



ENCOUNTER TYPE MASTER SCREEN

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INTENDED AUDIENCES

- Clients

1. INTRODUCTION

The **Encounter Type Master** screen allows clinics to define and manage various types of encounters used within the system. Each encounter type determines the default behaviors, templates, billing logic, and documentation format for patient visits. This master setup ensures streamlined workflow customization and accurate encounter tracking across different specialties and services.

Modules and Browsers Supported:

Following is the list of browsers that support this feature:

- Google Chrome
- Microsoft Edge
- Safari

Following is the list of modules that support this feature:

- EMR



Note:

- *'User' mentioned in the document is any Prognosis User within their permissible rights assigned to their role.*
- *Patient information within images is not real or at times may be blurred to safeguard Clinic information.*

2. ENCOUNTER TYPE MASTER SCREEN

Navigation:

Encounter Type Master screen

Settings → Configuration → Clinic column → **Enc Types**

The **Encounter Type Master** screen serves as a central hub for managing encounter types within Prognosis. This screen provides functionalities for users to view, add, or edit encounter types in the clinic's database.

This screen is accessible via the **Enc Types** menu on the Settings → Configuration page. A click on this menu opens the **Encounter Type** search popup which displays all active encounter types present in the clinic's database.

Encounter Type	
<input type="checkbox"/> Starting with	<input type="checkbox"/> Wrap
K < 1 of 1 >	
Type ↑↓	Name ↑↓
<input type="text" value="Search"/>	<input type="text" value="Search"/>
12	Zero Duration
AB	Functional Rehabilitation
AG	Audiogram
AI	Accident Related Incident - Aero Industries
AP	Pre-Employment Physical - Aero Industries
AR	Accident Related Incident
AW	Work Related Accident - Aero Industries
BB	Blood Borne Exposure
BP	Basic Physical
BT	Breath Alcohol Testing
CT	Clinical Lab Testing
CV	Covid 19 Test
DA	Disability exam for Social
DM	DOT Physical
DO	LHI Exam
DP	CHS Exam
DS	Drug Screen
DT	Th Skin Test

Figure: *Encounter Type search popup*

This popup displays the following columns:

- **Type:** This displays the 2-character encounter type code.
- **Name:** This displays the name of the encounter type.

Encounter types are displayed in descending alphabetical order of **Type** on this popup. To search for an encounter type, the appropriate type or name can be entered in the search fields provided under each column. The **Starting With** checkbox can be selected to filter the results to display only those entries where the searched term appears at the beginning of the text. If the **Wrap** checkbox is checked, then the column values wrap to fit the column width on the popup. The

navigation arrows present on the top right corner of the popup facilitate quick navigation between search results.

Two action buttons are present on the *Encounter Type* search popup:

- ADD NEW **ADD NEW button:** The **ADD NEW** button initiates the process of creating a new encounter type within the system. When clicked, this button opens a blank *Encounter Type Master* screen where users can input relevant details for a new encounter type.
- CLOSE **CLOSE button:** The **CLOSE** button closes the popup.

A click on any encounter type in the list closes the popup and navigates to the selected encounter type's record on the *Encounter Type Master* screen.

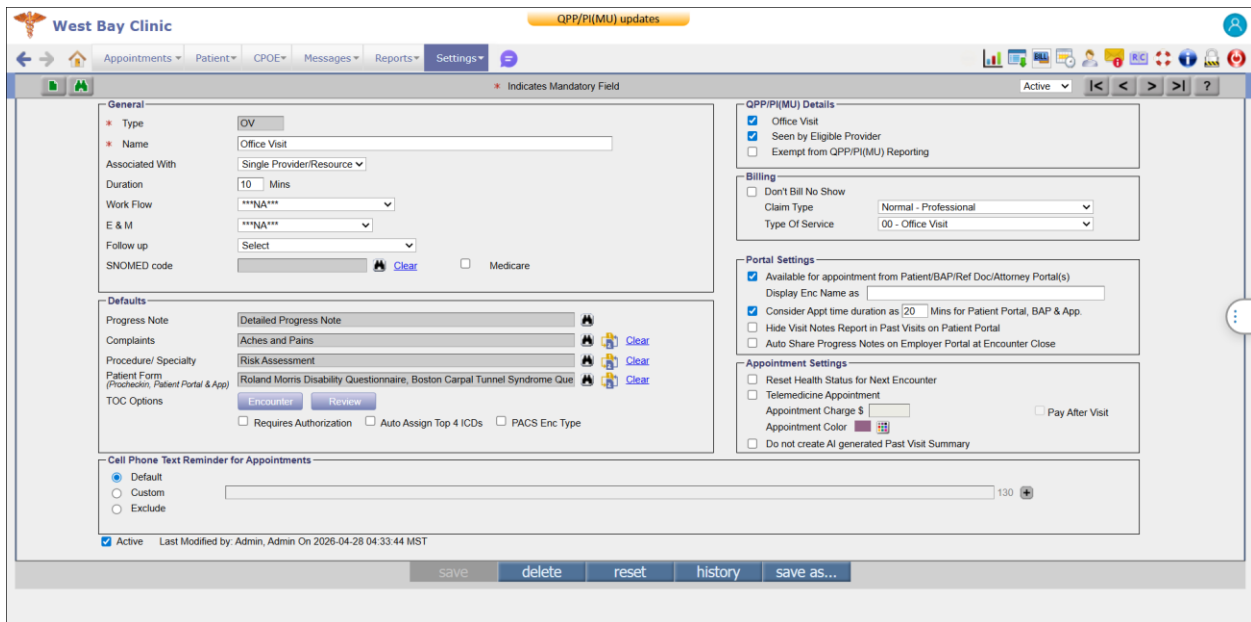


Figure: *Encounter Type Master* screen

The **Active** checkbox at the bottom of the screen determines the availability of an Encounter Type within Prognosis. When this checkbox is checked, the Encounter Type is considered active and will be available for selection across various modules. An Encounter Type can be marked as inactive to prevent it from being available for selection in the system.

Beside the **Active** checkbox, a **Last Modified By** stamp displays the date, time, and time zone of the most recent modification, along with the name of the user who made the change.

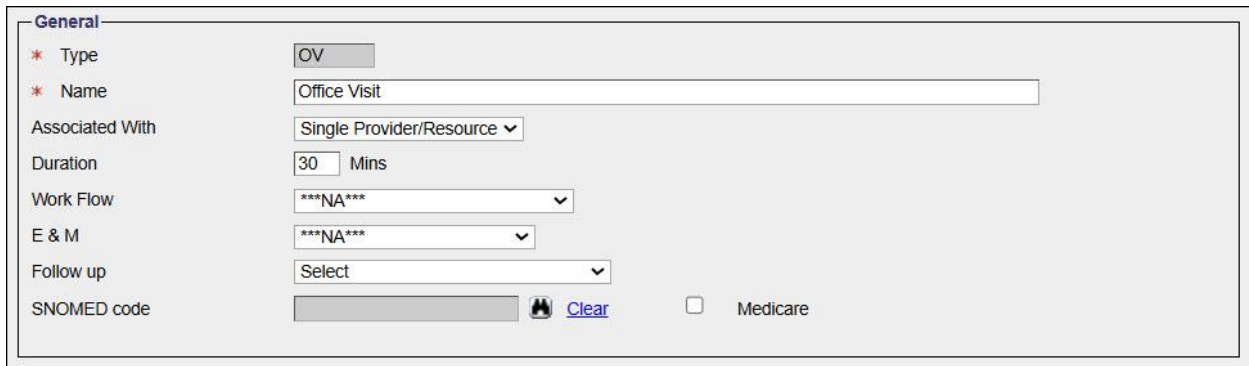
2.1. SECTIONS

The *Encounter Type Master* screen consists of 7 sections:

- General
- Defaults
- QPP/PI(MU) Details
- Billing
- Portal Settings
- Appointment Settings
- Cell Phone Text Reminder for Appointments

2.1.1. General

The *General* section captures the basic configuration details for each Encounter Type in Prognosis. These settings define how the encounter behaves across various workflows, clinical documentation, and billing.




