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## Patch Release

**Version: 4.0 Build: 1**

**Patch No.: 31**


**Released: April 8, 2026**

**Total Points: 5**

**Enhancements: 5 (Generic: 5, Internal: 0, Custom: 0)**

Bizmatics, Inc.  
2429 Military Road, Suite 300,  
Niagara Falls, NY 14304.  
[www.bizmaticsinc.com](http://www.bizmaticsinc.com)

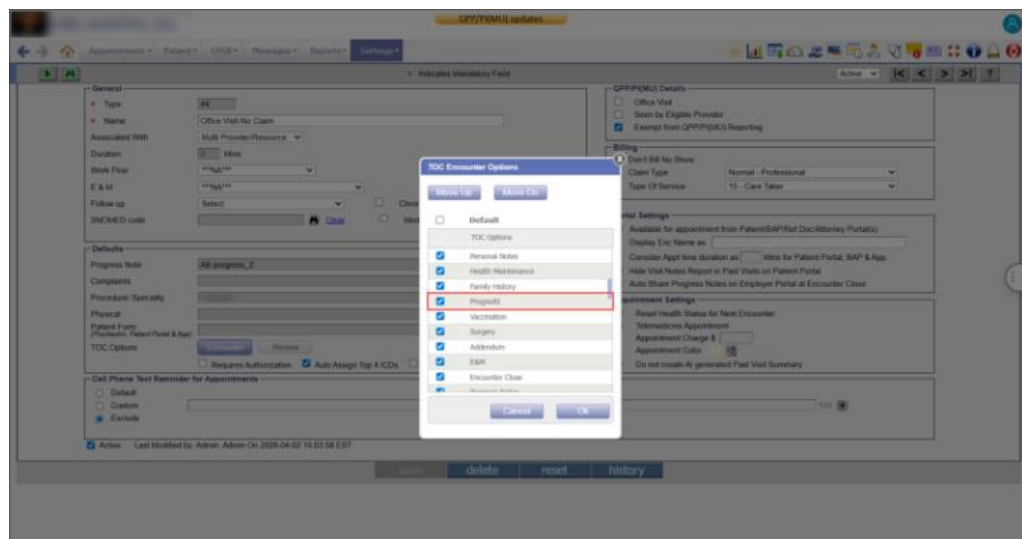
## Enhancement 1: PrognoAI Accessibility Enhancement via TOC Menu for Cross-Device Support

Module:	<b>EMR</b>
Type:	<b>GENERIC</b>
Case ID:	<b>537813</b>
Affected Screen(s):	<ul style="list-style-type: none"> <li>• <b>PrognoAI</b> <b>Navigation</b> Patient → Encounter → Encounter TOC → <i>PrognoAI</i></li> <li>• <b>Encounter Types Master</b> <b>Navigation</b> Settings → Configuration → Clinic column → Enc Types → TOC Options → <i>Encounter</i>  button</li> <li>• <b>Properties Master</b> <b>Navigation</b> Settings → Configuration → Admin column → <i>Properties</i></li> </ul>
Description:	<p>Enhancements have been successfully implemented to improve the accessibility and usability of the PrognoAI feature across devices, particularly addressing limitations faced by iPad users.</p> <p>Previously, the <i>PrognoAI</i> option was available exclusively within the <i>Third Pane</i> of the application. While functional for desktop users, this configuration restricted access on iPad browsers, where the <i>Third Pane</i> is not supported. To resolve this, PrognoAI has now been integrated into the Table of Contents (TOC) menu, ensuring seamless access across all supported devices.</p>



- Visibility of the **PrognosisAI** menu is restricted to users who have been granted access to PrognosisAI.
- The behavior of enabling/disabling tabs and visibility within the TOC mirrors the existing functionality of **PrognosisAI** in the **Third Pane**.

Additionally, the system ensures that if the TOC configuration is not selected at the **Encounter Type** master level, the **PrognosisAI** option will not be displayed for that specific encounter type.



**Figure:** *PrognosisAI* option selected on the TOC Encounter Options popup of the Encounter Master screen

As part of this phase, the existing PrognosisAI functionality within the **Third Pane** has been retained without any changes, ensuring continuity for desktop users.

The TOC UI has been updated to accommodate the **PrognosisAI** option. A temporary icon has been used for initial implementation, and a dedicated PrognosisAI icon aligned with TOC design standards will be incorporated once finalized.

## Enhancement 2: Consolidated Scribe Summary and Review Experience for Improved Usability

Module:	<b>EMR</b>
Type:	<b>GENERIC</b>

Case ID:	<b>537812</b>
Affected Screen(s):	<b>Scribe Summary</b> <b>Navigation</b> Patient → Encounter → Third Pane → Prognosis → <b>Scribe Summary</b>
Description:	<p>The Prognosis Scribe workflow has been enhanced to improve usability and streamline provider interaction with generated data. Based on usability observations and internal feedback, the previous multi-step process—where providers were required to first view the <b>Scribe Summary</b> and then navigate to a separate Review step—has been consolidated into a more intuitive, single-screen experience.</p> <p>The Scribe Summary and Review functionalities have now been successfully merged into a unified <b>Scribe Summary</b> screen. This enhancement ensures that providers can seamlessly view, review, and take action on the generated Scribe data within the same interface, eliminating the need for additional navigation or reliance on a <b>PROCEED</b> action.</p> <p>With this update, the Review button and associated actions are now directly accessible on the <b>Scribe Summary</b> screen, making the review step more visible and reducing the likelihood of it being overlooked. This change aligns the workflow with the intended user journey and improves overall efficiency.</p> <p>All existing functionalities related to accepting generated data and adding notes to respective sections remain unchanged, ensuring continuity in system behavior while enhancing the user experience through improved layout and accessibility.</p> <p>This UI enhancement has resulted in a more streamlined and user-friendly workflow, enabling providers to complete Scribe-related tasks more effectively within a single, consolidated view.</p>

**Enhancement 3: Unified appointment view across multiple locations has been introduced on the EMR and BILL homepage**

Module:	<b>EMR+PM</b>
Type:	<b>GENERIC</b>

Case ID:	<b>534028</b>
Affected Screen(s):	<p><b>Home</b></p> <p><b>Navigation</b> EMR Home screen</p> <p><b>Navigation</b> BILL Home screen</p>
Description:	<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>

### Enhancement 4: Hospital Portal has been introduced for Secure and Efficient Sharing of Patient-Specific ACOG Documentation Between OBGYN Clinics and Associated Hospitals

