



Patch Release

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Patch No.: 38

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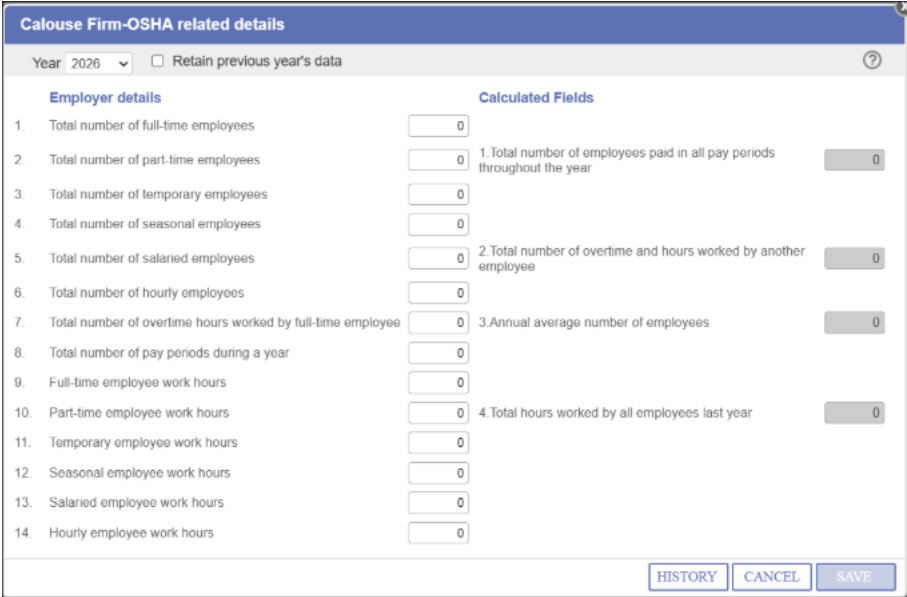
Total Points: 5

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

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

Enhancement 1: OSHA 300 and 300A Forms Integration and Reporting

Module:	EMR
Type:	GENERIC
Case ID:	526930
Enhancement I: Feature Enablement and System Behavior	
Affected Screen(s):	<ul style="list-style-type: none"> • OSHA Reports Navigation Reports → <i>OSHA Reports</i> • Employer Master Navigation Settings → Configuration → Vendors column → <i>Employer</i>
Description:	<p>The OSHA Reports module has been enhanced to provide a comprehensive, structured, and user-friendly workflow for capturing, processing, and generating OSHA-related data. The implementation ensures controlled data entry, accurate calculations, seamless report generation, and improved usability across multiple system touchpoints.</p> <p>Property-Based Activation</p> <ul style="list-style-type: none"> • An admin-level property, <i>occmcd.enable.OSHA</i> governs the availability of the OSHA module. • When the property is enabled: <ul style="list-style-type: none"> ○ <i>OSHA Reports</i> menu becomes visible. ○ <i>OSHA</i> action button is displayed on the <i>Employer</i> Master screen. ○ Related forms, and reports are activated. • When disabled: <ul style="list-style-type: none"> ○ All OSHA-related UI components are hidden. ○ When disabled, the existing specialty template related to OSHA 301 i.e. , Injury and Illness Incident Report - OSHA 301 is not impacted. <p>Diagnostic Utility Behavior</p> <ul style="list-style-type: none"> • A diagnostic process initializes the OSHA module by: <ul style="list-style-type: none"> ○ Enabling the admin-level property. ○ Creating required template records in the database.

	<ul style="list-style-type: none"> o Associating templates with the correct file sources. • Templates are sourced from a common repository and linked only upon activation, ensuring minimal database overhead until feature usage.
Enhancement II: Employer Master – OSHA Data Management	
Affected Screen(s):	Employer Master Navigation Settings → Configuration → Vendors column → <i>Employer</i>
Description:	<p>OSHA Button and Form Invocation</p> <ul style="list-style-type: none"> • The OSHA  button is displayed on both: <ul style="list-style-type: none"> o Existing employer records o Newly created employer records (post-save) Figure: OSHA button on the Employer Master screen • On click: <ul style="list-style-type: none"> o A modal popup named <i><Employer>-OSHA related details</i> opens with OSHA-specific fields. o The form supports both data creation and modification. <div data-bbox="505 1010 1406 1602" style="border: 1px solid gray; padding: 5px;">  </div> <p>Figure: <Employer>-OSHA related details popup</p> <p>Year Selection Logic and Behavior</p> <ul style="list-style-type: none"> • A year dropdown is provided for selecting the reporting year. Figure: Year dropdown on the <Employer>-OSHA related details popup • Behavior: <ul style="list-style-type: none"> o Previous three years data are displayed but their fields are disabled (grayed out).

