



Patch Release

Version: 4.0 Build: 1

Patch No.: 35

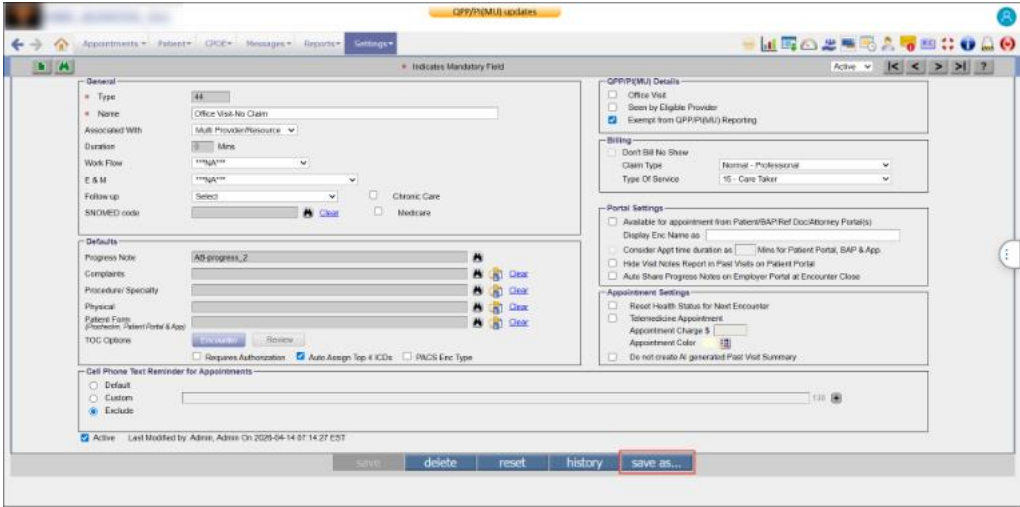
Released: April 23, 2026

Total Points: 5

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

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Enhancement 1: New Encounter Types can now be created from existing ones using the Save As (Copy) functionality

Module:	EMR
Type:	GENERIC
Case ID:	535982
Affected Screen(s):	Enc Types Master Navigation Settings → Configuration → Clinic column → <i>Enc Types</i>
Description:	<p>The <i>Encounter Type</i> Master screen in Prognosis has been enhanced with a Save As functionality that allows users to create a new encounter type by cloning an existing one. A new <i>save as...</i> button has been added alongside the existing action buttons (save, delete, reset, and history), positioned after the <i>history</i> button. This button is enabled when an existing encounter type record is in view.</p>  <p>Figure: save as... button on Encounter Types Master screen</p> <p>On clicking the <i>save as...</i> button, a modal popup titled <i>Create New Encounter Type</i> is displayed. This popup captures three mandatory inputs: <i>New Type</i> (text, maximum 2 characters), <i>New Name</i> (text, maximum 50 characters), and <i>Duration</i> (numeric, maximum 3 characters). The popup provides <i>OK</i> and <i>CANCEL</i> actions, where <i>OK</i> initiates the copy process and <i>CANCEL</i> dismisses the</p>

popup without changes. The **OK** action remains restricted until all required fields are populated as per validation rules.

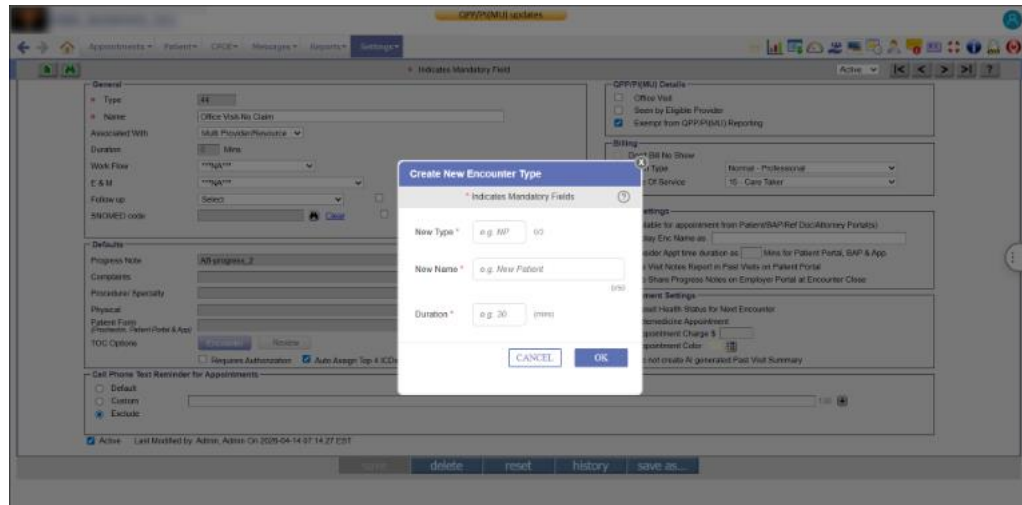


Figure: *Create New Encounter Type popup*

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

- 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 Enc 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), and
- Cell Phone Text Reminder preferences (Default, Custom, Exclude).

Template sequences and selected options are preserved exactly as configured in the source encounter type.

Only specific fields are excluded from being copied and are instead derived from user input or system defaults. The **Type**, **Name**, and **Duration** fields are

replaced with values entered in the popup, while the **Display Enc Name as** field is set to blank. The newly created encounter type is marked as Active by default and captures the **Last Modified by** value as the user performing the copy action. The functionality is available for all encounter types irrespective of their Active or Inactive status. Additionally, the newly created encounter type is not automatically associated with any provider or employer as a supported encounter type, requiring manual association by the clinic user.

Validation rules are enforced before record creation to ensure data integrity. The system checks for duplicate Type values in the **Encounter Type** Master and prevents duplication with an appropriate error message displayed on the **Create New Encounter Type** popup in red and bold. The message reads: **This Type already exists.**

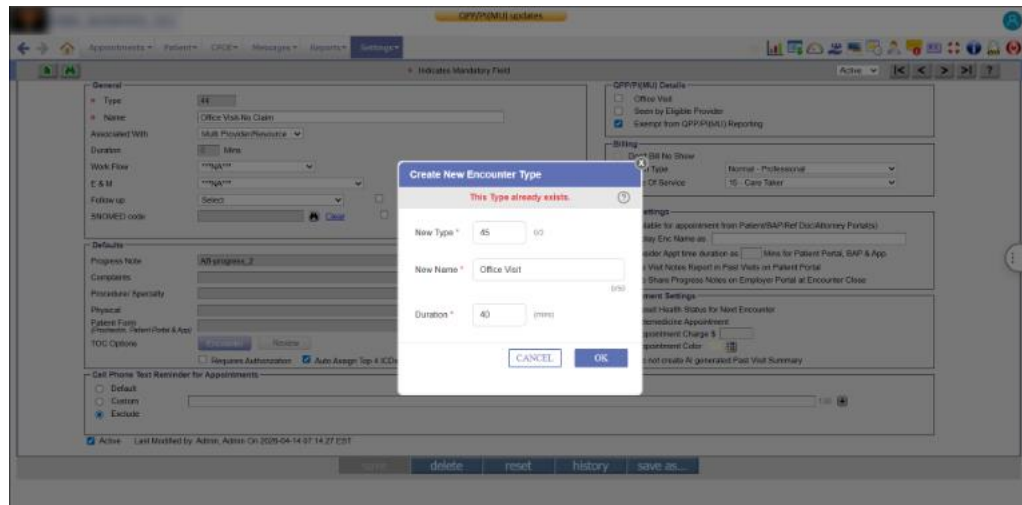


Figure: Validation message for duplicate Type

Field length validations are enforced for New Type (2 characters), New Name (50 characters), and Duration (3 characters), and all three fields are mandatory for successful submission.

Audit and history tracking have been implemented to ensure traceability. The system records audit details including source and new encounter type information, action type as COPY, user details, and timestamp. The **Enc. Type History** popup captures the creation event with a standardized message indicating the source encounter type, formatted as: **“Encounter Type copied from Old: Type-44 Name-Office Visit-No Claim to New: Type-48 Name-Office Visit.”**

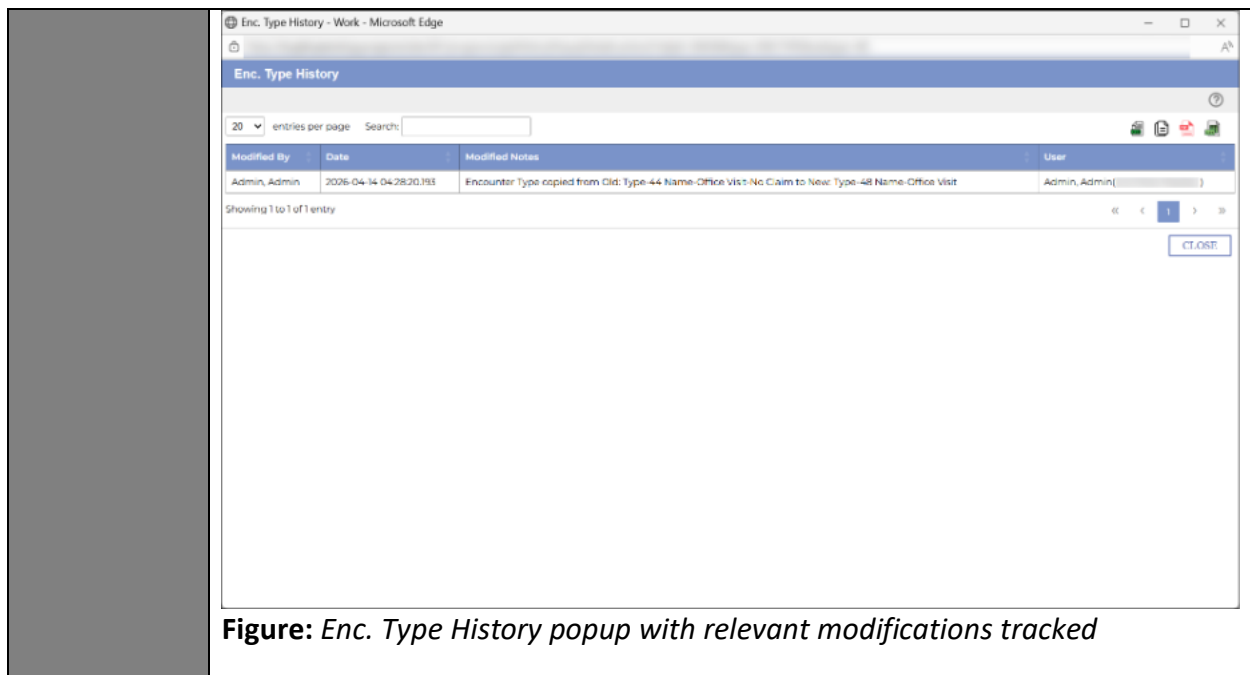



Figure: Enc. Type History popup with relevant modifications tracked

Enhancement 2: Prognosis AI Smart Coding has been introduced which enhances ICD and CPT capture through intelligent scribe review

Module:	EMR
Type:	GENERIC
Case ID:	531809
Affected Screen(s):	Scribe Summary Navigation Patient → Encounter → Third Pane  button → Prognosis AI → Scribe Summary tab
Description:	<p>The Scribe Review experience has been enhanced to intelligently identify, present, and manage ICD and CPT codes derived from clinical conversations, enabling providers to review and finalize coding with greater accuracy and reduced manual effort.</p> <p>The AI Scribe Summary Review section now features a refined structure where Assessment is presented as Assessment Notes and Plan as Plan Notes, with two newly introduced, dedicated sections for Diagnosis / ICD Codes and</p>

Procedure / CPT / HCPCS Codes. These sections are designed to centralize all coding-related actions within the review workflow.

