Server Update

For eRAD RIS

Version 3.0

Build 3.2017.6

Update 3.2017.6.4

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INTENDED AUDIENCE

The intended audience for this document is the RadNet Clinical Systems team and the eRAD Support/Service team.

It is appropriate to share the document with any customers applying the patch, in order to review new feature descriptions and resolved defects.

WHO IS AFFECTED

Build 2017.6 installs. This server update must be applied to 2017.6.3

NEW SETTINGS

ACCESS STRINGS

Setting	Default	Purpose
Portal.CCDA	None	Access to view C-CDAs.
Portal.Referring.Admin.AccountMigration	None	Access to the Account Migration tab.
Portal.Referring.Admin.ImgRetrieval	None	Access to the Image Retrieval tab.
Portal.Referring.Admin.SysMsgs	None	Access to the System Messages tab.
Portal.Referring.Admin.UserMgt	None	Access to the User Management tab.
Portal.Referring.Admin.UserMgt.ADD	None	Access to add a new account in the Provider Portal.
Portal.Referring.Admin.UserMgt.CreateNewUser	None	Access to create a new user in the Provider Portal.
Portal.Referring.Admin.UserMsgs	None	Access to the User Messages tab.
Portal.Referring.OutsidePractice	None	Access to search for all patients without requiring the user to check the box for "Search for patients outside my practice." Internal use.
Portal.UMOpinionLetter	None	Access to view UM Opinion Letters.

NEW FEATURES

FEATURE # 20428/18537 - NEW ACCESS STRINGS FOR CONNECT PROVIDER PORTAL ADMIN TOOL

The Admin Tool for the Connect Provider Portal allows users to perform a number of administrative tasks. Not all users need access to all of the functions that can be performed, so new access strings have been created so that users can be restricted from using functionality that is not pertinent to their role.

The base access string that allows users to log into the Admin Tool for the Provider Portal remains the same. The user must have Full access to *Portal.Referring.Admin* to log in.

The various functions are relegated to different tabs in the Admin Portal. The new access strings control access to those tabs. RIS Administrators automatically have full access to all Portal functionality.

The available access strings are:

- *Portal.Referring.Admin.UserMgt* – Access to the User Management tab.
- *Portal.Referring.Admin.UserMsgs* – Access to the User Messages tab.
- *Portal.Referring.Admin.SysMsgs* – Access to the System Messages tab.
- *Portal.Referring.Admin.ImgRetrieval* – Access to the Image Retrieval tab.
- *Portal.Referring.Admin.AccountMigration* – Access to the Account Migration tab.

A user with permission to access only User Management and System Messages will see the following upon logging into the Admin Portal:
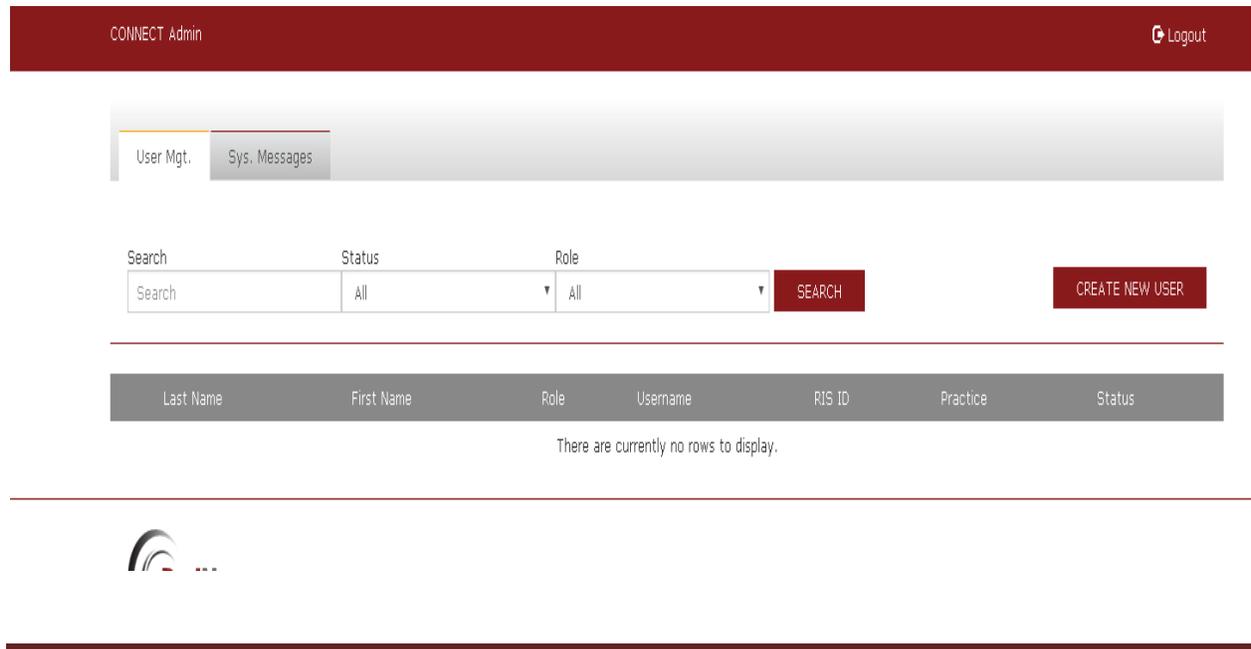
In addition to the new access strings to control access to these tabs, there are some additional access strings that control more specific functions.

