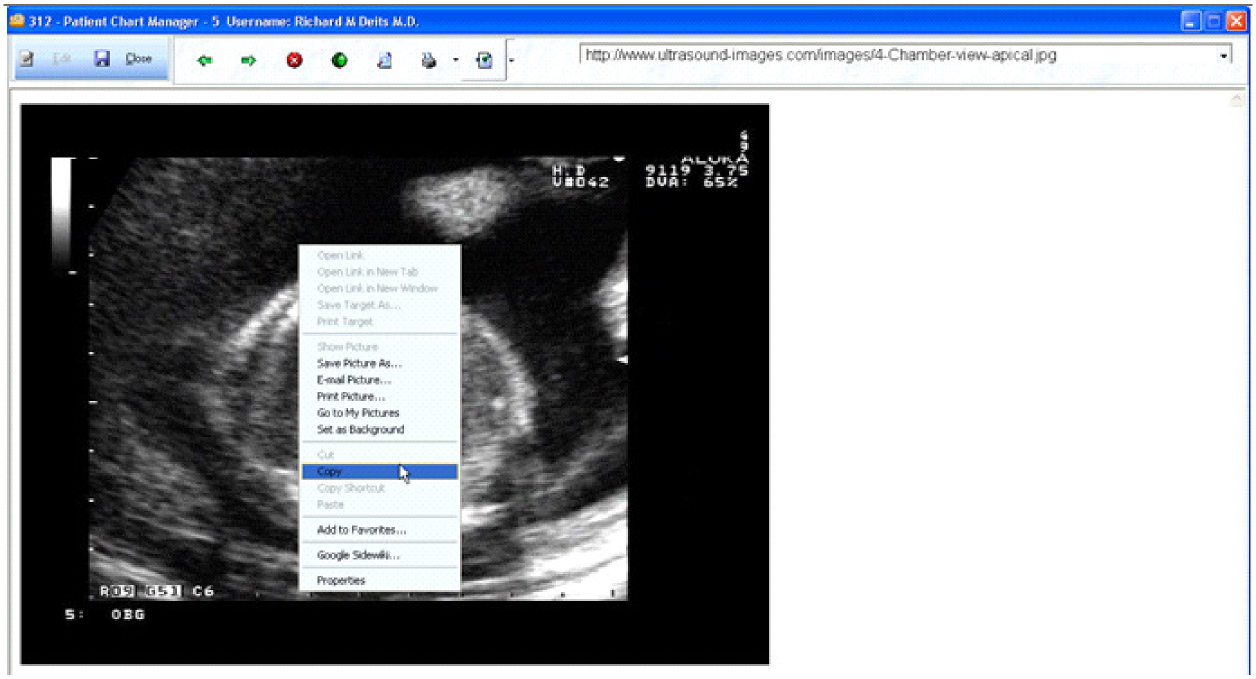
5. Click on the "Save Web/Tif/Image (bmp)"
6. Click on the "Image Only" option
7. Enter a File name for the image
8. Click Save