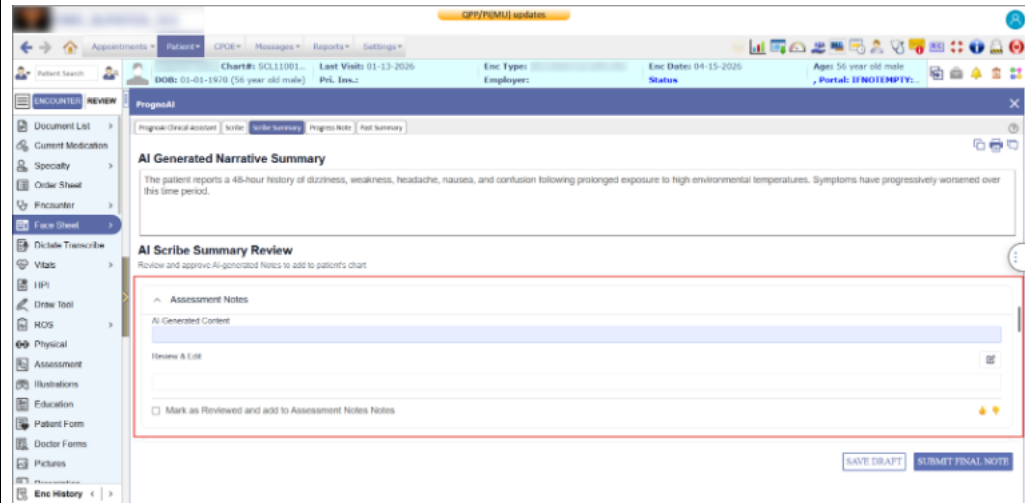


Figure: Assessment Notes section under AI Scribe Summary Review

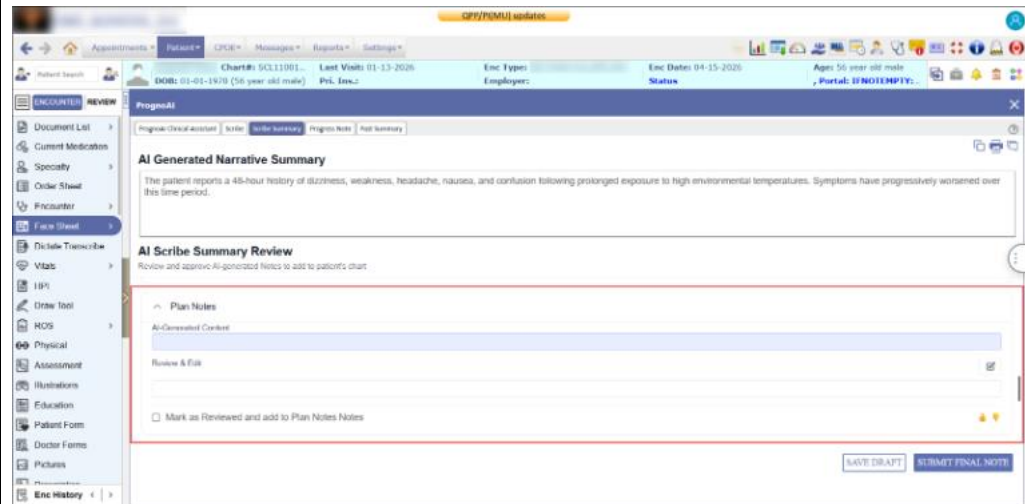


Figure: Plan Notes section under AI Scribe Summary Review

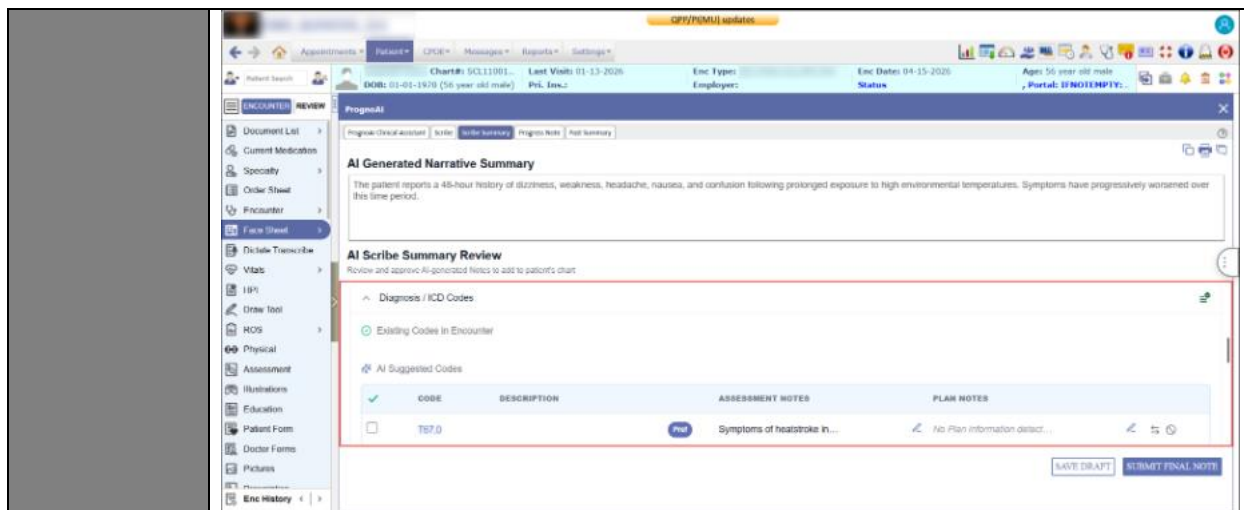


Figure: *Diagnosis / ICD Codes section under AI Scribe Summary Review*

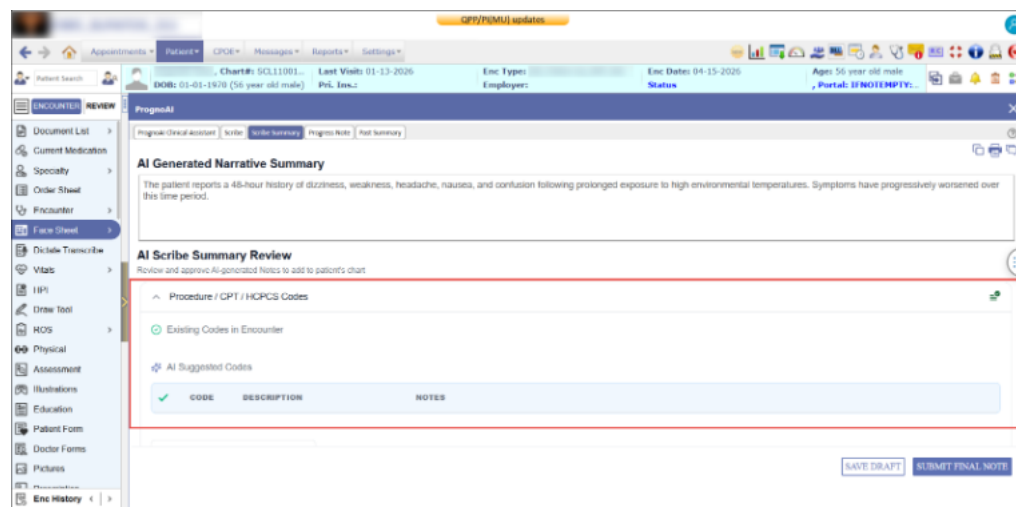


Figure: *Procedure / CPT / HCPCS Codes section under AI Scribe Summary Review*

Within the ICD and CPT sections, the system dynamically organizes codes into clearly defined categories based on their origin and status. Existing codes already associated with the encounter are displayed in a read-only format under **Existing Codes in Encounter**, ensuring visibility while preventing duplication or unintended modification.

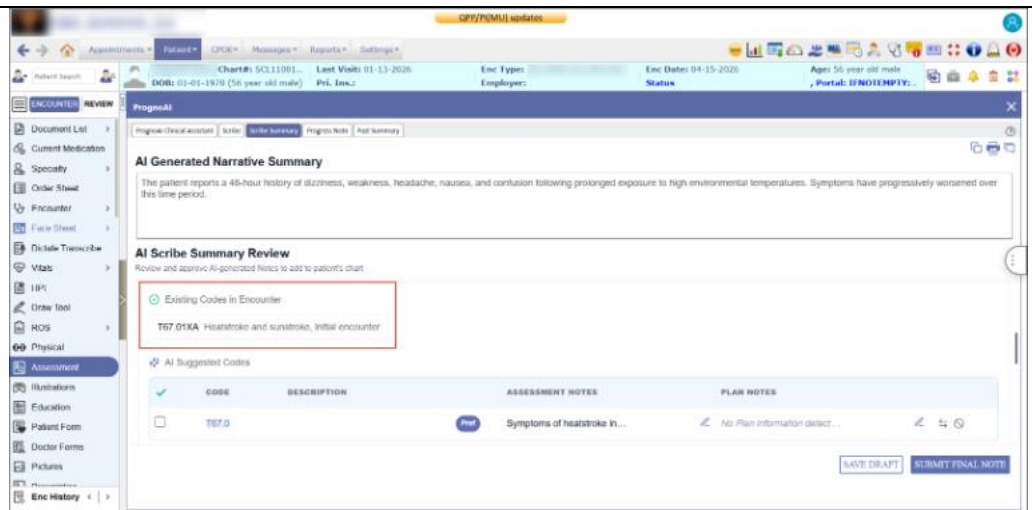


Figure: Existing Codes in Encounter section

AI-driven analysis of the scribe conversation identifies relevant ICD and CPT codes, which are presented under **AI Suggested Codes**. Each suggested code includes its code value, description, source indicator (Preferred List or IMO), and contextual notes explaining the rationale behind the suggestion. To maintain usability, the interface displays an initial set of suggestions with a scroll-enabled view for additional results.

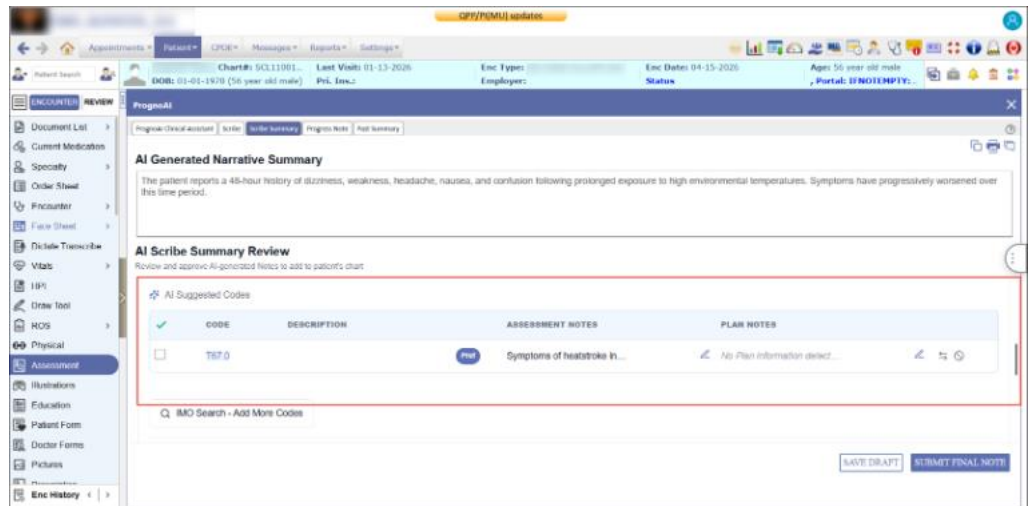





Figure: AI Suggested Codes section

Providers are given full control over these AI suggestions. Each code includes an option to **Edit** , **Replace** , or **Dismiss** , with the ability to optionally specify the reason for the dismissed code to be marked as not applicable. All

such actions are retained for audit and historical tracking, ensuring transparency in decision-making.

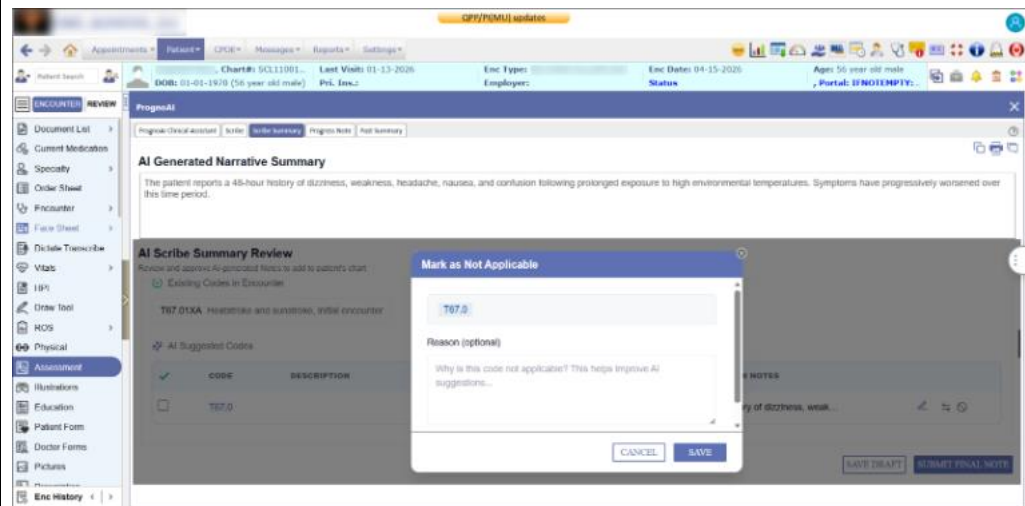


Figure: *Mark as Not Applicable popup*

To further enhance flexibility, providers can replace any AI-suggested code using the integrated **IMO Search - Add More Codes** functionality. This allows selection of a more appropriate alternative without losing the associated clinical context.

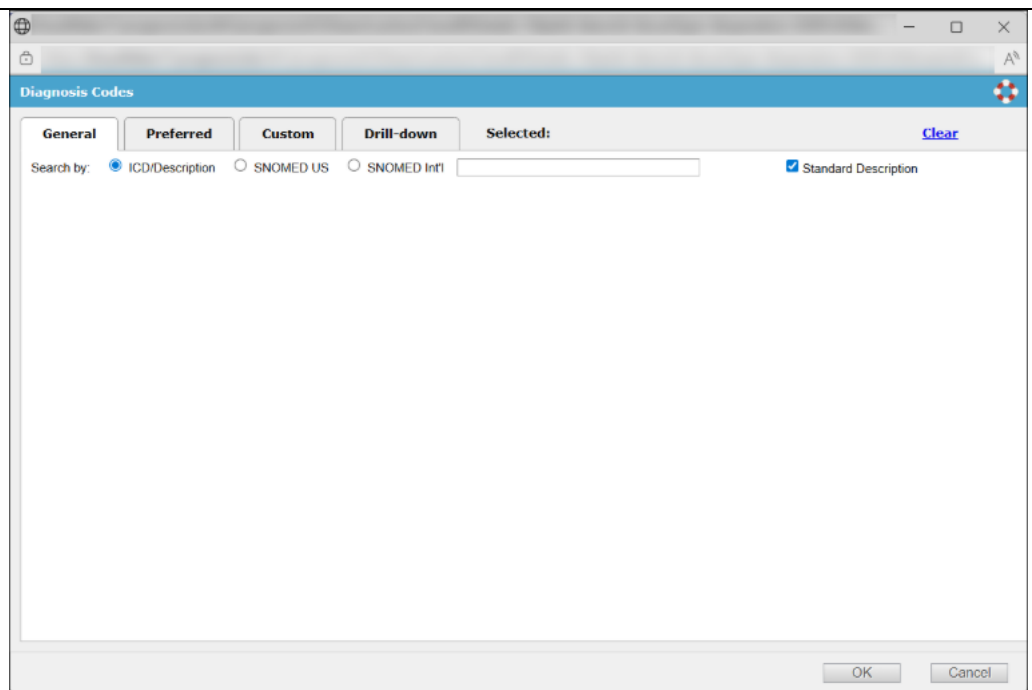


Figure: *Diagnosis Codes popup*

When a replacement is made, the original AI-suggested code is internally marked as Not Applicable with a system-generated reason, while the newly selected code is added under an **Edited Codes** section with its selection automatically enabled. The Edited Codes section is conditionally displayed only when such modifications exist.

