



School Health Management

V6.4 Release Notes

THE FOLLOWING SCHOOL HEALTH MANAGEMENT UPDATES ARE NOW AVAILABLE.

This release focuses on NEW Features and a number of defect corrections, for certain features for School Health Management and the Health Portal.

Specific updates for Health Portal:

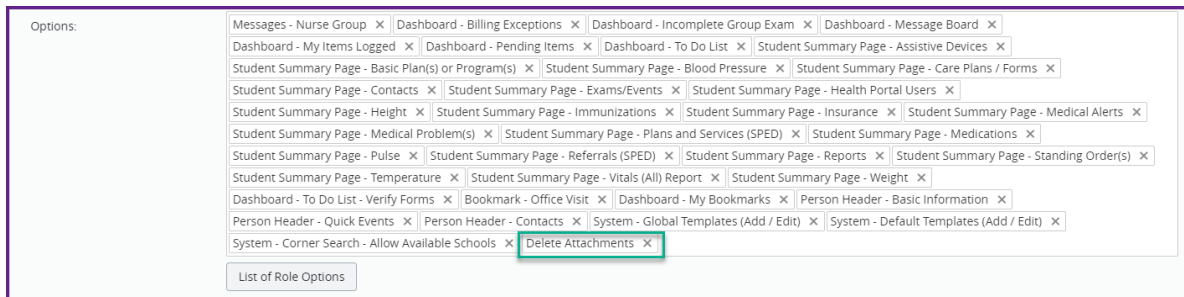
- For students not in the current track year and are in Withdrawn/Archive School, no reminders will be sent to those portal users.
- Notifications feature in Account Settings will sync when a user makes changes to their notification types, in either the web app or mobile app. Users can also turn off all notifications in the mobile app.
- When Health Portal accounts are made Inactive, the portal user will no longer be sent daily reminders, if your District has this feature enabled.

Specific updates for new and existing features include:

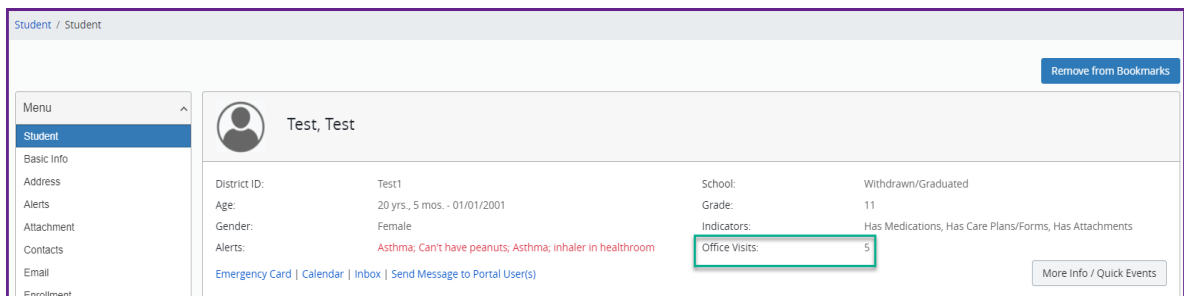
- A NEW field has been added to the Medical tab in the student profile for Immunization Certificate Expiration. This date will show as a read only date, in the Compliance section of the Immunization tab.

The screenshot displays the Frontline Education interface. At the top, there is a navigation bar with a 'Medical' tab highlighted. To the right of the navigation bar, there is a 'FERPA Consent Date' field and an 'Immunization Certificate Expiration' field set to '6/3/2022'. Below the navigation bar, the main content area is titled 'Immunization History / Card'. On the left side of this area is a 'Menu' with options: Card, Compliance, Exemption, Admission, Status, Identification, Registry, Contact Tracing, and Other. The 'Card' option is selected. The main content area shows a student profile for 'Test, Test'. The profile includes a 'Compliance' section with a 'Non-Compliant (South Carolina v5.3)' status and an 'Immunization Certificate Expiration' field set to '06/03/2022'. The profile also displays various fields: District ID (Test1), Age (20 yrs., 5 mos. - 01/01/2001), Gender (Female), Alerts (Asthma; Can't have peanuts; Asthma; inhaler in healthroom), School (Withdrawn/Graduated), Grade (11), Indicators (Has Medications, Has Care Plans/Forms, Has Attachments), and Office Visits (5). There is also an 'Audit' button in the top right corner of the profile card.