General	
* Type	OV
* Name	Office Visit
Associated With	Single Provider/Resource ▾
Duration	30 Mins
Work Flow	***NA*** ▾
E & M	***NA*** ▾
Follow up	Select ▾
SNOMED code	<input type="text"/>  Clear <input type="checkbox"/> Medicare

Figure: General section on Encounter Type Master screen

This section consists of the following options:

- **Type:** The *Type* field is used to enter a unique 2-character code representing the Encounter Type. This is a mandatory alphanumeric field and supports special characters such as: ! " # \$ % & ' () + , - . / : ; < = > ? @ [\] _ \ { } `

Once the Encounter Type is added and saved, the *Type* field becomes non-editable and cannot be modified.

Validation Rules:


- The code must consist of exactly two characters. If only one character is entered and the user clicks **save**, the system displays: **Encounter Type cannot be a Single Character.**
- If left blank and the user clicks **save**, the system displays: **Encounter Type cannot be blank.**
- If the entered code already exists in the master, the system displays: **This Code is already Present: Record cannot be Added.**



Note: The following hardcoded Encounter Type codes are not allowed in the **Type** field: SR, RR, DB, FS, DE, and FZ. These codes are reserved by the system and cannot be reused.

- **Name:** The **Name** field is used to enter a suitable name for the Encounter Type. It is a mandatory alphanumeric field that also supports special characters such as ! " # \$ % & ' () + , - . / : ; < = > ? @ [\] _ \ { } ` . The field has a character limit of 50.

Validation Rules:

- If the user leaves this field blank and clicks the **save** button, the system displays the message: **Encounter Name cannot be blank.**
- **Associated With:** The **Associated With** field allows the user to define how the encounter type will behave when scheduling appointments. The appropriate option can be selected from the dropdown list based on the scheduling requirements. The available options are:
 - **Single Provider/Resource:** This is the default selection for any new encounter type. It is used for standard visits or appointments involving a single provider or resource.
 - **Multi Provider/Resource:** This option is used for encounter types that may require scheduling more than one provider or resource—commonly used for procedures or surgeries involving multiple participants.
 - **Multi-Visits in a Day:** This option is used to schedule multiple appointments for a patient on the same day under a single encounter. When this option is selected, an **Add visit type**  button appears to open the **Visit Types** popup.

Visit Types

Please select visit types to be associated with this encounter type

Move Up
Move Dn

Minimum Wait Time Between Visits 10 Mins

	Type	Name	Duration
<input type="checkbox"/>	AB	Functional Rehabilitation	60
<input type="checkbox"/>	AG	Audiogram	30
<input type="checkbox"/>	AI	Accident Related Incident - Ae...	15
<input type="checkbox"/>	AP	Pre-Employment Physical - Aer...	30
<input type="checkbox"/>	AR	Accident Related Incident	30
<input type="checkbox"/>	AW	Work Related Accident - Aero I...	15
<input type="checkbox"/>	BB	Blood Borne Exposure	30
<input type="checkbox"/>	BP	Basic Physical	30
<input type="checkbox"/>	BT	Breath Alcohol Testing	15
<input type="checkbox"/>	CT	Clinical Lab Testing	30
<input type="checkbox"/>	CV	Covid 19 Test	10

Cancel
Ok

Figure: Visit Types popup

In this popup, the user can:

- Associate at least two and up to ten Visit Types.
- Set the Minimum Wait Time Between Visits using a dropdown which displays 10, 15, 20, 25 and 30 minutes as the options.
- Rearrange the order of Visit Types using the *Move Up* and *Move Dn* buttons.

Validation Rules:

- If only one Visit Type is selected and the user clicks **OK**, the system displays: **Please associate at least two visit types.**
- If more than ten Visit Types are selected, the system displays: **Maximum select limit exceeded.**
- If no Visit Types are selected and the *save* button on *Encounter Type* Master is clicked, the system displays: **Selected option for 'Associated With' field is 'Multi-Visits in a Day'. Please add the associated Visit types.**

 **Note:**

- *The **Visit Types** popup displays the list of all active, non-zero duration encounter types.*
 - *If the **Associated With** field is set to **Single Provider/Resource** or **Multi Provider/Resource**, and a user attempts to change it to **Multi-Visits in a Day**, an alert message is displayed — **Cannot change the associated value as an appointment is already present with this encounter type.** This occurs when an appointment has already been scheduled using the selected encounter type.*
 - *An Encounter Type associated with **Multi-Visits in a Day** cannot be marked as inactive or deleted. To proceed with deletion or inactivation, the association must first be removed.*
- **Duration:** The *Duration* field is used to enter the duration of the appointment in minutes. The default value for a newly added Encounter Type is 0, and the field accepts a maximum of 3 numeric characters. This duration can be modified, if required, at the time of scheduling an appointment through *Duration* field on the **Appointment Schedule** popup.

