eRAD RIS

Customer Release Notes

Minor Build v3.2021.1.18

REVISED JANUARY 22, 2021

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Publication History

Revision	Author	Description
January 22, 2021	Kevin Brooks / Hilary Saltmarsh	▪ Commercial release. ▪ Note this document no longer includes an "Installation" section.

SUMMARY

Intended Audience

The intended audience for this **Customer Release Notes** document is the RIS Administration team for all eRAD RIS customers.

This document describes the purpose, configuration, and operation of new features made available with this release, identifies issues resolved in the release, and highlights any unresolved known limitations.

This information should be used by all customers to determine how these changes affect their organization's workflow, and to plan their upgrade strategy for eRAD RIS.

> *There is no separate **Service Release Notes** edition of this document for this release.*

Who Is Affected

A minor release, eRAD RIS v3.2021.1.18 includes several feature enhancements, including support for a "Timely Filing Interval" for insurance carriers and updated milestone tracking for Utilization Management, as well as resolving a variety of issues.

This version is recommended to be applied on 3.2018.5.6.1 or 3.2021.1.4 installs.

> *Please carefully review these release notes, even if your organization will not be upgraded immediately, to identify and communicate any issues that may affect your organization.*

NEW SETTINGS

System Configuration Settings

The following settings were added or updated with this release:

| Setting	Value and Default	Purpose
UMDocumentTypes	Value=CSV of active "Document Type Code" values as String, Default=Blank	Comma separated list of active Document Types that represent a UM request. Added in v2021.1.18 #27036

NEW FEATURES

Scheduling

Feature #25938 – Configurable default tab for scheduling search results

Summary

This enhancement to Scheduling adds the ability to set the preferred tab to display initially when presenting search results.
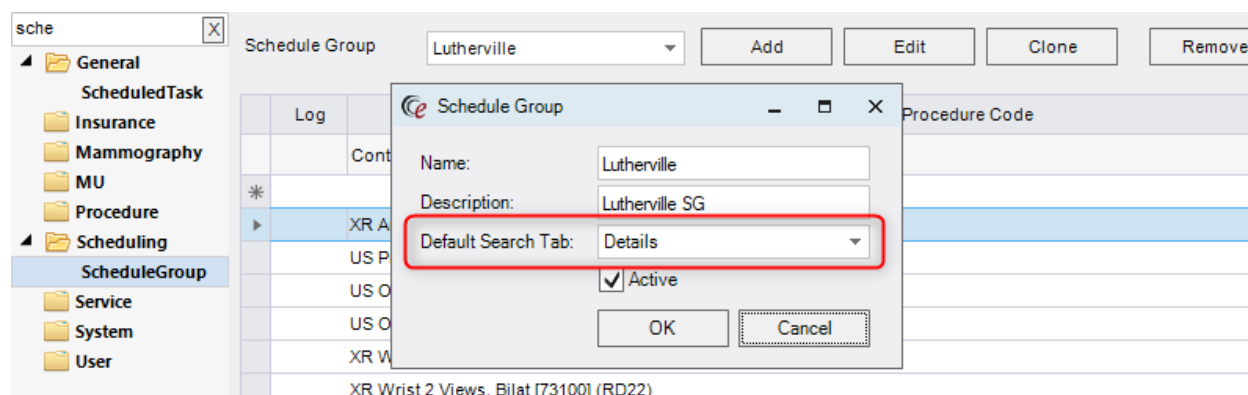
Rather than always defaulting the `Summary` tab when presenting scheduling search results, RIS now supports a new preference at the Schedule Group level with the option to specify `Details` as the default tab to display.

The default behavior continues to display the `Summary` tab, but this is overridden if the user belongs to any Schedule Group that specifies `Details` as the default.

Configuration Instructions

No System Administrator actions are necessary to enable this feature; however, optional configuration is available:

- Update the `Default Search Tab` option for any Schedule Groups that prefer to have Details as the default tab.

Worklists

Feature #28892 – New Last Cancel Date column on the Orders to Schedule WL

Summary

This enhancement to Worklists introduces a `Last Cancel Date` column to the Orders to Schedule worklist, allowing schedulers to filter or sort to find recent cancelations.

Background

Patients often have scheduled appointments that are canceled and not immediately rescheduled, but instead they are placed back onto the Orders To Schedule WL (also known as Schedule Later workflow). When this occurs, the existing `Cancel Reason` column shows the most recent `CanceledStudyReason`, which can be provided via Reschedule workflow.

