



Patch Release

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Patch No.: 31





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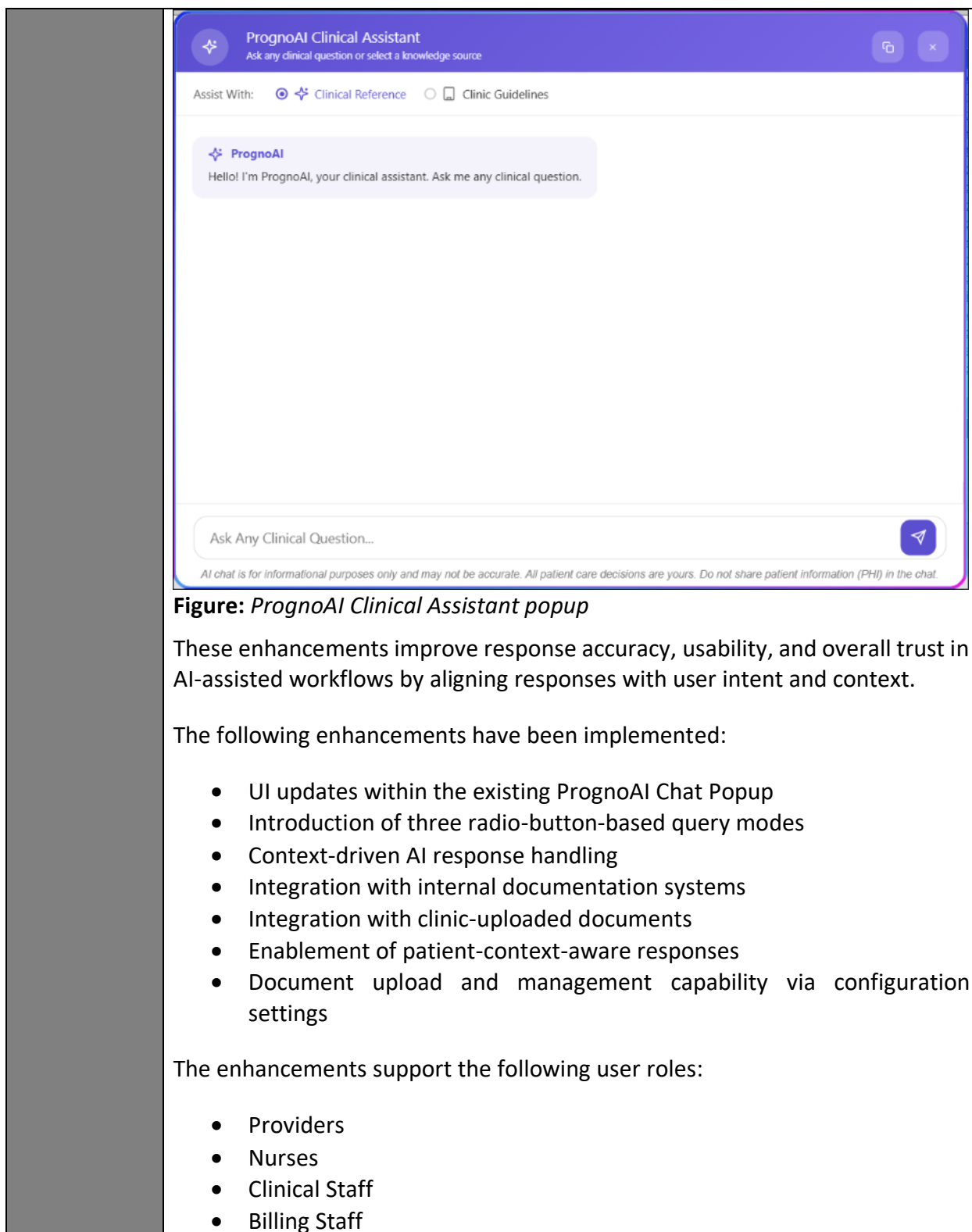
Total Points: 2

Enhancements: 2 (Generic: 2, Internal: 0, Custom: 0)