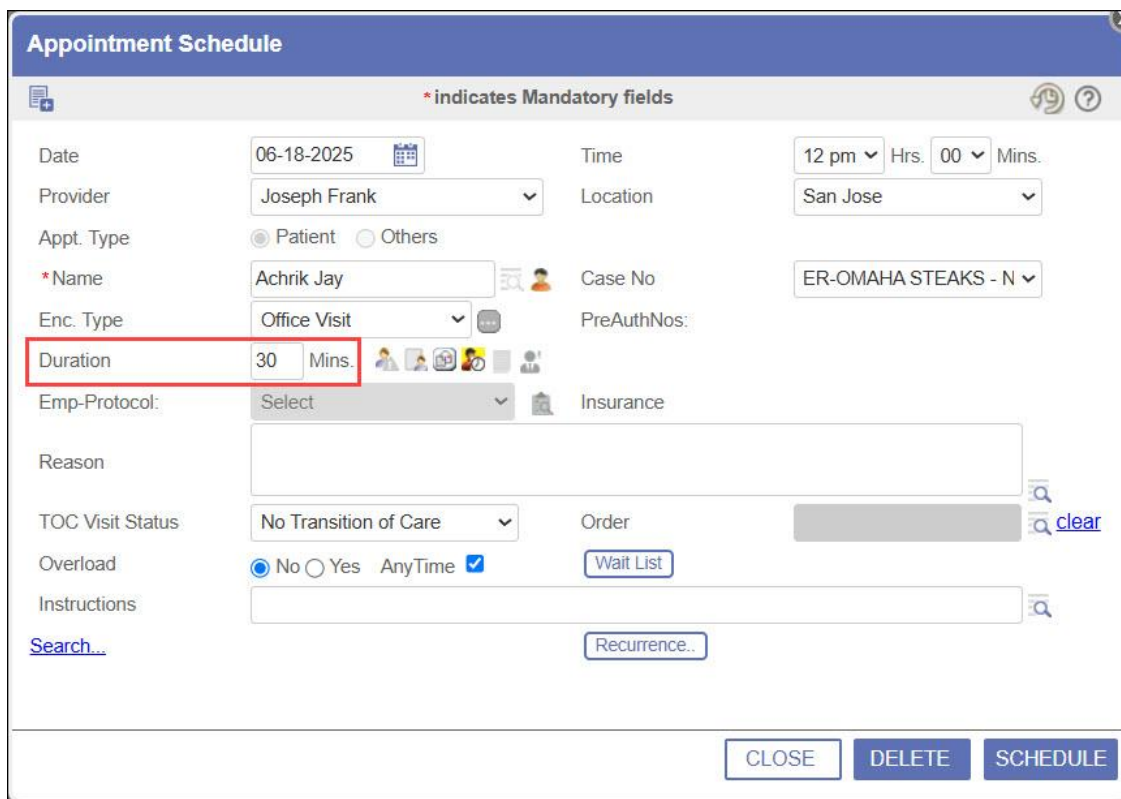


Figure: *Duration field on Appointment Schedule popup*

If the **Associated With** field is set to **Multi-Visits in a Day**, the **Duration** field is automatically set to 0 and becomes non-editable.

Validation Rules:

- If alphabets or special characters are entered and the **save** button is clicked, the system displays the message: **Duration is not valid.**
- **Work Flow:** In Prognosis, a workflow represents a defined sequence of menu screens (events) that guide the user through an encounter. Each menu option selected within the system is treated as an event, and different encounter types may require different workflows depending on the nature of the visit.

All possible workflow sequences based on the typical steps required for the encounter are defined in advance under the **Work Flow Definition** Master (Settings → Configuration → **Work Flow Definition**). These predefined sequences can then be assigned to specific Encounter Types using this **Work Flow** dropdown.

The default value for a newly added Encounter Type is **NA**. Users such as Providers, Medical Assistants, Clinical Staff, and Office Staff can configure their own preferred workflow, if needed, via their respective Medics Master screens. Once configured, the user can navigate through the workflow events within the encounter using the green arrows displayed at the bottom-right and bottom-left corners of the screen.

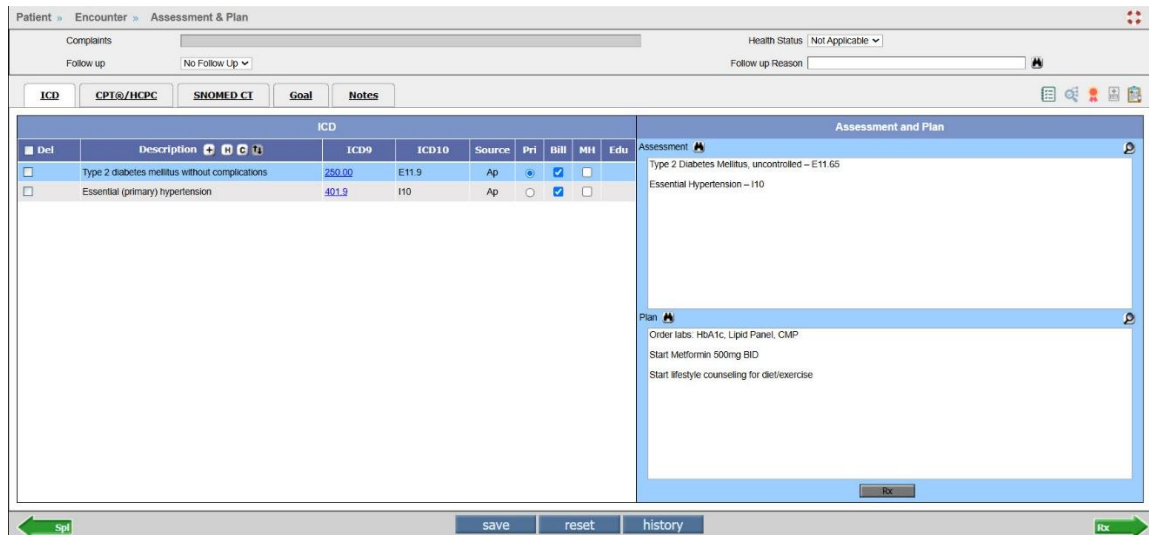


Figure: Workflow arrows displayed on Assessment screen

- **E & M:** E & M stands for Evaluation and Management. This **E & M** dropdown is used to select the applicable E&M code for the Encounter Type. The default value for a newly added Encounter Type is **NA**. E&M code sets are configured in advance under **E and M**

Master (Settings → Configuration → **Work Flow Definition**), and include CPT codes for levels 1 through 5, based on the type of patient encounter being billed.

- **Follow Up:** The **Follow Up** dropdown is used to define the recommended follow-up interval for the patient (in days, weeks, months, or years). The selected value becomes the default **Follow Up** period displayed on the **Assessment** screen.

Options in this dropdown are configured under Settings → Configuration → Group Types → **Follow Up Days Period (FP)**.

- **SNOMED Code:** The **SNOMED Code** field allows users to associate SNOMED codes with the selected Encounter Type. These codes are particularly relevant for National Quality Forum (NQF) calculations and help define the type of service associated with the encounter.

Clicking the **Add SNOMED Code** button opens the **SNOMED Search** popup which contains two tabs: **ICD** and **CPT/HCPC**, each offering options for searching and selecting codes.