Module:	<b>EMR+HOSPITAL PORTAL</b>
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Type:	<b>GENERIC</b>
Case ID:	<b>529631</b>
<b>Enhancement I: Hospital Master Creation and Management</b>	
Affected Screen(s):	<b>Hospital Master Navigation</b> EMR → Settings → Configuration → Vendors column → <i>Hospital</i>
Description:	<p>Hospital Portal has been successfully introduced to enable OBGYN clinics to securely and efficiently share patient-specific documentation, such as ACOG forms, with one or more associated hospitals. This enhancement ensures that hospitals are granted controlled, read-only access to critical patient data through a dedicated, unidirectional portal, thereby maintaining strict data governance and compliance with privacy standards.</p> <p>The solution addresses the need for seamless coordination between clinics and hospitals by digitizing and centralizing the process of sharing prenatal documentation. It eliminates manual handoffs, reduces dependency on intermediaries, and ensures that hospitals always access the most up-to-date patient records.</p> <p>The system now enables clinics to securely share ACOG forms and related prenatal documentation with hospitals via a controlled Hospital Portal. The portal ensures that only patients with an active pregnancy cycle and relevant completed encounters are visible to hospitals, thereby maintaining strict data filtering and relevance.</p> <p>The enhancement ensures:</p> <ul style="list-style-type: none"> <li>• Controlled access to patient data</li> <li>• Secure authentication mechanisms</li> <li>• Audit tracking of all hospital activities</li> <li>• Simplified workflow for document retrieval and printing</li> </ul> <p>The implemented solution is divided into two major functional components:</p> <ol style="list-style-type: none"> <li>1. <b>Hospital Master and User Management</b> A centralized framework has been introduced to define hospitals and manage their access credentials. The system supports both shared login</li> </ol>

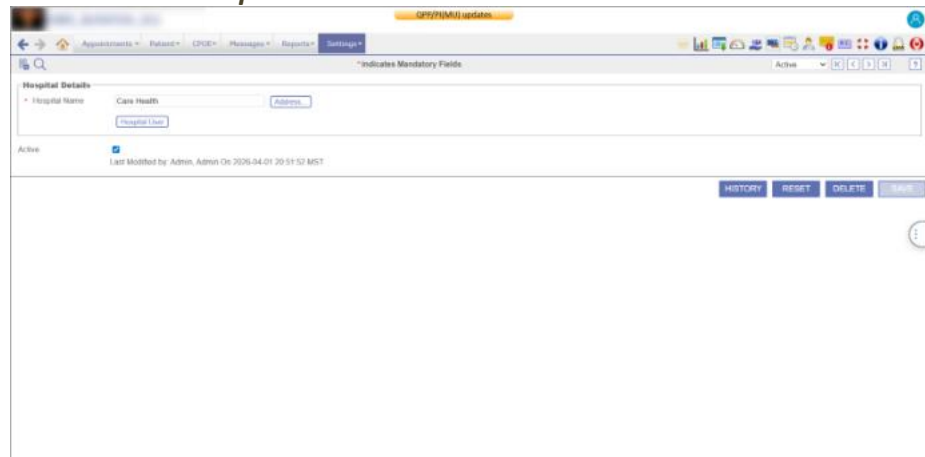
credentials for departments and individual credentials for hospital staff. Audit tracking ensures traceability of all user actions.

2. **Hospital Portal Interface**


A dedicated web-based portal has been implemented for hospitals, consisting of a secure login page and a focused landing page. The portal allows hospitals to search for patients with active pregnancy cycles and access the latest ACOG forms from closed encounters, with options to view and print documents directly.

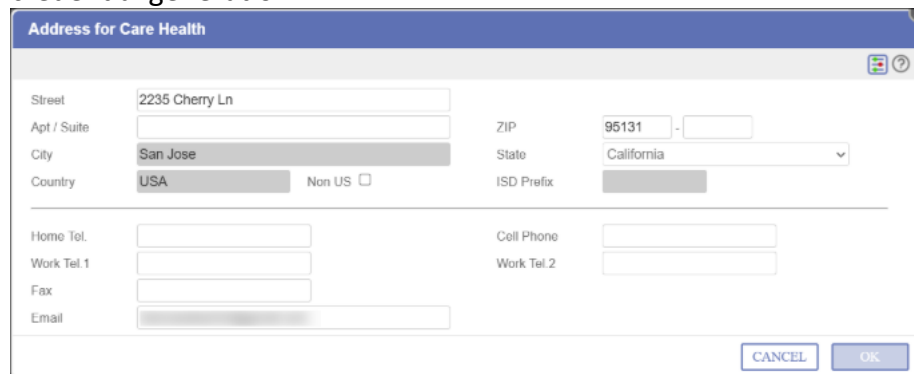
**Hospital Master Creation and Management**

- Prognosis now supports creation of hospital records with mandatory fields such as **Hospital Name** and **Address**.



**Figure: Hospital Master screen**

- The **Address** popup invoked using the **Address...**  button includes email capture, which serves as the primary identifier for login credential generation.

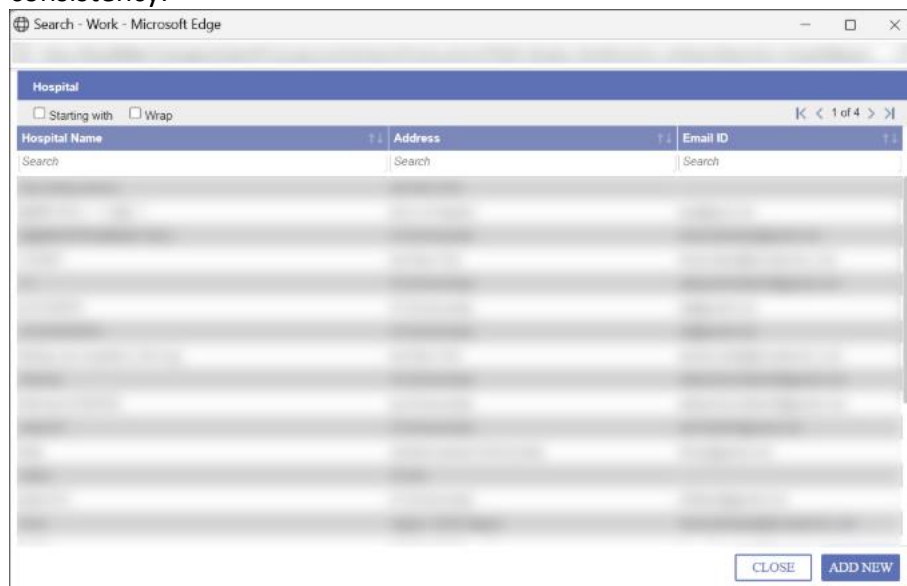


**Figure: Address popup**

- A structured layout similar to **Employer** Master has been implemented, ensuring familiarity and ease of use.