Bizmatics, Inc.
2429 Military Road, Suite 300,
Niagara Falls, NY 14304.
www.bizmaticsinc.com

Enhancement 1: Prognosis Clinical Assistant popup has been enhanced to support context-aware query handling through clearly defined interaction modes

Module:	EMR+PM
Type:	GENERIC
Case ID:	533298
Affected Screen(s):	<p>Prognosis Clinical Assistant</p> <p>Navigation Prognosis Notch  → Prognosis Clinical Assistant  icon</p> <p>Navigation Patient → Encounter → Third Pane  icon → Prognosis  icon</p>
Description:	<p>The Prognosis Chat popup has been enhanced to support context-aware query handling through clearly defined interaction modes. This improvement ensures that users can direct their queries to the most relevant AI knowledge source, including clinical knowledge, system documentation, clinic-specific documents, and patient-specific data.</p>



- Administrative Users
- Care Staff

UI Enhancements – PrognoAI Chat popup

1. Chat Popup Changes

The existing chat popup has been enhanced to include three selectable query modes using radio buttons:

- Clinical Reference
- Clinical Guidelines
- Patient Chart

Only one mode is selectable at a time, ensuring clear contextual intent.

Additional enhancements include:

- Tooltips for each mode to guide user selection
- Tooltip for the chat icon indicating its purpose as *PrognoAI Clinical Assistant*
- *Thumbs Up* 👍, *Thumbs Down* 👎, *Copy* 📄, *Print* 🖨️ and *Provide Feedback* 💬 options across all modes
- Persistent tracking of feedback and interaction data in the database

2. Functional Requirements by Mode

- **Clinical Reference Mode:** This mode provides access to general clinical knowledge and evidence-based medical information. AI responds exclusively to clinical and medical queries, while non-clinical and system-related queries are restricted. Unsupported queries trigger a standard guidance message directing users to appropriate resources.

