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Phoenix Weekly Release 0.0.0.1834

Phoenix Online DPMS

Weekly Release

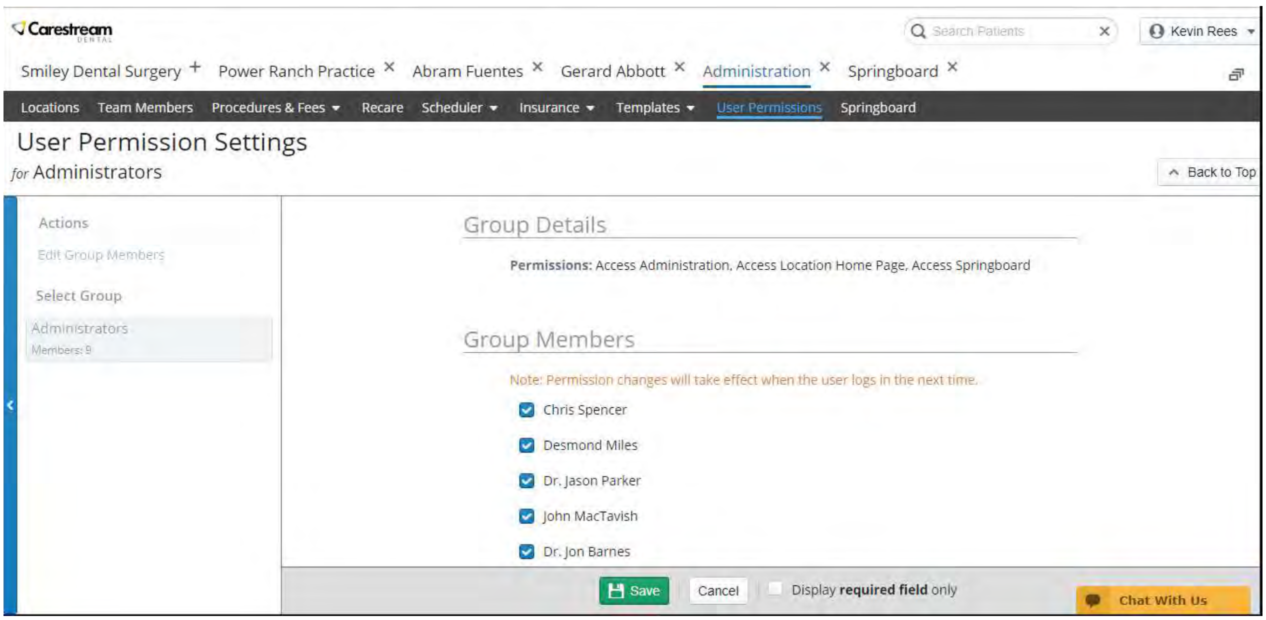
Build 0.0.0.1834 | April 5, 2018

These are the highlights of the new features available in this week's Phoenix DPMS release.

Initial Implementation of Role-Based Security

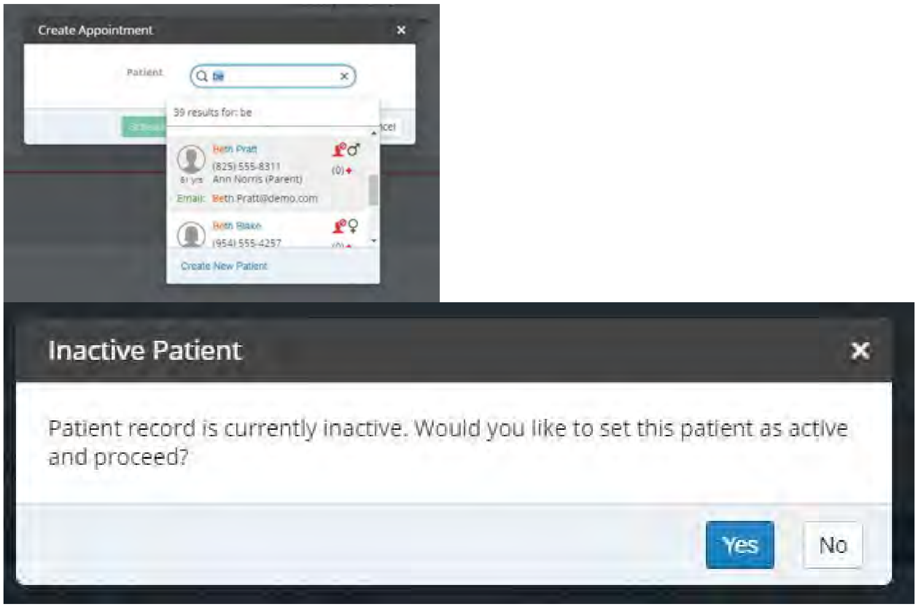
In this week's release we have implemented the first phase of role-based security in the application. A new User Permissions section has been added to the Administration tab that allows users to assign team members to permissions groups. For this first phase, an "Administrators" group has been created to help restrict access to the Administration tab itself as well as a few key UIs and functions throughout the application. Now, only those team members that have been assigned to the "Administrators" group will be able to get access to the main Administration tab, as well as the Location Homepage and Springboard UIs. This was in response to some initial user feedback, concerned with the visibility of practice financial information to all users. This also serves to restrict access to the main Administration tab functionality that is used to configure the business rules and control user accounts (including these new User Permission Settings).

By default, the initial user account created for a practice / customer is assigned to the Administrators permissions group and will have full access. As new Team Members are created, these users can be added to the permissions groups to expand their access to additional functionality in the application. It should be noted that Team Members can always access their own Team Member Settings UI to manage their user account, regardless of membership to permissions groups. We will continue to expand the User Permission Settings functionality in future releases, but this first pass has allowed us to address the primary user concerns that we have received from our Beta and Braintrust users. We are very interested to hear more about what additional permissions and security measures that users would like to see added.



Inactive Patient Warning

We have also added a workflow enhancement in this week's release that improves the handling of inactive patient records. Previously we implemented a visual indicator on the Patient Minicard that denotes when a patient record has been marked as inactive. Now, users will also be notified when trying to book an appointment for an inactive patient and given the option to either cancel the booking (if it was in error) or automatically change the patient record to active and proceed with the booking. This will help to prevent erroneous bookings of old or inactive patient records as well as easing the process of reactivating a lapsed patient without any unnecessary steps.



Optimizations and Fixes

The following fixes and optimizations have been also been added to Phoenix this week.

1. Changed terminology from “Recall” to “Recare” throughout the application.
2. Updated various field labels in the Insurance Plan dialog based on user feedback / request.
3. Addressed an issue where the Patient Minicard would sometimes show appointments with an unknown status.
4. Increased the height of the user menu to make it function better on lower screen resolutions.
5. Improved the Springboard Dashboard Administration screen to better accommodate lower screen resolutions.
6. Removed the ability to filter the Treatment Plan List UI by group procedure as this was generating confusing results for the user.
7. Fixed a technical issue which allows us to make updates without the user restarting their session.
8. Implemented additional performance improvements and design enhancements for patients and procedures.
9. Fixed a defect that was impacting the conversion of a connected person to a patient.
10. Made some modifications in how the team member drop down list content is refreshed across the app.
11. Fixed a defect in which the Archived Daysheets closed date was not taking the location’s time zone into account.
12. Fixed a defect in which Insurance Payers where marked as hidden so they could not be selected when setting up an Insurance Plan.
13. Fixed a defect in which the user might get an error when changing the status of an appointment too quickly.

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