While this is helpful to provide contextual information to schedulers who are working the Orders to Schedule WL and are tasked with following up to get the patient back on the schedule, they have no easy way to filter or sort the Orders to Schedule WL to find patients who were **recently** canceled and placed on the WL. Due to the large number of items that can be on the worklist, this information is beneficial to identify and quickly address the patients who have the highest chance of rescheduling. The Ordered Date is not helpful for this purpose because the order could have been submitted months in the past, even though the patient only canceled yesterday.

Feature Description

A new `Last Cancel Date` column has been added to the Orders to Schedule WL to display the most recent cancelation date/time. If the order is canceled on 12/24/20 and later rescheduled and then canceled again on 1/2/2021, the column would show the date of 1/2/2021 on the worklist.

In addition, the existing `Cancel Reason` column has been re-labeled as `Last Cancel Reason` for clarity and consistency.

Configuration Instructions

No System Administrator actions are necessary to enable this feature.

Billing

Feature #14800, #14801 – Add support for Timely Filing Interval for Insurance Carriers

Summary

This enhancement allows for the specification of a "Timely Filing Interval" value for insurance carriers, and updates worklists to display new Deadline for Filing Date and Remaining Filing Days columns, allowing users to prioritize issues such as Billing Exceptions based on the remaining time allowed by the carrier to submit a claim.

With this change, users can identify and take immediate action when items are approaching their timely filing deadline, which will hopefully decrease denials due to missed deadlines. Conditional formatting and worklist views can also be built using these new columns.

Background

Insurance carriers may define what they call a "Timely Filing" deadline, which lists the amount of time after an exam's date of service in which a claim can be submitted. If that timeframe is missed, they will no longer pay for the patient's exam unless an appeal is made and accepted. The length of the timely filing period can vary between payers.

Feature Description

In order to assist users in identifying exams that are approaching their timely filing deadline, a new optional `Timely Filing Interval` for carriers can now be specified via the `Carrier` table, indicating the number of days the carrier allows claims to be submitted after the date of service.

The `Activity`, `Billing Exception`, and `Billing Confirmation` worklists will now use this value to calculate new `Deadline for Filing Date` and `Remaining Filing Days` columns, with the remaining filing days calculated as the number of days between the current date and the deadline.

For example, Carrier ABC Insurance has a Timely Filing Interval of 10 days and a patient has an exam performed on 1/15/21. Based on the Timely Filing Interval, a deadline of 1/25/21 will be displayed on relevant worklists. When viewing the worklist, on 1/16/21, the Timely Filing Countdown column will indicate 9 days remaining. When viewing it on 1/25/21, it will indicate 0 days. On 1/27/21, it will display as -2, indicating two days past the deadline.

Configuration Instructions

System Administrators must complete the following actions to enable this feature:

RIS Client

Changes to RIS Lookup Table Settings

- Update the values for `Timely Filing Interval` for entries in the `Carrier` RIS Lookup Table Editor.
    - Setting to `0` disables calculation of filing days.

○ A negative value means that as soon as the exam is performed, it is behind by a day on filing (this is not an expected configuration).

> *If the interval value is modified, any existing records will be re-calculated overnight via the existing nightly SQL Agent job called* `<dbname> : RIS WL - Recalculate Worklist Items- Carrier`.

Scanning

Feature #28875 – New Referral Flag column in the ScanType RIS Lookup Table

Summary

This enhancement to Scanning introduces a new Referral Flag identifier column in the ScanType RIS Lookup Table to identify when a scanned document represents a referral for imaging.

Feature Description

For Feature #27036 described below, it is important to know when a scanned document represents some type of referral for imaging (aka a script or doctor's order). There can be a number of different ScanTypes that represent different kinds of referrals. For example, there may be one ScanType for Verbal Orders, another for EMR Orders, another for studies ordered via the Provider Portal, etc.

With this enhancement, a new `Referral Flag` column has been added to the `ScanType` RIS Lookup Table Editor.

Configuration Instructions

System Administrators must complete the following actions to enable this feature:

RIS Client

Changes to RIS Lookup Table Settings

- Update the `Referral Flag` value for relevant entries in `ScanType` RIS Lookup Table Editor.

Utilization Management

Feature #27036 – Additional milestones and calculation logic for UM Authorization Dates

Summary

This enhancement to Utilization Management revises the authorization milestones and activity that is tracked and displayed for Utilization Management Authorization workflow, and updates how these timestamps are calculated.