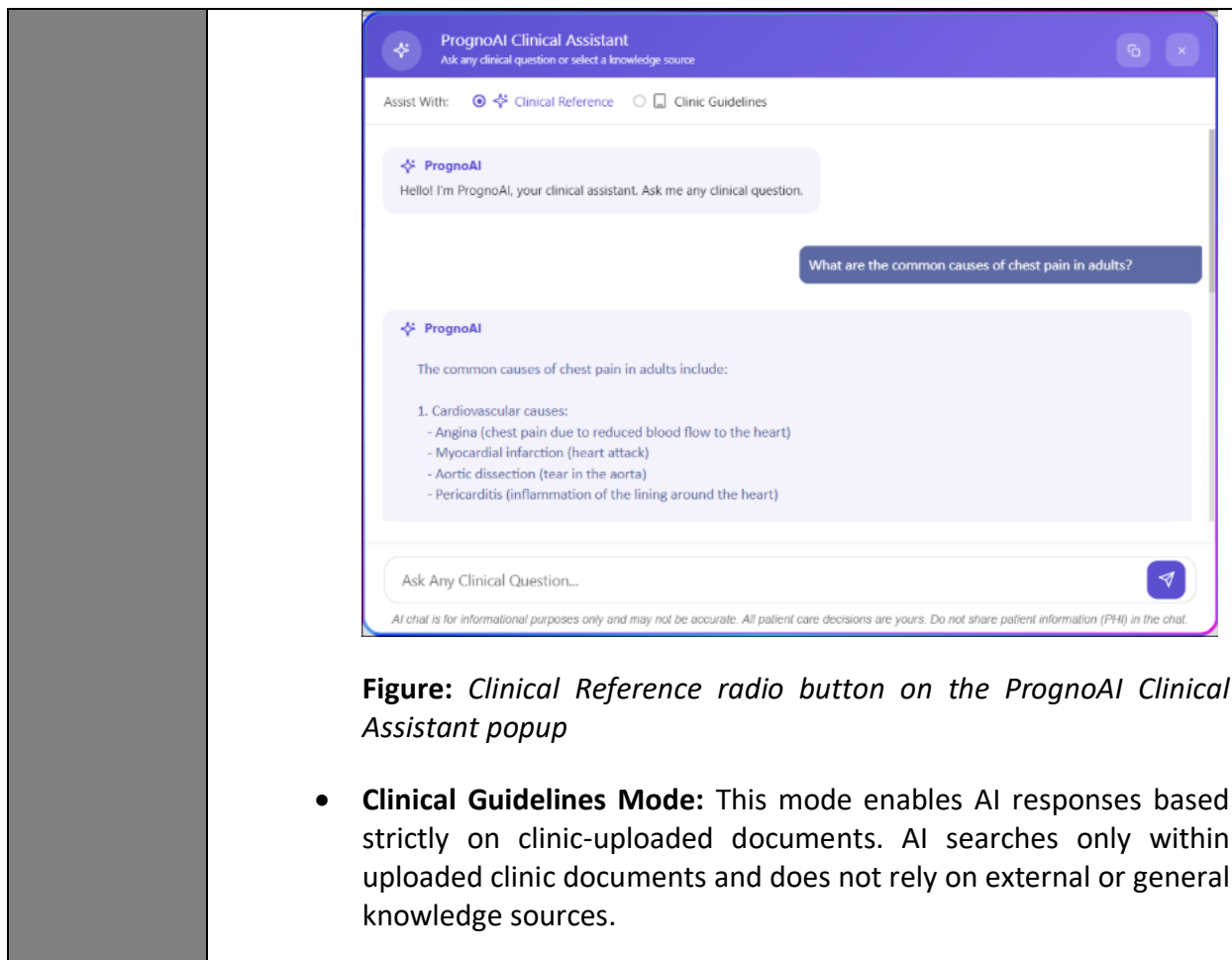


Figure: *Clinical Reference radio button on the Prognosis AI Clinical Assistant popup*

- **Clinical Guidelines Mode:** This mode enables AI responses based strictly on clinic-uploaded documents. AI searches only within uploaded clinic documents and does not rely on external or general knowledge sources.