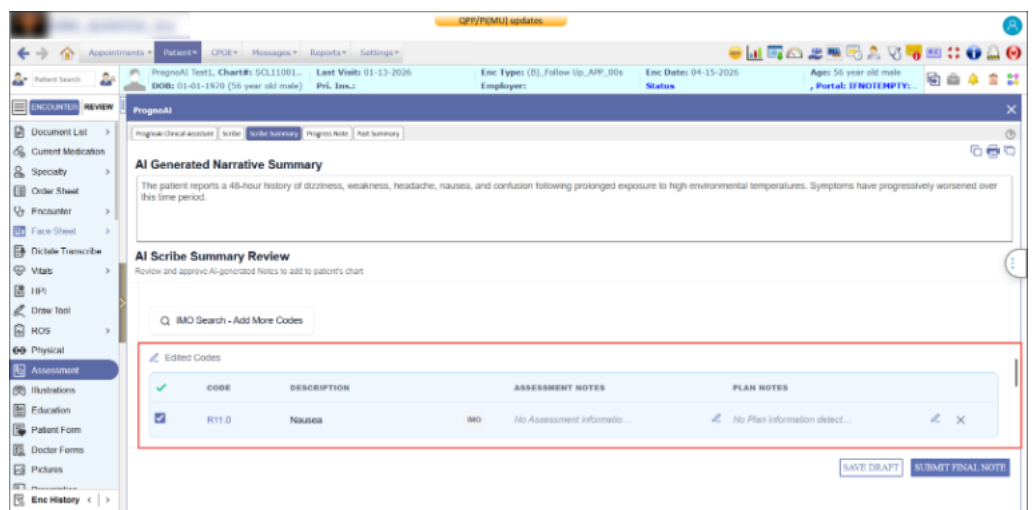



Figure: *Edited Codes section*

	<p>In addition to replacements, providers can independently search and add new ICD or CPT codes through IMO if the AI suggestions are insufficient. These manually added codes are also grouped under Edited Codes, ensuring a clear distinction between AI-driven and user-driven inputs.</p> <p>The system supports iterative review, allowing providers to adjust selections, mark codes, or introduce changes multiple times prior to final submission. No locking mechanism is enforced during this stage, ensuring flexibility in documentation.</p> <p>Upon clicking the SUBMIT FINAL NOTE  button, only the codes explicitly selected by the provider are committed to the patient’s Assessment. Unselected codes are disregarded, and existing codes remain unchanged. Once submitted, the coding selections are finalized and no further edits are permitted within the encounter.</p> <p>Behind the scenes, the system enhances accuracy by cross-referencing AI-identified codes with Clinic and Provider Preferred Code Lists. If a match is found, the preferred description is applied and clearly flagged. In cases where multiple descriptions exist, the most recently used description is prioritized. If no preferred match is available, the system retrieves standardized descriptions from the IMO database and flags them accordingly.</p> <p>All suggested, selected, modified, or rejected codes—including those marked as Not Applicable—are persistently stored along with their associated actions and reasons. This ensures a complete audit trail and supports compliance, reporting, and future analysis.</p> <p>Overall, this enhancement introduces a structured, intelligent, and provider-controlled coding workflow that seamlessly integrates AI recommendations with clinical judgment, improving both efficiency and documentation quality.</p>
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Enhancement 3: Hospital Portal and Patient Search Enhancements Introducing Mandatory Email Asterisk, Exact-Match Patient Search, and ACOG Clinical Eligibility Enforcement

Module:	EMR+HOSPITAL PORTAL
Type:	GENERIC

Case ID:	529631
Enhancement I: Email ID Field — Mandatory Asterisk for Hospital and Hospital User	
Affected Screen(s):	Hospital Master Navigation Settings → Configuration → Vendors column → <i>Hospital</i>
Description:	<p>Enhancements have been implemented within the Hospital Portal module. The <i>Email ID</i> field has been provided with an asterisk for Hospital and Hospital Users, and the Patient Search has been redesigned to require an exact match on First Name, Last Name, and Date of Birth — replacing the previous autocomplete approach. These changes improve data integrity, tighten security, and ensure search results are returned only for clinically eligible patients.</p> <p>1. Email ID Field — Mandatory Asterisk for Hospital and Hospital User</p> <p>The <i>Email ID</i> field was already mandatory for both Hospital and Hospital Users, governed by the property <i>hospital.login.email.mandatory</i>. As part of this update, an asterisk * is now displayed next to the email address fields for both Hospital and Hospital User records, clearly indicating that the field is mandatory for both. This ensures that all Hospital and Hospital User records are required to contain a valid email address at the point of entry.</p>
Enhancement II: Patient Search — Autocomplete Removed and Functionality Enhanced	
Affected Screen(s):	<ul style="list-style-type: none"> ● Portal Settings Master Navigation Settings → Configuration → Workflow column → Portal Settings → <i>Hospital Portal</i> ● Clinic Shared Documents Navigation Hospital Portal → Login → <i>Clinic Shared Documents</i>
Description:	The previous patient search mechanism — which relied on autocomplete based on the patient's first name and last name — has been replaced. The updated search requires an exact match across three fields: <i>First Name</i> , <i>Last Name</i> , and <i>Date of Birth (DOB)</i> .

As a result, the autocomplete configuration property is no longer applicable and has been removed. The corresponding section has also been removed from Portal Settings → *Hospital Portal*.

Search Interface

The Patient Search interface presents the following label and fields:

- **Label:** Patient Search
- **Fields:** First Name | Last Name | DOB | Search (*button*)

Match Criteria

A search result is returned only when all of the following conditions are satisfied simultaneously:

Exact field match:

- First Name matches a registered patient record in the Clinic's EMR
- Last Name matches a registered patient record in the Clinic's EMR
- Date of Birth (DOB) matches a registered patient record in the Clinic's EMR

Additional patient eligibility criteria:

- Patient gender is Female
- Patient has an open pregnancy cycle
- The patient's latest closed encounter contains an ACOG form







Validation Messages

The following validation messages are displayed based on the outcome of a patient search:

1. **Scenario:** Patient details entered do not match any record in the EMR (e.g., incorrect name or DOB)
Validation: "*Patient not found with given search details.*"
2. **Scenario:** Patient record does not exist in the EMR
Validation: "*Patient not found with given search details.*"
3. **Scenario:** Patient details match, but the patient does not have an ACOG form (e.g., pregnancy is closed, or pregnancy is open but the encounter is not yet closed)

	Validation: "No document record found for this patient."						
Enhancement III: MM-DD-YYYY format introduced for Date displayed in the Document Date column of the Hospital Portal							
Affected Screen(s):	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Clinic</td> <td style="width: 33%;">Shared</td> <td style="width: 33%;">Documents</td> </tr> <tr> <td>Navigation Hospital Portal → Login → <i>Clinic Shared Documents</i></td> <td></td> <td></td> </tr> </table>	Clinic	Shared	Documents	Navigation Hospital Portal → Login → <i>Clinic Shared Documents</i>		
Clinic	Shared	Documents					
Navigation Hospital Portal → Login → <i>Clinic Shared Documents</i>							
Description:	The Document Date column in the search results displays the encounter date from which the patient's latest ACOG form was retrieved. MM-DD-YYYY format has been introduced for this Date.						


Enhancement 4: Secure Two-Way Messaging Between Patients and Your Clinic has been introduced through PrognosChat for Single Location

Module:	EMR+PM+PATIENT PORTAL+MY HEALTH RECORDS APP						
Type:	GENERIC						
Case ID:	499652						
Enhancement I: Chat Center for Clinic Staff (Prognosis EHR & Billing)							
Affected Screen(s):	<ul style="list-style-type: none"> ● Chat Center <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Navigation</td> <td>Prognosis → EMR → <i>Chat Center</i>  icon</td> </tr> <tr> <td>Navigation</td> <td>Prognosis → Billing → <i>Chat Center</i>  icon</td> </tr> </table> ● User Role Master <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Navigation</td> <td>Settings → Configuration → Admin column → <i>User Role</i></td> </tr> </table> 	Navigation	Prognosis → EMR → <i>Chat Center</i>  icon	Navigation	Prognosis → Billing → <i>Chat Center</i>  icon	Navigation	Settings → Configuration → Admin column → <i>User Role</i>
Navigation	Prognosis → EMR → <i>Chat Center</i>  icon						
Navigation	Prognosis → Billing → <i>Chat Center</i>  icon						
Navigation	Settings → Configuration → Admin column → <i>User Role</i>						
Description:	Prognosis now includes PrognosChat , a fully integrated, real-time two-way messaging platform that connects your clinic staff and patients in a secure, HIPAA-compliant environment. This enhancement replaces the limitations of one-way notifications and manual phone outreach with a live, structured communication channel embedded directly into the tools your team and patients use every day. PrognosChat is available across three environments — the Prognosis clinical and billing interface for clinic staff, the Patient Portal for						

web-based patient access, and the Prognosis Patient Portal mobile app for patients on the go.

1. Chat Center for Clinic Staff (Prognosis EHR & Billing)

Feature Availability and Access

PrognosisChat is a subscription-based feature. It is disabled by default for all clinics and becomes available only after activation. Once enabled for your clinic, the **Chat Center**  icon becomes visible in the Prognosis navigation bar.

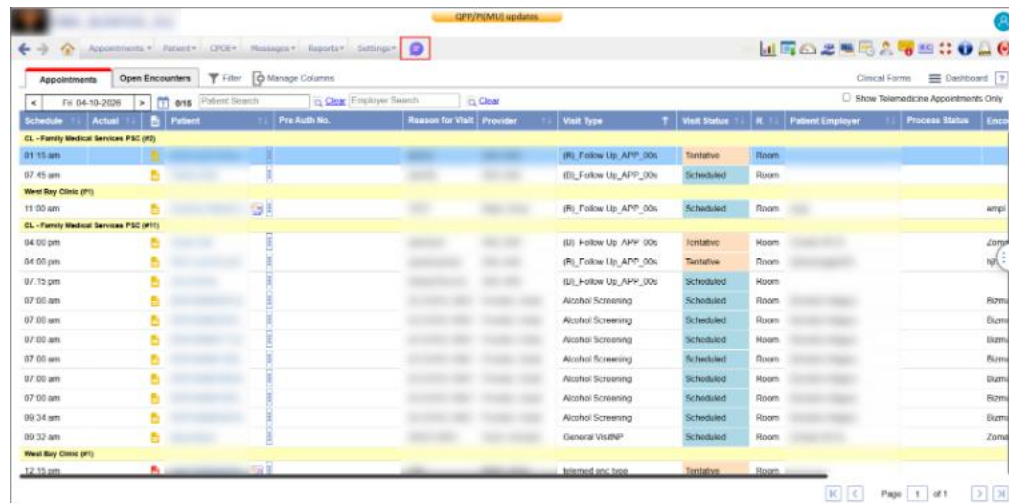





Figure: Chat Center icon in Prognosis

Clinics that have not yet subscribed still see the **Chat Center**  icon in a disabled state, with a tooltip reading: **"Chat Center is now available! Contact Support or Sales representative for more information."** This ensures that all staff are aware the feature exists and can request access when the clinic is ready.

Similarly, if the feature is enabled at the clinic level but a particular user has not yet been assigned the appropriate access role, clicking the **Chat Center**  icon presents a clear message guiding administrator to assign the required role. Once a subscription lapses or is deactivated, the feature is promptly disabled by the support team.

This feature is available exclusively to clinics that are using the Patient Portal.

The icon uses a clean message bubble design consistent with the styling of other navigation elements, displayed in the same blue color scheme. It is labeled "Chat Center" and remains visible and accessible from every screen in both modules regardless of what the user is doing.

- a. **Unread message badge:** When there are unread patient messages, a red circular badge appears next to the "Chat Center"  label displaying the exact count of unread conversations — for example, "3," "12," or "99+" for high volumes. The badge updates in real time as new messages arrive without requiring a page refresh.
- b. **Hover state:** When a user hovers over the icon, a tooltip displaying "Chat Center" appears for quick identification.
- c. **Toast notifications:** When a new patient message arrives while a staff member is actively working in Prognosis and the Chat Center window is not open, a toast notification appears just below the Chat Center icon with the message: "Hello! There are new messages for you." This notification remains on screen for 30 seconds before automatically dismissing, and clicking it opens the Chat Center directly. Only one toast notification is shown per session to avoid repeated interruptions, even if multiple new messages arrive in quick succession.
- d. **Opening the Chat Center:** Clicking the *Chat Center* icon opens the *Chat Center* as a popup window, similar to the *Help* icon behavior in Prognosis. The window can be minimized, maximized, or closed using the controls at the top right corner, allowing staff to multitask freely between patient conversations and their regular clinical workflows without losing their place in either.

The Chat Center Interface — Left Panel

The left panel is the navigation and management hub of the Chat Center. It organizes all patient conversations and provides the tools staff need to find, filter, and manage their communication queue.

Header and user identity: At the top left of the panel, the feature name "PrognosisChat" is displayed. Directly below it, the logged-in user's name appears alongside their profile avatar — either their uploaded photo from their Prognosis profile, or their initials in a circular icon if no photo is on file (for example, "AA" for System Admin).

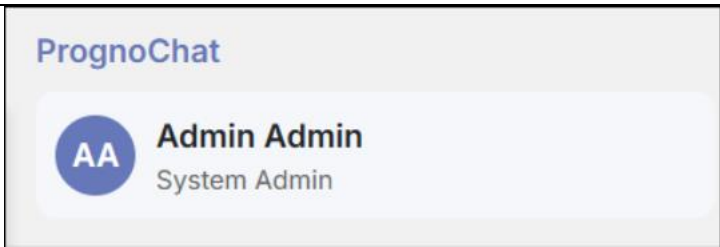
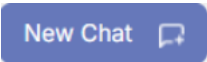


Figure: Feature Name and User Profile on the Chat Center popup

New Chat Button

A prominent **New Chat**  button at the top of the left panel allows staff to initiate a conversation with any patient. Clicking it opens a **Patients** search interface that searches across all active patients who have Patient Portal login credentials set up in Prognosis.

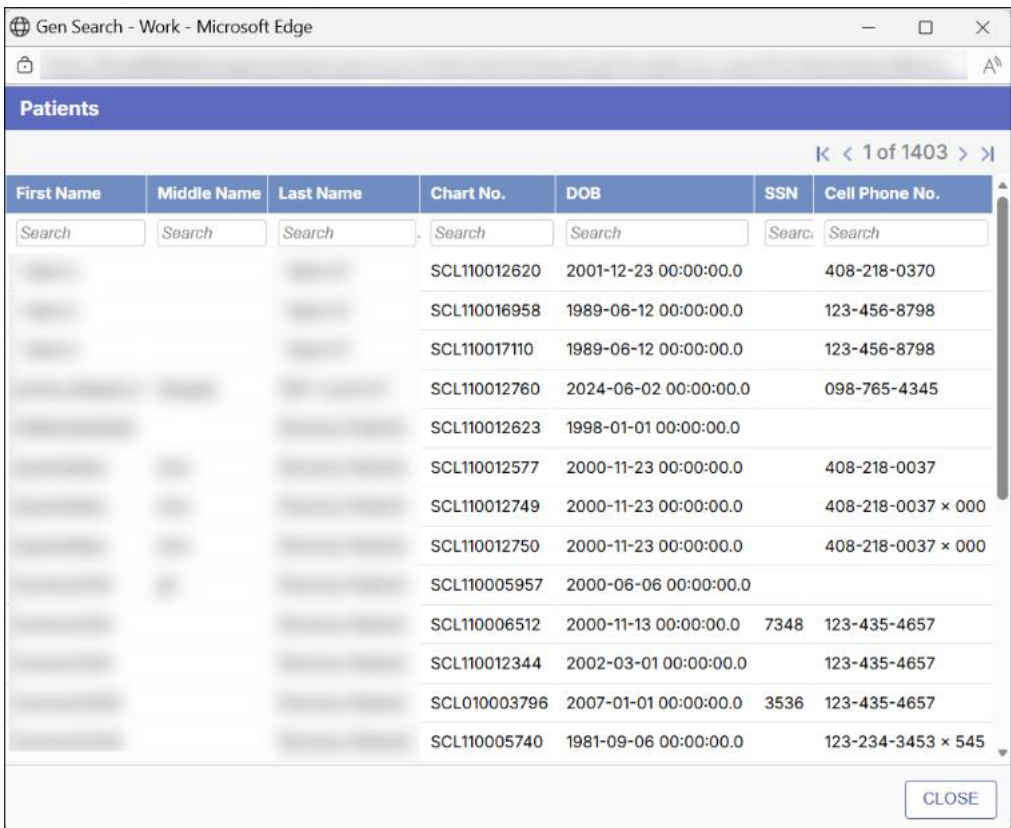


Figure: Patients Search popup

The search is real-time and supports multiple fields simultaneously: **First Name, Middle Name, Last Name, Chart No., DOB, SSN, and Cell Phone No.** Searches work with partial entries — a minimum of three characters is

required to activate results — and are not case-sensitive. Exact matches appear first, followed by partial matches. The system also prevents duplicate active chats: if a patient already has an open conversation, a second one cannot be initiated.