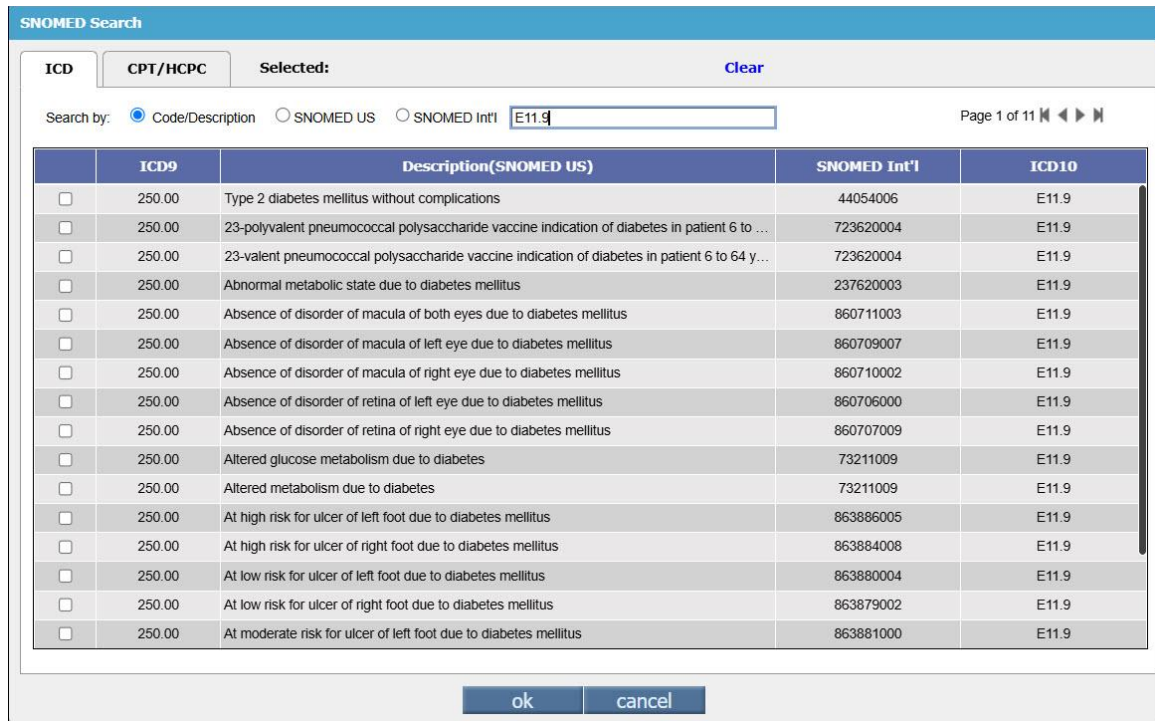






Figure: SNOMED Search popup





- **ICD Tab:** In the **ICD** tab, users can search for SNOMED codes using various criteria:
 - **Code/Description:** Select this radio button to search by entering either the ICD code or its description.

- **SNOMED US:** Choose this option to search by entering a US SNOMED code directly in the search field.
- **SNOMED Int'l:** Select this to search using an International SNOMED code.
- **Navigation Arrows:** Use the First Page , Previous Page , Next Page , and Last Page  icons to navigate through multiple pages of search results.

The results table in the **ICD** tab displays the following columns:

- **Select:** Checkboxes to select the desired ICDs.
- **ICD9:** Displays the corresponding ICD-9 code.
- **Description (SNOMED US):** Shows the code description.
- **SNOMED Int'l:** Displays the International SNOMED code number.
- **ICD10:** Shows the associated ICD-10 code.

Use the **Clear** hyperlink to reset and undo any current selections.


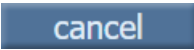
- **CPT/HCPC Tab:** The **CPT/HCPC** tab provides similar search functionality:
 - **Code/Description:** Select this option to search using a CPT, HCPC, or SNOMED code or its description.
 - **SNOMED US:** Enter a US SNOMED code to search for relevant matches.
 - **SNOMED Int'l:** Use this to search using an International SNOMED code.
 - **Navigation Arrows:** Navigate results using First Page , Previous Page , Next Page , and Last Page  icons.

The results table includes the following columns:

- **Select:** Checkboxes to select desired codes.
- **ICD9:** Displays the ICD-9 code if available.
- **Type:** Indicates whether the code is CPT, HCPC, or SNOMED.
- **Description (SNOMED US):** Displays the description of the SNOMED code.
- **SNOMED Int'l:** Shows the corresponding International SNOMED code.

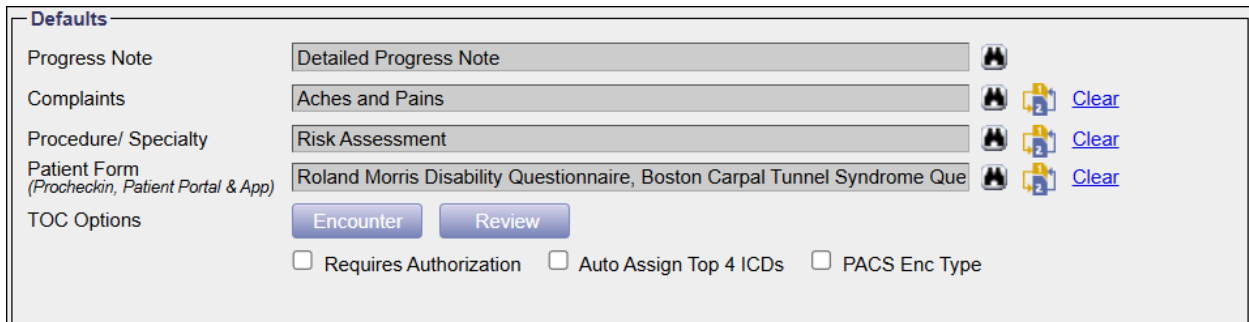
Use the **Clear** hyperlink to clear all current selections.

There are 2 action buttons on the popup:

-  **ok:** The *ok* button confirms the selected code(s) and closes the *SNOMED Search* popup.
-  **cancel:** The *cancel* button closes the popup without applying any changes.
- **Medicare checkbox:** The *Medicare* checkbox determines which CPT/HCPC codes are added to the assessment based on their government classification.
 - When the checkbox is checked, only CPT/HCPC codes (mandatory) associated with the specialty template and marked as *Both* and/or *Government* are added to the assessment.
 - When the checkbox is unchecked, the system includes codes marked as *Both* and/or *Non-Government*.

2.1.2. Defaults

The *Defaults* section allows users to predefine key clinical and procedural elements associated with a specific Encounter Type.













Defaults	
Progress Note	Detailed Progress Note 
Complaints	Aches and Pains  Clear
Procedure/ Specialty	Risk Assessment  Clear
Patient Form (Procheckin, Patient Portal & App)	Roland Morris Disability Questionnaire, Boston Carpal Tunnel Syndrome Que  Clear
TOC Options	<input type="button" value="Encounter"/> <input type="button" value="Review"/> <input type="checkbox"/> Requires Authorization <input type="checkbox"/> Auto Assign Top 4 ICDs <input type="checkbox"/> PACS Enc Type




Figure: Defaults section on Encounter Type Master screen

This section consists of the following options:

- **Progress Note:** The *Progress Note* field is used to select and associate a specific Progress Note template with the encounter type. This field is a display-only field.
 - Clicking the *Select Template*  search icon next to the field opens the *Templates* popup, which displays all Progress Notes templates from Settings → Configuration → Output Templates column → *Progress Notes*. Users can select the required template from the list to link it with the encounter type.
 - The *Clear* hyperlink next to the search icon removes the selected template from the field.