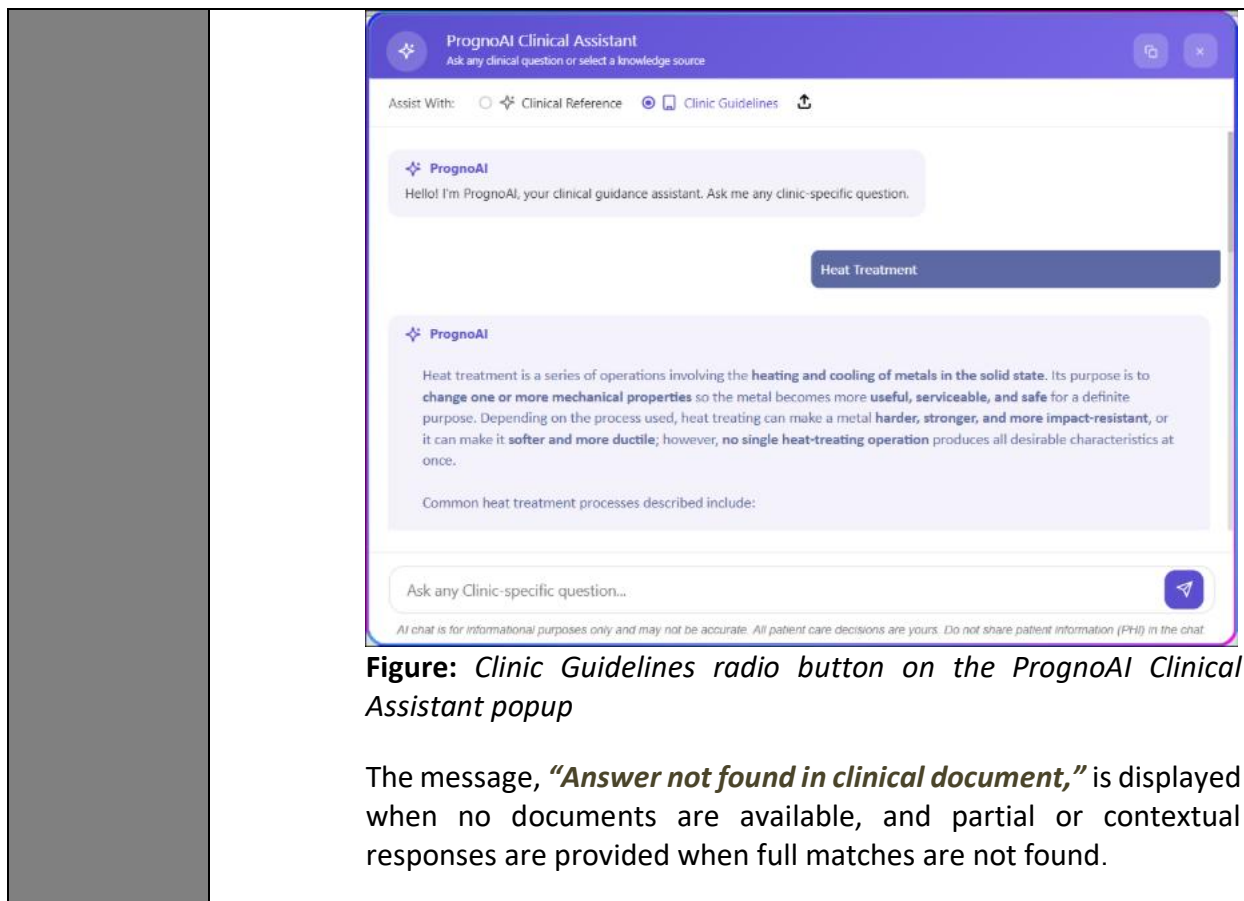


Figure: Clinic Guidelines radio button on the Prognosis AI Clinical Assistant popup

The message, ***“Answer not found in clinical document,”*** is displayed when no documents are available, and partial or contextual responses are provided when full matches are not found.