Once a patient is selected, a **Category** popup appears asking the staff member to choose the appropriate topic for the conversation (such as General Inquiry, Appointment Request, Medical Question, Billing Question, Prescription Refill, or Test Results).

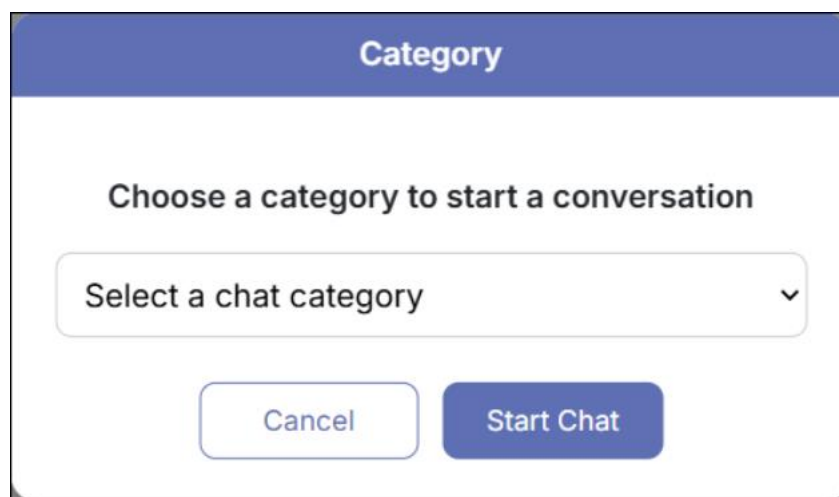
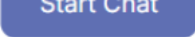


Figure: *Category popup*

Clicking **Start Chat**  button initiates the conversation from the clinic side. The search fields available in the New Chat interface are configurable by support administrators, who can enable or disable specific fields and define the order in which they appear.

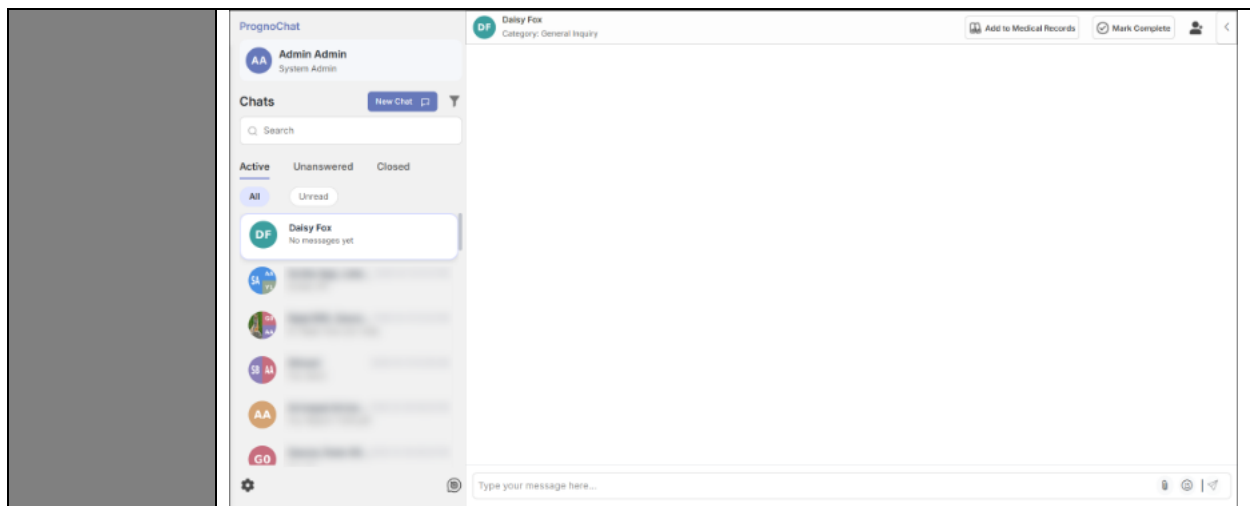


Figure: *New Chat Interface with no messages*

Search Bar

A search bar sits below the **New Chat** button and allows staff to quickly locate any specific patient conversation within the active, unanswered and closed chat queues. It searches by patient name (including partial name matches) and by chat category. The search activates after two or three characters are entered, is case-insensitive, and returns exact matches first. An "X" icon on the right side of the search field or pressing the Escape key clears the search and returns the full list. A message reading "No matching patient found" appears if a search returns no results.

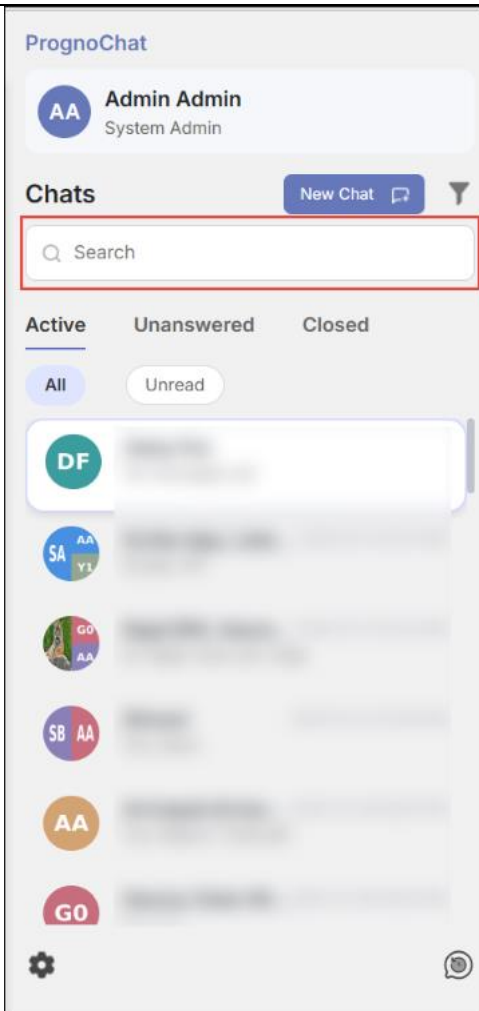



Figure: Search bar on the left panel of the Chat Center popup

The search bar operates across active, unread, and unassigned chat queues. It also searches through archived or closed conversations.

Filter Options

A **Filter**  icon positioned next to the **New Chat** button provides additional ways to narrow the conversation list. When at least one filter is active, a green dot appears on the filter icon to indicate that the current view is filtered. All filters can be cleared at once with a **Clear All** option, or removed individually. Filters apply immediately upon selection and work together using AND logic — a conversation must match all active filters to appear.

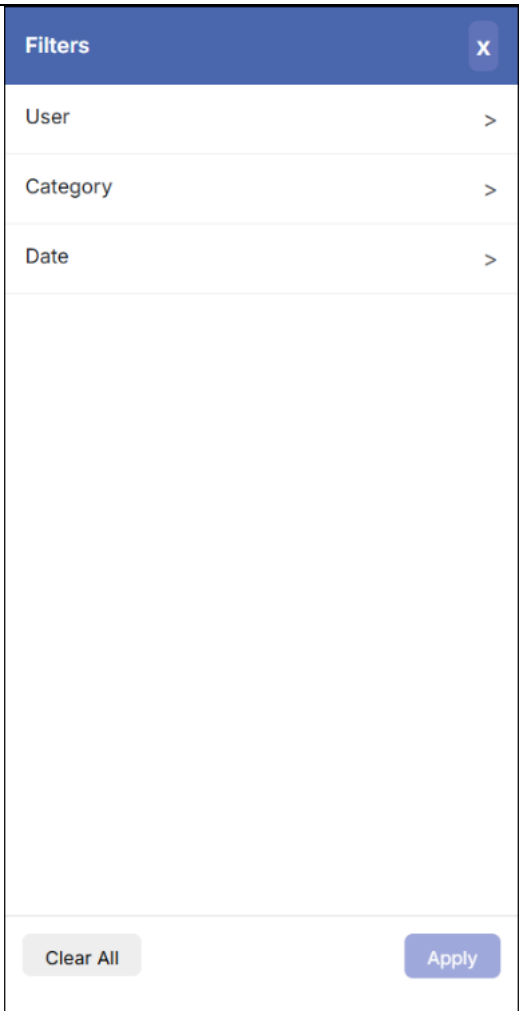
A screenshot of a web application's "Filters" pane. The pane has a dark blue header with the word "Filters" and a close button (X). Below the header, there are three filter categories: "User", "Category", and "Date", each with a right-pointing chevron icon. At the bottom of the pane, there are two buttons: "Clear All" and "Apply".

Figure: Filters pane

The available filters are:

- **User** — available to administrators with *LiveChatAccess* plus *Admin* user roles; shows a searchable dropdown of all staff members who have Chat Center access, with support for selecting multiple users at once.
- **Category**— available to all users; allows filtering by one or more of the configured chat categories.
- **Date** — available to all users; allows selection of dates within one month range.

When no filter is applied, the logged-in user sees all active (read and unread) chats assigned to them, along with all conversations in the unassigned queue.

Chat Organization Tabs

The left panel organizes conversations into five clearly labeled tabs:


- **All Chats** — Super Admin users see all conversations across all staff. Non-admin users see only their own assigned conversations. Both read and unread chats are included.
- **Unread** — Displays conversations that have incoming messages the logged-in user has not yet read, including chats they are actively assigned to.
- **Active** — Shows all currently ongoing conversations (both read and unread) that are assigned to the logged-in user.
- **Unassigned** — A shared queue visible to all users with **LiveChatAccess**, showing conversations that have not yet been picked up by any staff member. These are displayed in chronological order, oldest first, and update in real time as new unassigned messages arrive. Any staff member can take a conversation from this queue.
- **Closed** — Shows conversations that have been marked complete. For regular users, this shows only their own closed chats. By default, closed chats from the last two days are displayed, with a date range filter available allowing access to up to 30 days of history.

Chat List Display

Each conversation in the list shows the patient's name, the timestamp of the last message, a preview of the patient's message, and the chat category. Visual indicators distinguish between read and unread conversations and between active and unassigned status.

Bottom Panel — Administrative Tools

At the bottom of the left panel, two icons are available exclusively to Super Admin users with the **LiveChatAccess** role:

- **Chat Center Settings**  **Icon** — Opens the full settings configuration panel where administrators manage all aspects of the Chat Center for their clinic.

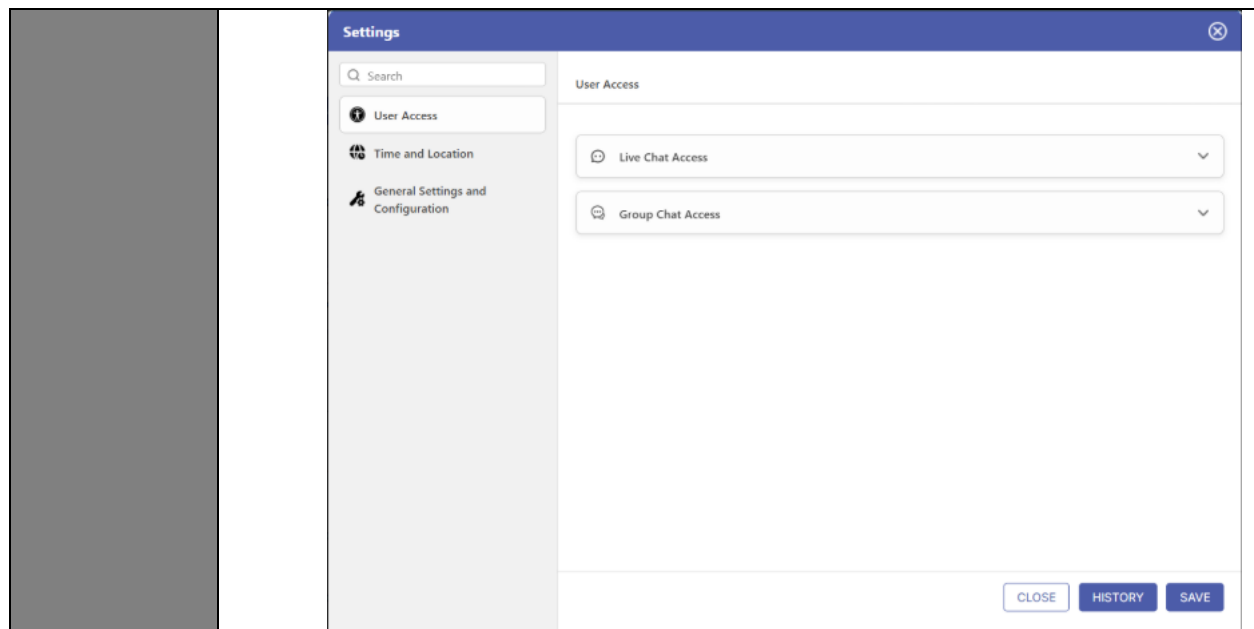



Figure: Settings popup

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Chat History Icon — Opens a dedicated audit and history interface displaying a tabular log of all past chat sessions. This log includes the patient name, the assigned staff member, the start and end date and time of each conversation, total duration, chat category, Status and a Comments column indicating whether the chat was closed manually by the clinic, by the patient, or automatically by the system due to inactivity. The history view supports filtering by date range, patient name, staff member, category, and columns are sortable. This interface is intended for administrative oversight and compliance monitoring.