- *Portal.Referring.Admin.UserMgt.CreateNewUser* – Access to create new Provider Portal users.
- *Portal.Referring.Admin.UserMgt.ADD* – Access to use the ADD button to create a portal account for a RIS user who does not already have one.
- *Portal.CCDA* – Access to view C-CDAs.
- *Portal.UMOpinionLetter* – Access to view UM Opinion Letters.
- *Portal.Referring.OutsidePractice* – Access to search for all patients without requiring the user to check the box for "Search for patients outside my practice." This is intended for internal users only.

As with all access strings, for an individual user to receive the associated permission, they must belong to a User Group which has the pertinent access string assigned. For all of the new access strings, the Access Level must be set to Full to grant access. If a user has multiple User Groups, the highest level of access will be granted for each access string.

FEATURE # 20429/18942 - ADMIN TOOL USER SEARCH WILL ONLY RETURN APPLICABLE RIS USERS

Please Note: A redesign of this feature is underway which will change the logic described below in an upcoming build.

When searching for users on the User Management tab, there are certain types of users that should be excluded. Internal RIS users, such as technologists, are unlikely to need portal accounts. Displaying these users in the search results can sometimes lead to a portal administrator inadvertently changing the settings or passwords of non-portal users, which can impact their ability to access the eRAD RIS application. In addition, returning results for inactive users is not helpful and makes it more difficult to find the desired user.

In order to eliminate undesired results, the search will now only display results under the following circumstances:

- Only active users will be displayed.
- If the user has one of the following Resource Types, they **will** be displayed in search results regardless of any other Resource Types they may have.
    - Referring Physician
    - Unknown Referring
    - UM Reviewer
    - Marketing Representative
- If the user does not have any of the above Resource Types, they will still be displayed in search results **unless** they have one of the following Resource Types:
    - Technologist
    - Editor
    - Radiologist
    - Surgeon
    - Injection Physician

These changes are applied to both the Provider Portal and the Utilization Management Portal.

FEATURE # 20400/19701 – PROVIDER PORTAL: RESTRICT RESCHEDULING OR CANCELLING ORDERS TO APPROPRIATE USERS

Changes have been made to the Provider Portal to restrict which Portal users can cancel or reschedule an appointment.

Staff Users:

If the current user created the order, they will be permitted to cancel or reschedule. If not, the system will evaluate whether the user is "viewing for" a provider that is the "Requested By" provider *or* a provider that is affiliated with the ordering provider.

If there is not a match, the staff user will not be allowed to reschedule or cancel. These buttons will not be available at the top of the page.

Referring Providers:

The referring provider can only cancel or reschedule if they are a match to the "Requested By" provider. In other words, referring providers can only action their own orders.

FEATURE # 20467/19978 - CONFIGURATION TO ALLOW FOR THE SEPARATE DEPLOYMENT OF A PRACTICE'S PATIENT AND PROVIDER PORTALS

Separate deployment options have been created in the Practice editor so that the Patient Portal and the Provider Portal can be enabled separately.

In the Practice editor, there are now checkboxes to enable the associated Site Group on the tab for the Patient Portal and the tab for the Referring Portal.

Patient Portal:

Provider Portal:

When the checkbox is checked, the practice's corresponding Site Group will be displayed on the Imaging Group page for the Patient or Provider Portal independently.

Patient Portal:
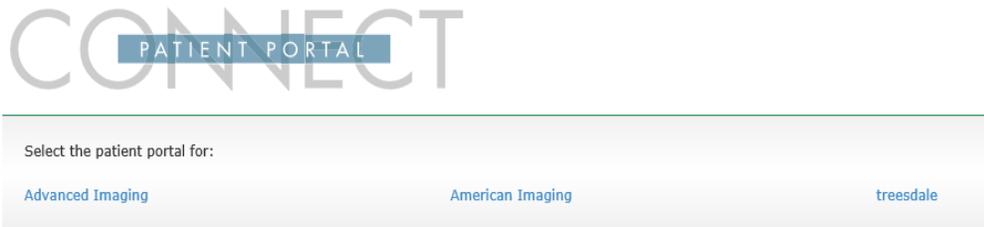
Provider Portal:
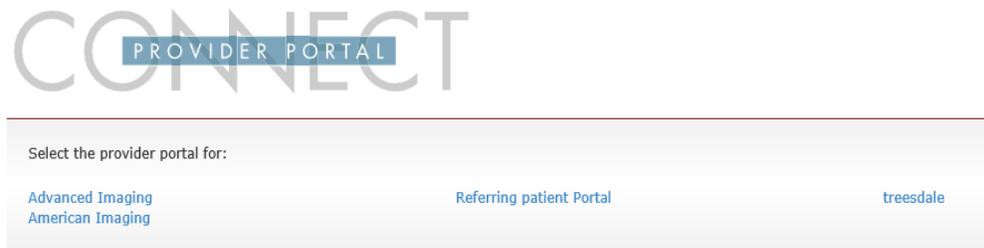
FEATURE # 20464/19996 - APPROVED UM ORDERS CREATED THROUGH THE PROVIDER PORTAL ARE MADE AVAILABLE FOR THE PATIENT TO SCHEDULE IN THE PATIENT PORTAL

Sometimes orders created through the Provider Portal require Utilization Review before scheduling can occur. The Patient Portal will now make these orders available for the patient to schedule after Utilization Review is complete and the order is approved.