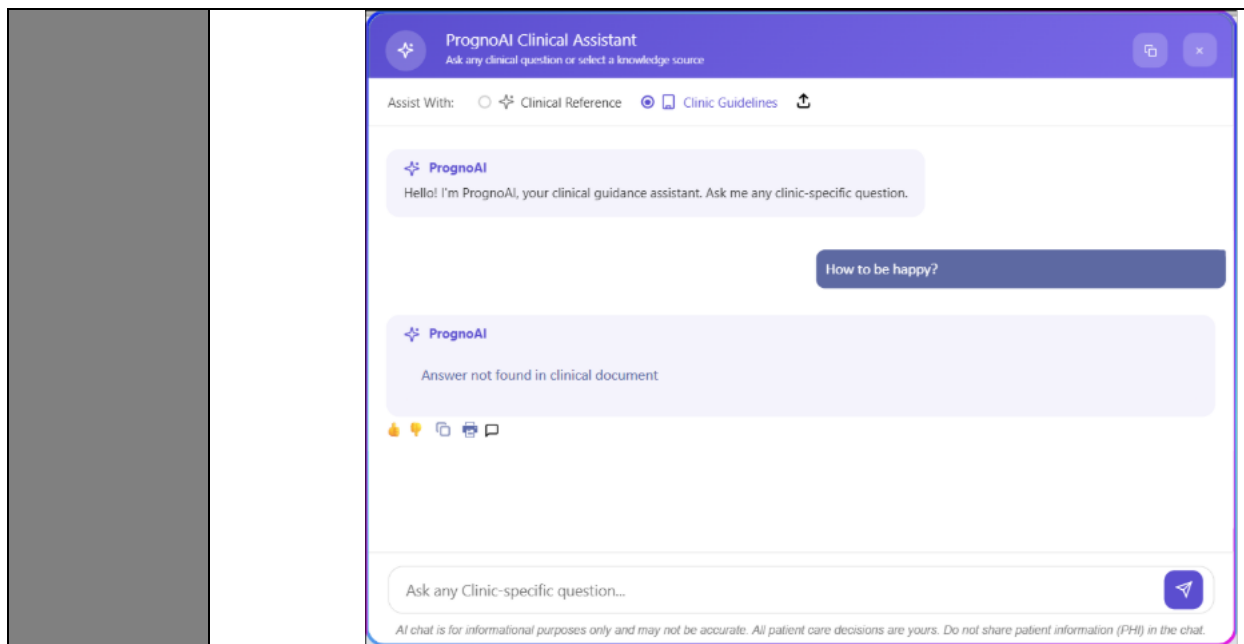



Figure: Message shown when answer is not available in the clinical document

3. Document Upload Mechanism

A document management capability has been introduced to allow clinics to upload, categorize, and manage internal documents for AI reference. The **Clinic Guidelines Documents** popup is invoked via the **Upload Clinic Documents**  option.

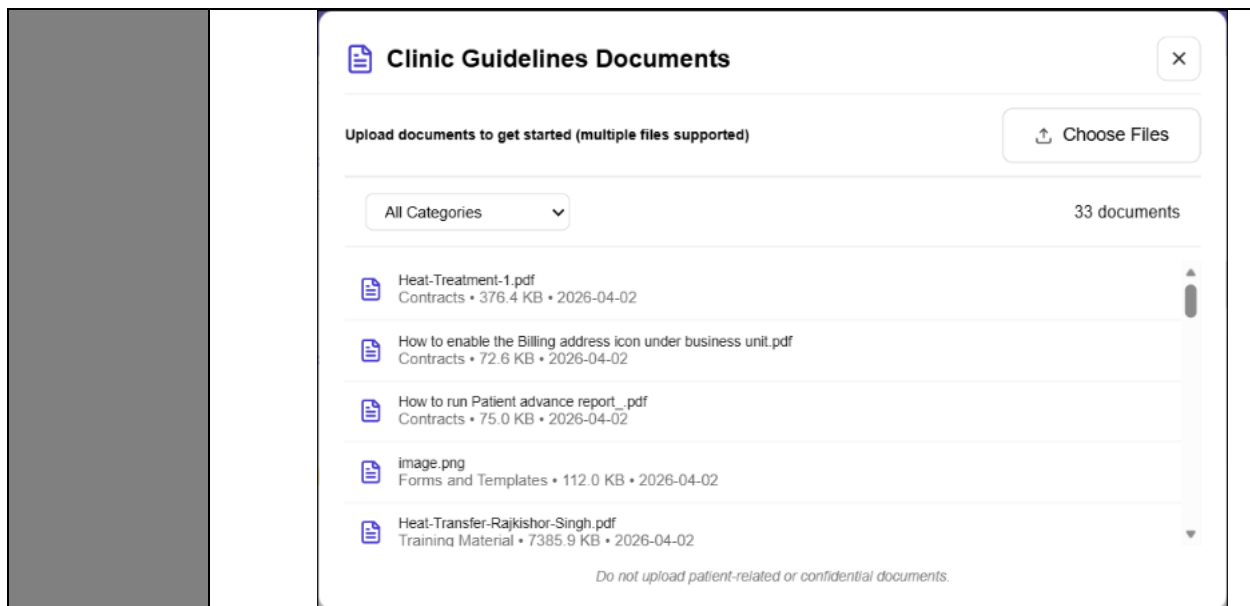


Figure: *Clinic Guidelines Documents popup*

Access is available via the settings icon within the Prognosis configuration and is restricted to users with a dedicated document upload role. Visibility of settings is controlled based on user roles.

The system supports multiple file formats including PDF, Word, Excel, images, and text files, and allows bulk upload of documents. Category assignment is required before upload, with a default category applied if none is selected.

Documents are organized into predefined categories such as **Contracts**, **Treatment Guidelines**, **Training Material**, and **Forms and Templates**. Users can assign categories to multiple selected documents, add or remove documents before upload, upload all selected documents in a single action, and view the document count during upload.