Calouse Firm-OSHA related details

Year 2024 ?

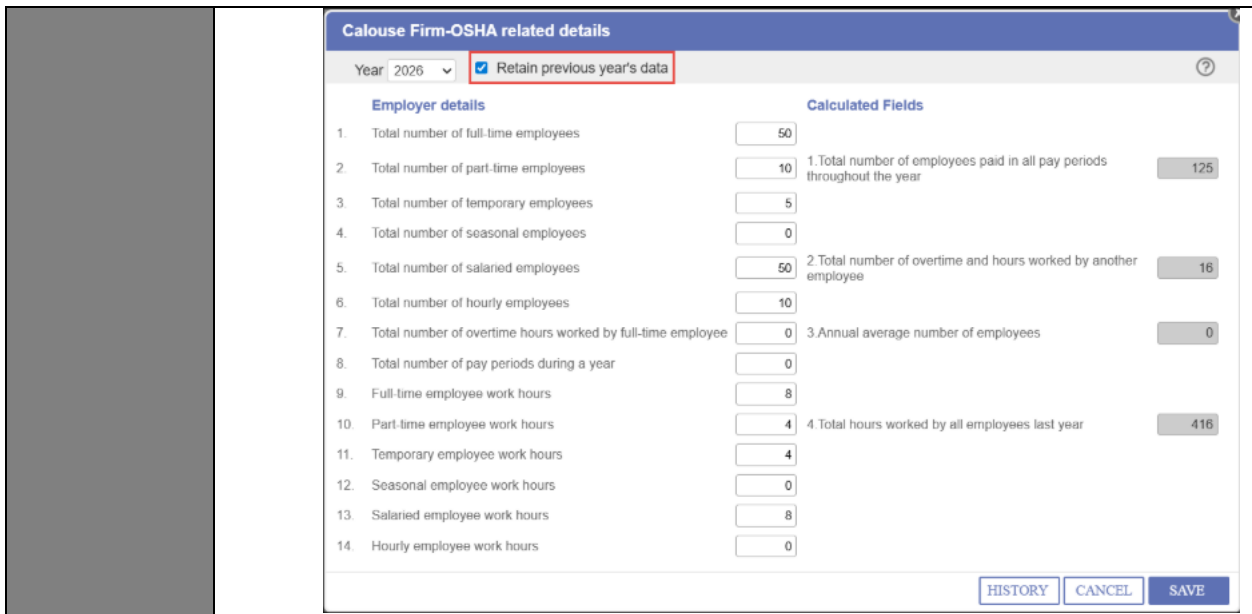
Employer details	Calculated Fields
1. Total number of full-time employees	<input type="text" value="0"/>
2. Total number of part-time employees	<input type="text" value="0"/>
3. Total number of temporary employees	<input type="text" value="0"/>
4. Total number of seasonal employees	<input type="text" value="0"/>
5. Total number of salaried employees	<input type="text" value="0"/>
6. Total number of hourly employees	<input type="text" value="0"/>
7. Total number of overtime hours worked by full-time employee	<input type="text" value="0"/>
8. Total number of pay periods during a year	<input type="text" value="0"/>
9. Full-time employee work hours	<input type="text" value="0"/>
10. Part-time employee work hours	<input type="text" value="0"/>
11. Temporary employee work hours	<input type="text" value="0"/>
12. Seasonal employee work hours	<input type="text" value="0"/>
13. Salaried employee work hours	<input type="text" value="0"/>
14. Hourly employee work hours	<input type="text" value="0"/>
	1. Total number of employees paid in all pay periods throughout the year <input type="text" value="0"/>
	2. Total number of overtime and hours worked by another employee <input type="text" value="0"/>
	3. Annual average number of employees <input type="text" value="0"/>
	4. Total hours worked by all employees last year <input type="text" value="0"/>

Figure: Disabled fields on the <Employer>-OSHA related details popup for the past three years

- Disabled years cannot be selected or edited.
- Only the current year is active for input and modification.
- This ensures:
 - Historical data remains intact.
 - Users cannot overwrite past records.

Retain Previous Year Data Functionality

- Available only for the current reporting year.