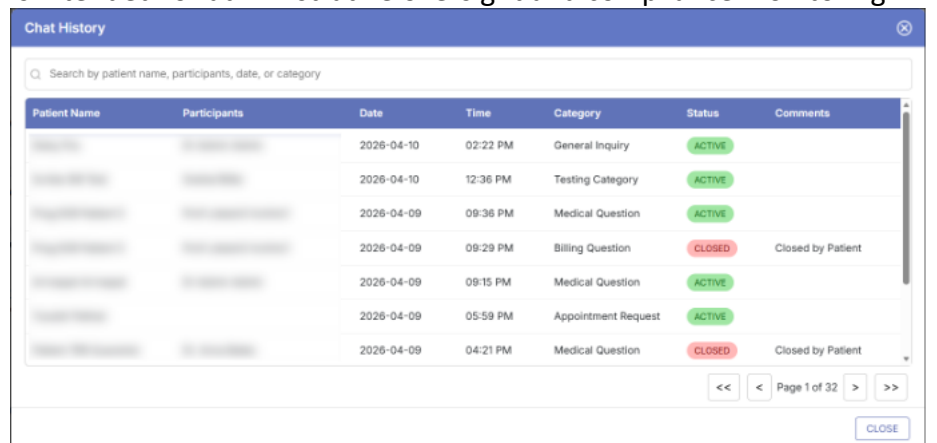


Figure: Chat History popup

When the chat list is long, these administrative icons remain accessible as a fixed overlay so they are never pushed out of view by a lengthy queue.

Responsive Design

The left panel maintains a consistent width across screen sizes. Long patient names or category names are truncated with an ellipsis, with a tooltip revealing the full text on hover. The chat list scrolls independently with a vertical scroll when conversations exceed the panel height.

The Chat Center Interface — Center Panel (Live Conversation)

The center panel is the active conversation workspace where all real-time messaging takes place.

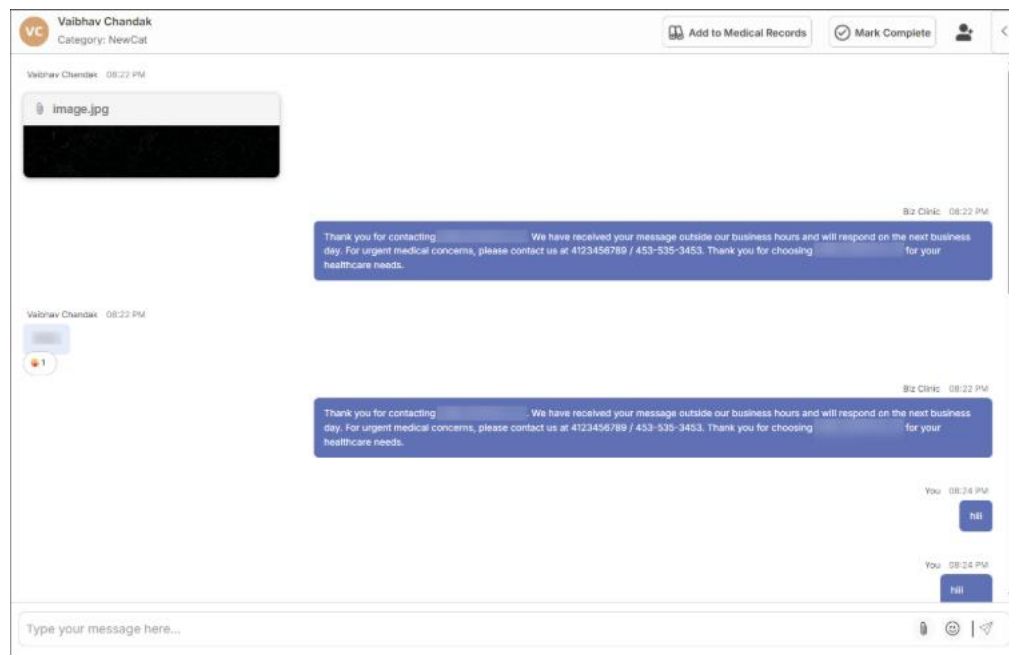





Figure: *Chat Center – Center Panel*

Patient Header

At the top of the center panel, the patient's avatar is displayed — either their photo from the Patient Portal, or their initials in a circular icon. The patient's full name appears prominently next to the avatar, with the current chat category displayed below. For group chats, only first names are shown for all participants in the message thread, with the patient's first name shown from

the portal side and the clinic user's title and first name (for example, "Dr. Anna") shown from the clinic side.

The header also contains four action controls:

-  **Add to Medical Records** — Saves the entire conversation to the patient's document list in Prognosis as a new document type called "Patient Chat." The saved record includes the patient name, date, time, category, and the full formatted chat exchange with display names and timestamps for each message.
-  **Mark Complete** — A checkbox that, when selected, triggers a confirmation dialog ("Mark this conversation as complete?") and, upon confirmation, moves the conversation from active to completed status, making it read-only and archiving it in the Closed Chats tab.
-  **Add User** — Opens a searchable list of clinic staff members who have Group Chat access, allowing one or more additional users to be added to the current conversation for collaborative patient care.

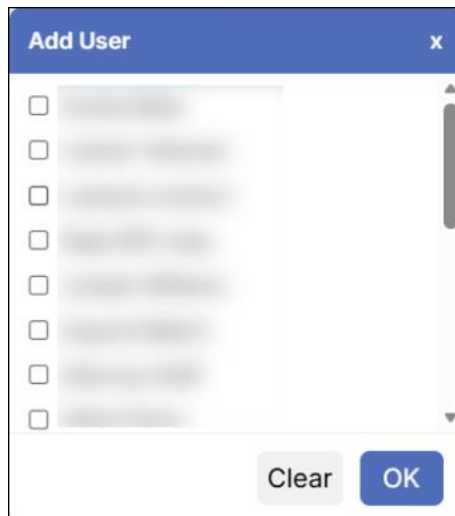



Figure: Add User popup

-  **Info Icon** — Toggles the visibility of the right panel (Patient Information & History). Clicking it expands or collapses the right panel without affecting the chat session.

Message Display

Messages are displayed in color-coded speech bubbles: sender messages appear on the right side in dark blue, and receiver messages appear on the left side in light blue. Each message shows a timestamp and, in group chats, the sender's name. The conversation auto-scrolls to the latest message when new content arrives, and staff can manually scroll up to review earlier messages in the history.


Typing indicators: A live "User is typing..." or "Patient is typing..." indicator appears at the bottom of the conversation area in real time while any participant is composing a message. In group chats, the indicator shows "User1 and User2 are typing..." for concurrent activity. Full Names are used in typing indicators.

Message interactions: Staff can react to any message with thumbs up or thumbs down icons, or with quick emoji reactions (😊, 👍, ❤️, 😂, 😱, 😬, 🙄). They can also reply to a specific message, forward it to another user, or copy it for use in clinical notes. All reactions are visible to all chat participants in real time.

Message Input Area

The message input field at the bottom of the center panel supports multiple lines and expands automatically as text is entered. The placeholder text reads "Type your message here..." There is no character limit.

Three controls accompany the input field:

-  **Emoji icon** — Opens an emoji picker with recently used emoji displayed for quick access, and a search field for finding specific emoji.

👉



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Figure: Emoji list

-  **Attach Documents icon** — Allows staff to attach files to the conversation. Supported file types and size limits follow the existing Prognosis attachment configuration for the clinic.
-  **Send button** — Submits the message. Pressing the Enter key also sends the message; Shift+Enter creates a new line within the message without sending it. Ctrl+A selects all text in the input field.

The Chat Center Interface — Right Panel (Patient Information & History)

The right panel provides contextual patient information and quick links to relevant Prognosis records without requiring the staff member to leave the Chat Center.

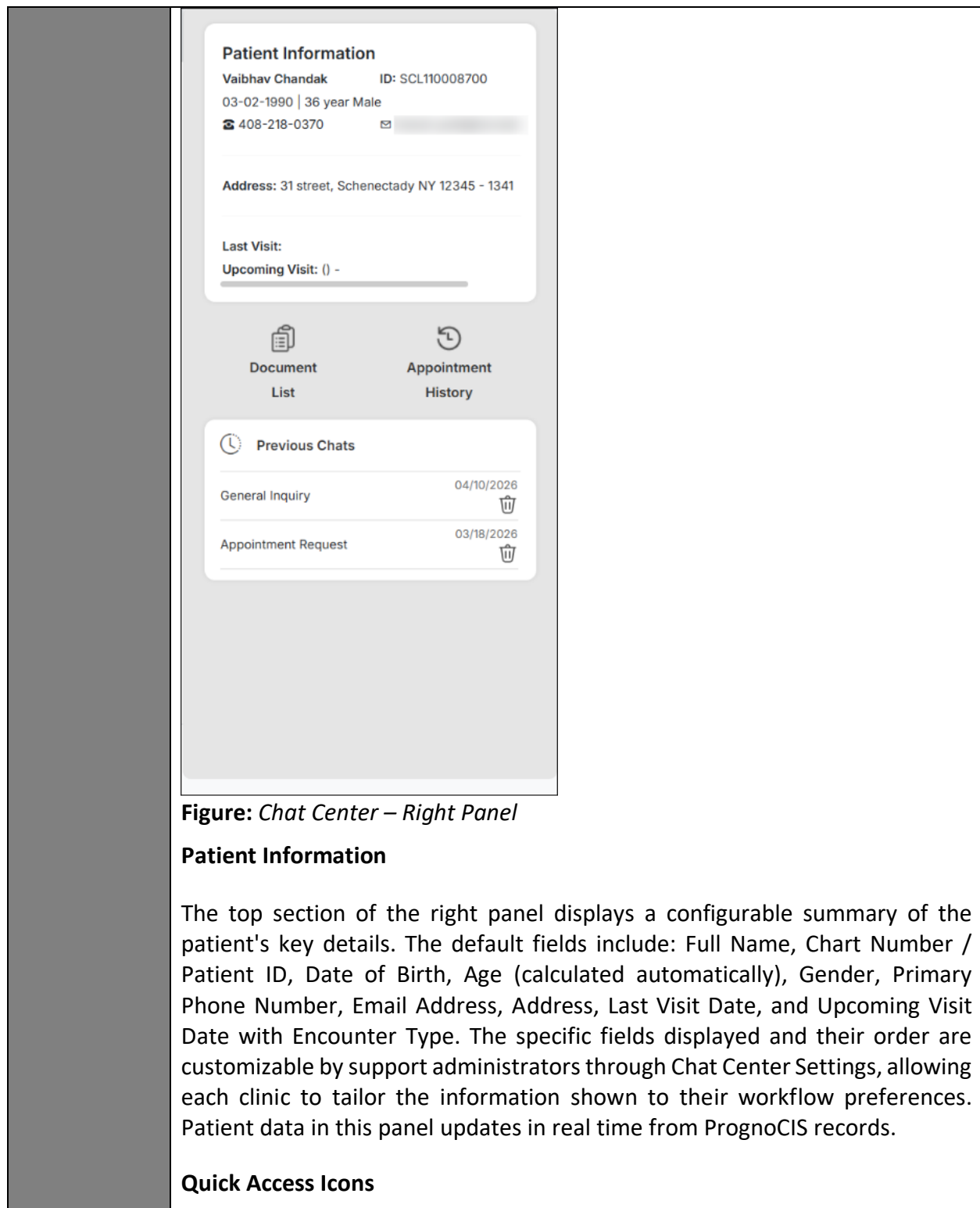




Figure: *Chat Center – Right Panel*

Patient Information

The top section of the right panel displays a configurable summary of the patient's key details. The default fields include: Full Name, Chart Number / Patient ID, Date of Birth, Age (calculated automatically), Gender, Primary Phone Number, Email Address, Address, Last Visit Date, and Upcoming Visit Date with Encounter Type. The specific fields displayed and their order are customizable by support administrators through Chat Center Settings, allowing each clinic to tailor the information shown to their workflow preferences. Patient data in this panel updates in real time from Prognosis records.

Quick Access Icons

Two icons provide direct links to the patient's records in Prognosis without losing the chat context:

- 
Document List — Opens the patient's full document list in Prognosis.
- 
Appointment History — Opens the patient's complete appointment history in a pop-up screen.

Previous Chats

Below the patient information section, a **Previous Chats** section displays the patient's most recently completed conversations with the clinic. By default, the last 5 completed chats are shown, with a configurable maximum of 10. Each entry shows the chat category and the date the conversation was completed, listed in reverse chronological order (most recent first).

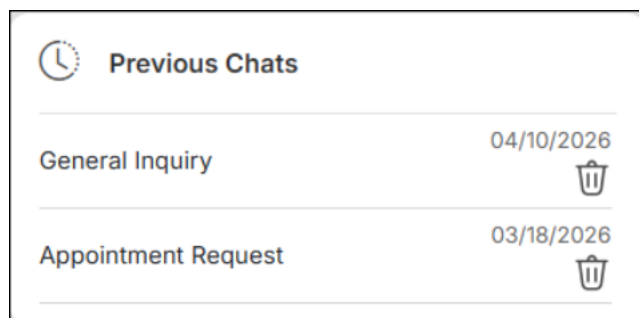



Figure: *Previous Chats* section

Clicking any previous chat entry opens the full conversation history in the center panel in read-only mode — the message input area is grayed out and disabled. The complete message history is displayed with original timestamps, reactions, and sender identification preserved. A Back button returns the user to the current active chat.

A **Delete chat**  icon next to each previous chat entry allows removal of that chat history. A confirmation dialog ("**Are you sure you want to delete this chat history?**") appears before permanent deletion. Only administrators with **LiveChatAccess** can delete chat records. Deletions are flagged in the system

with the deleting user's name and the date of deletion, and all deletions are logged in the audit trail.


Panel Controls



A **Close** button at the top right of the right panel closes only the right panel, returning focus to the center panel without affecting the active chat session. The system remembers whether each user had the right panel open or closed and restores that preference the next time they open the Chat Center. On smaller screens, the right panel can auto-hide to maximize the available space for the conversation.

Pressing the Escape key on the keyboard closes the right panel first; pressing it a second time closes the entire Chat Center interface. If there are unsent messages in the input field when the Chat Center is closed.



Chat Center Settings

The **Chat Center Settings** panel is accessible via the gear  icon at the bottom of the left panel and is visible only to Super Admin users with the **LiveChatAccess** role. It is organized into logical sections for easy navigation, with Save, Cancel, and History buttons at the top or bottom of the interface.

History button: Opens a settings change log in a modal, showing a table of all past configuration changes. Each entry displays the Setting Name, the user who made the change, the date and time of the change, and a brief note describing what was modified. This log is in reverse chronological order.