9. Click OK to the message

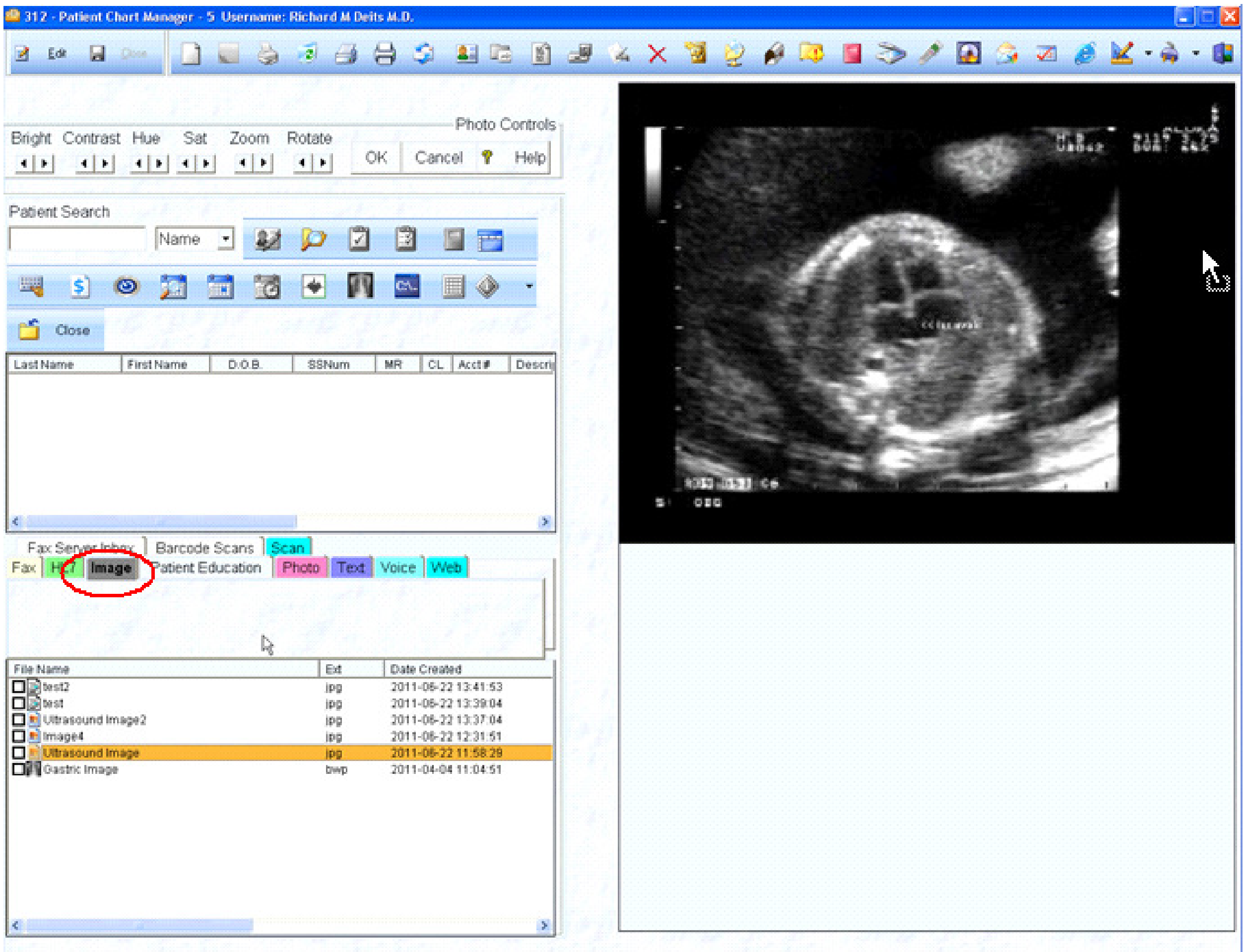


10. Right Click on the image and select the "Copy" option



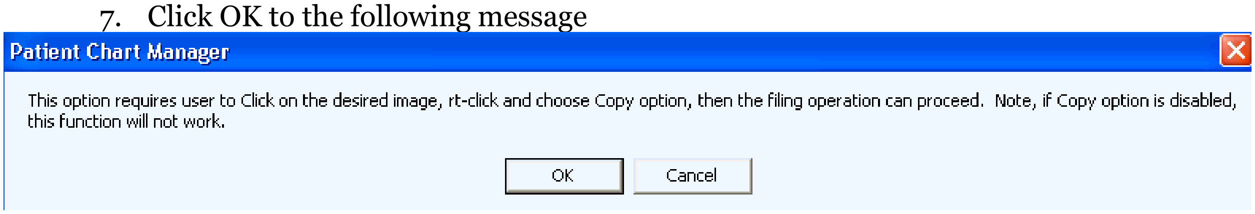
11. Click Ok to the following message

12. Double Click on the Image tab to refresh, and proceed with the filing process.



b. Filing the Image directly into the patient's chart

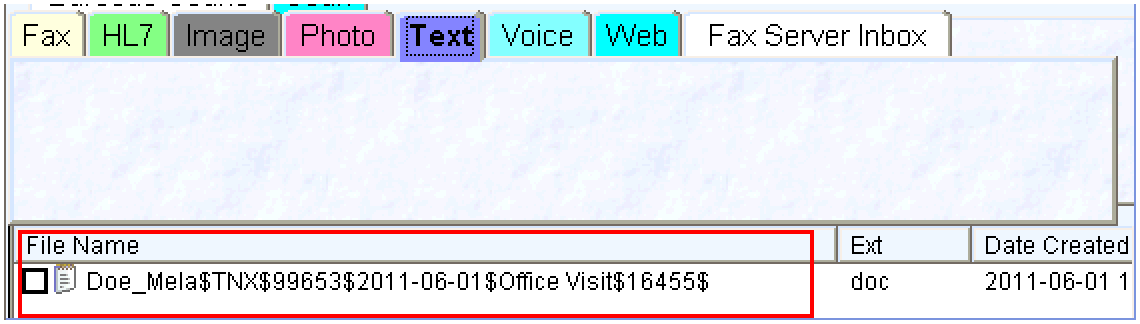
1. Open the patient's chart, this will give you the opportunity to file the image directly to the patient's chart
2. Click on the Browse Internet 
3. Enter the Website
4. (Optional) Click on the Edit button located on the upper left of the screen to view in Full screen
5. Click on the "Save Web/Tif/Image (bmp)"
6. Click on the "Image Only" option
7. Click OK to the following message



8. Right click on the Image, Select Copy
9. The Date Dialog will show on the left side, choose a Date for the Image
10. The List of Image Names will show, choose the desired Name
11. Click OK
12. Then OK to file the image/photo(s) now, otherwise, Cancel