- **Complaints:** The **Complaints** field is used to select one or more complaints to associate with the Encounter Type. This field is a display-only field. When hovering over the **Complaints** field, a tooltip displays the names of all selected complaints.
 - Clicking the **Select Complaints**  search icon next to the field opens the **Complaints** popup, which displays all Complaint templates from Settings → Configuration → Workflow column → **Complaints**. Users can select a maximum of 10 complaints from the popup and click **OK** to link them with the encounter type as default complaints. If the user selects more than 10 complaints, the system displays an alert message: **Selected Max No Of Codes**.
 - The **Clear** hyperlink next to the search icon clears all selected complaints.
 - The **Set Sequence**  icon is used to define the order in which selected complaints are displayed on the corresponding screens during a patient's encounter. The complaints will appear in the same sequence as configured through this option.
- **Procedure/ Specialty:** The **Procedure/ Specialty** field allows users to select one or multiple procedure templates related to a specialty and associate them with the Encounter Type. This field is a display-only field.
 - Clicking the **Select Template**  search icon next to the field opens the **Procedures** popup, which displays all Specialty templates from Settings → Configuration → Specialty column → **Templates**. From this popup, users can select a maximum of 20 procedure templates related to a specialty and associate them with the Encounter Type by clicking **OK**. If more than 20 templates are selected, the system displays an alert message: **Selected Max No Of Codes**.
 - The **Clear** hyperlink next to the search icon clears all selected or entered templates.
 - The **Set Sequence**  icon is used to define the display order of selected procedures. This opens the **Set Sequence** popup, where the selected templates are listed. The configured sequence is reflected on the Specialty screen during a patient's encounter.
- **Patient Form:** The **Patient Form** field allows users to associate one or more Patient Forms with a specific Encounter Type for use in ProCheckIn, Patient Portal, and the My Health Records (MHR) App.
 - Clicking the **Search Patient Form**  icon opens the **Patient Form** search popup, which displays all active Patient Forms configured for the clinic. Users can select

multiple forms from the list to associate with the encounter type. Once selected, the names of the Patient Forms are displayed in the field.

- The **Set Sequence**  icon is used to modify the display order in which these forms appear to patients on ProCheckIn, the Patient Portal, and the MHR App. Clicking this icon opens a **Set Sequence** popup displaying the names of all selected Patient Forms. You can drag the  icon for a form to change the sequence, or click on the **Remove**  icon present before a form to delete it from the popup.

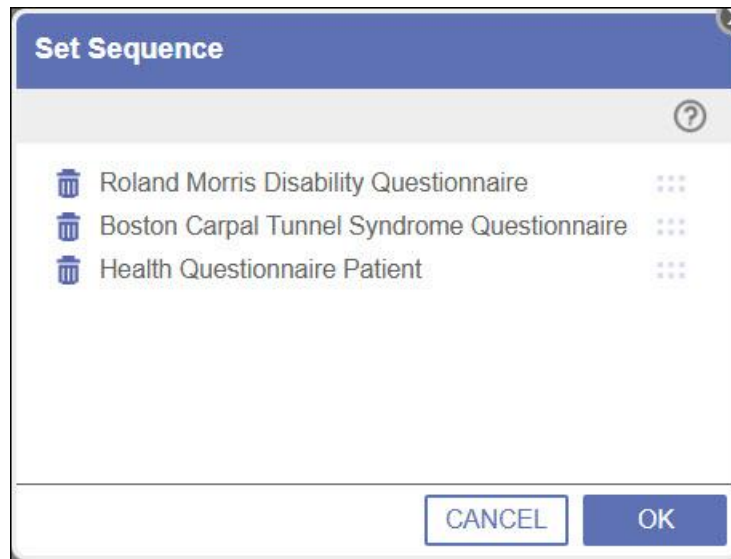

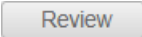



Figure: Set Sequence popup

- **TOC Options:** The **TOC Options** field allows users to configure Table of Contents (TOC) settings for both **Encounter** and **Review** screens, based on the selected Encounter Type. This field displays 2 buttons: **Encounter** and **Review**.
 - **Encounter** **Encounter:** This button is used to customize the TOC options displayed on the **Patient Encounter** screen. Clicking it opens the **TOC Encounter Options** popup. On this popup:
 - If the **Default** checkbox is selected, the system automatically displays the values defined in the **toc.menu.options** property as pre-selected in the **TOC Encounter Options** popup. Users can modify the sequence of selected options using the **Move Up** and **Move Dn** buttons.
 - If the **Default** checkbox is unchecked, the sequence can be modified and once saved, the **Encounter**  button turns blue, indicating custom TOC settings are in place for that Encounter Type.

-  **Review:** This button is used to configure the TOC options shown on the **Review** screen of the Patient Encounter. Clicking it opens the **TOC Review Options** popup. On this popup:
 - When the **Default** checkbox is selected, the values from the **toc.review.options** property are displayed as pre-selected in the **TOC Review Options** popup. Users can also reorder these options using the **Move Up** and **Move Dn** buttons.
 - If the **Default** checkbox is unchecked, saving changes on the **Encounter Type Master** screen will cause the **Review**  button to turn blue, indicating a custom configuration.

 **Note:**

- *In case, Hook is defined in the hook property, then the label of defined Hook also will be displayed in the TOC Options list.*
- *Any Specialty sub-types defined in the property **toc.menu.specialty.subtypes** are also displayed in the TOC Options list.*
- *The **Duration** field under the **General** section should be non-zero to view the customized TOC on the **Patient Encounter** screen.*
- **Requires Authorization checkbox:** The **Requires Authorization** checkbox enables preauthorization for the selected encounter type. This checkbox is displayed only when the admin-level property **prognosis.rfa.enabled** is set to **On** and is unchecked by default. When selected and saved, the encounter type is referred to as an “RFA Enabled Encounter Type”.
 - For RFA-enabled encounter types, when any of the following order types are added—Lab, Radiology, Consult, Procedure, Prescription, Items, or DME—they automatically require preauthorization, and a corresponding entry is generated on the **PreAuth Tracking** screen.
 - Orders listed in the PreAuth Exception list (defined via the **PreAuth Exception** screen) are excluded from this process and are not added to the **PreAuth Tracking** screen.
- **Auto Assign Top 4 ICDs checkbox:** The **Auto Assign Top 4 ICDs** checkbox can be selected and saved to automatically assign the top four ICD codes to CPTs on the **Assessment** screen during a patient encounter using this encounter type. When selected and saved,

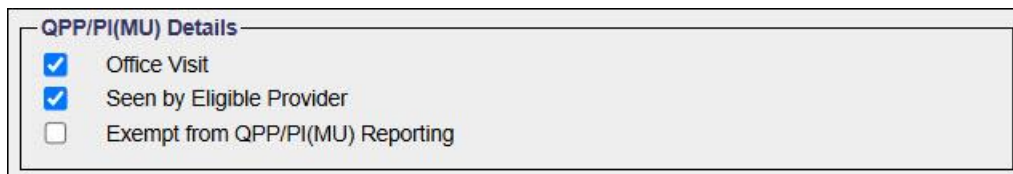
this option automatically assigns the top four ICD codes to CPT/HCPC codes on the **Assessment** screen during a patient encounter.

If fewer than four ICD codes are available, the system assigns all that are present. Users can still manually adjust ICD assignments even when this option is enabled. The checkbox is unchecked by default.

- **PACS Enc Type:** This checkbox, when enabled, designates the Encounter Type as a PACS Encounter Type. Only Encounter Types with this checkbox enabled will be available for selection during scheduling of PACS-related appointments.

2.1.3. QPP/PI(MU) Details

The **QPP/PI(MU) Details** section includes three checkboxes that control how encounters of a given Encounter Type are treated in Promoting Interoperability (PI) calculations, previously known as Meaningful Use (MU).