Access and Permissions

User Access

- **Live Chat Access** — A multi-select option with search functionality allows administrators to select which clinic staff members have access to the Chat Center. Clicking on the  button displays a popup with each user's full name and role in separate columns. You can select Users from this list. When  icon is clicked, all the selected users are shown in an expanded popup. The currently logged-in Super Admin

cannot be removed from the access list. When removing a user, a confirmation dialog appears: **"Remove [username]? Yes / No."**

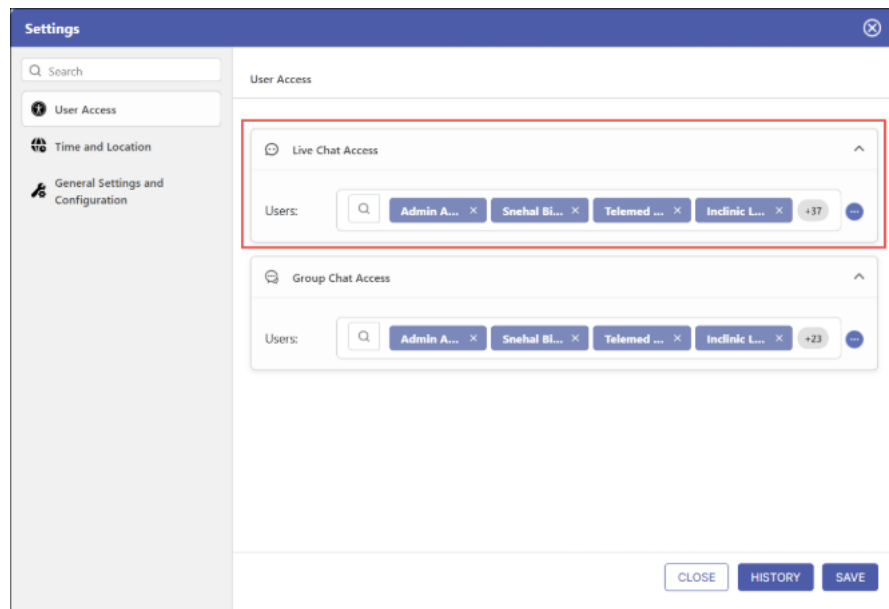




Figure: Live Chat Access section on the Settings popup

- **Group Chat Access** — A separate multi-select option, identical in design, controls which of the Live Chat Access users can participate in group chat sessions with patients. Clicking on the  button displays a popup with each user's full name and role in separate columns. Only users already granted Live Chat Access can appear in this list. You can select Users from this list. When  icon is clicked, all the selected users are shown in an expanded popup. By default, Group chat access is applicable to only those Live chat access users to whom group chat access is given.

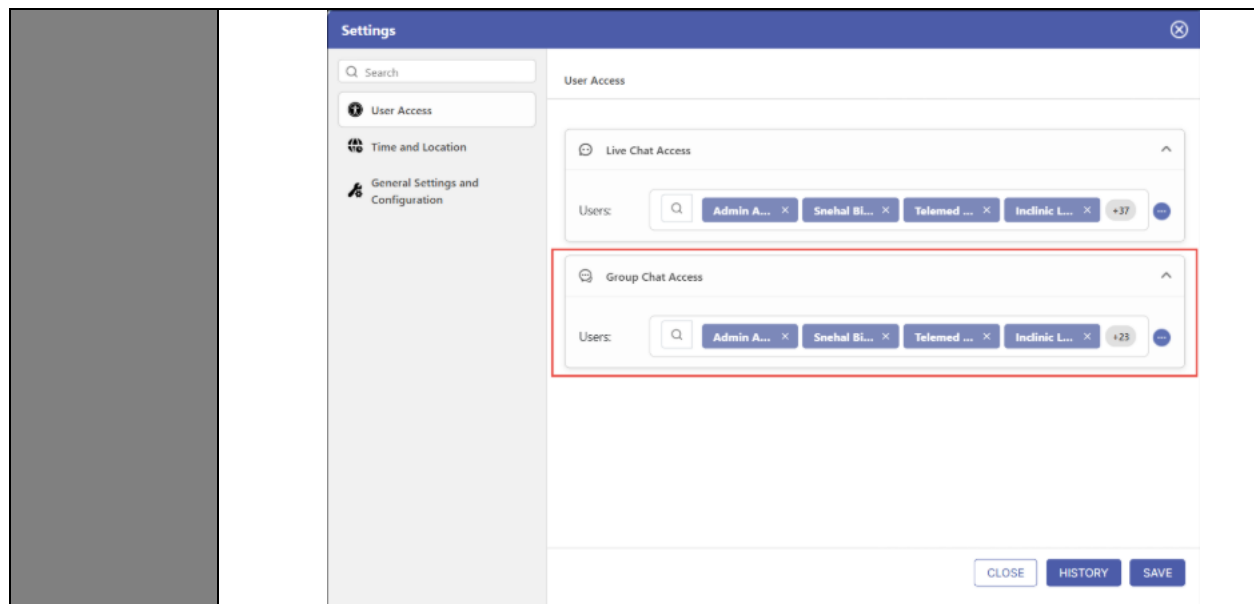


Figure: *Group Chat Access section on the Settings popup*

Time and Location

- **Auto Close Chat Settings** — A numeric text field where administrators enter the number of minutes of inactivity after which the system automatically closes an open chat. Any value from 1 day to 4 days is supported. When a chat is auto-closed due to inactivity, it is logged in the Chat History with the closure reason noted as "Auto-Closed Due to Inactivity."

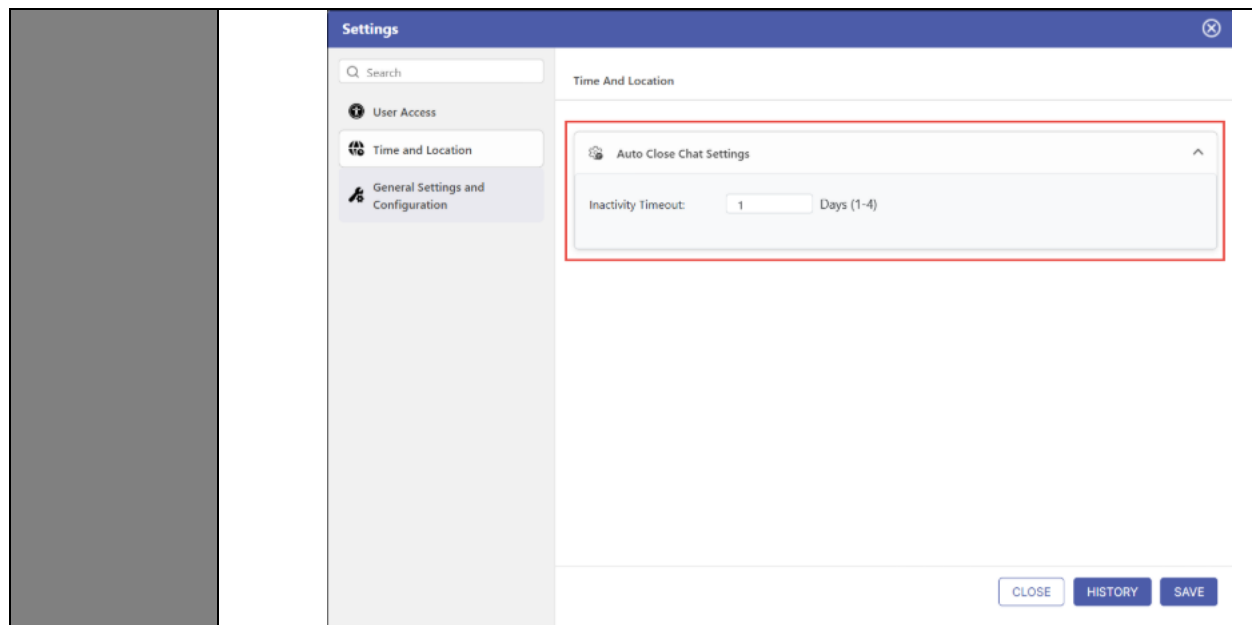


Figure: *Auto Close Chat Settings section on the Settings popup*

General Settings and Configuration

- **Allow Patients to End Chat** — A toggle switch (On/Off) that controls whether patients see a "Close Chat" button in their interface. When disabled (the default), only clinic staff can mark conversations as complete. When enabled, patients can close their own chat sessions.

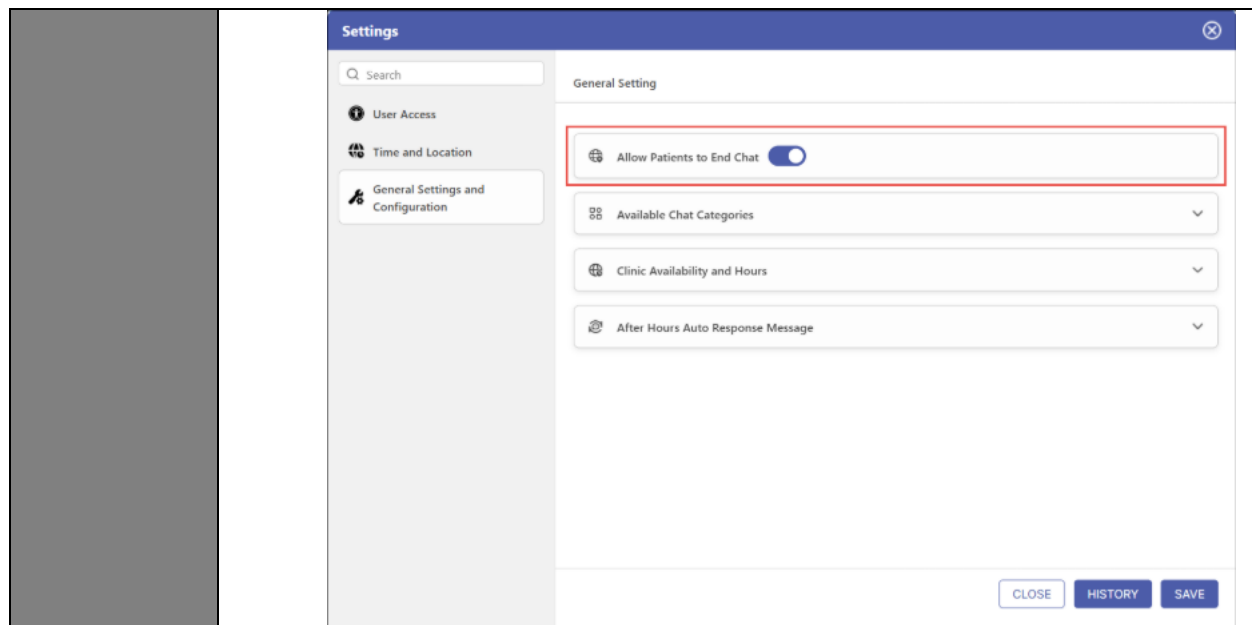


Figure: *Allow Patients to End Chat on the Settings popup*

- **Available Chat Categories** — A managed list of the topics patients and staff can select when initiating new conversations. Administrators can add new custom categories, edit existing category names, mark categories as inactive (via an Active checkbox rather than permanent deletion), and reorder categories using a drag-and-drop sort control. Default categories include: General Inquiry, Appointment Request, Medical Question, Billing Question, Prescription Refill, and Test Results. At least one active category must remain configured at all times.

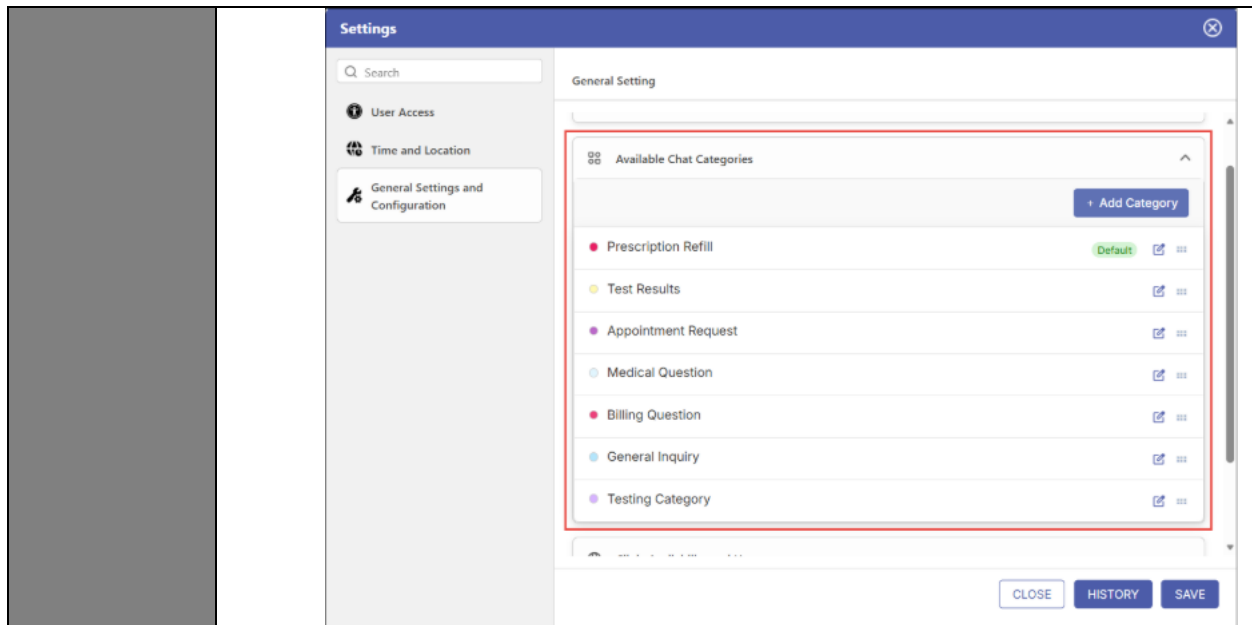


Figure: Available Chat Categories on the Settings popup

- **Clinic Availability and Hours** — A day-by-day schedule configuration where administrators define the hours during which live chat support is available. Each day of the week can be set independently with a start and end time picker, or marked as "Closed." A "24/7" option is available for clinics that provide around-the-clock support. The time zone is automatically pulled from the clinic's existing Prognosis CIS configuration. Default hours are set to Monday through Friday, 9 AM to 5 PM, with Saturday and Sunday closed.