Authorization Dates		
Request received	12-09-2020 01:59 PM	
Order created	12-09-2020 02:00 PM	Ma(
UM required	12-09-2020 01:57 PM	
UM complete	12-09-2020 03:09 PM	Ma(
UM review hours	1	
Last updated	12-09-2020 03:09 PM	Ma(

ADDITIONAL MILESTONE TIMESTAMPS ARE NOW DISPLAYED IN THE AUTHORIZATION DATES SECTION ON THE UM TAB, ALONG WITH THE USER NAME WHEN APPLICABLE.

The Authorization Dates section on the UM tab will now display the timestamp and user information for the Request Received, Order Created, UM Required, UM Complete, and Last Updated events, as well as displaying the cumulative UM Review hours.

Background

Utilization Management has associated contractual obligations to meet certain turn-around times for performing the review. Medical Groups are looking for some key waypoints during the UM process that RIS did not always provide previously, or provided in an inconsistent or poorly defined way. For example, date/time stamps are provided to the Medical Groups in the UM Opinion Letter, a custom management report, on a worklist in the UM Portal, as well as the Details section on the UM Portal, but in each place the dates presented may have different labels and are sometimes defined differently. In all cases, the information the Medical Group is most interested in was not available because some logic needs to change to match their expectations about when the UM Clock should be started, for example.

This enhancement is focused on making the desired changes to the data elements and calculations in the RIS and will also lay the groundwork for additional future changes to how information is displayed in other areas.

Feature Description

Previously, the Authorization Dates section on the UM tab only displayed timestamps for the Created, Updated, Reviewed and Finalized events.

With this change, timestamps are now calculated and information displayed as follows:

Request Received

Date/Time RIS received the request for the exam(s). This could be different depending on the method the order was sent:

- For an EMR Order, this will be the date/time the RIS received the electronic order.
- For an order placed via the Provider Portal, this will be the date/time the order was placed.
- If the order was created from an Inbound Document, this will be the date/time the Inbound Document was received.
- Otherwise, this date/time will be assumed to be equivalent to the Order Created date/time. Unfortunately, there is no way for RIS to account for the time a paper referral is handed to the front desk, for example, so this assumption is made.

Order Created

- Date/time the order was created in RIS. This is often, but not *always*, equivalent to the Request Received date.
- This information provides important context for requests that were received via Inbound Document WL because an item may have been sitting on the Inbound Document WL for a notable amount of time before it is processed and turned into an order.

UM Required

- Date/time the study qualified for UM.
- This will sometimes be the same as the Order Created date, but if the Insurance or Procedure is updated at a later point and the order then becomes UM Required, these values will be different.
- There is a notable change regarding the calculation of this date/time, which is made to accommodate Medical Groups' expectations for reporting the number of hours a request has been under review. When an Inbound Document is recognized as a UM Review request, this date should be EQUAL to the Request Received date, even if the order does not meet the rules for requiring UM (oftentimes this is the case because insurance is not yet entered, so UM is not yet set as Required).

- To achieve this, RIS will evaluate two items to determine whether the inbound document is a UM request. First, a new `UMDocumentTypes` RIS System Configuration setting has been created to identify the Document Types that represent a UM request. Any dedicated UM Fax Lines should be configured to place documents in a dedicated folder which will be assigned a Document Type.

- Because dedicated UM fax numbers sometimes receive patient documents that are not UM requests (clinicals, for example), RIS will also check the `ScanType` that the user assigned when processing the inbound document. If the assigned ScanType is configured with `Referral Flag` set to Y (see Feature #28875 above) and the `DocumentType` matches one of the configured `UMDocumentTypes`, RIS will consider the inbound document to be a UM request and the UM Required date/time stamp will equal the Request Received date/time stamp.

- If the order was not created from an Inbound Document or the Inbound Document type does ***not*** match one of the configured `UMDocumentTypes` types with an assigned `ScanType` that is configured with Referral Flag as Y, this date/time stamp will be the date/time that RIS flagged the order as UM Required.

UM Complete

- Date/time UM reached a FINAL status (equivalent to the date/time the UM Clock was stopped).