As long as the procedure(s) are configured in the Procedure Picker to allow for scheduling in the Patient Portal, the patient will see the "Make An Appointment" button in the Patient Portal and can move forward with scheduling the appointment.
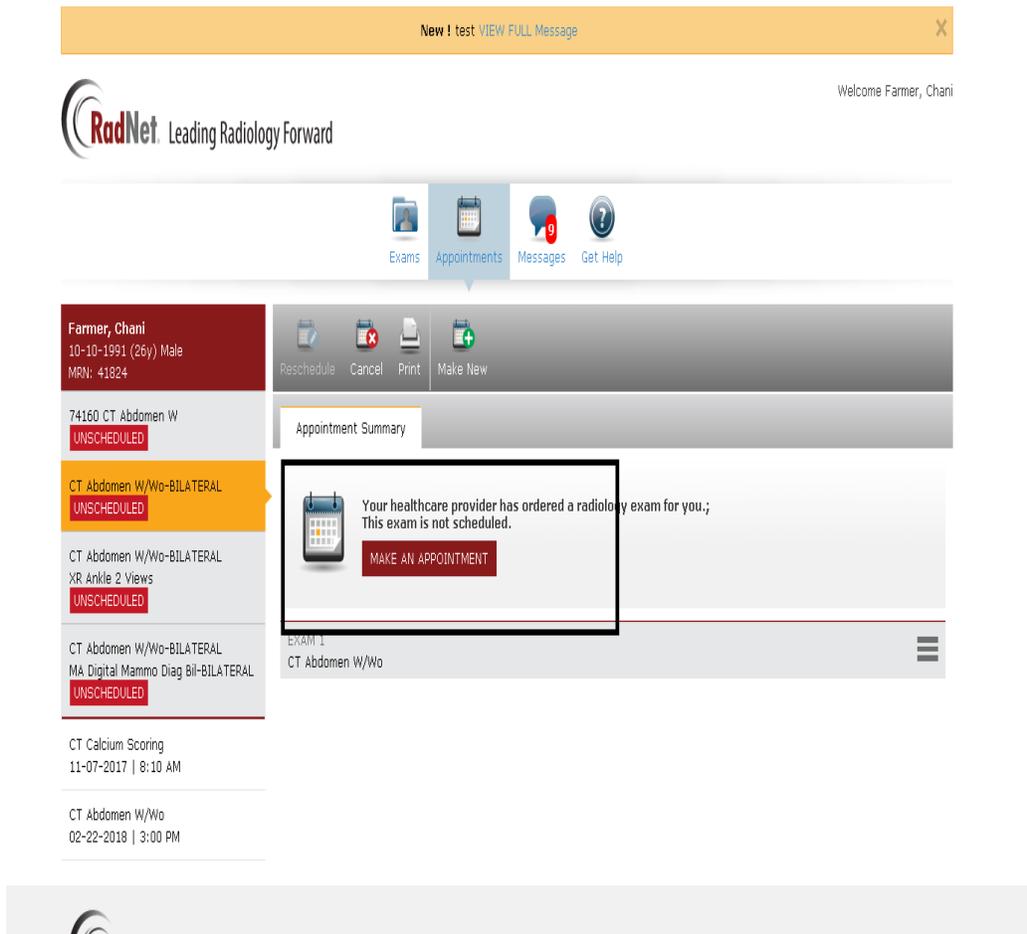
FEATURE # 20444/18026 - UM GOLD CARD WORKFLOW NOW SUPPORTED IN THE PROVIDER PORTAL

Utilization Management in eRAD RIS supports *Gold Card* workflow, which allows orders from designated Gold Card providers to bypass utilization review. Enhancements have been made to the Connect Provider Portal to support the same workflow for Gold Card providers.

To determine whether an order should bypass UM workflow and proceed to scheduling, the Connect Portal will utilize the same workflow used in the RIS.

First, the system will check to see whether the provider is marked as Gold Card. This information is stored in the Personnel table under the Referring Flags section.
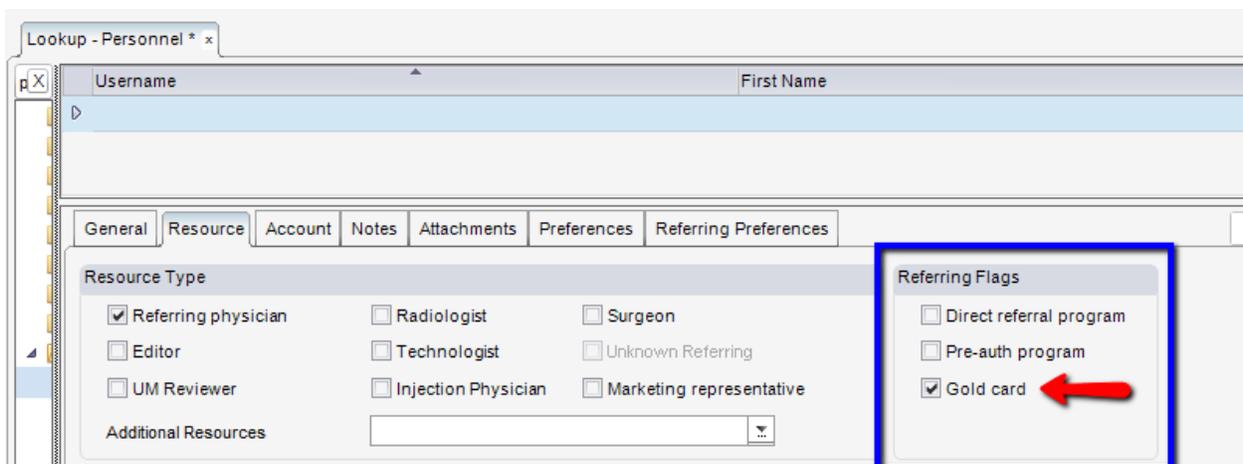
If the provider is configured for Gold Card, the system will check the existing *UMGoldCardAutoApprove* System Configuration value. If the value is False, the order will go through the normal Utilization Management workflow. If the value is True, the order will be automatically be marked as UM Complete.