### *Search and Navigation Enhancements*

- A robust search popup has been implemented with fields such as **Hospital Name, Address, and Email**.
- Advanced search features include:
  - “Starting With” filter for prefix-based search
  - “Wrap” functionality for better readability of long text
  - Pagination controls (First, Previous, Next, Last) with tooltips
  - Column-based sorting with dynamic icon indicators (ascending/descending)
- By default, hospital records are displayed alphabetically, ensuring consistency.



**Figure:** *Hospital Search popup*

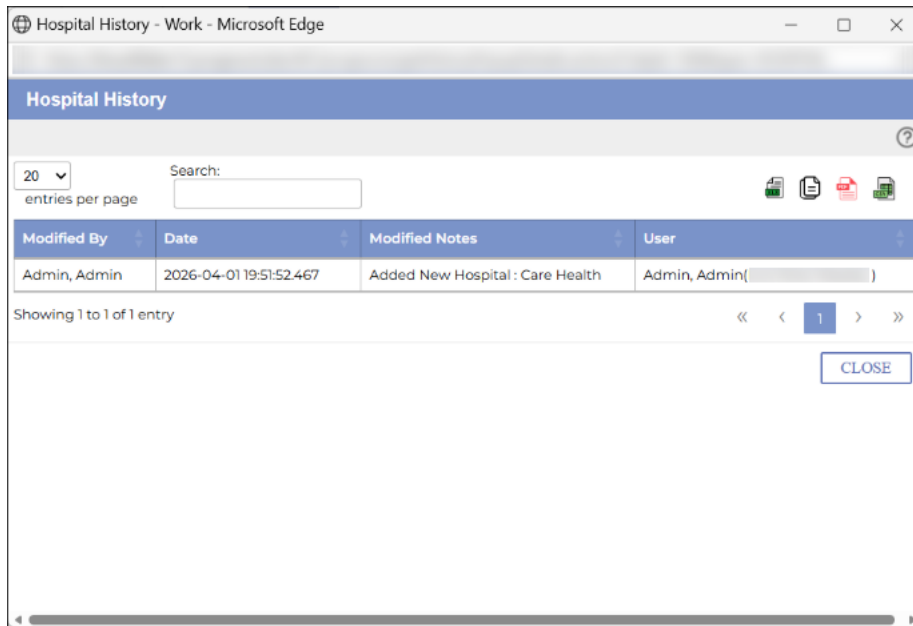
### *Status and Lifecycle Management*

- Hospitals are assigned an Active status by default upon creation.
- The system supports toggling between Active, Inactive, and All records through a dropdown filter.
- Inactive hospitals are restricted from accessing the portal while retaining historical data for audit purposes.

### *Audit and History Tracking*

- A comprehensive audit mechanism has been implemented to track:
  - Patient record searches
  - Viewing of ACOG forms
  - Printing actions

- The **Hospital History** popup invoked using the **HISTORY** button captures all modifications made to hospital records, including timestamps and user details.




**Figure: Hospital History popup**  
Hospital Users Management

- The Hospital Users feature allows multiple users to be associated with a single hospital.

Hospital Users for Care Health					
First Name	Last Name	Email ID	History	Inactive	
Aaron	King	Aaron.King5445@gmail.cc	History	<input type="checkbox"/>	
James	Joseph	James.Joseph897@gmail.	History	<input type="checkbox"/>	
			History	<input type="checkbox"/>	
			History	<input type="checkbox"/>	
			History	<input type="checkbox"/>	
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			History	<input type="checkbox"/>	
			History	<input type="checkbox"/>	



**Figure:** *Hospital Users popup*

- o A dedicated popup invoked via the **Hospital User**  button enables creation and management of hospital users.
- o Email ID is enforced as a unique identifier and is used as the login credential.
- o Mandatory fields include First Name, Last Name, and Email ID, with strict validation rules.
- o The system prevents duplication of email IDs across users, ensuring uniqueness.

**Validation and Error Handling**

- Mandatory field validations ensure complete data entry.
- Email format validation ensures correctness of login credentials.
- Restrictions are enforced on modifying email IDs once assigned, as they serve as User IDs.
- Some validations include:
  - o **Please enter a valid e-mail address. For example: abc@company.com**, when an invalid Email ID is entered in the field.
  - o **This Email ID is already added for another user. Can not add duplicate email ID.**, when the same Email ID has been used for another Hospital user.

User Lifecycle and Security

- Users can be deleted using the  icon or marked as Inactive by checking the box. Clicking on the  icon prompts a confirmation message which says, Are you sure, you want to delete this user? With **OK** and **Cancel** buttons. User can select **OK** to proceed or **Cancel** to stop the deletion of the record.
- Inactive users are automatically restricted from accessing the Hospital Portal.
- A detailed history log captures all changes, including email updates and status changes on the **Hospital User History** popup.