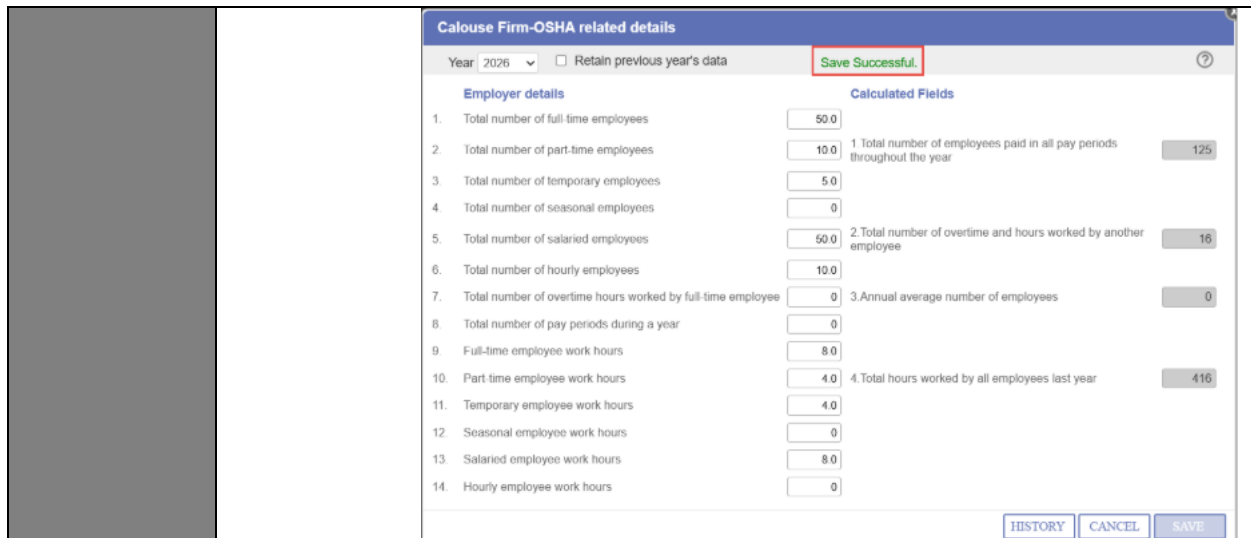
Employer details		Calculated Fields	
1. Total number of full-time employees	50	1. Total number of employees paid in all pay periods throughout the year	125
2. Total number of part-time employees	10	2. Total number of overtime and hours worked by another employee	18
3. Total number of temporary employees	5	3. Annual average number of employees	0
4. Total number of seasonal employees	0	4. Total hours worked by all employees last year	416
5. Total number of salaried employees	50		
6. Total number of hourly employees	10		
7. Total number of overtime hours worked by full-time employee	0		
8. Total number of pay periods during a year	0		
9. Full-time employee work hours	8		
10. Part-time employee work hours	4		
11. Temporary employee work hours	4		
12. Seasonal employee work hours	0		
13. Salaried employee work hours	8		
14. Hourly employee work hours	0		

Figure: Retain previous year's data checkbox on the <Employer>-OSHA related details popup

- Behavior:
 - When selected:
 - ♣ System fetches data from the immediate previous year.
 - ♣ Fields are auto-populated with prior values.
 - Users can edit pre-filled values before saving.
- For non-current years:
 - This option is hidden to avoid ambiguity and incorrect usage.

Data Persistence and Audit Behavior

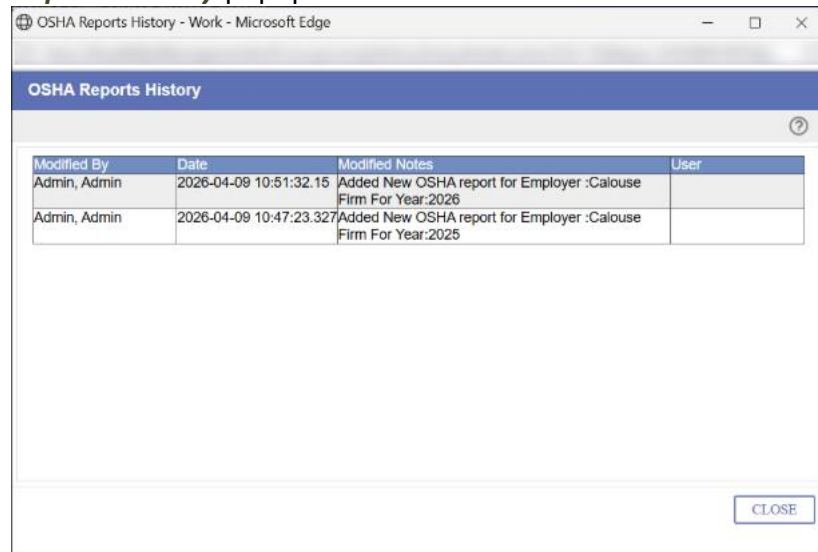
- On saving the form:
 - User-entered data is stored in the transactional table.
 - Calculated values are not persisted.
- System feedback:
 - A success message is displayed at the top of the <Employer>-OSHA related details popup.