The system will refer to the System Configuration values for *UMDefaultGoldCardStatusCode* and *UMDefaultGoldCardResolutionCode* to automatically set the UM Status and Resolution. For example, Recommended As Gold Card.
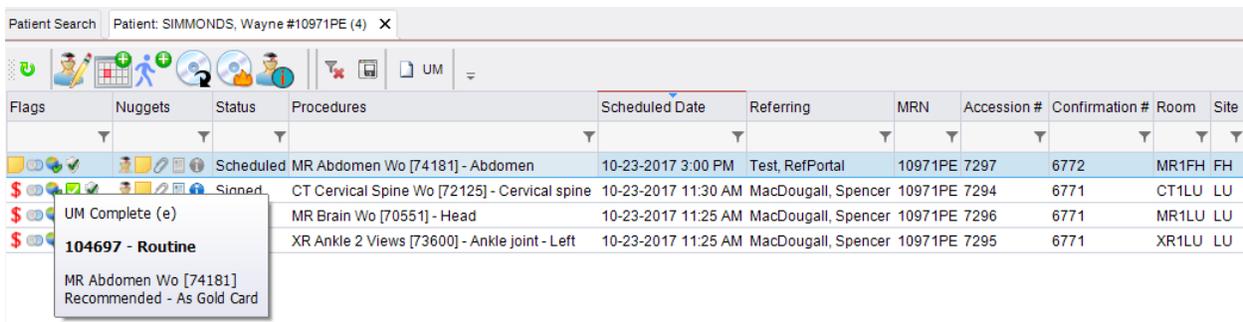
Most importantly, the provider will be able to continue scheduling the exam for the patient or the patient can be invited to schedule the appointment in the Patient Portal. For providers *without* Gold Card status, utilization review will need to be completed before scheduling.

RESOLVED ITEMS

Most items resolved in this hotfix were originally part of later builds and have been pulled into this patch for early release.

Redmine # for 2017.6.4	Redmine # for 2018.1 and 2018.2	Subject
20531		Provider Portal - Browse file upload button now renders properly in Google Chrome on a Mac.
20529		Provider Portal - More informative error message is provided to the user when their password reset is unsuccessful.
20528	19835	Resolved an issue that could cause Provider Portal account migration workflow to halt after answering security questions.
20498		Billing codes are no longer missing when EMR orders are assigned a new procedure.
20492		PreCert is now re-evaluated after a procedure change on Perform Exam screen.
20445	18342	UM Required screen is now presented after the provider has been selected when scheduling via the Provider Portal.
20443	19700	Corrected a typo on the Cancel Reschedule dialog button in the Provider Portal.
20442	19697	The Tutorials link has been removed from portal "404" error pages.
20441	19696	Added more appropriate message to the Orders Pending Approval banner for Staff users in the Provider Portal.
20439	19932	A change was made to prevent two PACS accounts from being created for new user accounts in Provider Portal due to requests timing out.
20438	19699	Removed hard coded message in the Provider Portal indicating that the imaging center will contact the patient for scheduling after utilization review.
20437	19769	In the Provider Portal, users will default to entering insurance or payment method information. If they do not wish to enter the information, the user will have to manually select the option to omit.
20435	19708	An indicator now informs the user that their search is being processed when searching for a patient in the Provider Portal when creating an order.
20434	19698	The "Need Help Making Appointment" button in the Provider Portal is now directing users to the correct page.
20433	19703	When a provider uses the Invite Patient to Schedule option in the Provider Portal, all links in the email sent to the patient now bring the patient to the same place in the workflow.
20432	19702	Provider Portal worklists now update more responsively after events such as creating, scheduling or approving an order.
20431	19707	Provider Portal - Resolved an issue with the Approve button being unavailable if the user moves backwards in the workflow, returning to the Review step, during order approval workflow.
20430	19705	During account creation in the Provider Portal, the URL embedded in the link of the verification email no longer directs users to the "Account Recovery" workflow. All email links now correctly point to the CreateAccount/Verify page.
20427	19712	All affiliated providers and patients now being shown accurately in the Provider Portal after correcting some issues where the portal referred to the user's RIS practice instead of the Referring Practice.

20426	19768	The Full Viewer is now the default image viewer for new user accounts in the Provider Portal. It is also possible for an administrator to adjust the setting via the Admin Tool.