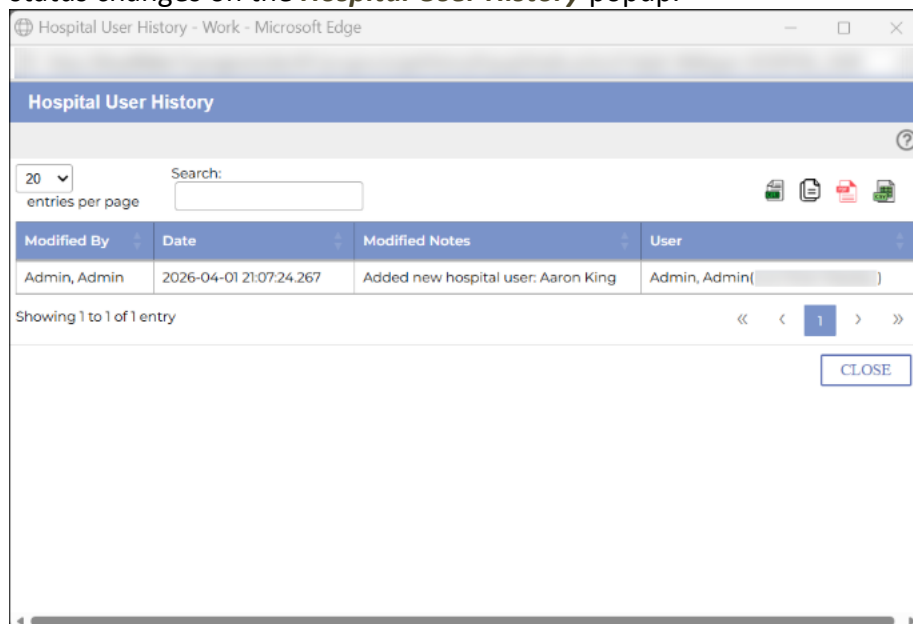


Figure: Hospital User History popup

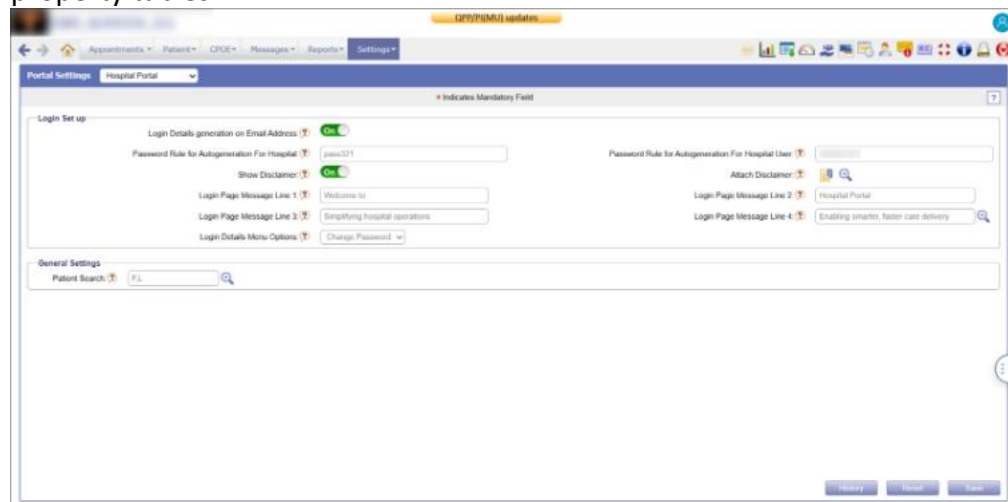
A checkmark appears on the **Hospital User**  button when details are added to the **Hospital Users** popup.

Enhancement II: Hospital Portal Settings has been introduced for configuration

<p><b>Affected Screen(s):</b></p>	<p><b>Portal Settings Master</b>  <b>Navigation</b> EMR → Settings → Configuration → Workflow column → Portal Settings → <b>Hospital Portal</b></p>
<p><b>Description:</b></p>	<p>A system-level flag has been implemented to control Hospital Portal activation. The portal can be configured in advance even when disabled, ensuring readiness upon activation. All configurable elements are mapped to system-</p>

level properties, ensuring centralized control while maintaining abstraction from backend property tables.

The **Hospital Portal Settings** Master module has been introduced under Settings → Configuration → Workflow column → Portal Settings → **Hospital Portal**. All configurable elements are mapped to system-level properties, ensuring centralized control while maintaining abstraction from backend property tables.



**Figure: Hospital Portal Master screen**


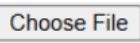



The **Hospital Portal Settings** Master screen is divided into two sections: **Login Set up** and **General Settings**.

**Login Set up:**


This section controls how hospital users log in and how credentials are managed.

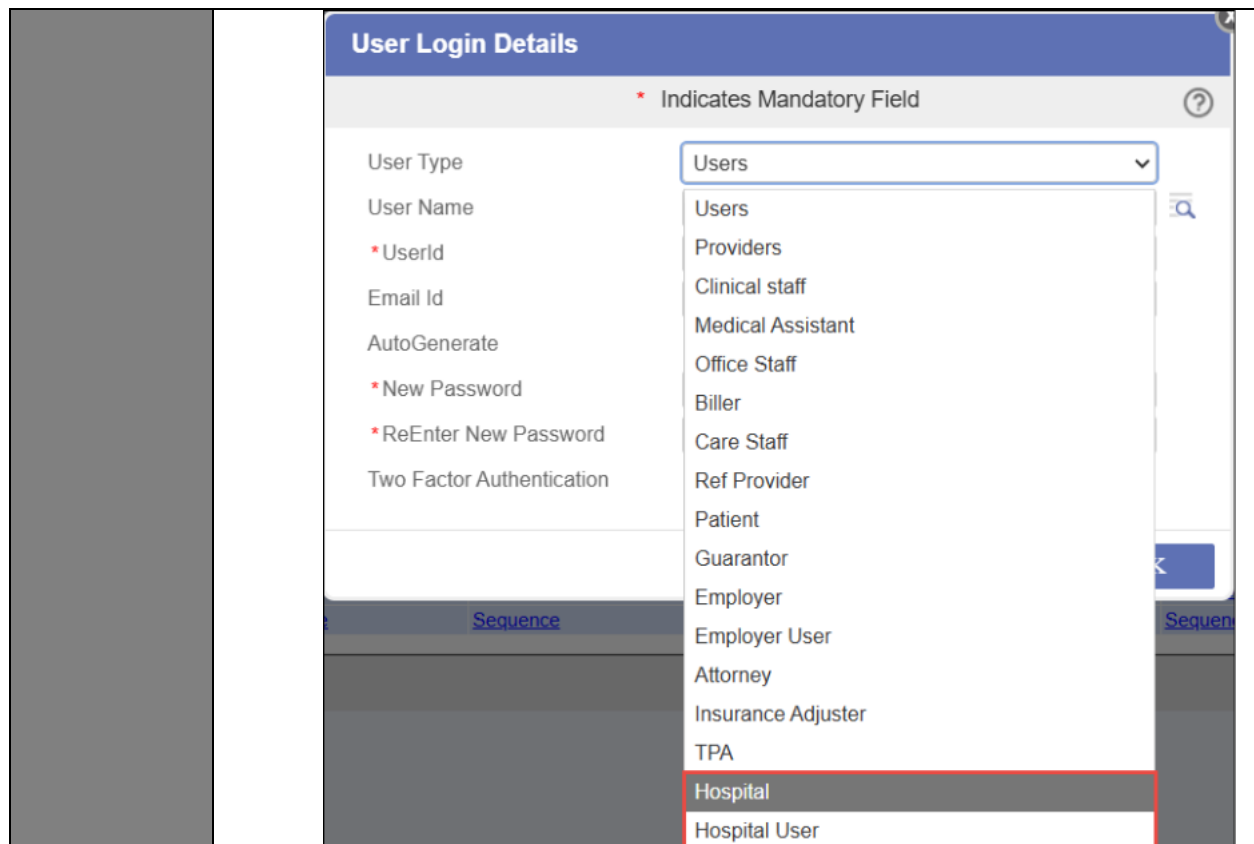
- **Login Details generation on Email Address:** If this property is **On**, Hospital Portal logins use email addresses as User IDs for both Hospitals and Hospital Users. When **Off**, logins instead use the Hospital name or Hospital User name as the User ID.
- **Password Rule for Autogeneration For Hospital:** Sets the value to be used as the auto-generated password for Hospital Portal logins when creating credentials from the Login Details screen for a Hospital. For example, if the property is set to “password1”, the same value will be assigned as the password and emailed to the respective Hospital. If the property is left blank, the system defaults to “password1”.
- **Password Rule for Autogeneration For Hospital User:** Sets the value to be used as the auto-generated password for Hospital Portal logins when creating credentials from the **Login Details** screen for Hospital Users. For example, if the property is set to “password1”, the same value will be assigned as the password and emailed to all Hospital Users for whom

the password is auto-generated. If the property is left blank, the system defaults to “password1”.