Post-upload, documents are searchable and filterable by category, with options available to download or delete each document.

The system includes structured storage for document and category management, maintaining document metadata such as file details, category, and upload information, along with category master data.

4. Patient Chart Mode

Patient-specific query handling has been introduced with contextual AI responses based on patient data. This mode is available only when a patient chart is active, initially from the **Encounter** screen, and remains hidden in non-patient workflows.

AI responses are generated using available patient data, including encounter details, medical history, lab and radiology results, medications and care plans, and insurance and eligibility data.

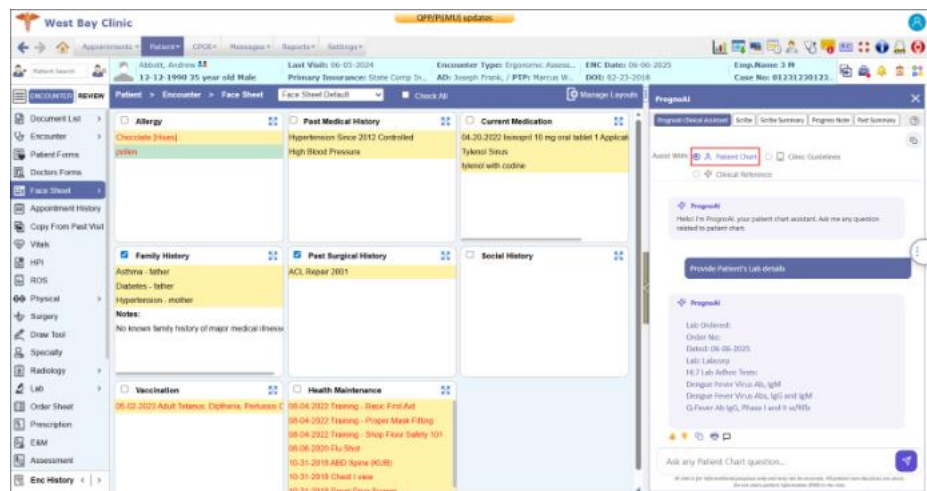


Figure: Patient Chart mode on Prognosis AI Clinical Assistant on the Third Pane

5. Error Handling & Messaging

Standardized system messages have been implemented to handle missing data scenarios, partial or ambiguous responses, incorrect mode selection, and temporary system unavailability. These messages ensure clarity and guide users toward appropriate corrective actions.

Enhancement 2: Unified appointment view across multiple locations has been introduced on the EMR and BILL homepage

Module:	EMR+PM
Type:	GENERIC
Case ID:	534028

<p>Affected Screen(s):</p>	<p>Home</p> <p>Navigation EMR Home screen</p> <p>Navigation BILL Home screen</p>
<p>Description:</p>	<p>A unified appointment view has been introduced on the Homepage across the EMR and Billing modules to support providers and authorized staff working in a multi-location setup. This enhancement enables users to view appointments across all their authorized locations from a single screen without the need to manually switch locations.</p> <p>When the property <i>homepage.show.provider.appts.all.locations</i> (for providers) or <i>homepage.show.othermedics.appts.all.locations</i> (for non-provider staff) is enabled, the Homepage displays appointments from all accessible locations, sorted chronologically based on the scheduled appointment time. A <i>Location</i> filter is made available, listing all authorized locations, allowing users to refine the appointment view as needed, with all locations selected by default. Each appointment clearly indicates its associated location, with the location name displayed prominently on the Homepage.</p> <p>Additionally, the enhancement enables users to initiate encounters for appointments across different locations directly from the Homepage. When an encounter is started, the system automatically identifies the appointment's location and applies the corresponding location-specific provider MED ID, ensuring that all encounter data, billing details, and audit logs are accurately associated with the correct location. This maintains billing accuracy, compliance, and data integrity while eliminating the need for manual location switching. The enhancement applies to the <i>Homepage</i> screen in both EMR and Billing modules.</p>