The screenshot shows a section titled "QPP/PI(MU) Details" with a light gray background. It contains three checkboxes:

- Office Visit
- Seen by Eligible Provider
- Exempt from QPP/PI(MU) Reporting

Figure: QPP/PI(MU) Details section on Encounter Type Master screen

There are 3 checkboxes available under this section:

- Office Visit
- Seen by Eligible Provider
- Exempt from QPP/PI(MU) Reporting

The behavior of these options is governed by the following rules:

- If either or both the **Office Visit** and **Seen by Eligible Provider** options are selected, encounters using this Encounter Type will be considered in Promoting Interoperability (PI) calculations.
- If the **Exempt from QPP/PI (MU) Reporting** option is selected along with either or both of the other two options (**Office Visit** and/or **Seen by Eligible Provider**), the **Exempt** selection overrides the others. As a result, such encounters will not be considered in PI/MU reporting.
- If only **Exempt from QPP/PI (MU) Reporting** is selected, then encounters of that Encounter Type are excluded from Promoting Interoperability calculations.

2.1.4. Billing

The **Billing** section in the **Encounter Type Master** screen is visible only when the Billing service is enabled for the clinic. It includes key settings that help determine how encounters are billed and claimed.

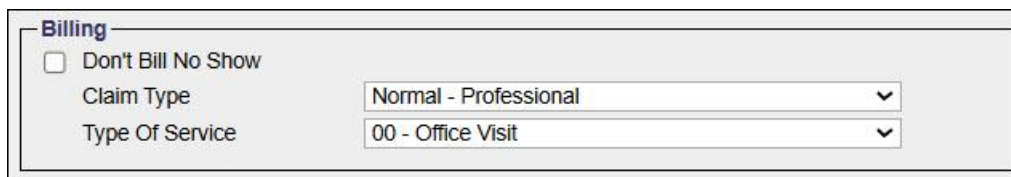



Figure: Billing section on Encounter Type Master screen

This section consists of the following options:

- **Don't Bill No Show checkbox:** When the **Don't Bill No Show** checkbox is selected, penalty invoices will not be generated automatically for patients whose **Visit Status** is marked as **No Show**. This allows clinics to suppress billing for missed appointments, based on their internal policies.

 **Note:** If the **Claim Type** is set to **Employer Claim** and the **Bill No-Show** checkbox is selected on the **Employer Master** screen for the employer linked to the patient's encounter, the **Don't Bill No Show** checkbox is overridden, and an **Employer Claim** is created for **Employee No-Show** appointments.

- **Claim Type:** The **Claim Type** dropdown is used to select the claim type associated with the Encounter Type. If the clinic supports both EMR and Billing modules, the default selection is **Normal - Professional**. If the clinic uses only the EMR module, the **Claim Type** field is not displayed.

The following options are available for selection:

- Normal - Professional
- Workers Comp - Professional
- Auto Accident - Professional
- Other Accident - Professional
- UB04 Institutional
- Employer Claim
- Professional + Institutional
- Self Pay + Institutional

- Self Pay - Patient
- No Claim
- **Types of Service:** The *Types of Service* dropdown is used to select the appropriate type of service linked to the Encounter Type. The options in this list are populated from Settings → Configuration → Group Types → *Type of Service (B4)*.

2.1.5. Portal Settings

The **Portal Settings** section allows configuration of encounter types for visibility and behavior across various external-facing portals, including the Patient Portal, Referral Doctor Portal, Attorney Portal, Book Appointment Page (BAP), My Health Records (MHR) App, and Employer Portal.

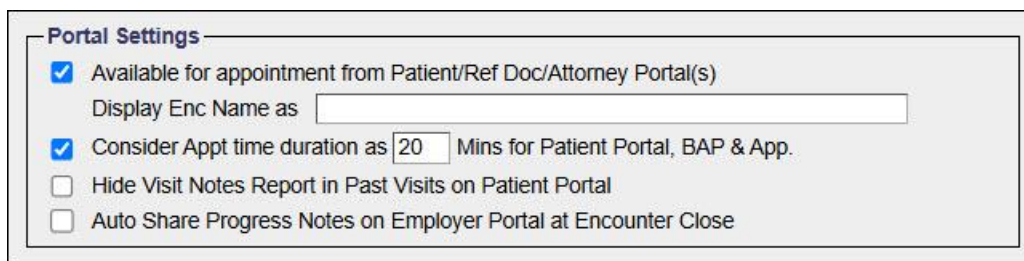


Figure: Portal Settings section on Encounter Type Master screen

This section consists of the following options:

- **Available for Appointment from Patient/Ref Doc/Attorney Portal(s):** The *Available for Appointment from Patient/Ref Doc/Attorney Portal(s)* checkbox is used to make the Encounter Type available for selection on the **Appointment** screen of the Patient Portal, Referral Doctor Portal, and Attorney Portal. When enabled, patients or representatives can book appointments using this Encounter Type from any of these platforms.
- **Display Enc Name as:** The *Display Enc Name as* field is used to enter a custom display name for the Encounter Type that will be displayed instead of the Parent Encounter Type name on the Patient Portal, Referral Doctor Portal, Attorney Portal, and Book Appointment Page (BAP). This is a mandatory alphanumeric field when the *Available for Appointment from Patient/Ref Doc/Attorney Portal(s)* checkbox is selected, and supports special characters like ! " # \$ % & ' () + , - . / : ; < = > ? @ [\] _ \ { }`. This field has a 35-character limit.
- **Consider Appt time duration as __ Mins for Patient Portal, BAP & App:** The *Consider Appt time duration as __ Mins for Patient Portal, BAP & App* checkbox controls how appointment duration is interpreted on the Patient Portal, Book Appointment Page, and

the MHR App. It is enabled only when the **Available for Appointment from Patient/Ref Doc/Attorney Portal(s)** checkbox is checked.

If selected, appointment slots will be based on the duration entered in this field. If not selected, slots are based on the **Duration** field defined on the **Encounter Type Master** screen.

- Hide Visit Notes Report in Past Visits on Patient Portal:** The **Hide Visit Notes Report in Past Visits on Patient** this checkbox is used to hide the **Report** hyperlink (under the **Visit Notes** column) for Progress Notes related to this Encounter Type on the **Past Visits** screen of the Patient Portal.
- Auto Share Progress Notes on Employer Portal at Encounter Close:** The **Auto Share Progress Notes on Employer Portal at Encounter Close** checkbox, when enabled, automatically shares the Progress Notes on the Employer Portal immediately after an encounter is closed. This option is available only if the Employer Portal is turned **On**; if the portal is **Off**, the checkbox remains visible but disabled, displaying a tooltip on hover stating: **Disabled because Employer Portal is OFF**.

By default, this checkbox is unchecked for all users with the Employer Portal enabled. For encounters that close automatically based on the property **enc.close.afterdays**, the Progress Notes are shared automatically upon closure. However, if a closed encounter is reopened and then closed again, the notes will not be auto-shared a second time even if the checkbox is selected. Additionally, zero-duration encounters are excluded from this feature.

Once Progress Notes are automatically shared on the Employer Portal, they cannot be manually shared again from the TOC **Document List** screen. When the notes are shared, the **Employer Portal** toggle button in the TOC appears as **On**. The shared Progress Notes can then be viewed in the **Clinic Shared Documents** section of the Employer Portal.

2.1.6. Appointment Settings

The **Appointment Settings** section allows configuration of key settings related to scheduling and managing appointments for specific Encounter Types.