- **Show Disclaimer:** Enables the display of a disclaimer pop-up on the first login to the Hospital Portal when the property is turned **On**; when turned **Off**, the popup is not shown. The content of the disclaimer is sourced from an HTML file uploaded via the *Hospital Portal Settings* Master screen. If no HTML file is uploaded, the disclaimer pop-up will appear blank. The default value is **Off**.
- **Attach Disclaimer:** Enables the user to Attach Disclaimer File. Clicking the *Attach Disclaimer*  icon invokes the popup, which allows users to select a file from the local folder using the *Choose File*  button and make attachments using the *attach*  button. The *View Disclaimer*  icon invokes the preview of the attached file.
- **Login Page Message Line 1:** Determines the welcome message displayed on the Hospital Portal login page. By default, this is set to “Welcome to”. The field has a maximum character limit of 16 characters.
- **Login Page Message Line 2:** Determines the text displayed below the “Welcome to” message on the Hospital Portal login page. By default, this is set to “ProgoCIS Hospital Portal.” The field has a maximum character limit of 21 characters.
- **Login Page Message Line 3:** Displays a line of text below the second message on the Hospital Portal login page. This field can be used to add a single-line message about the clinic or practice. The field has a maximum character limit of 31 characters and is blank by default.
- **Login Page Message Line 4:** Displays text below the third line of the message on the Hospital Portal login page. This field is intended to provide a brief introduction to the portal. Users can use HTML <br> tags to format the displayed content. The field has a maximum character limit of 196 characters and is blank by default. Clicking the *Zoom*  icon invokes the *Notes* popup displaying the notes added to the field.
- **Login Details Menu Options:** Determines the login detail options available on the Hospital Portal based on the selected property value. Selecting “P (Password)” enables the Change Password option, while selecting “N (None)” disables all password modification options. The default value is “P (Password)”.

**General Settings:**

	<p>This section defines basic operational behavior of the portal.</p> <ul style="list-style-type: none"> <li>• <b>Patient Search:</b> Specifies the format used for Patient Search in the Hospital Portal. The format should be defined using a combination of “F” (First Name) and “L” (Last Name), along with appropriate separators. Clicking the <b>Zoom</b>  icon invokes the <b>Notes</b> popup displaying the notes added to the field.</li> </ul>
<p><b>Enhancement III: Login Details for Hospital and Hospital User</b></p>	
<p><b>Affected Screen(s):</b></p>	<p><b>Login Details</b>  <span style="background-color: #00a651; color: white; padding: 2px;">Navigation</span> EMR → Settings → Configuration → Admin column → <b>Login Details</b></p>
<p><b>Description:</b></p>	<ul style="list-style-type: none"> <li>• Automated workflows have been implemented for generating and sending login credentials for via email upon record creation.</li> <li>• Email validation is enforced to ensure successful credential delivery.</li> <li>• System-generated confirmation messages provide feedback to users upon successful credential sharing.</li> <li>• Credential reset functionality has been integrated into the <b>Login Details</b> screen, enabling administrative control.</li> </ul>



**Figure:** User Login Details popup with User Types Hospital and Hospital User

<b>Enhancement IV: Hospital Portal has been introduced</b>	
<b>Affected Screen(s):</b>	<ul style="list-style-type: none"> <li>• <b>Login page</b> <b>Navigation</b> Hospital Portal → <i>Login</i></li> <li>• <b>Clinic Shared Documents</b> <b>Navigation</b> Hospital Portal → Login → <i>Clinic Shared Documents</i></li> </ul>
<b>Description:</b>	<p><b>Accessing Hospital Portal</b></p> <ul style="list-style-type: none"> <li>• The Hospital Portal URL is automatically shared via email during credential generation.</li> <li>• Additionally, clinic users can retrieve the portal link from the Info section within Prognosis EMR.</li> </ul>



**Figure: Hospital Portal link on the Info popup**

- A streamlined workflow allows easy copying and sharing of the portal URL.



**Figure: Popup with Hospital Portal URL that can be copied**

### Hospital Portal Login Page Design

**Figure: Hospital Portal Login page**

#### UI and Responsiveness

- A modern and responsive UI has been implemented, aligned with TPA Portal design standards.
- Support for multiple screen resolutions ensures optimal display across devices.

#### Security and Validation

- CAPTCHA validation has been implemented to prevent unauthorized access.

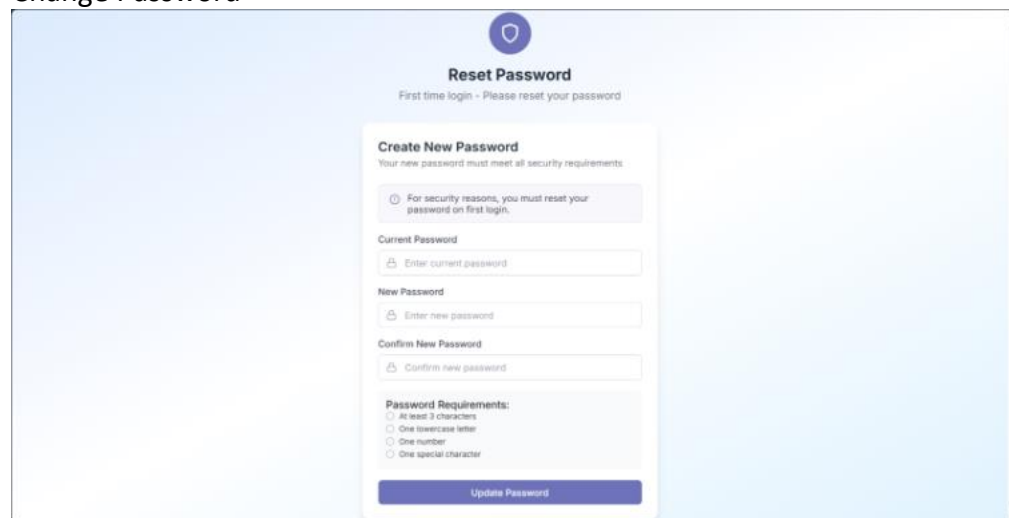
- Comprehensive error handling ensures clear user feedback for:
  - Missing credentials
  - Invalid login attempts
  - Incorrect CAPTCHA entries
  - Inactive user access

### Password Management Workflows

#### Forgot Password

- Secure password reset functionality has been implemented using email verification and CAPTCHA.
- System-generated emails provide temporary credentials with clear instructions.