Olympus Dictation for Text documents- The document file name format for documents generated and sent for transcription has changed and will be as follows:

Doe_MelaTNX99653$2011-06-01$Office Visit16455.doc
(Patient Name$DocAuthor$CDDocID$DocDate$DocName$ReqNum$)



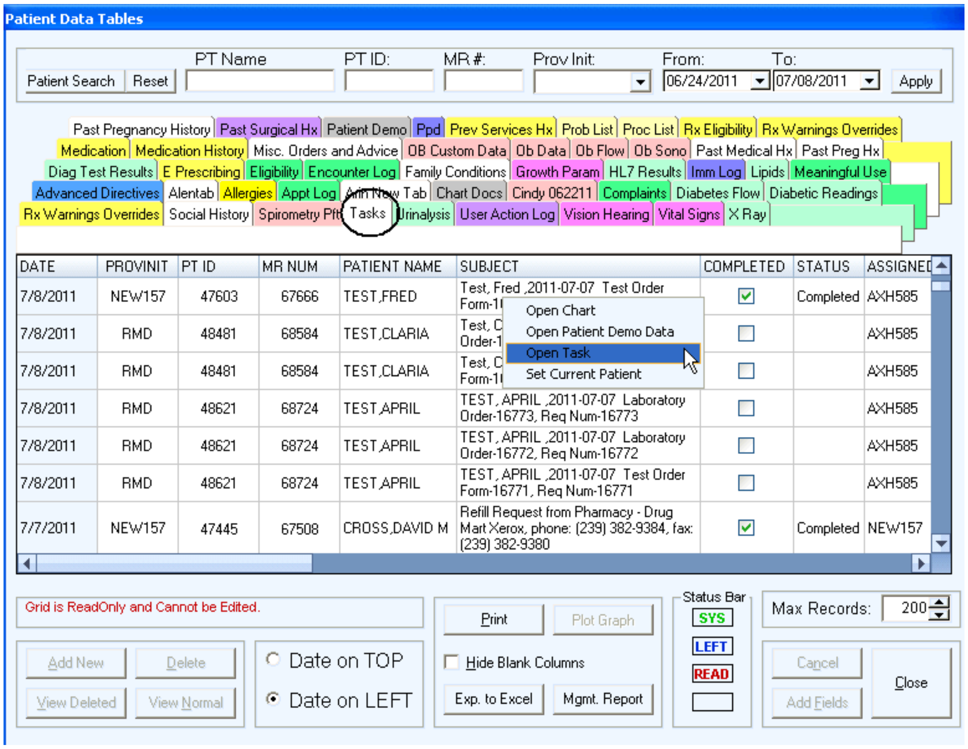
Prior to this update the file name contained the server name and clinic share name as well and there were scenarios in which the file name would not match the server name and clinic share name causing issues when trying to auto-file the returned transcription documents back into the charts. This occurred especially if the practice had multiple clinics and servers and switched clinics back and forth to generate these files, etc…

Import Note: Before this update is performed, all of the previously generated text documents which are currently in the text inbox or pending transcription, must be filed, as the new logic with this update for auto-filing will no longer work for previous documents; and they will have to be manually filed after the update.