UM Review Hours

- This is not a date/time stamp but instead shows the value of the UM Clock. This represents the number of hours the study was under UM Review, based on existing configuration for UM Review Hours (e.g. 8-5 Mon-Fri, excluding holidays).
- Note a significant change to this value is that the UM Clock will now start at the Request Received Date/Time. UM Review Hours will still apply as usual, so if that configuration is Mon-Fri from 8-5 and the Request Received Date was on a Saturday, the UM Clock (and thus the UM Review Hours) will start on Monday at 8 am. Note that this will mean that the UM Clock will sometimes be ***backdated*** because the study might not qualify for UM Required until later in the workflow. This is the desired behavior because it matches the expectation of the Medical Groups.
- Additional changes will be made in a future build that will make further adjustments to how UM Review Hours are counted when procedures are changed or added at later points in the workflow.

- Most recent Date/time when any of the following data was updated:
  - UM Status
  - UM Resolution
  - Billing codes (added/removed/swapped)
  - Confirmation Received
- This is a change to how the Last Updated date/time stamp was previously calculated.

Configuration Instructions

System Administrators must complete the following actions to enable this feature:

RIS Client

Changes to RIS System Configuration Settings

- Configure `UMDocumentTypes` to identify the Document Types that represent UM requests (i.e. Inbound Document folders that contain faxes sent to a dedicated UM Fax Line).

The following related settings were added or updated:

Setting	Value and Default	Purpose
UMDocumentTypes	Value=CSV of active "Document Type Code" values as String, Default=Blank	Comma separated list of active document types that represent a UM request. Added in v2021.1.18 #27036

- Update the `Referral Flag` value for relevant entries in `ScanType` RIS Lookup Table Editor (see Feature #28875 above).

Database

- Review the customizable `z_um_letter_summary` stored procedure used to generate the UM Opinion Letter.

RESOLVED ISSUES AND KNOWN LIMITATIONS

Resolved Issues

This release resolves the following issues:

Redmine #	Subject
28378	Resolved Worklists issue where EMR orders did not update on Orders to Schedule WL after changing the procedure code.
28448	Resolved Provider Attachments issue where a Provider Portal Electronic Referral was not consistently generated into RIS Attachments.
28617	Resolved Insurance Eligibility issue where special characters in the plan number resulted in a parsing error.
28912	Resolved Provider Images issue where Portal was making duplicate calls to both v7 and v8 PACS.
29059	Resolved Worklists performance issue loading the Document Distribution WL.
29074	Resolved DB Upgrade scripts issue where the follow up and dictionary tables were not getting populated.
29079	Resolved issue where Patient History control row highlighting was not working.
29087	Resolved Worklist Filtering issue where Relative date/time filter in Scheduled date column was not returning results.
29099	Resolved Document Distribution issue where the Document Distribution Engine failed to encrypt PDF files.

New Known Limitations

No new known limitations were identified with this release.

VERSION DETAILS

Package Contents

The release package includes the following folders:

@Hotfixes	4/20/2012 8:51 AM
_Documentation	1/19/2021 9:06 AM
_ReleaseNotes	1/20/2021 1:26 PM
Client Application	1/19/2021 9:04 AM
DB	1/19/2021 9:04 AM
External WebAPI	1/19/2021 9:04 AM
Identity Service	1/19/2021 9:04 AM
Management Reports	1/19/2021 9:04 AM
RIS Service	1/19/2021 9:04 AM
Service Tools	1/19/2021 9:10 AM
Web Digital Forms	1/19/2021 9:04 AM
Web Patient Connect	1/19/2021 9:05 AM
Web Referring Connect	1/19/2021 9:05 AM
Web UM Connect	1/19/2021 9:05 AM
Build_2021.1.18_1081.zip	1/19/2021 9:07 AM
RISServerMasterCert.pfx	3/31/2016 1:38 PM

Code Stream

The following source code branches have been merged into this release:

~ Previous years patches released in 2020
*** = previous years patches released in 2019
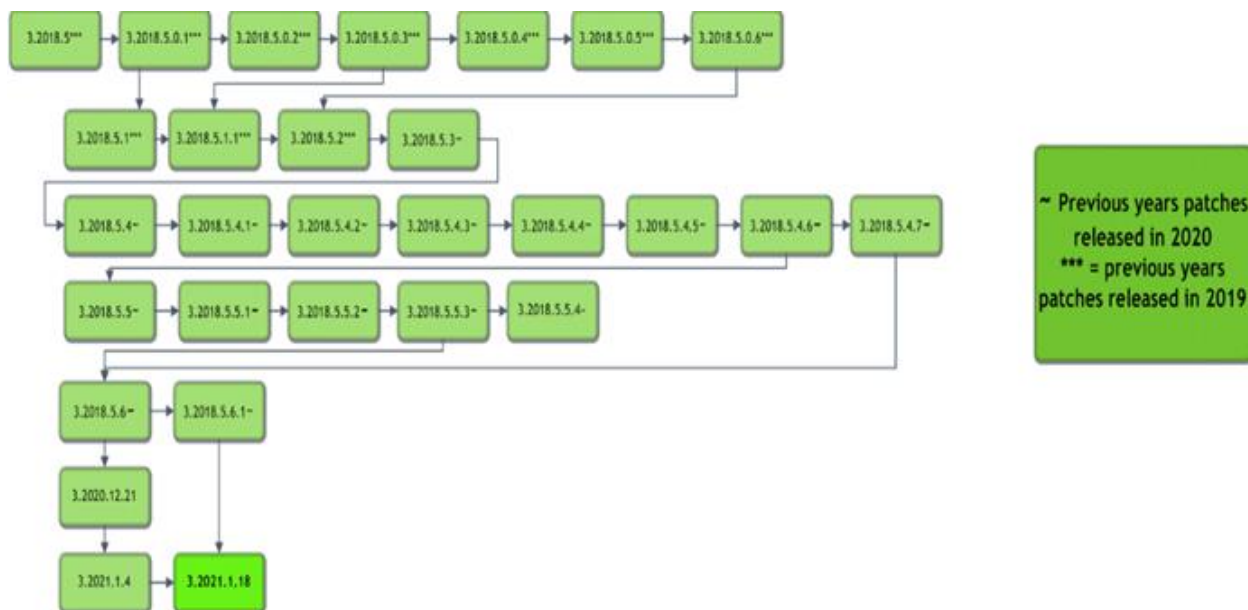
Light Green = Previously Released software

Gray = Internal version, non-release version

Bright Green = Current Release

eRAD RIS Release Version Numbers

The following table details the version identifiers for components in this release:

Build	Patch	UI Version	Core Version	WS Version	DB Version	Digital Forms	Patient Portal	UM Portal	Provider Portal	Notes
2018.5	-	3.18.5(3GB)	3.18.5.0	3.18.5.0	3.18.5.0.0.01832865	3.18.5.0	3.18.5.0.0.822	3.18.5.0.0.822	3.18.5.0.0.822	Full Version Release. Including Patient, Provider and UM Portals
2018.5	.0.1	3.18.5.0.1(3GB)	3.18.5.0.1	3.18.5.0.1	3.18.5.0.1.01913234	3.18.5.0.1	3.18.5.0.1.874	3.18.5.0.1.874	3.18.5.0.1.874	GUI, Web Services, DB, Patient/Provider/UM Portals
2018.5	.0.2	3.18.5.0.2(3GB)	3.18.5.0.1	3.18.5.0.2						GUI, Web Services
2018.5	.0.3	3.18.5.0.3(3GB)	3.18.5.0.1	3.18.5.0.3	3.18.5.0.3.01972329	3.18.5.0.3	3.18.5.0.3.887	3.18.5.0.3.887	3.18.5.0.3.887	GUI, Web Services, DB, Digital Forms, Patient, Provider and UM Portals
2018.5	.0.4	3.18.5.0.4(3GB)	3.18.5.0.1	3.18.5.0.4	3.18.5.0.4.02023490	3.18.5.0.4	3.18.5.0.4.903	3.18.5.0.4.903	3.18.5.0.4.903	GUI, Web Services, DB, Digital Forms, Patient, Provider and UM Portals
2018.5	.0.5	3.18.5.0.5(3GB)								GUI
2018.5	.0.6	3.18.5.0.6(3GB)		3.18.5.0.6	3.18.5.0.6.02076323					GUI, Web Services, DB
2018.5	1	3.18.5.1.0(3GB)	3.18.5.1.0	3.18.5.1.0	3.18.5.1.0.01916269	3.18.5.1.0	3.18.5.1.0.878	3.18.5.1.0.878	3.18.5.1.0.878	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	1.1	3.18.5.1.1(3GB)	3.18.5.1.1	3.18.5.1.1	3.18.5.1.1.01983618	3.18.5.1.1	3.18.5.1.1.890	3.18.5.1.1.890	3.18.5.1.1.890	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	2	3.18.5.2.0(3GB)	3.18.5.2.0	3.18.5.2.0	3.18.5.2.0.02084897	3.18.5.2.0	3.18.5.2.0.924	3.18.5.2.0.924	3.18.5.2.0.924	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	3	3.18.5.3.0(3GB)	3.18.5.3.0	3.18.5.3.0	3.18.5.3.0.02174049	3.18.5.3.0	3.18.5.3.0.951	3.18.5.3.0.951	3.18.5.3.0.951	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	4	3.18.5.4.0(3GB)	3.18.5.4.0	3.18.5.4.0	3.18.5.4.0.02214458	3.18.5.4.0	3.18.5.4.0.961	3.18.5.4.0.961	3.18.5.4.0.961	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	4.1	3.18.5.4.1(3GB)		3.18.5.4.1						GUI and Web Service
2018.5	4.2	3.18.5.4.2(3GB)		3.18.5.4.2						GUI and Web Service
2018.5	4.3			3.18.5.4.3						Web Service
2018.5	4.4	3.18.5.4.4(3GB)	3.18.5.4.4	3.18.5.4.4	3.18.5.4.4.02297855		3.18.5.4.4.982			GUI, Web Service, DB and Patient Portal Updates
2018.5	4.5	3.18.5.4.5(3GB)	3.18.5.4.5	3.18.5.4.5	3.18.5.4.5.02314967	3.18.5.4.5	3.18.5.4.5.988	3.18.5.4.5.988	3.18.5.4.5.988	GUI, Web Service, DB and Patient, Referring and UM Portal Updates
2018.5	4.6	3.18.5.4.6(3GB)	3.18.5.4.6	3.18.5.4.6	3.18.5.4.5.02314967	3.18.5.4.5	3.18.5.4.5.996	3.18.5.4.5.996	3.18.5.4.5.996	GUI, Web Service, Patient, Referring and UM Portal Updates
2018.5	4.7			3.18.5.4.7						Web Services only
2018.5	5	3.18.5.5(3GB)	3.18.5.5	3.18.5.5	3.18.5.5.0.02404209	3.18.5.5	3.18.5.5.0.1019	3.18.5.5.0.1019	3.18.5.5.0.1019	Full version release
2018.5	5.1	3.18.5.5.1(3GB)	3.18.5.5.1	3.18.5.5.1	3.18.5.5.1.02460669	3.18.5.5.1	3.18.5.5.1.1023	3.18.5.5.1.1023	3.18.5.5.1.1023	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2018.5	5.2	3.18.5.5.2(3GB)								GUI
2018.5	5.3	3.18.5.5.3(3GB)	3.18.5.5.3	3.18.5.5.3	3.18.5.5.3.02479332					GUI, Web Services, DB
2018.5	5.4	3.18.5.5.4(3GB)	3.18.5.5.4	3.18.5.5.4	3.18.5.5.4.02587388					GUI, Web Services, DB
2018.5	6	3.18.5.6(3GB)	3.18.5.6	3.18.5.6	3.18.5.6.0.02571320	3.18.5.6.0	3.18.5.6.0.1050	3.18.5.6.0.1050	3.18.5.6.0.1050	Full version release
2018.5	6.1	3.18.5.6.1(3GB)	3.18.5.6.1	3.18.5.6.1	3.18.5.6.1.02601339	3.18.5.6.1	3.18.5.6.1.1070	3.18.5.6.1.1070	3.18.5.6.1.1070	GUI, Web Services, DB, Patient/Provider/UM Portals and Digital Forms
2020.12.21	-	3.20.12.21.0(3GB)	3.18.5.6	3.20.12.21.0	3.20.12.21.0.02608693	3.20.12.21.0	3.20.12.21.0.897	3.20.12.21.0.897	3.20.12.21.0.897	Full version release
2021.1.4	-	3.21.1.4.0(3GB)	3.21.1.4				3.21.1.4.0.1075	3.21.1.4.0.1075	3.21.1.4.0.1075	GUI and Patient/Provider/UM portals
2021.1.18	-	3.21.1.18.0(3GB)	3.21.1.18	3.21.1.18.0	3.21.1.18.002652234	3.21.1.18.0	3.21.1.18.0.1081	3.21.1.18.0.1081	3.21.1.18.0.1081	GUI, Web Services, DB, Patient/Provider/UM portals and Digital Forms