Employer details		Calculated Fields	
1. Total number of full-time employees	50.0	1. Total number of employees paid in all pay periods throughout the year	125
2. Total number of part-time employees	10.0	2. Total number of overtime and hours worked by another employee	16
3. Total number of temporary employees	5.0	3. Annual average number of employees	0
4. Total number of seasonal employees	0	4. Total hours worked by all employees last year	416
5. Total number of salaried employees	50.0		
6. Total number of hourly employees	10.0		
7. Total number of overtime hours worked by full-time employee	0		
8. Total number of pay periods during a year	0		
9. Full-time employee work hours	8.0		
10. Part-time employee work hours	4.0		
11. Temporary employee work hours	4.0		
12. Seasonal employee work hours	0		
13. Salaried employee work hours	8.0		
14. Hourly employee work hours	0		

Figure: Message displayed on <Employer>-OSHA related details popup on save successful

- o Clicking on the **HISTORY** button invokes the **OSHA Reports History** popup.




Modified By	Date	Modified Notes	User
Admin, Admin	2026-04-09 10:51:32.15	Added New OSHA report for Employer :Calouse Firm For Year:2026	
Admin, Admin	2026-04-09 10:47:23.327	Added New OSHA report for Employer :Calouse Firm For Year:2025	

Figure: OSHA Reports History popup

- o It reflects:
 - ♣ Total number of modifications made
 - ♣ Change tracking for the record

Enhancement III: Workflow and Report Generation

Affected Screen(s):	Employer Master Navigation Settings → Configuration → Vendors column → <i>Employer</i>
Description:	<p>Calculation Logic</p> <ul style="list-style-type: none"> • Calculated fields derive values based on user inputs (e.g., totals, averages, derived metrics). • Behavior: <ul style="list-style-type: none"> ○ Automatically updated in real-time as inputs change. ○ Non-editable by users. ○ Always reflect the latest computed values. ○ The calculation is based on the formula instructions in OSHA 300A <p>UI Behavior</p> <ul style="list-style-type: none"> • Calculated fields are displayed in a read-only (grayed-out) format. • Input controls include numeric steppers where applicable. • UI adjustments ensure: <ul style="list-style-type: none"> ○ Maximum numeric visibility ○ Reduced padding for better readability ○ No dependency on horizontal scrolling for viewing values
Enhancement IV: Case Management Integration	
Affected Screen(s):	Case Management popup Navigation Patient → Register → <i>Case Management</i>  icon
Description:	<p>Additional Classification Row</p> <ul style="list-style-type: none"> • A new classification: <i>Other Recordable cases</i> has been introduced. • It behaves consistently with existing classification rows.

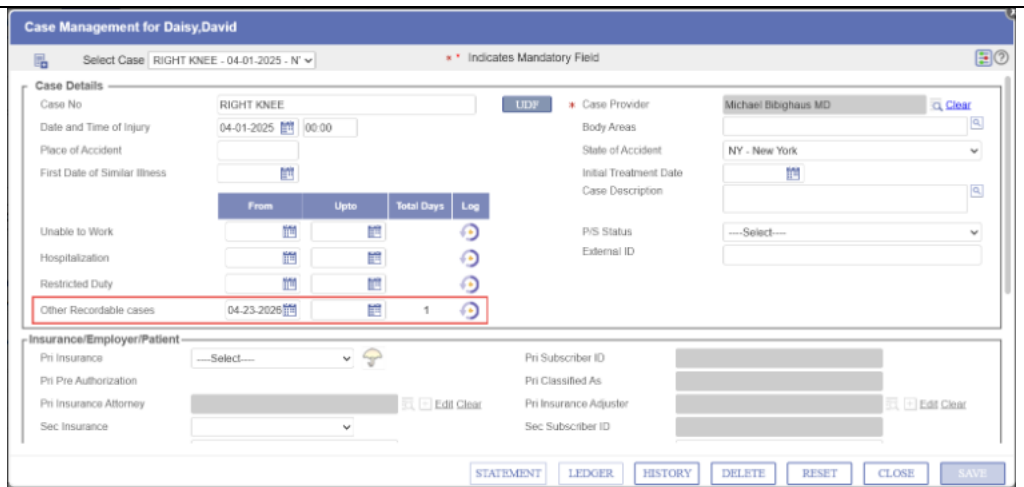


Figure: Other Recordable cases field on the Case Management popup

Classification Behavior

- Data from Case Management flows into OSHA reports.
- Expected behavior:
 - Only one classification should logically apply per case.
- System handling:
 - If multiple classifications are entered:
 - ♣ Data is still captured
 - ♣ Reporting logic prioritizes meaningful output based on available values identified in 301 Form and corresponding details of Total days from Case Management screen
- This ensures flexibility at input while maintaining report clarity.

