Dashboard Features and Updates

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As part of our ongoing efforts to enhance this new feature, this article outlines the details of the improvements and issue resolutions that users can expect. Below is a list of enhancements (User Stories) and issues (Bugs) that are currently in progress or have been prioritized for upcoming releases:

User Story Cards In Progress

User Story 17960 (***Status: QA Passed pending release - Release 24.117***): Intake Setup - Add new Patient ID card to Intake Setup

The expectation is that practices may want to capture the new Patient ID as part of the intake process.

User Story 18203 (***Status: QA Passed pending release - Release 24.117***): Check In Dashboard - User Settings - Enhance for users that only have a single monitor

The goal is to provide single-monitor users with a display option that enhances their navigation efficiency and focus when moving from the dashboard to other areas of OfficeEMR (e.g., Open in EMR, Open in eDocuments, or clicking the iScheduler Appointment Link). Additionally, this option should allow users to easily and efficiently return to the dashboard when they are finished.

User Story 18204 (***Status: QA Passed pending release - Release 24.117***): Check In-Out Dashboard - Insurance Card Display Enhancement

The expectation is that we will continue to display by first looking at the Company Settings Primary Insurance Card Naming Standard and Secondary Insurance Card Naming Standard but when a practice is NOT using the existing Company Settings then the default will be to use the scanned images that exist in the Primary and Secondary Insurance card folders - ordering the existing images descending order and then using them to display as follows:

- *Primary Front will display the most current image scan in the Primary Insurance card folder*
- *Primary Back will display the second most current image scan in the Primary Insurance card folder*
- *Secondary Front will display the most current image scan in the Secondary Insurance card folder*
- *Secondary Back will display the second most current image scan in the Secondary Insurance card folder*

User Story 18202 (***Status: QA Passed pending release - Release 24.117***): Check In Dashboard - Filter Section - Add indicator (visual focus) user's default filter

The expectation is that we will add an indicator to the Filter list items so the user can see at-a-glance which of the filters they have set to be their user default.

User Story 18204 (***Status: QA Passed pending release - Release 24.117***): Check In-Out Dashboard - Insurance Card Display Enhancement

The expectation is that we will continue to display by first looking at the Company Settings Primary Insurance Card Naming Standard and Secondary Insurance Card Naming Standard as we are currently doing. However, when a practice is NOT using the existing Company Settings then the default will be to use the scanned images *that exist in the Primary and Secondary Insurance card folders - ordering the existing images descending order and then* using them to display as follows:

- *Primary Front will display the most current image scan in the Primary Insurance card folder*
- *Primary Back will display the second most current image scan in the Primary Insurance card folder*
- *Secondary Front will display the most current image scan in the Secondary Insurance card folder*
- *Secondary Back will display the second most current image scan in the Secondary Insurance card folder*

User Story 18202 (***Status: QA Passed pending release - Release 24.117***): Check In Dashboard - Filter Section - Add indicator (visual focus) user's default filter

The expectation is that we will flag the user's default filter for visual clarity when looking at their drop down list of filters and in the user's filter settings list.

User Story 18203 (***Status: QA Passed pending release - Release 24.117***): Check In Dashboard - User Settings - Enhance for users that only have a single monitor

The expectation is that we, based on a user setting, user's will be able to switch their Dashboard display to a Single Monitor view that embeds the Dashboard in the iScheduler screen - creating a toggle between iScheduler view and Check In/Out Dashboard view.

User Story 18257 (***Status: QA Passed pending release - Release 24.117***): CICO Dashboard - Include Balance on Receipt Tab and default Type Field to Copay

Known Issue Cards In Progress

No reported issues.

Released

Bug 18090 (***Released 24.114***): Check In/Out Dashboard - Patient View as List View - Orders set to expanded causes unexpected scroll

When users choose to set their Check In/Out Dashboard - Patient View as List View - and have Orders set to load as expanded, that setting is causing the Patient View data to jump to wherever the Orders data is being displayed instead of focusing the users view to the top of the List View and allowing them to scroll through the categories in the order that they set them in. This bug is not affecting the Tab View - only occurs when viewing data in List View.

User Story 18063 (*Released 24.113*): Check In/Out Dashboard - Patient search box - update to allow DOB search for Patient List patients

The expectation is that users will be able to search for patients using DOB the same as they can in iScheduler searches.

User Story 18062 (***Released 24.113***) Check In/Out Dashboard - Patient with multiple appointments - option to update appointment status for all that day's appointments for the patient

The expectation is that when practices already have set the existing Company Setting 'Check-In multiple appointments for the patient for the day' the Check In/Out Dashboard will leverage that setting and the user will be able prompted to check in those appointments (the same as they would if performing check-in from iScheduler).

User Story 18089 (*Released 24.114*): Check In/Out Dashboard - Enhance Functionality around appointment status changes for Rescheduled and Cancelled

The expectation is that when a user is in the Check In/Out Dashboard and changes an appointment status to 'Rescheduled' or 'Cancelled', the user would be redirected into iScheduler and the Cancel Comments screen would be open and the user's cursor focus would be in Comment field. The user could input their Cancel/Reschedule comment, and then the user should encounter the new appointment copy that is ready for the user to create a replacement patient appointment (the same as if the user had perform the 'Reschedule' or 'Cancel' in iScheduler).

User Story 18104 (*Released 24.115*): Check In/Out - Set Patient Validation Text to Red on Fail

The expectation is that when the Patient Validation contains failures for the Patient Demographics Summary tab, have the text in red would improve visibility. Currently those issues do not stand out and are easy to overlook.

Bug 18190 (*Released 24.115*): Check In Dashboard - Any user can delete a Shared filter for All Users

The role that allows Shared filter creation is allowing any user to delete a Shared filter. There will be a temporary hot-fix to not allow deletion of filters going out to production on 7/26/24 and then a subsequent release will put better controls around a Shared filter to 1. control delete, 2. warm if delete will impact other users, 3. offer the alternative of just setting the Shared filter to 'Inactive' for just your user (removing it from your user drop down without affecting other users).

Future Release Planning

User Story 18186: Check In Dashboard - Authorization Category in Patient View Section - Display the indicator alerting user to specific tab or tabs to review

The expectation is that the Authorization screen is tentatively slated to undergo a redesign in 2025 and this enhancement request would be incorporated as part of that project.