#### Change Password



**Figure:** *Reset Password page on the Hospital Portal*

- Mandatory password change is enforced on first login and after password reset.
- Password validation rules ensure compliance with security standards, including minimum length and alphanumeric requirements.
- Email notifications confirm successful password updates.

#### Disclaimer Handling

- Disclaimer acceptance is enforced based on configuration.
- Users must explicitly accept terms before accessing the portal.



**Figure: Disclaimer popup on the Hospital Portal**

## Hospital Portal Landing Page Design

### Patient Search and Data Filtering

- The landing page provides a focused search interface for retrieving patients by first and last name.
- The system filters results to include only:
  - Patients with active pregnancy cycles
  - Patients with ACOG forms from closed encounters

### Search Results Display

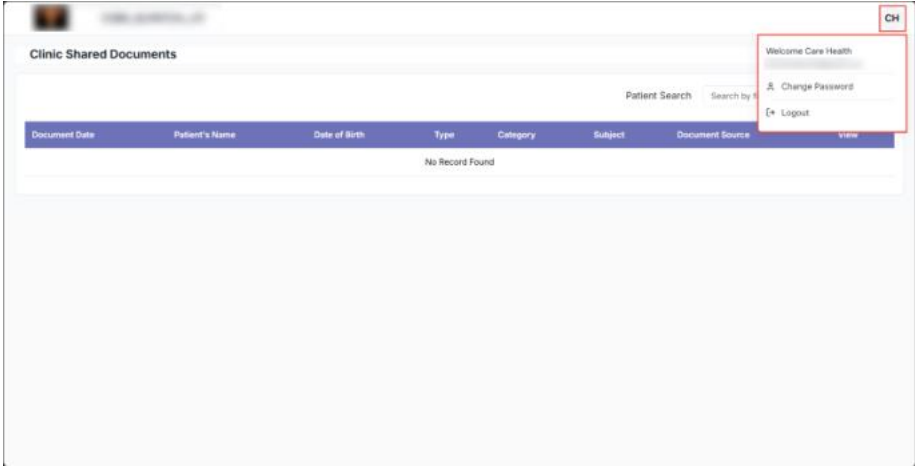
- Results are displayed in a structured grid with detailed columns including:
  - Document Date
  - Patient Name
  - Date of Birth
  - Type
  - Category
  - Subject
  - Document Source
  - View

### Document Access

- Inline document viewing has been implemented, allowing users to view ACOG forms directly on the page.
- Print functionality is integrated for seamless document handling.
- Close functionality ensures efficient navigation.

### User Interface Enhancements

- Header includes clinic branding and user profile details.





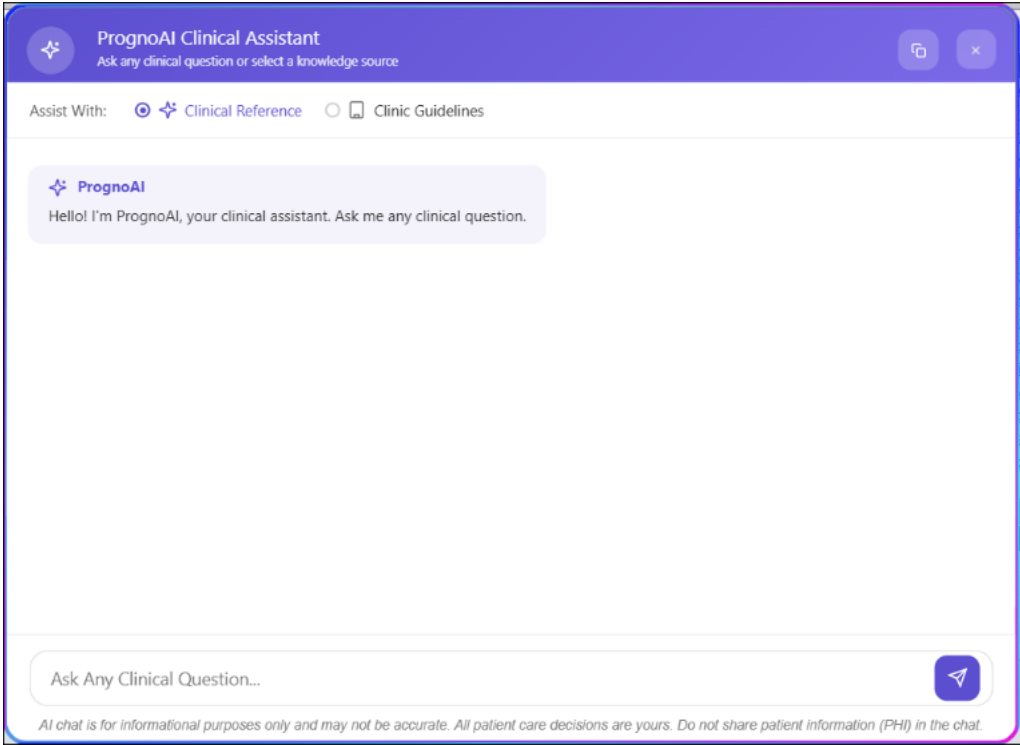
	<ul style="list-style-type: none"> <li>Profile dropdown provides options for password management and logout.</li> </ul>  <p><b>Figure:</b> Header and Profile dropdown on the Hospital Portal Landing page</p>
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**Enhancement V: Standardized email templates have been implemented**

<b>Affected Screen(s):</b>	<p><b>E-Mail Master</b>  <b>Navigation</b> EMR → Settings → Configuration → Output Templates → <i>E-Mail</i></p>
<b>Description:</b>	<ul style="list-style-type: none"> <li>Standardized email templates have been implemented for:             <ul style="list-style-type: none"> <li>Credential creation - <i>Login Email For Hospital / Hospital User</i></li> <li>Password reset - <i>Forgot Password Email from Hospital Portal</i></li> <li>Password change notifications - <i>Change Password Email For Hospital</i></li> </ul> </li> <li>Templates are fully customizable and accessible through the Output Templates module.</li> <li>Consistent formatting ensures professional communication and improved user experience.</li> </ul>

**Enhancement 5: Prognosis Clinical Assistant popup has been enhanced to support context-aware query handling through clearly defined interaction modes**

<b>Module:</b>	<b>EMR+PM</b>
<b>Type:</b>	<b>GENERIC</b>
<b>Case ID:</b>	<b>533298</b>