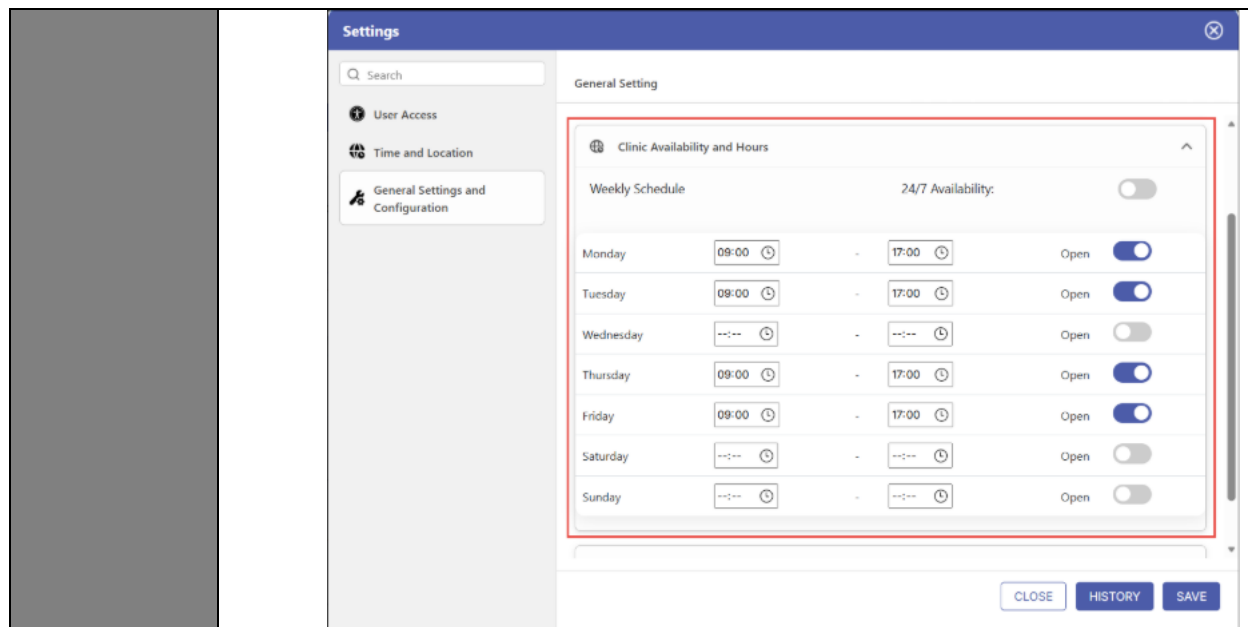


Figure: Clinic Availability and Hours on the Settings popup

- **After-Hours Auto-Response Message** — A rich text editor where administrators compose the message automatically sent to patients who contact the clinic outside of configured business hours. The default message template reads:

"Thank you for contacting [Clinic Name]. We have received your message outside our business hours and will respond on the next business day. For urgent medical concerns, please contact us at [Clinic Phone Number]. Thank you for choosing [Clinic Name] for your healthcare needs."

A **Clinic/Location Display Name** text field (up to 50 characters) where administrators enter the name that appears in system-generated automated messages sent to patients, such as after-hours responses. When a patient initiates a chat, this name is displayed until an actual clinic staff member joins the conversation, at which point the staff member's name replaces it.

The clinic name and phone number fields are automatically populated from Prognosis CIS, and the full message can be customized with additional details. Dynamic tags are supported for clinic name, phone number, address, location name, and patient location details.

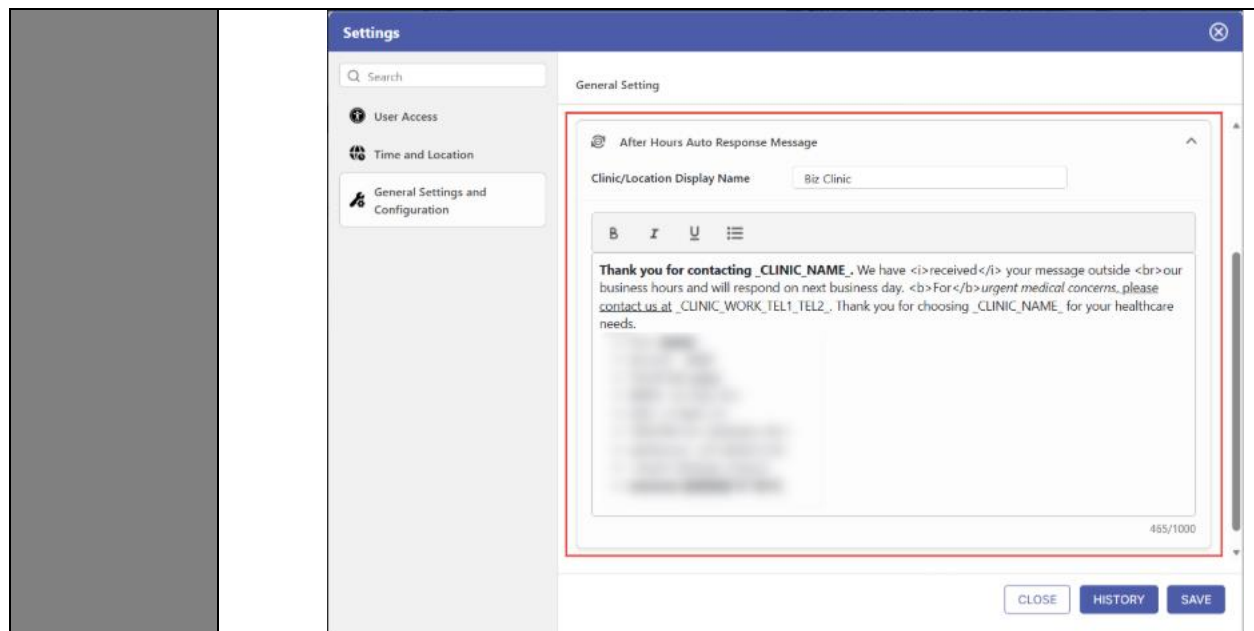


Figure: *After Hours Auto Response Message section on the Settings popup*

Validation and Change Behavior

All settings changes take effect immediately upon saving. Availability hour configurations must be logically valid (start times must precede end times). After-hours messages cannot be left blank if chat hours are restricted. At least one chat category must remain active at all times. Changes to user access permissions trigger immediate notifications to affected staff members. Settings changes never affect conversations that are already active at the time the change is saved.





Setup Variations by Clinic Type

The Chat Center adapts automatically to your clinic's configuration:

Single Location: All conversations are clinic-wide. No location filter is displayed in the Chat Center. Chat routing is handled by available staff users.

First-Time User Experience (FTUX) for Clinic Staff

Prognosis includes guided tooltips to help clinic staff discover and learn the Chat Center when they use it for the first time:

	<ul style="list-style-type: none"> • Chat Center icon — Highlighted with the tooltip: <i>"Welcome to Chat Center — This is where your clinic can chat with patients in real time."</i> • New Chat button — Highlighted with: <i>"Start a New Chat — Click here to start a conversation with a patient."</i> • Unassigned Chats tab — Tooltip reads: <i>"Unassigned Chats — New patient messages appear here until a clinic user picks them up."</i> • Chat History icon (admin only) — Tooltip reads: <i>"Chat History & Audit — View completed chats, duration, and who handled each conversation."</i> • Settings icon (admin only) — Tooltip reads: <i>"Chat Center Settings — Manage user access, categories, working hours, and auto-close rules."</i> • Add to Medical Record icon — Tooltip reads: <i>"Add to Medical Record — Select this icon to save important messages or attachments directly to the patient's document list."</i> • Mark Complete / End Chat — Tooltip reads: <i>"End Conversation — Mark chat as complete once the patient's request is resolved."</i> • Group Chat icon (first time a user with Group Chat access opens a one-on-one conversation) — Tooltip reads: <i>"Start a Group Chat — Add one or more clinic users to join this patient conversation."</i>
Enhancement II: Chat Center for Patients — Patient Portal Web	
Affected Screen(s):	Dashboard  Patient Portal → Dashboard → Chat Center  icon
Description:	<p>Patients using the Prognosis Patient Portal on the web now have access to a full two-way messaging experience with their clinic, directly within the portal they already use to manage their health information.</p> <p>Chat Center Icon — Patient Portal Navigation</p> <p> A Chat Center  icon is displayed in the top navigation bar of the Patient Portal on every page — <i>Dashboard, My Health Record, Appointment</i>, and all other sections. It is positioned to the left of the patient's profile name and dropdown, and is styled consistently with the blue theme used across the portal's navigation.</p>

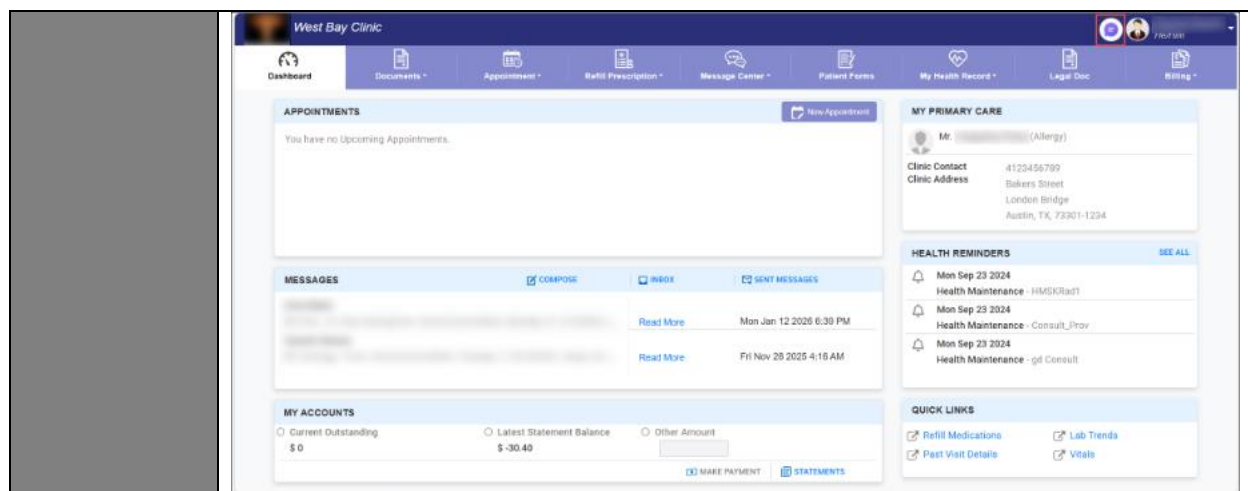


Figure: Chat Center icon on Patient Portal

Unread badge: A red circular badge with white text appears on the icon when there are unread messages, showing the exact unread count (for example, "1," "5," or "99+"). The badge updates in real time.

Hover state: Hovering over the icon shows a "Chat Center" tooltip and changes the cursor to a pointer.

Toast notifications: When a new clinic message arrives and the Chat Center is not currently open, a toast notification appears below the icon in the top right corner reading: *"You have a new message from your clinic."* It auto-dismisses after 30 seconds, and clicking it opens the Chat Center directly. The toast does not appear if the Chat Center is already open. Multiple messages arriving close together generate a single toast with the updated count rather than multiple separate alerts.

Starting a New Conversation — Category Selection

When a patient clicks the Chat Center icon and has no existing active conversations, a Category Selection popup appears with the prompt: *"Hey there — how can the clinic support you today?"* The patient must select one category before proceeding. Available categories include: General Inquiry, Appointment Request, Prescription Refill Request, Billing/Insurance, Medical Records Request, and Other — plus any custom categories configured by the clinic. The selected category is stored as part of the conversation so clinic staff can see it immediately.

If the patient already has an active open conversation, clicking the icon opens the chat inbox directly, showing the existing thread. If the patient wants to start an additional new topic, they can click "Start New Conversation" from within the inbox.

Canceling the category popup does not create any conversation thread.

The Patient Chat Interface

After selecting a category (or opening an existing conversation), the full live chat interface loads directly within the Patient Portal — new browser tab opens, and the patient remains logged in throughout.

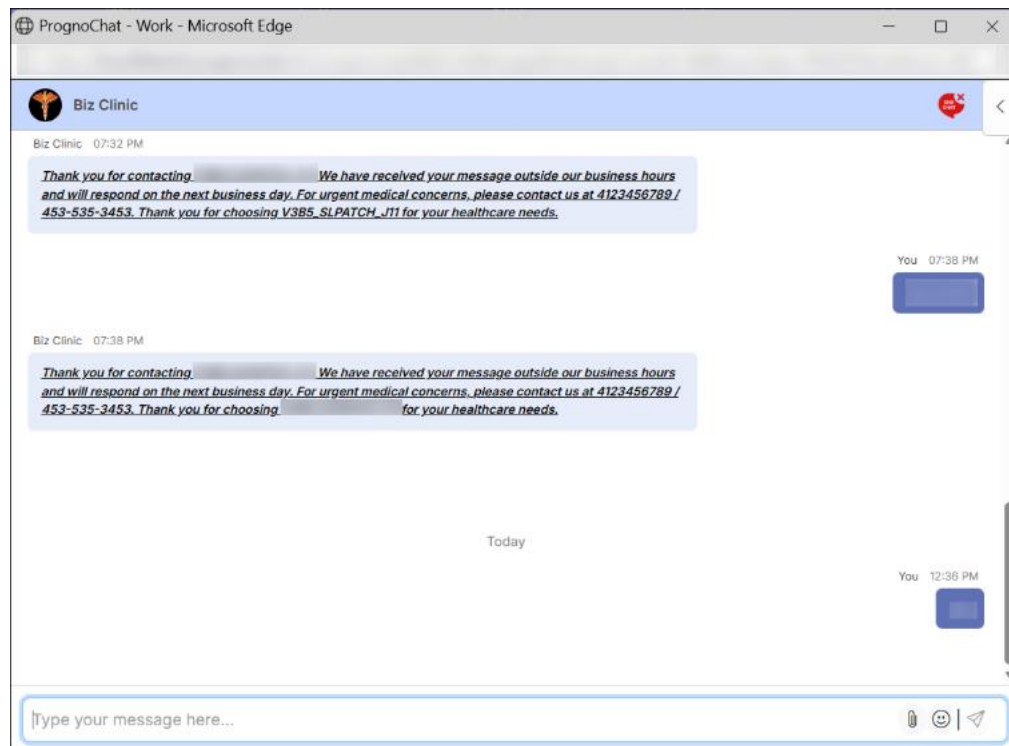


Figure: Chat Center opened from the Patient Portal

Message thread: All messages are displayed in chronological order. Messages are grouped by date (Today, Yesterday, etc.) for easy reading. Patient messages are clearly labeled "You" in a distinct color. Clinic staff messages show the staff member's title and first name (for example, "Dr. Anna — Receptionist") in a different color. Each message shows the time it was sent.

Real-time updates: New incoming messages from clinic staff appear instantly without requiring a page refresh. The chat window auto-scrolls to the latest message. When clinic staff are typing, an optional "Staff is typing..." indicator may appear.

Message composition: A text input field sits at the bottom of the screen with the placeholder "Type your message here..." Patients click the Send button or press Enter to submit messages. An attachment icon (paperclip) allows patients to attach documents or images. File types and size limits are governed by the clinic's existing Prognosis attachment settings.

Chat persistence: If a patient leaves the chat page and returns, the conversation state is preserved exactly as they left it — unless it was closed by clinic staff, by the patient, or by the clinic's auto-close settings.

Right-side information panel: An expandable and collapsible side panel shows the patient's upcoming, most recent, and today's appointment details, configured via the clinic's template settings. A Previous Chats shortcut is also accessible from this panel.