Enhancement V: OSHA Report Generation

Affected Screen(s):	OSHA Reports
Description:	<p>Navigation Reports → OSHA Reports</p> <p>Reports Accessibility (UI-Driven)</p> <ul style="list-style-type: none"> • OSHA Form 300 and OSHA Form 300A are accessible through the application’s navigation: Reports → OSHA Reports • The availability of this module is controlled via system property: <ul style="list-style-type: none"> ○ When enabled: <ul style="list-style-type: none"> ♣ OSHA reporting options are visible within the Reports menu ○ When disabled:

- ♣ The OSHA module is hidden from the UI

User Workflow for Report Generation

- From the UI perspective, the user:

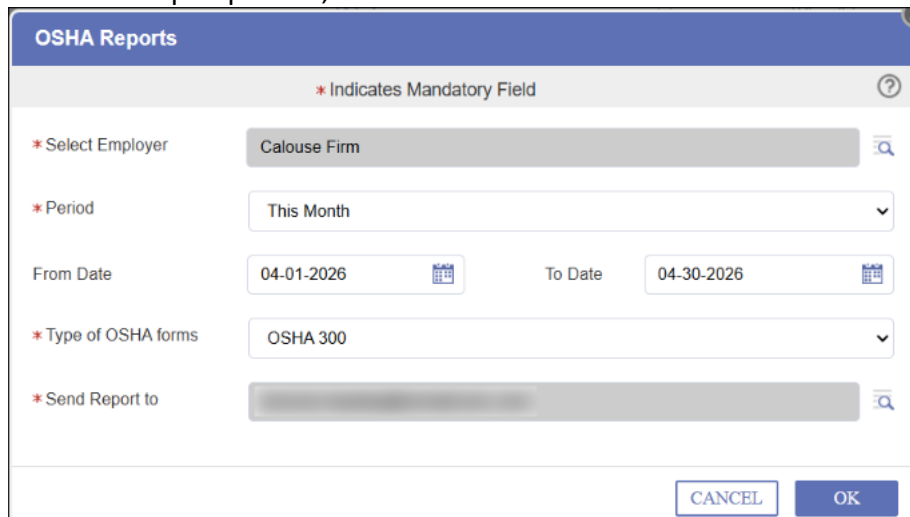



Figure: OSHA Reports

- The following fields are shown in the **OSHA Reports** popup:
 - ***Select Employer:** Allows the user to choose the employer for which OSHA reports will be generated.
 - ***Period:** Enables selection of the reporting duration for which OSHA data is to be fetched.
 - **From Date:** Specifies the start date of the reporting range when a custom period is selected.
 - **To Date:** Specifies the end date of the reporting range when a custom period is selected.
 - ***Type of OSHA Forms:** Determines whether the system generates OSHA 300 (detailed) or OSHA 300A (summary) report.
 - ***Send Report To:** Captures the email recipient(s) to whom the generated OSHA report will be sent. User can add additional recipient by clicking on the **Search**  icon and select multiple recipients.
 - **OK:** Validates inputs and triggers generation of the selected OSHA report.
 - **Cancel:** Closes the screen without generating the report.

OSHA 300 Form – UI to Data Mapping Behavior


- The OSHA 300 form is populated using data originating from:

- Case Management
- Employer Master
- Injury and Illness Incident Report - OSHA 301
- Behavior:
 - Each case created or managed through the UI:
 - ♣ Is linked to an employer
 - ♣ Contains encounter-level and case management details
 - The system identifies:
 - ♣ Records where Case Management Number (Form 301) exists
 - These records are translated into OSHA 300 log entries
- UI Impact:
 - Accurate data entry at the case level directly impacts OSHA report accuracy
 - No additional manual input is required at the reporting stage


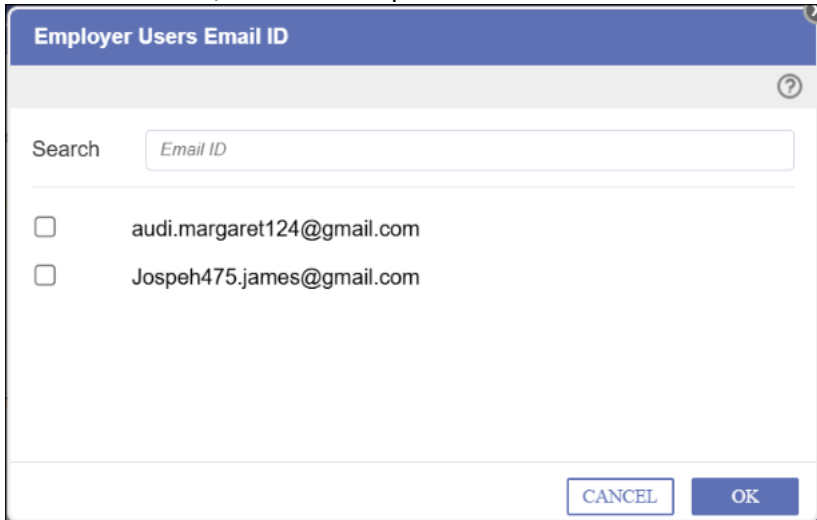
OSHA 300A Form – System Calculated Summary