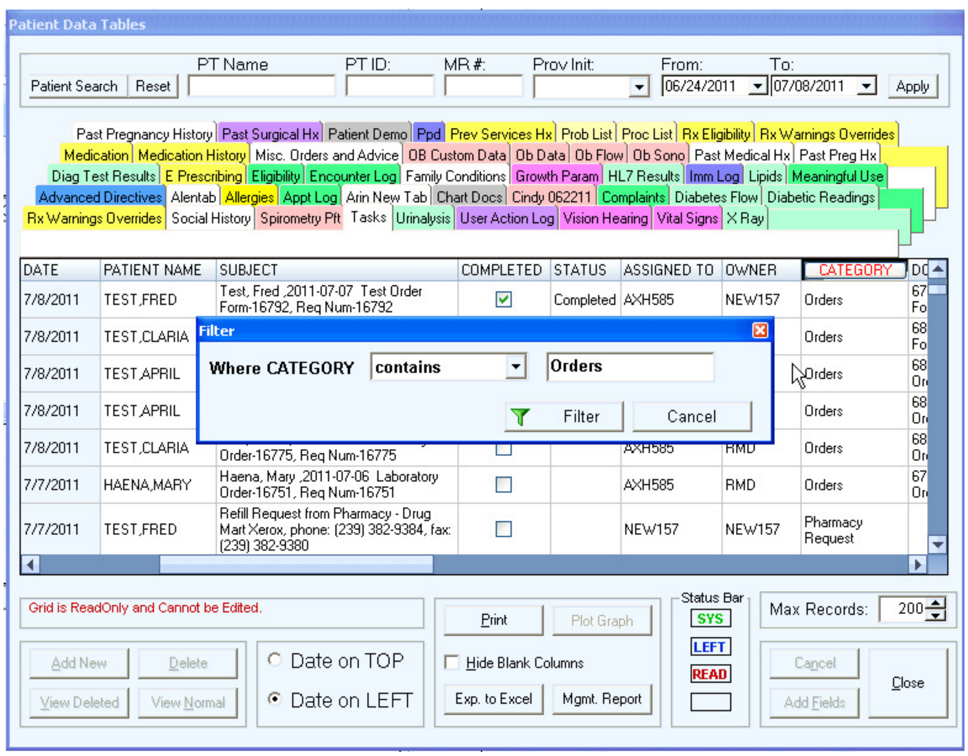
Patient Data Tables

Tasks View -The Task view in Patient Data Tables allows users more flexibility, and the ability to sort and to view all of the outstanding tasks for all users.

a. The task notes cannot be shown in this view due to the size of the data field, but you can right- click on a row and choose to "Open Task".
b. The "Provinit" column is the same as the task owner.

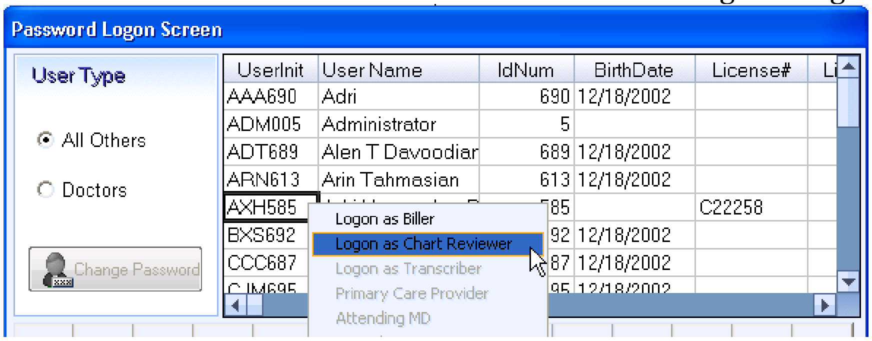


c. You can click on the column headers to sort the data or use the right click on the header options to filter specific data, such as the category to view only one category at a time
d. The results can be printed from this view