Appointment Settings

Reset Health Status for Next Encounter

Telemedicine Appointment

Appointment Charge \$ Pay After Visit

Appointment Color

Do not create AI generated Past Visit Summary

Figure: *Appointment Settings* section on *Encounter Type Master* screen

This section consists of the following options:

- **Reset Health Status for Next Encounter:** The *Reset Health Status for Next Encounter* checkbox can be selected to prevent the *Health Status* chosen on the *Assessment* and *Encounter Close* screens from carrying forward to the next encounter. Instead, the *Health Status* defaults to *Not Applicable* in the subsequent encounter.



Note:

- *If the **Not Applicable** Health Status is inactive, it is automatically activated in the backend and set as the default status in the dropdown.*
- *If any previous encounters remain open or if there are zero-duration encounters, the **Health Status** defaults to **Not Applicable**.*
- **Telemedicine Appointment:** The *Telemedicine Appointment* checkbox can be selected to mark the encounter as eligible for Telemedicine visits in Prognosis EMR, Portals and Apps. This option is available only when the admin-level property *prognosis.telemed.enable* is set to **On** from the *Properties* Master screen. If the property is **Off**, this checkbox is hidden entirely.


The checkbox is disabled if the *Associated With* field is set to *Multi Provider/Resource* or *Multi-Visits in a Day*, but remains enabled for *Single Provider/Resource*.

Encounter Types having this checkbox selected are not displayed on the *Start New Encounter* screen.

- **Appointment Charge \$:** The *Appointment Charge \$* field is used to enter the fee that the patient must pay for the Telemedicine appointment. The field becomes active once the *Telemedicine Appointment* checkbox is checked and accepts numeric values between 1 and 999.99.

If an invalid amount is entered—such as less than 1, or a number exceeding three digits before the decimal and two digits after—an error message appears on save stating: *Please enter a numeric value for Appointment Charge between 1 to 999.99.*

- **Pay After Visit:** The *Pay After Visit* checkbox appears only when the property *prognosis.telemed.videoconf.mode* is set to *2-Promeeet*. If enabled and saved, patients scheduled with this Encounter Type can pay for their Telemedicine appointment after the visit via the ProMeet interface.

- Appointment Color:** The *Appointment Color* field can be used to select a color representing this Encounter Type's appointments on the *Appointment Schedule* screen. The *Select Color*  icon opens a color picker popup to select a color. Once selected, the chosen color is displayed next to the icon for easy identification.

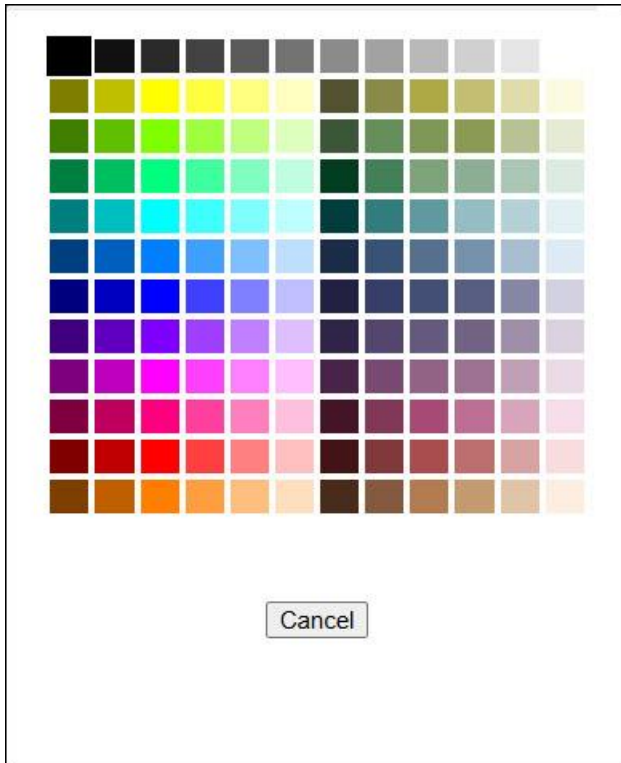


Figure: Color picker popup

- Do not create AI generated Past Visit Summary checkbox:** This checkbox, when enabled, excludes the Encounter Type from the automated schedule process that generates the Past Progress Note Summary (Past Visit Summary). If this checkbox is checked for an Encounter Type, that Encounter Type will not be considered for AI-generated Past Visit Summary creation.

2.1.7. Cellphone Text Reminder for Appointments

The *Cell Phone Text Reminder for Appointments* section allows configuration of text message reminders for appointments specific to each Encounter Type.

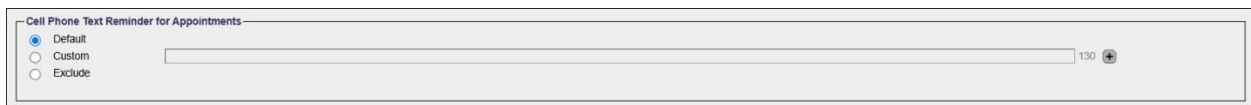




Figure: Cell Phone Text Reminder for Appointments section on Encounter Type Master screen

This section consists of the following options:




- **Default:** The **Default** radio button can be selected to send the system's default text reminder message. This is the preselected option when creating a new Encounter Type.

If the **Associated With** field is set to **Single Provider/Resource** or **Multi Provider/Resource** and the **Duration** field is zero, saving the Encounter Type triggers a message: **Cell Phone Text Reminder for Appointments will be set to 'Exclude' as Duration is 0 mins**. After this message, the **Exclude** option is automatically selected, and the Encounter Type is saved. This notification does not appear if **Associated With** is set to **Multi-Visits in a Day**, where the **Duration** field shows zero and is disabled.
- **Custom:** The **Custom** radio button can be selected to send a customized text reminder message entered in the text field. The message length is limited to 130 characters. Use the **Add Tags**  button can be used to insert related tags dynamically into the message. This button is active only when the **Custom** option is selected. Only the following special characters are permitted in the custom message text: # @ ! & % ' . ,
- **Exclude:** The **Exclude** radio button can be selected to disable text reminders entirely for appointments of this Encounter Type.

 **Note:** *If an Encounter Type is excluded in the Text Reminder for Scheduled Appointments process parameters, no text reminders will be sent for that Encounter Type regardless of whether Default or Custom is selected.*

2.2. ACTION BUTTONS

The **Encounter Type Master** screen displays 4 action buttons:

-  **save Button:** The **save** button saves the current record in Prognosis. Use it after entering or updating Encounter Type details to ensure the changes are stored in the system.
-  **delete Button:** The **delete** button deletes the selected Encounter Type from Prognosis. A confirmation prompt stating: **Are you sure you want to delete this record?** will appear to verify the delete action before it is completed. If it is used, a **Cannot Delete.Used in Appointments** message is displayed on clicking **OK**, and the encounter cannot be deleted.
-  **reset Button:** The **reset** button clears any unsaved changes made to the record, restoring the screen to the last saved state.

- history
history Button: The *history* button opens the *Encounter Type History* popup, displaying a log of the most recent modifications made to the selected Encounter Type.