- OSHA 300A is derived from OSHA 300 data:
 - The system aggregates case-level entries into summary metrics
- Behavior:
 - All calculations are automated
 - UI does not require user input for computed values
 - Ensures consistency across reports

Fillable PDF Rendering (UI Output Behavior)

- On clicking **OK**  button:
 - A fillable PDF is generated and displayed within the UI
- The rendered document:
 - Mirrors official OSHA format
 - Includes all populated and calculated fields
- UI Actions available:
 - Print
 - Email
 - Close

Enhancement VI: Email Functionality

<p>Affected Screen(s):</p>	<p>OSHA Reports Navigation Reports → <i>OSHA Reports</i></p>
<p>Description:</p>	<p>Recipient Selection Interface</p> <ul style="list-style-type: none"> On clicking the <i>Employer User Email IDs</i>  icon next to the <i>Send Report to field</i> of the <i>OSHA Reports</i> popup: <ul style="list-style-type: none"> A selection UI is displayed. Behavior: <ul style="list-style-type: none"> Default email is auto-populated from employer details. Additional email IDs (associated users) are listed. Users can select/deselect recipients. <div data-bbox="597 760 1409 1276" data-label="Image">  </div> <p>Figure: Employer Users Email ID</p> <p>Scroll and Layout Handling</p> <ul style="list-style-type: none"> If the number of email recipients exceeds visible space: <ul style="list-style-type: none"> A scrollable container is activated. Search/filter remains fixed for ease of use. <p>Email Trigger Workflow</p> <ul style="list-style-type: none"> On clicking send: <ul style="list-style-type: none"> A confirmation prompt is displayed. Upon confirmation: <ul style="list-style-type: none"> ♣ Email is triggered in the backend. ♣ Status is processed asynchronously. <p>Email Content Behavior</p> <ul style="list-style-type: none"> Email body follows a structured format: <ul style="list-style-type: none"> Greeting

	<ul style="list-style-type: none"> ○ Report generation message with context ○ Closing signature ● Ensures: <ul style="list-style-type: none"> ○ Professional communication ○ Clear understanding for recipients <p>Attachment Handling</p> <ul style="list-style-type: none"> ● Generated reports are attached as PDF files. ● Naming convention: <ul style="list-style-type: none"> ○ Includes organization identifier and report context ○ Avoids ambiguous or system-generated names ● Ensures: <ul style="list-style-type: none"> ○ Easy identification ○ Improved trust and usability
<p>Enhancement VII: Scheduled Reporting – Functional Behavior</p>	
<p>Affected Screen(s):</p>	<ul style="list-style-type: none"> ● Scheduled Process Navigation Settings → Configuration → Clinic column → <i>Scheduled Process</i> ● Download Files Navigation Settings → Configuration → Clinic column → Download Files → <i>OSHA REPORT</i>
<p>Description:</p>	<p>New Scheduled Process</p> <p>A scheduled process named, <i>OSHA 300 and 300A Forms (OSHA_300/300A) (OSHA_REPORTS)</i> is configured to run during non-working hours on pre-defined frequency for the current reporting period. During execution, the system pre-generates OSHA 300 and OSHA 300A fillable data and stores it in backend tables. This ensures faster and seamless report retrieval and download, especially during annual reporting requirements.</p>