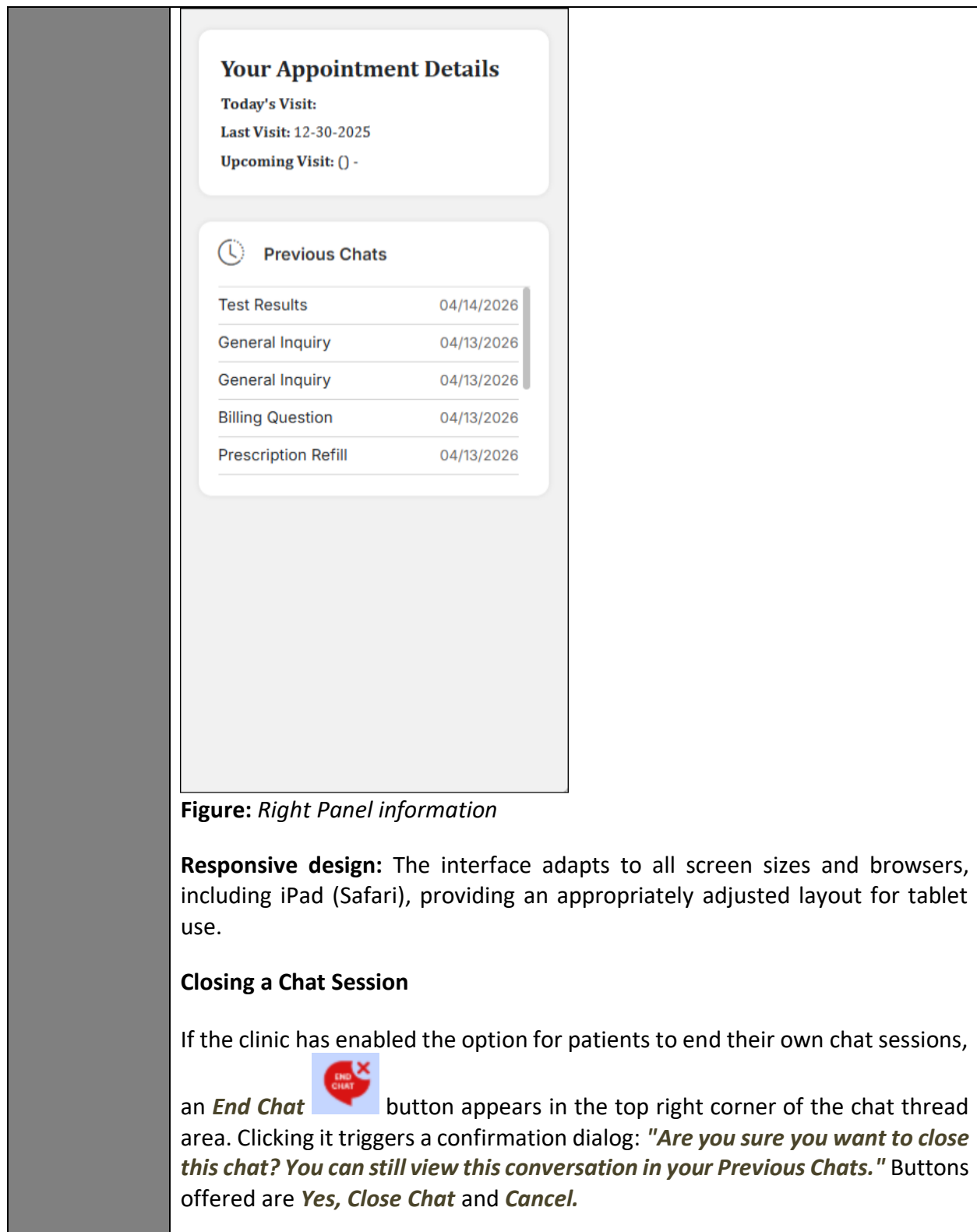



Figure: Right Panel information

Responsive design: The interface adapts to all screen sizes and browsers, including iPad (Safari), providing an appropriately adjusted layout for tablet use.

Closing a Chat Session

If the clinic has enabled the option for patients to end their own chat sessions,

an **End Chat**  button appears in the top right corner of the chat thread area. Clicking it triggers a confirmation dialog: **"Are you sure you want to close this chat? You can still view this conversation in your Previous Chats."** Buttons offered are **Yes, Close Chat** and **Cancel**.

Once confirmed, the conversation becomes read-only — the patient can no longer send messages in that thread. It moves to the Previous Chats section with a "Closed" status label. To continue communicating, the patient must start a new conversation. Clinic staff are notified within the Chat Center when a patient closes a session.

Previous Chats

A *Previous Chats* section within the chat interface displays the patient's completed conversation history. By default, the last 5 completed chats are shown, with a configurable maximum of 10 determined by the clinic. Each entry shows the chat category and the date the conversation was completed, in reverse chronological order.

Patients can click any entry to open the full conversation in read-only mode — the input field is disabled and grayed out, but the complete message history is visible with timestamps and sender identification. A Back button returns the patient to their active chat or the inbox.

A delete icon next to each entry allows permanent removal with a confirmation prompt: *"Are you sure you want to delete this chat history?"* Confirmed deletions are permanent from the patient's view and are logged in the system audit trail.

After-Hours and Offline Handling

When a patient sends a message outside the clinic's configured business hours, an automated response appears immediately in the chat window — before any human reply — confirming receipt and setting expectations for when a response will follow. The patient's message is still delivered to clinic staff and appears in the unassigned queue when they log in.

Notifications When Not Logged In

To ensure patients never miss a clinic reply, the system sends notifications when patients are not actively logged in:

Push notifications: If the patient has enabled browser push notifications, a Firebase push notification is delivered to their registered device or browser. It displays the clinic name as the sender and a generic message such as *"You have a new message in your Patient Portal."* No sensitive health information is ever included in the notification. Tapping or clicking the notification takes

	<p>the patient to the Patient Portal login screen and redirects them directly to the Chat Center after signing in. Failed push notifications are retried automatically with a configurable number of retries.</p> <p>Email notifications: If push notifications are not enabled or no device is registered, the system sends an email notification instead. The email includes the clinic name and logo (optional), secure wording such as <i>"You have a new message from your clinic. Please log in to view it,"</i> and a secure link to the Patient Portal login page. No protected health information appears in the email body.</p> <p>Patients can manage their push notification preferences from within their Patient Portal settings. All notifications comply fully with healthcare privacy standards.</p>
<p>Enhancement III: Chat Center for Patients — My Health Records App</p>	
<p>Affected Screen(s):</p>	<ul style="list-style-type: none"> • Live Chat Navigation My Health Records App → Home Dashboard → Live Chat Tile → <i>Inbox</i> • Previous Chats Navigation Category Selection → Select Category → Live Chat Interface → Appointment Info Panel → Close Chat → <i>Previous Chats</i>
<p>Description:</p>	<p>The complete Chat Center experience is available on the Prognosis Patient Portal mobile app for both iOS and Android devices, optimized for touch interactions, smaller screens, and native mobile capabilities.</p> <p>Live Chat Tile on the App Dashboard</p> <p>A <i>Live Chat</i> tile appears as a main dashboard tile on the Patient Portal app's home screen, displayed alongside other tiles such as My Health Records, Message Center, Patient Forms, Refill Meds, and Attach Documents. The tile uses a chat bubble icon in the app's brand blue color scheme with the label "Live Chat" beneath it.</p> <p>The tile is visible immediately upon login for maximum discoverability. If there are unread messages, a small red badge with the unread count appears in the top right corner of the tile. The tile is touch-friendly with appropriate spacing and sizing for all supported screen sizes.</p>

Tapping the Live Chat tile opens either the **Chat Inbox** (if the patient has existing conversations) or the **Category Selection** screen (if starting fresh).

Category Selection on Mobile

If the patient does not have an active open conversation, tapping the Live Chat tile opens a full-screen category selection view with large, easy-to-tap options displayed as cards or list items. Each category is clearly labeled (General Inquiry, Appointment Request, Prescription Refill, Billing/Insurance, Medical Records Request, Other) and optionally accompanied by a distinguishing icon.

The patient must select a category before they can begin typing. For multi-location clinics where patients are permitted to choose their location, a location selection dropdown appears on this screen as well. Once the patient taps a category, the app navigates directly to the live chat interface with the selected category displayed at the top.

The Mobile Chat Interface

The active chat screen opens as a dedicated full-screen view:

Message display: All messages appear in chronological order in color-coded speech bubbles — different colors for patient and clinic staff messages — with sender name/role and timestamps for each message.

Message input bar: A fixed input bar stays anchored at the bottom of the screen at all times, even when the keyboard is open. It includes a text input field, a Send button, an attachment icon, and an emoji icon.

Real-time delivery: Incoming clinic messages appear instantly. The screen auto-scrolls to the latest message with each new arrival.

Attachments: When an attachment is sent or received, it appears as a thumbnail or file link directly within the conversation thread.

Closing the chat: If the clinic has enabled patient-side chat closure, a Close Chat option is available on the active chat screen. Tapping it shows a confirmation popup: **"Are you sure you want to close this chat?"** Confirming makes the conversation read-only and moves it to the Previous Chats section.

Appointment Information Panel

While in an active chat, patients can tap an Info icon or swipe up to open an Appointment Information panel as a bottom sheet. This panel displays the patient's upcoming visit, today's visit (if applicable), and last visit, including appointment date, time, and type. The bottom sheet is swipeable and can be dismissed by dragging it downward.

Previous Chats on Mobile

Previous Chats are accessible via a tab or link inside the Live Chat module, or through a swipe-up bottom sheet within the chat interface. The Previous Chats list shows the chat category or subject and the completion date for each entry, along with a delete icon.

Tapping any previous chat opens the full conversation in read-only mode — the input area is disabled, and the complete message history is visible with timestamps and sender names. A Back or Close button exits the read-only view. Tapping the delete icon shows a confirmation prompt before permanently removing the conversation from the patient's view. Deleted conversations are logged in the system audit trail.

After-Hours Auto-Response on Mobile

When a patient sends a message outside clinic hours, an auto-response appears immediately in the chat: ***"Our team is currently offline. We'll reply during business hours."*** The patient's message is still stored and delivered to clinic staff when they next log in.

Push Notifications for Mobile

When the app is closed or running in the background, Firebase Cloud Messaging (FCM) delivers a push notification to the patient's device for new clinic messages. The notification shows the clinic name as the sender and generic text: ***"A new message has been received from [Clinic Name]."*** Sensitive message content is never included in push notifications. Tapping the notification opens the app, directs the patient to the login screen if needed, and navigates them directly to the relevant chat thread once authenticated.

Enhancement 5: Unified Portal settings configuration with multi-portal support

Module:	EMR+PM+PATIENT PORTAL+EMPLOYER PORTAL
Type:	GENERIC
Case ID:	531006
Enhancement I: Unified Portal Settings for Multi-Portal Configuration and Access Control	
Affected Screen(s):	Portal Settings Navigation Settings → Configuration → Workflow column → <i>Portal Settings</i>
Description:	<p>The system introduces a unified Portal Settings configuration screen by renaming the existing <i>Employer Portal</i> Settings menu to Portal Settings. This enhancement consolidates configuration for multiple portals under a single menu, including <i>Employer Portal</i>, <i>Patient Portal</i>, and newly added portals such as <i>Insurance Adjuster Portal</i>, <i>Attorney Portal</i>, <i>Referring Provider Portal</i>, <i>ProCheckIN</i>, <i>Hospital Portal</i> and <i>TPA Portal</i>.</p> <p>When users access Portal Settings, a dropdown list is displayed at the top to select the desired portal. The selected portal loads its respective settings screen while maintaining consistency with the existing UI design (fonts, colors, and styles).</p> <p>The menu remains visible even when specific portals are turned OFF, allowing users with appropriate read and update permissions to configure settings at any time. A single role-based access control (Settings Configuration → Role → Portal Settings) governs access to all portal configurations.</p>

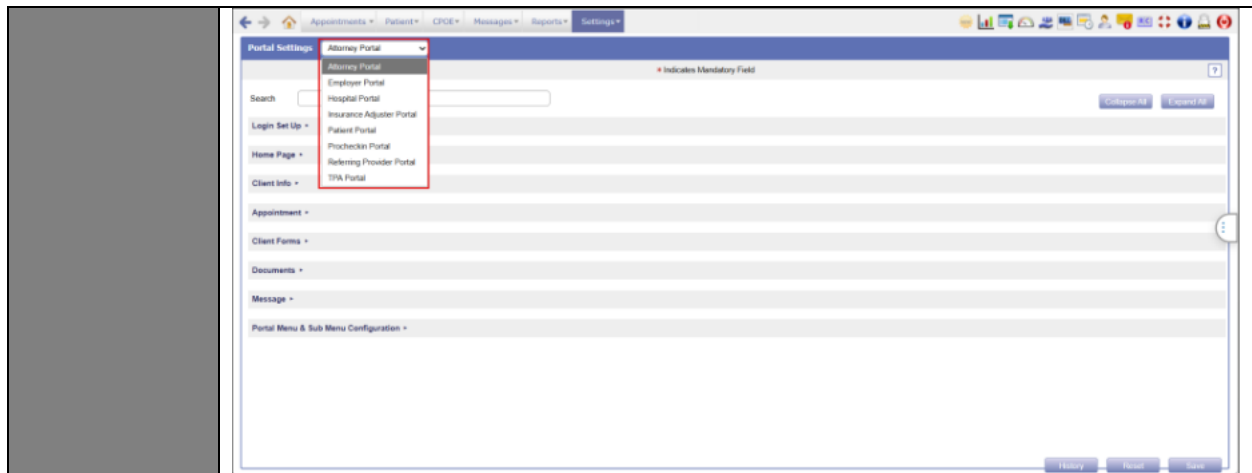


Figure: New Portal options displayed under Portal Settings

Enhancement II: UI Enhancements with Accordion Layout, Global Search, and Multi-Location Indicators

<p>Affected Screen(s):</p>	<p>NA</p>
<p>Description:</p>	<p>The UI uses an accordion-based layout, allowing sections to be expanded and collapsed individually or via global controls. A global search feature is introduced, which activates when more than two characters are entered. It searches across all section labels and values, highlights matches and automatically expands collapsed sections to display results. For multi-location (ML) configurations, properties with <i>PRP_BOOL_MULTILOC = 1</i> display a red <i>“ML”</i> indicator, indicating location-specific values. Existing help icons (?) continue to provide property-level guidance. In this phase, existing property behaviors remain unchanged, including handling of multivalue/char value fields and Patient Portal property system settings. Accordion and global search functionality are implemented for Employer and Patient Portals and will be extended to additional portals in future releases.</p>