CODE STREAM

Legend:

Light Green = Previously Released software

Gray = Internal version, non-release version

Bright Green = Current Release
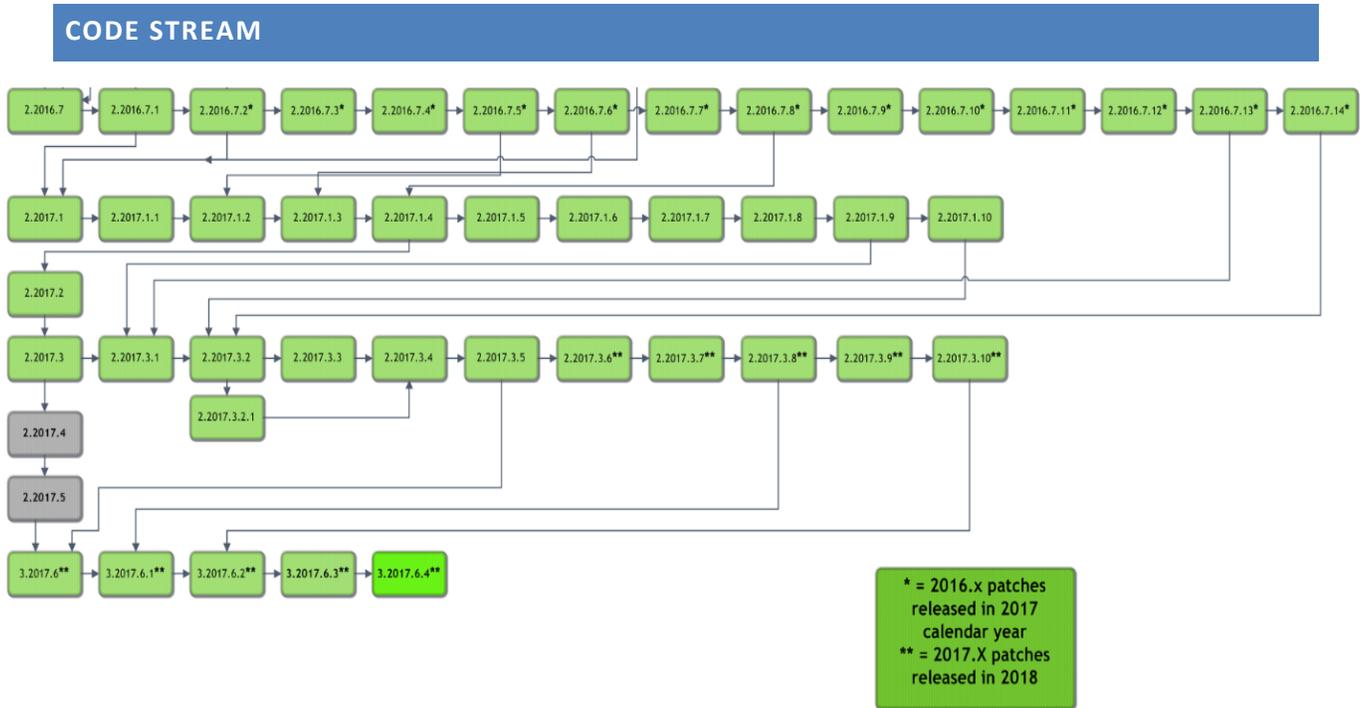
ERAD RIS RELEASE VERSION NUMBERS