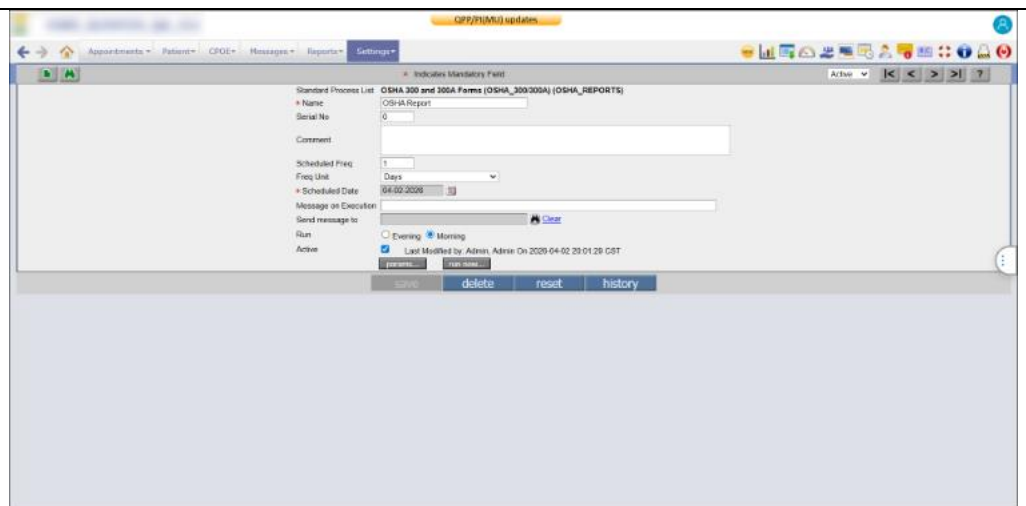


Figure: Scheduled Process, OSHA 300 and 300A Forms (OSHA_300/300A) (OSHA_REPORTS)

The default email address for report distribution is automatically fetched from **Address** popup of the **Employer** Master, ensuring accurate and consistent communication without requiring manual input.

Clicking the **params...** **params...** button for this scheduled process, the **Parameters of OSHA 300 and 300A Forms (OSHA_300/300A) (OSHA_REPORTS)** popup is displayed with the following options:

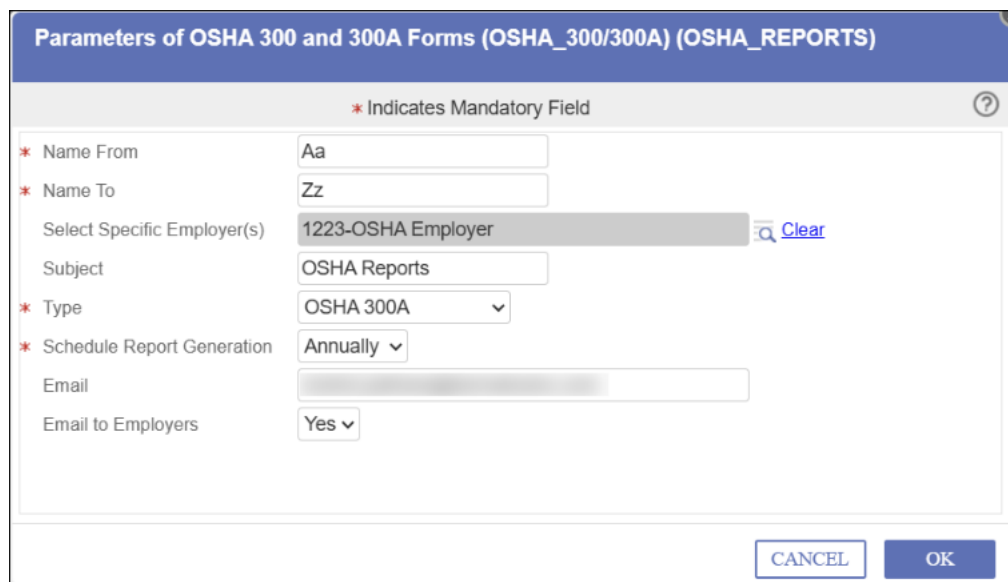



Figure: Parameters of OSHA 300 and 300A Forms (OSHA_300/300A) (OSHA_REPORTS)

- ***Name From:** This is the starting point of the OSHA Form name range. When you enter a value here, the system will begin searching for OSHA Form names starting from this value in alphabetical order. It acts like the lower boundary of your search range.
- ***Name To:** This is the ending point of the OSHA Form name range. When you enter a value here, the system will search for OSHA Form names up to this value in alphabetical order. It acts like the upper boundary of your search range.
- **Select Specific Employer(s):** Clicking the **Search**  icon invokes the **EMPLOYER** search list for users to select an employer, which then identifies all associated patients with a 301 Form recorded for the specified year. Clicking **Clear** removes the selected entry.
- **Subject:** A field to define the subject line of the email.
- ***Type:** A mandatory selection to determine whether the system generates the OSHA 300, OSHA 300A, or both.
- ***Schedule Report Generation:** A mandatory, dropdown which enables users to schedule the report generation Monthly, Weekly, Quarterly or Quarterly.
- **Email:** Entering the Email ID of the user notifies the users on report generation.
- **Email to Employers:** Selecting Yes or No decides if an Email should be sent to the selected Employers or not.


Output Management

- Generated reports are:
 - Stored in the **Download Files** section under the “OSHA REPORT” Category.
 - Accessible post-execution
- Users can retrieve reports without regenerating them.



