



Patch Release

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Total Points: 2

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

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Enhancement 1: User-wise Sort Functionality on Billing Screens in Prognosis CIS

Module:	PM
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Type:	GENERIC
Case ID:	502384
Affected Screen(s):	<ul style="list-style-type: none"> • Unprocessed Claims Navigation Claims → <i>Unprocessed</i> • Approve Claims Navigation Claims → <i>Approve Claims</i> • Processed By Claims Navigation Claims → Processed → <i>By Claims</i> • Processed By Charges Navigation Claims → Processed → <i>By Charges</i> • Send Professional Claims Navigation Claims → Send → <i>Professional</i> • Send Institutional Claims Navigation Claims → Send → <i>Institutional</i> • EDI Failed Claims Navigation Claims → <i>Returned/Rejected</i> • Bulk Insurance Navigation Remittance → Write Off → <i>Bulk Insurance</i> • Bulk Patient Navigation Remittance → Write Off → <i>Bulk Patient</i> • Bulk Employer Navigation Remittance → Write Off → <i>Bulk Employer</i> • Assigned Tasks Navigation AR/Follow-up → Assigned Tasks → <i>Claim</i> Navigation AR/Follow-up → Assigned Tasks → <i>Clinic</i> • Outstanding Claims Navigation AR/Follow-up → <i>Outstanding</i> • Assignment List Navigation AR/Follow-up → Outstanding → <i>Assignment List</i> • Insurance Denied Navigation AR/Follow-up → <i>Denied</i>

	<ul style="list-style-type: none"> • Disputed / Retained Responsibility Navigation AR/Follow-up → <i>Disputed</i> • Send to Collection Agency Navigation AR/Follow-up → <i>Send To Collection</i>
<p>Description:</p>	<p>The User-wise Sort Functionality has been successfully implemented across selected Billing module screens to enhance personalization and usability within the system. This enhancement enables each logged-in user to independently configure, apply, and retain their own sorting preferences without impacting other users' views or workflows. The system now ensures that sorting behavior is strictly user-specific, thereby eliminating any risk of shared or overridden configurations across users accessing the same screens.</p> <p>The existing <i>Sort Criteria</i> popup interface continues to function without any UI changes, ensuring a seamless user experience. Users are now able to configure sorting fields as per their individual requirements, and upon confirmation, the selected sort is applied immediately to the respective screen. The configured sort preferences are persistently stored at the user level in the backend, allowing them to be retained across screen navigation, session changes, and subsequent logins. Whenever a user revisits a screen, the system automatically retrieves and applies their saved sorting configuration, ensuring continuity in data viewing.</p> <p>In cases where no user-specific sort configuration exists, the system continues to display records based on the default sorting logic. This ensures that users who have not configured any custom sorting experience no change in behavior. Additionally, all sorting configurations remain completely isolated, meaning that each user can define and modify their own sort preferences without affecting others. Under no circumstances are sort configurations shared, overridden, or visible across different user accounts.</p> <p>From a system perspective, the enhancement introduces backend storage for maintaining user-specific sort configurations, ensuring efficient retrieval and application without impacting performance. Additional quality checks have been incorporated to validate system responsiveness and ensure that sorting operations do not degrade screen performance.</p> <p>A key dependency has been introduced with the Manage Columns functionality. Whenever column configurations are modified—such as adding, removing, or reordering columns—all existing user-specific sort preferences for</p>

that clinic are automatically reset. This behavior has been implemented to maintain data integrity and prevent inconsistencies between column structures and saved sorting logic. A system message is now displayed within the **Manage Columns** popup to inform users of this reset behavior. This message is shown on an *i* button on hovering the cursor. The message reads: ***If an admin user changes the order of any Manage Columns, or adds/removes columns based on a clinic's request, the admin must inform the clinic that all existing user-created sort preferences will be reset for all users within the clinic.*** It is also ensured that administrative users are aware of this dependency and communicate such changes to end users, as all previously saved sorting preferences will no longer be applicable post-modification.

From a system behavior standpoint, once a user accesses a specific screen, a dedicated configuration entry is created for that user, derived initially from the admin-defined setup. Any subsequent personalization by the user overrides this inherited configuration. If administrative changes to column settings occur after the user has already accessed the screen, the user's configuration is reset and becomes independent of further admin updates. However, for screens not yet accessed by the user, the system continues to inherit the latest admin configurations until the user navigates to those screens for the first time. This ensures a balanced approach between default standardization and user-level customization.

Overall, this enhancement significantly improves efficiency by reducing repetitive sorting actions, enhances user autonomy through personalized data views, and maintains strict separation of user configurations to ensure a consistent and reliable user experience across the Billing module.

Enhancement 2: Global Payments integration has been introduced with support for multiple payment modes

Module:	PM
Type:	GENERIC
Case ID:	529431
Affected Screen(s):	Patient Receipts Navigation Remittance → Patient Payments → <i>Receipts</i>

Description:	<p>An enhancement has been introduced to support Global Payments V2 integration for payment processing. With this update, the system now supports multiple payment scenarios including card present, card not present, and card on file transactions, enabling greater flexibility in payment handling.</p> <p>The integration introduces new configuration properties such as API Key, Secret Key, and Setup Mode, which are used for secure authentication and environment setup. The Setup Mode can be configured as Demo or Production based on the implementation stage.</p> <p>Additionally, the system now supports configuration of multiple merchant IDs, allowing separate handling of card present (device-based transactions) and card not present (manual or online transactions). This also enables support for multiple payment devices through configurable device identifiers.</p>
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