Patch	UI Version	Core Version	WS Version	DB Version	Digital Forms	Patient Portal	UM Portal	Provider Portal	Notes
6	2.16.7.6 (3GB)	2.16.7.0	2.16.7.6	2.16.7.0.00490835	2.16.7.0	1.16.7.0.493031	2.16.7.0.493008		GUI and Web Service updates
7	2.16.7.7 (3GB)	2.16.7.0	2.16.7.7	2.16.7.0.00490835	2.16.7.0	1.16.7.0.493031	2.16.7.0.493008		GUI and Web Service updates
8	2.16.7.8 (3GB)	2.16.7.0	2.16.7.7	2.16.7.8.00683507	2.16.7.0	1.16.7.0.493031	2.16.7.0.493008		GUI and DB updates
9	2.16.7.9 (3GB)	2.16.7.0	2.16.7.9	2.16.7.9.00715012	2.16.7.0	1.16.7.0.493031	2.16.7.9.723457		GUI, Web Services, DB updates and UM Portal
10	2.16.7.10 (3GB)	2.16.7.0	2.16.7.10	2.16.7.9.00715012	2.16.7.0	1.16.7.0.493031	2.16.7.9.723457		GUI and Web Service updates
11	2.16.7.11 (3GB)	2.16.7.0	2.16.7.11	2.16.7.11.00761267	2.16.7.0	1.16.7.0.493031	2.16.7.9.723457		GUI, Web Service and DB updates
12	2.16.7.12 (3GB)	2.16.7.0	2.16.7.11	2.16.7.11.00761267	2.16.7.0	1.16.7.0.493031	2.16.7.9.723457		GUI
13	2.16.7.13 (3GB)	2.16.7.0	2.16.7.13	2.16.7.13.00823274	2.16.7.0	2.16.7.13.805715	2.16.7.13.805717		GUI, Web Service, DB, Patient and UM Portal updates
14	2.16.7.14 (3GB)	2.16.7.0	2.16.7.14	2.16.7.14.00888220	2.16.7.0	2.16.7.14.897644	2.16.7.14.897646		GUI, Web Service, DB, Patient and UM Portal updates
-	2.17.1.0 (3GB)	2.17.1.0	2.17.1.0	2.17.1.0.00559886	2.17.1.0	2.17.1.0.572290	2.17.1.0.00000		Full Version Release
1	2.17.1.1 (3GB)	2.17.1.0	2.17.1.1	2.17.1.1.00589952	2.17.1.0	2.17.1.0.572290	2.17.1.0.00000		GUI, Web Service and DB updates
2	2.17.1.2 (3GB)	2.17.1.0	2.17.1.2	2.17.1.2.00621962	2.17.1.0	2.17.1.0.572290	2.17.1.0.00000		GUI, Web Service and DB updates
3	2.17.1.3 (3GB)	2.17.1.0	2.17.1.3	2.17.1.3.00640480	2.17.1.0	2.17.1.0.572290	2.17.1.0.00000		GUI, Web Service and DB updates
4	2.17.1.4 (3GB)	2.17.1.0	2.17.1.4	2.17.1.4.00692239	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI, Web Service, DB and Patient Portal updates
5	2.17.1.4 (3GB)	2.17.1.0	2.17.1.5	2.17.1.4.00692239	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		Web Service
6	2.17.1.6 (3GB)	2.17.1.0	2.17.1.5	2.17.1.6.00745281	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI and DB Updates
7	2.17.1.7 (3GB)	2.17.1.0	2.17.1.5	2.17.1.6.00745281	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI update
8	2.17.1.8 (3GB)	2.17.1.0	2.17.1.5	2.17.1.6.00745281	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI update
9	2.17.1.9 (3GB)	2.17.1.0	2.17.1.5	2.17.1.6.00745281	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI update
10	2.17.1.10 (3GB)	2.17.1.0	2.17.1.10	2.17.1.6.00745281	2.17.1.0	2.17.1.4.701924	2.17.1.0.00000		GUI and Web Service update
-	2.17.2.0(3GB)	2.17.2.0	2.17.2.0	2.17.2.0.00695782	2.17.2.0	2.17.2.0.702238	2.17.2.0.702213	2.17.2.0.702226	Full Version Release. First release of Provider Portal
-	2.17.3.0(3GB)	2.17.3.0	2.17.3.0	2.17.3.0.00764112	2.17.3.0	2.17.3.0.321	2.17.3.0.321	2.17.3.0.321	Full Version Release. Including Patient, Provider and UM Portals
1	2.17.3.1(3GB)	2.17.3.0	2.17.3.1	2.17.3.1.00846328	2.17.3.1	2.17.3.1.853299	2.17.3.1.853301	2.17.3.1.856171	GUI, Web Sevice, DB. Including Patient, Provider and UM Portals
2	2.17.3.2(3GB)	2.17.3.0	2.17.3.2	2.17.3.2.00898348	2.17.3.2	2.17.3.2.913898	2.17.3.2.913899	2.17.3.1.856171	GUI, Web Sevice, DB. Including Patient, Provider and UM Portals
2.1	2.17.3.2.1(3GB)	2.17.3.0	2.17.3.2	2.17.3.2.00898348	2.17.3.2	2.17.3.2.913898	2.17.3.2.913899	2.17.3.1.856171	GUI Only
3	2.17.3.3(3GB)	2.17.3.0	2.17.3.3	2.17.3.3.00954008	2.17.3.2	2.17.3.3.962869	2.17.3.3.962870	2.17.3.3.962870	GUI, Web Sevice, DB. Including Patient, Provider and UM Portals
4	2.17.3.4(3GB)	2.17.3.0	2.17.3.4	2.17.3.4.00987562	2.17.3.2	2.17.3.3.962869	2.17.3.3.962870	2.17.3.3.962870	GUI, Web Sevice and DB
5	2.17.3.5(3GB)	2.17.3.0	2.17.3.5	2.17.3.5.01023250	2.17.3.2	2.17.3.5.1025862	2.17.3.5.1025862	2.17.3.5.1023087	GUI, Web Sevice, DB, Patient Portal, Referring Portal, UM Portal
6	2.17.3.6(3GB)	2.17.3.0	2.17.3.6	2.17.3.6.01065114	2.17.3.2	2.17.3.5.1023087	2.17.3.5.1025862	2.17.3.5.1023087	GUI, Web Sevice, DB,
7	2.17.3.7(3GB)	2.17.3.0	2.17.3.6	2.17.3.6.01065114	2.17.3.2	2.17.3.5.1023087	2.17.3.5.1025862	2.17.3.5.1023087	GUI
8	2.17.3.8(3GB)	2.17.3.0	2.17.3.8	2.17.3.6.01065114	2.17.3.2	2.17.3.5.1023087	2.17.3.5.1025862	2.17.3.5.1023087	GUI and Web Service
9	2.17.3.8(3GB)	2.17.3.0	2.17.3.9	2.17.3.6.01065114	2.17.3.2	2.17.3.5.1023087	2.17.3.5.1025862	2.17.3.5.1023087	Web Service
10	2.17.3.10(3GB)	2.17.3.0	2.17.3.10	2.17.3.10.01125764	2.17.3.2	2.17.3.5.1023087	2.17.3.5.1025862	2.17.3.5.1023087	GUI, Web Service and DB updates
-	3.17.6.0(3GB)	3.17.6.0	3.17.6.0	3.17.6.0.01037550	3.17.6.0	3.17.6.0.1037868	3.17.6.0.1037869	3.17.6.0.1037869	Full Version Release. Including Patient, Provider and UM Portals
1	3.17.6.1(3GB)	3.17.6.0	3.17.6.1	3.17.6.1.01094077	3.17.6.0	3.17.6.0.1037868	3.17.6.0.1037869	3.17.6.0.1037869	GUI, Web Service and DB updates
2	3.17.6.2(3GB)	3.17.6.0	3.17.6.2	3.17.6.2.01130171	3.17.6.2	3.17.6.2.1138297	3.17.6.2.1138298	3.17.6.2.1138298	GUI, Web Service, DB, Patient, Provider and UM Portals and Digital Forms
3	3.17.6.3(3GB)	3.17.6.0	3.17.6.3	3.17.6.3.01166033	3.17.6.3	3.17.6.3.1168622	3.17.6.3.1168622	3.17.6.3.1168623	GUI, Web Service, DB, Patient, Provider and UM Portals and Digital Forms
4	3.17.6.4(3GB)	3.17.6.0	3.17.6.4	3.17.6.4.01187509	3.17.6.4	3.17.6.4.1190295	3.17.6.4.1190295	3.17.6.4.1190295	GUI, Web Service, DB, Patient, Provider and UM Portals and Digital Forms