Figure: OSHA Reports on the Download Files screen

Enhancement 2: Integration of AI-Generated Past Progress Notes Summary into Current Encounter Notes

Module:	EMR
Type:	GENERIC
Case ID:	540047
Affected Screen(s):	Past Summary Navigation Patient → Encounter → Third Pane  button → Prognosis → Past Summary tab
Description:	<p>This enhancement introduces the ability to include the AI-generated Past Progress Notes Summary directly within the current encounter’s progress notes, improving clinical context and continuity of care.</p> <p>An option has been implemented to dynamically pull the AI-generated summary of previous visits into the ongoing encounter documentation. Previously, when a patient returned after a gap of several months, the AI-generated summary of past visits was made available on the Home page, either through scheduled processing or manual generation. However, this information was not accessible within the actual encounter progress notes, which displayed only the details of the current visit.</p> <p>With this enhancement, a configurable tag (e.g., [ENC_AI_PAST_VISIT_SUMMARY]) has been introduced. When included in the</p>




	<p>progress note template, this tag retrieves and displays the AI-generated Past Progress Notes Summary directly within the current encounter documentation. The retrieved content is presented under a clearly defined header, “Previous Visit Information,” ensuring a clear distinction between historical data and current encounter notes.</p> <p>The functionality of this tag is dependent on the availability of an AI-generated summary. If summaries have been generated for prior encounters, the tag dynamically renders the available data. In scenarios where AI was enabled for earlier encounters but later disabled, the system continues to display summaries for encounters where data exists. For encounters where AI was turned off and no summary was generated, the tag renders no content.</p> <p>The implementation ensures that previously generated summaries remain accessible regardless of the current AI status, aligning with expected behavior for historical data retrieval. This approach maintains consistency in documentation while accommodating variations in AI enablement across encounters.</p>
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Enhancement 3: Display of Pregnancy-Related Lab Orders and Results in Prenatal Labs Tab

Module:	EMR
Type:	GENERIC
Case ID:	44117191265
Affected Screen(s):	Prenatal Navigation Patient → Encounter → Encounter TOC → Prenatal → Labs tab → (Lab matrix button beside ACOG)
Description:	<p>Enhancements are implemented in the Prenatal Module to ensure that pregnancy-related lab orders and lab result details are properly displayed within the Prenatal Labs tab.</p> <p>Enhancement Details</p> <ul style="list-style-type: none"> • A new Lab Matrix icon is added beside the ACOG button within the Prenatal > Lab tab.


	<ul style="list-style-type: none"> • Clicking the Lab Matrix icon opens the lab matrix view, which displays the associated prenatal lab result details for the patient. • The enhancement improves accessibility to prenatal lab information by providing a centralized view of pregnancy-related laboratory results within the Prenatal workflow. • Relevant lab orders and corresponding results are displayed in an organized format to support efficient prenatal care review and tracking.
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Enhancement 4: PrognoAI Dashboard Access via Info Button

Module:	EMR+PM
Type:	GENERIC
Case ID:	541154
Affected Screen(s):	Info popup Navigation PrognoCIS → <i>Info</i>  button
Description:	<p>This enhancement enables direct access to the PrognoAI dashboard from the PrognoCIS <i>Info</i>  button, improving accessibility and user experience.</p> <p>A dashboard link has been introduced within the same column as the PrognoAI Status, positioned adjacent to it. The link is displayed only when the PrognoAI Status is On. When the status is Off, the dashboard link is not visible.</p> <p>The dashboard view is role-based:</p> <ul style="list-style-type: none"> • SSO Login (Admin): Displays the Clinic Admin Dashboard with an overview of PrognoAI usage across all providers. • Provider Login: Displays the Provider Dashboard with usage specific to the logged-in provider. • Clinic User (with 'PrognoAI Dashboard' role): Displays the Clinic Admin Dashboard. <p>The dashboard accessed via the <i>Info</i>  button is consistent with the view available through the PrognoAI notch, ensuring uniform behavior across entry points.</p>

	<p>When the dashboard link is clicked, it opens as a popup. The 'i' button screen is automatically closed, and only the dashboard is displayed to avoid overlap.</p> <p>Additionally, for SSO Admin users, the PrognoAI notch has been updated to include access to the Clinic Admin Dashboard alongside the existing chat functionality.</p>
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Enhancement 5: PrognoAI Provider Count on Info Button

Module:	EMR+PM
Type:	GENERIC
Case ID:	541154
Affected Screen(s):	Info popup Navigation PrognoCIS → <i>Info</i>  button
Description:	<p>This enhancement adds visibility to PrognoAI adoption by displaying the number of providers enabled for PrognoAI within the PrognoCIS <i>Info</i> button.</p> <p>A new field has been introduced next to the PrognoAI Status showing the count of providers in the clinic who are enabled for PrognoAI (e.g., “#PrognoAI Providers: X”). The value is dynamically calculated based on current configurations.</p> <p>If no providers are enabled, the count is displayed as “#PrognoAI Providers: 0”, ensuring clarity and consistency.</p>