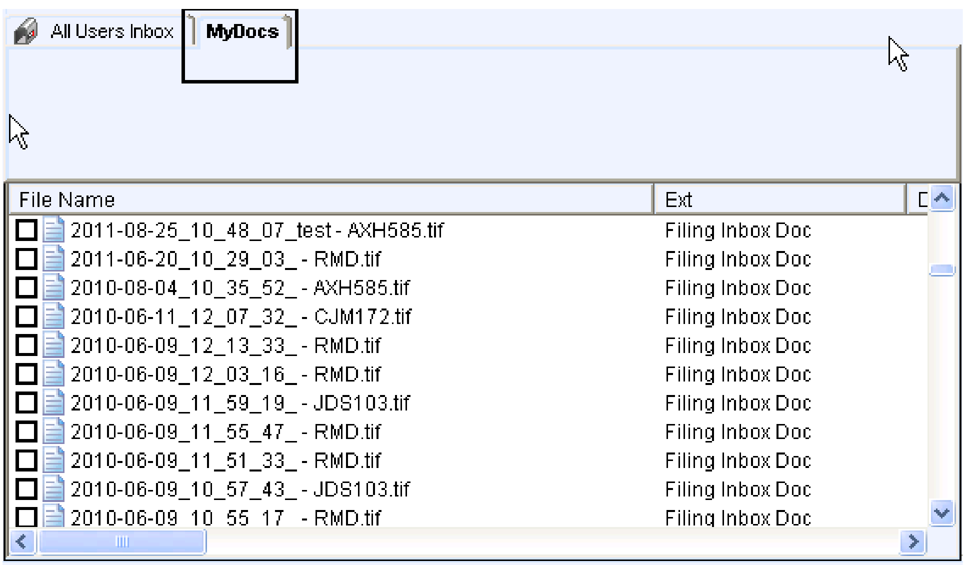
User Privileges

Chart Reviewer login now has access to all users' "MyDocs" – the "MyDocs" inbox containing all users' documents will now be accessible to users who log in using the Chart Reviewer privilege option.



The Chart Reviewer user can view, delete or send documents to other users from the MyDocs inbox, individual pages cannot be sent, only the entire document. The Chart Reviewer user cannot edit these documents. Prior to this update only the "All Users Inbox" was accessible.

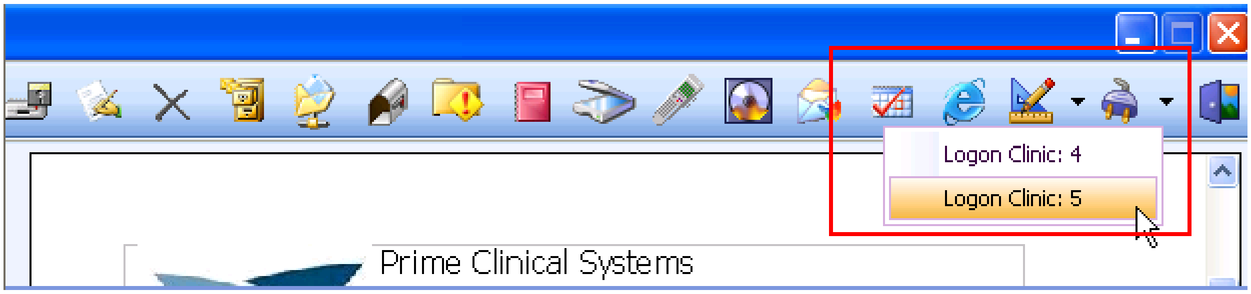
The file name contains the date the document was sent to a user, comment (if one was entered at the time of sending) and the user id of the user who currently has this document in their mailbox. For documents that were sent a long time ago, the file name may be different, the chart reviewer user will have to preview the documents prior to deleting or sending to other users.



Miscellaneous Changes

Quick clinic switch option for multiple clinic users- There is a new option for switching clinics which is located on the main toolbar, to the right of the Log On/Log Off button. If a user is logged on to another clinic, they can click on the drop down and choose from the available clinics. This option is only available when the user is already logged on to a clinic. If the user is logged off, they will only be able to log in to the clinic they were already logged into.

In order to use this option, do not click on Log Off, click on the drop down menu instead and choose another clinic.


Logon Clinic: 4
Logon Clinic: 5
Prime Clinical Systems