Enc. Type History		
Modified By	Date	Modified Notes
Marcus Welby MD	2025-04-23 05:39:16.223	TOC Encounter options Old: Document List, Radiology, Start Encounter, Patient Forms, Doctors Forms, Face Sheet, Vitals, HPI, ROS, Physical, Draw Tool, Specialty, Lab, Order Sheet, Prescription, E&M, Assessment, Dictate Transcribe, Education, Progress Notes, Encounter Close, Addendum, Pictures, Procedure, Health Maintenance New: Document List, Radiology, Start Encounter, Patient Forms, Doctors Forms, Face Sheet, Vitals, HPI, ROS, Physical, Specialty, Lab, Order Sheet, Assessment, Progress Notes, Encounter Close, Addendum

CLOSE

Figure: *Encounter Type History popup*

This popup displays the following:

- Modified By:** The *Modified By* column displays the name of the user who made the change.
- Date:** The *Date* column shows the date and timestamp when the modification was performed.
- Modified Notes:** The *Modified Notes* column provides a description of the changes made to the encounter type.

A **CLOSE** CLOSE button is provided on the popup to allow users to exit and close the popup.

- save as...
save as... Button: The *save as...* button allows users to create a new encounter type by cloning an existing one. This button is enabled when an existing encounter type record is in view.

On clicking the *save as...* button, a modal popup titled *Create New Encounter Type* is displayed.

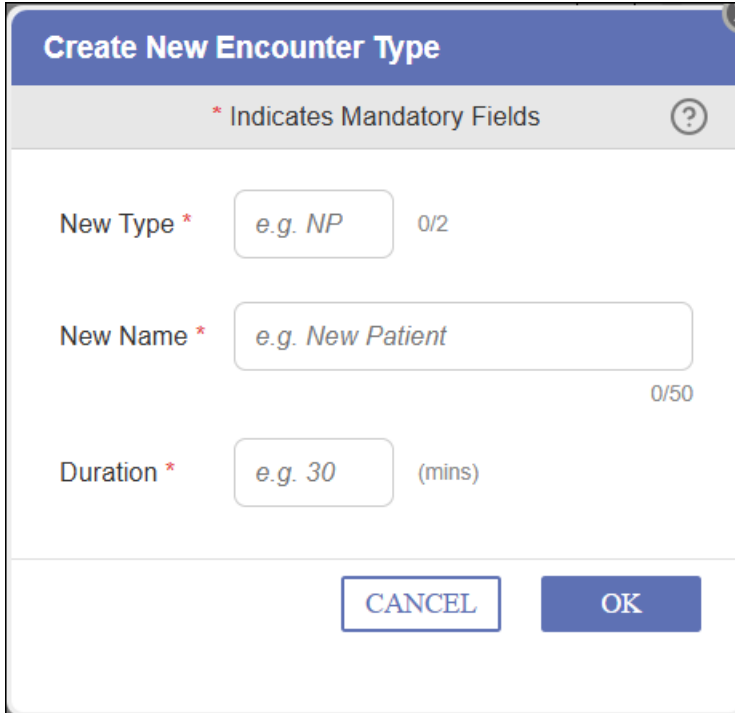


Figure: *Create New Encounter Type popup*

This popup captures three mandatory inputs:

- **New Type** (text, maximum 2 characters)
- **New Name** (text, maximum 50 characters)
- **Duration** (numeric, maximum 3 characters)

The popup provides **OK** and **CANCEL** actions. The **OK** button initiates the copy process, while **CANCEL** dismisses the popup without making changes. The **OK** action remains unavailable until all required fields are entered in accordance with validation rules.

Upon confirmation, the system creates a new encounter type by copying all configurations from the selected source encounter type. This includes replication across the following sections:

- **General** (Associated with, Workflow, E&M, Follow Up, SNOMED Code, Medicare, Chronic Care)
- **Defaults** (Progress Note, Complaints, Procedure/Specialty, Physical, Patient Form, TOC Options, Requires Authorization, Auto Assign Top 4 ICDs, PACS Encounter Type)
- **QPP/PI (MU) Details** (Office Visit, Seen by Eligible Provider, Exempt from Reporting)
- **Billing** (Don't Bill No Show, Claim Type, Type of Service)

- **Portal Settings** (Appointment availability, duration considerations, visibility settings, auto-sharing)
- **Appointment Settings** (Health status reset, telemedicine, charges, payment settings, color, AI summary settings)
- **Cell Phone Text Reminder Preferences** (Default, Custom, Exclude)

Template sequences and selected configurations are preserved as defined in the source encounter type.

Certain fields are not carried forward during the copy process and are instead derived from user input or system defaults:

- **Type**, **Name**, and **Duration** are populated based on the values entered in the popup
- **Display Encounter Name As** is set to blank

The newly created encounter type is marked as **Active**, and the **Last Modified By** field reflects the user performing the action. This functionality applies to all encounter types, regardless of their Active or Inactive status.

Newly created encounter types are not automatically associated with any provider or employer as supported encounter types. Such associations must be configured manually by the user.

Validation rules are enforced to ensure data integrity:

- The system checks for duplicate **Type** values and prevents duplication
- If a duplicate is identified, an error message is displayed in red and bold within the popup:
"This Type already exists."

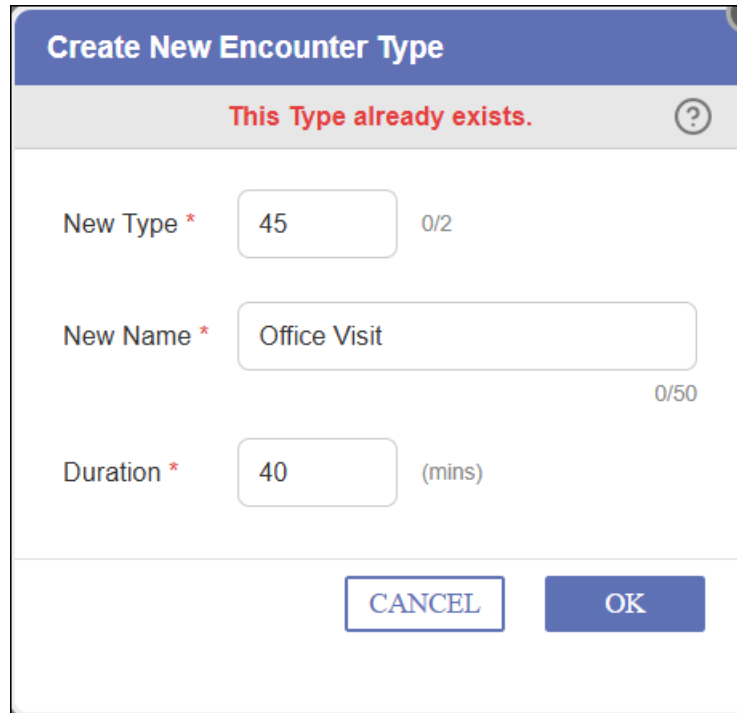


Figure: Validation message for duplicate Type

- Field length validations are applied as follows:
 - New Type: maximum 2 characters
 - New Name: maximum 50 characters
 - Duration: maximum 3 characters
- All three fields are mandatory for successful submission

Audit and history tracking are maintained for traceability. The system records details including source and new encounter type information, action type (**COPY**), user details, and timestamp.

The *Enc. Type History* popup reflects the creation event with a standardized message in the following format:

“Encounter Type copied from Old: Type-44 Name-Office Visit-No Claim to New: Type-48 Name-Office Visit.”