<p><b>Affected Screen(s):</b></p>	<p><b>PrognoAI Clinical Assistant</b></p> <p><b>Navigation</b> PrognoAI Notch  → <b>PrognoAI Clinical Assistant</b>  icon</p> <p><b>Navigation</b> Patient → Encounter → Third Pane  icon → <b>PrognoAI</b>  icon</p>
<p><b>Description:</b></p>	<p>The <b>PrognoAI Chat</b> 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> <div data-bbox="402 772 1416 1512" data-label="Image">  </div> <p><b>Figure: PrognoAI Clinical Assistant popup</b></p> <p>These enhancements improve response accuracy, usability, and overall trust in AI-assisted workflows by aligning responses with user intent and context.</p> <p>The following enhancements have been implemented:</p> <ul style="list-style-type: none"> <li>• UI updates within the existing PrognoAI Chat Popup</li> <li>• Introduction of three radio-button-based query modes</li> <li>• Context-driven AI response handling</li> </ul>

- Integration with internal documentation systems
- Integration with clinic-uploaded documents
- Enablement of patient-context-aware responses
- Document upload and management capability via configuration settings

The enhancements support the following user roles:

- Providers
- Nurses
- Clinical Staff
- Billing Staff
- Administrative Users
- Care Staff

#### UI Enhancements – Prognosis 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

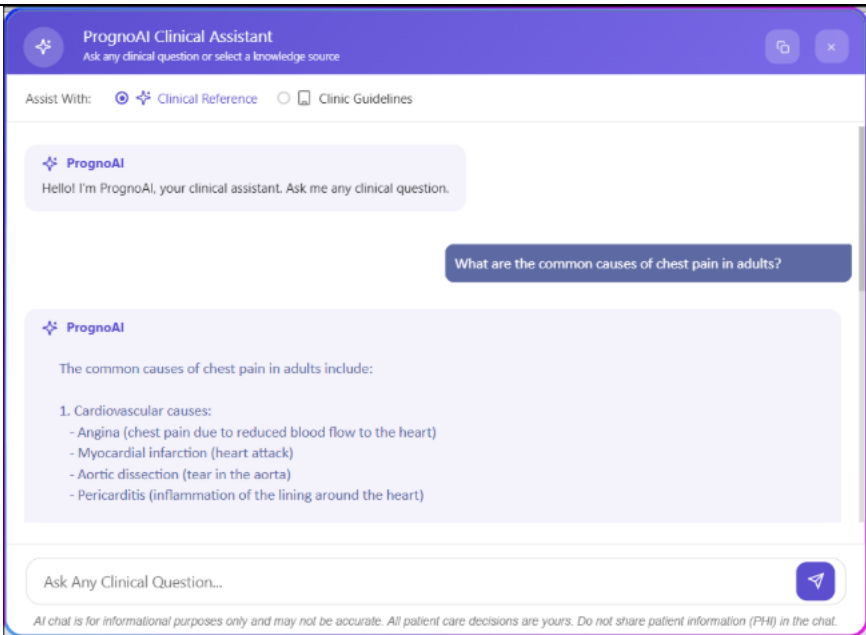
Only one mode is selectable at a time, ensuring clear contextual intent.

Additional enhancements include:

- Tooltips for each mode to guide user selection
- Tooltip for the chat icon indicating its purpose as *Prognosis 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

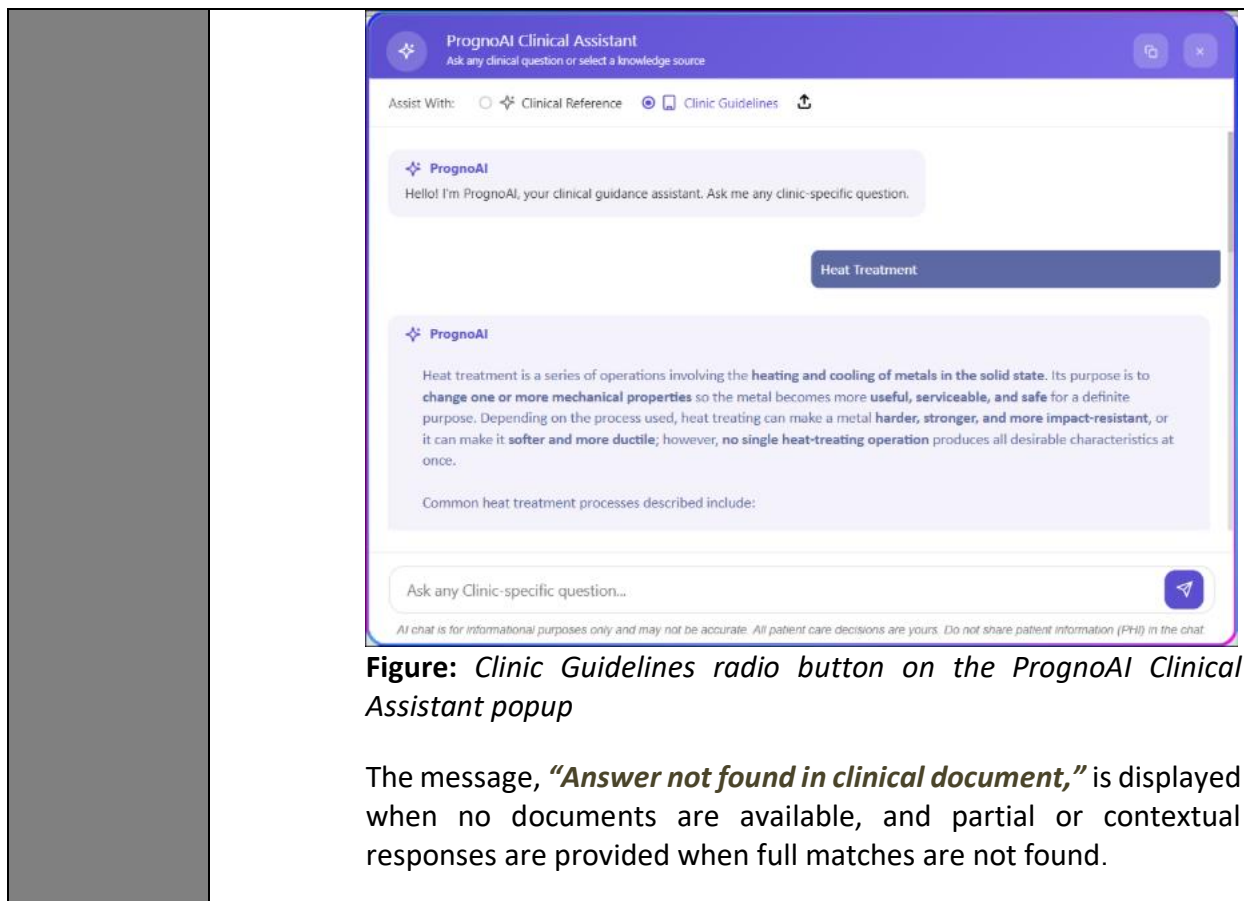
##### 2. Functional Requirements by Mode

- **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.