INSTALLING

CLIENT/GUI

Copy and replace the current rRIS…zip file with the eRAD_rRIS_2017.6.4.zip file provided with this release.

Be sure to make a backup of the ris.exe.config file contained within the current .zip folder.

WEB SERVICE

This updated is only required for the Wedge Web Services. The Core RIS Service and Document Distribution Service are not required to be updated.

1. The web service upgrade consists of replacing the files in the RIS Web Service directory with the files supplied in the rRISService folder with this build. Always create a backup of the files being replaced. This upgrade includes 141 files in the rRISService folder and 7 sub folders. Of those folders, 1 is a folder titled **"XSL"** that contains a sub folder and files within the subfolder. Another folder is titled **"deploy"** that contains the new .config files that will be deployed with the user of the file called "ServicesConfigWizard.exe" (see instructions below). Folders ar (Arabic), en_AU (Australian English), en-ZA (South Africa), he (Hebrew), pt_BR (Brazilian Portuguese), es-AR (Argentina Spanish) and ru-RU (Russian) and are localization folders. The WedgePlugins folder contains various plugin files for RADAR, MIRTH, Ensemble, etc…

Services Configuration Wizard

With the release of 42 to decrease the chance of losing configuration setting and missing new configuration options, we will no longer include the configuration files in the release in the main set of files, but they will now exist in a "deploy" folder, which will contain the three site configurable config files; applicationsettings, connectionstrings, and services as well as a copy of the rRISServices.exe configuration file. The contents of this folder should not be required to be touched.

On the install of a new service, all files will be copied to the appropriate locations on the server (no configurations will be over written). If instructed or to confirm no new configurations have been added the user can run the new application "ServicesConfigWizard.exe"

This application will read the existing configuration file(s) (if files exist), and compare to the provided new configuration files then will display three tabs, for each configuration file:

Application Settings: all existing configuration value will be displayed, if there are any new configuration entries they will be displayed in red.
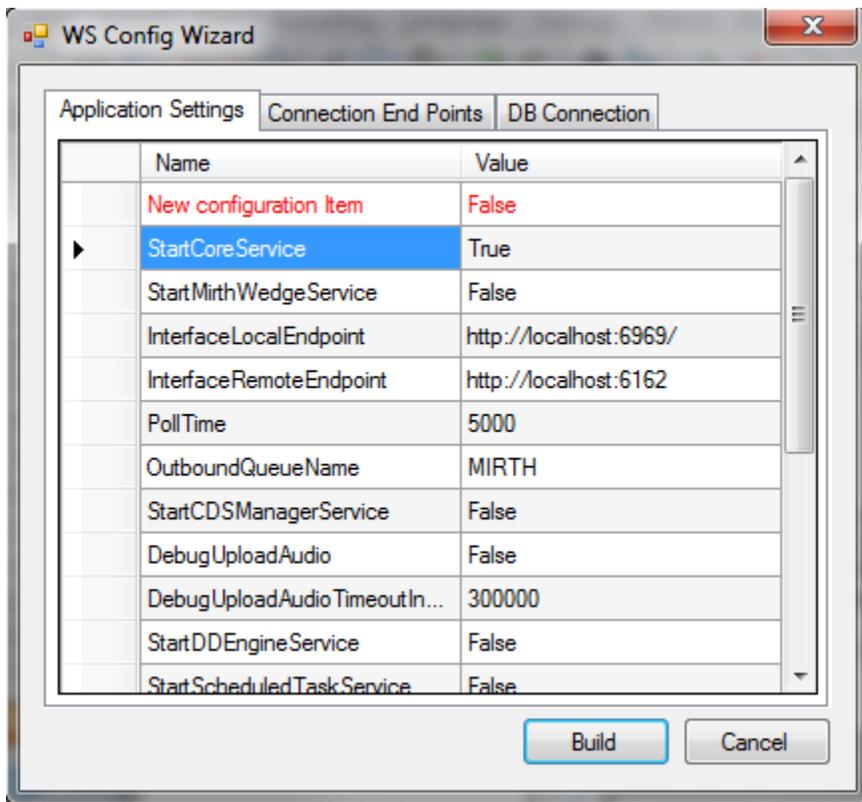
Connection End Points: will display the existing configuration, if the value is left blank then that entry will not be created, in the case of "Study Service" or "CDS Service" if both http and net.tcp were not provided then that endpoint will not be created at all.
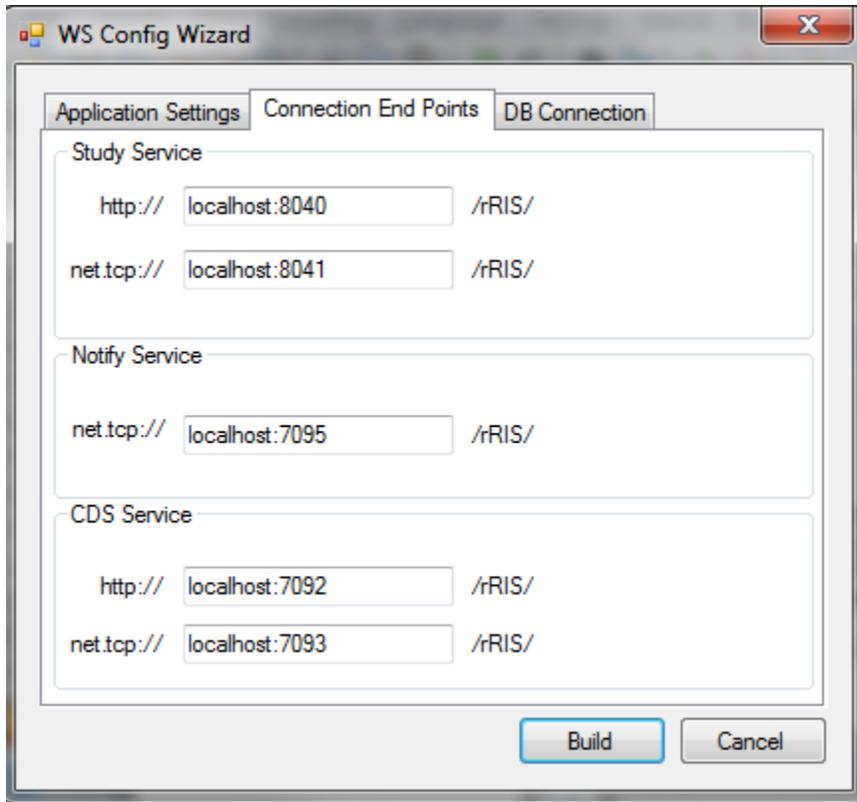

DATABASE UPDATES

Always run the upgrade scripts in a test environment of the actual database to make sure they run cleanly. If any errors occur please contact development.

Note: There is a new upgrade process introduced with B43.1 called "RunUpgrade.bat". The batch file will open a command window. This process will prompt you for the database server name, database name and authentication credentials. There is no need to run the database upgrade scripts manually as was done in previous releases.

1) From the upgrade folder, double click the "RunUpgrade.bat" command file.

2) Enter the server name, database name and authentication credentials to the database. You have 2 choices for authentication credentials.

3) You can choose to use "Trusted connection". Using this option will pass the identity of the currently logged on user. If this user has "db_owner" access to the eRAD RIS database then feel free to use this options.

4) If you decide not to use "Trusted connection" then you will be prompted for user id and password.

Example:
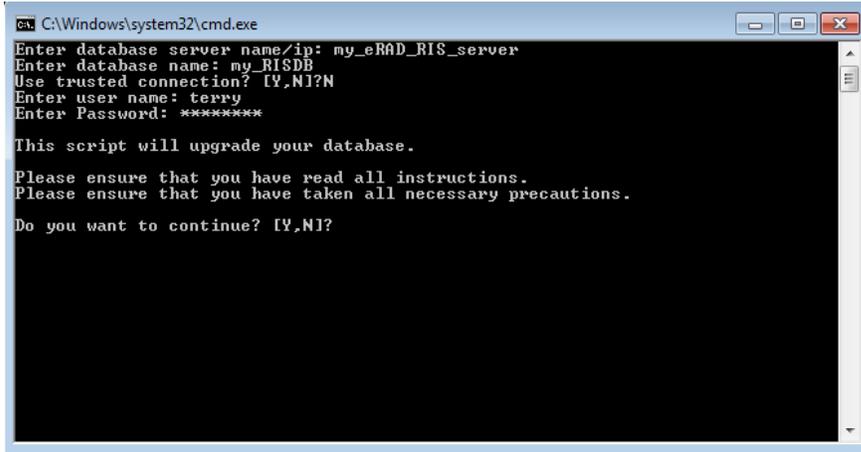
5) After the upgrade program has finished you can find the upgrade logs in the "log" folder. The file name will be eRAD_RIS_db_upgrade_timestamp.log, where timestamp is a value representing the date and time the upgrade started. If you see any errors please contact the development team