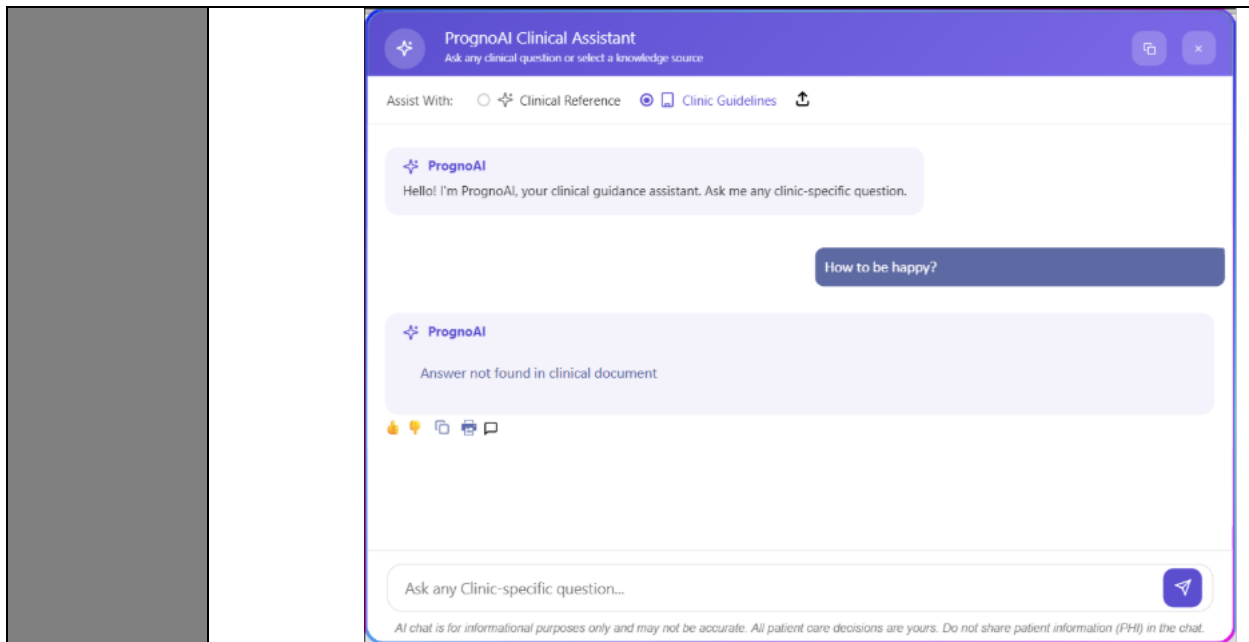
**Figure:** *Clinical Reference radio button on the Prognosis AI Clinical Assistant popup*

- **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.

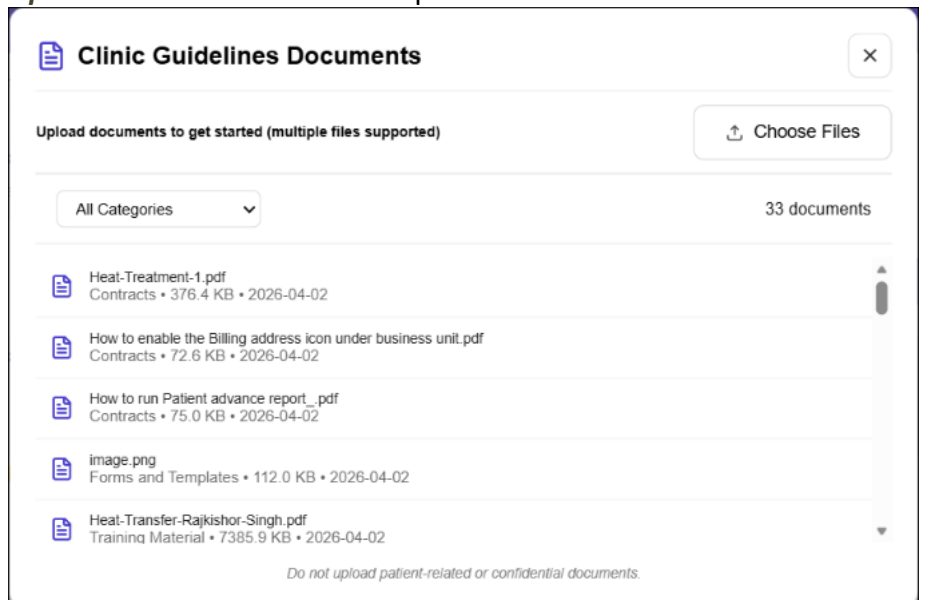


**Figure:** Message shown when answer is not available in the clinical document

### 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 AI 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.

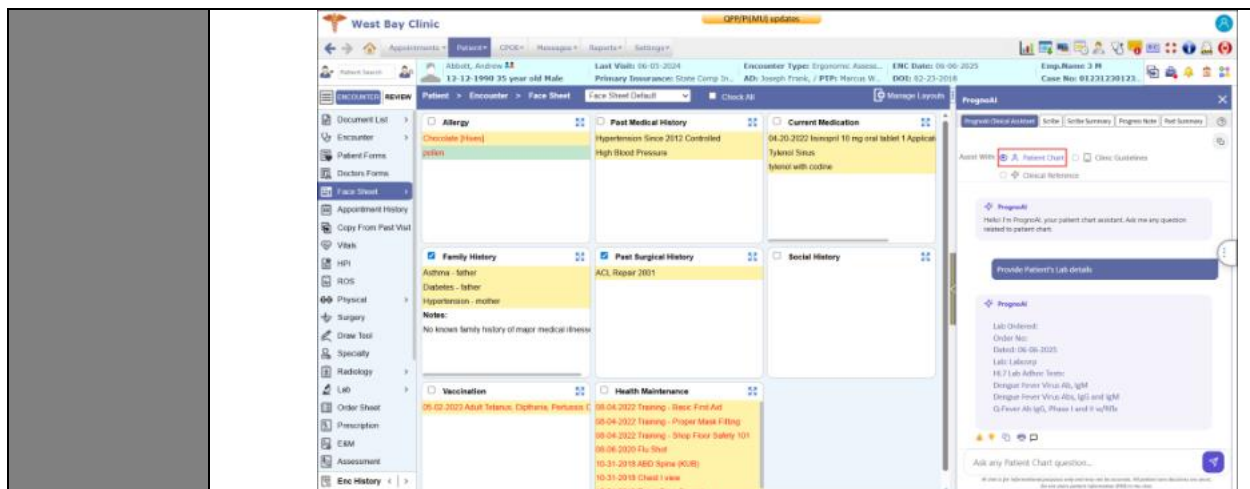
Post-upload, documents are searchable and filterable by category, with options available to download or delete each document.

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 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.