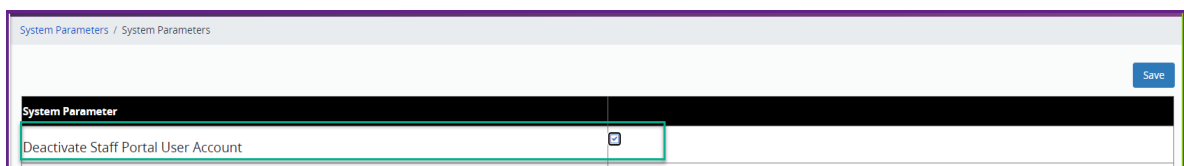
- A NEW system parameter was added to Basic Settings to allow the district to remove the Attachments tab from Events. The setting *Show Attachments in Events*, would be unchecked if you want to remove this tab. Please contact support to have your site reset.
- A new setting in System Parameters in *Import Settings and Default Values*, will deactivate staff portal accounts when a user leaves the district and they are no longer in the staff import file.
- A NEW option in security roles is available, to allow an Admin user to remove the ability to delete Event attachments.



- A NEW Bookmark option in roles has been added for COVID-19 Case Management.
- The Office Visit School Year count has been added back into the student header:



- If the district staff is no longer in the import file and you would like their portal account deactivated, update the setting in System Parameters → Import Settings and Default Values → Deactivate Staff Portal User Account:



- The Personal Notes *Note* field has been increased to 8000 characters.
- The Template lists in Group Events is now in alpha order.
- The Health History Appraisal form will now populate data from the second column in the frequency grid if there is no data in the first column.
- In the Health Portal User Accounts, an audit log has been added to the Assigned People tab.
- The Event Letters *Created By* has been corrected to show the person who generates the letter.

- LEA ID was added as a new search criteria to Administration→District, Regions, Schools→Schools, for a more enhanced way to search schools.

Schools

School Name: Other Name:

Operational Status:

LEA ID:

Show 10 entries

Name	Faculty	Students	Feeder Pattern	Operational Status	LEA ID	Action
Withdrawn/Graduated	0			Open	999999999	Edit

Showing 1 to 1 of 1 entries

Previous 1 Next

- The Screening Compliance search page has been corrected to show Scoliosis instead of Vision showing twice.
- Education Sessions no longer save without having the Session Facilitator populated.
- The time stamp for the Portal Form Response tab has been restored to the page.
- A new widget, Import File History, was added to the Import/Export Config Dashboard to show statuses of files and a link to the Batch Report.
- To set SPOT Vision Templates settings in System Parameters, this setting has been placed into the Events/Items-->Group Events-->Vision Exam Auto Screening Device (SPOT or PlusOptix) Templates menu.
- The Exam/Events PDF on the student profile no longer generates errors.
- The Growth Chart tab has been corrected to show all data from Growth and Physical Exams.
- The Immunization Certificate Expiration view only will no longer show 1/1/1900 when the date field is changed to no date.
- Audit logs have been added to the Non-Person Basic Info and Email tabs along with Student Contacts tab.
- For clients who have purchased the IRC, a correction was made for when two identical registry IDs are found on a student in the state's registry, records will now be brought into the student's record.
- The Group Events Rapid Wizard no longer creates duplicate exams when clicking the Create Exams button more than once.
- The MBH COC event fields will be locked down to not allow editing of the fields, except the RAD and Comments. This is locked down once the event has passed the review process.

Specific updates for Reports:

- The Billing 835 Summary C-025 Report has been corrected to show all data that has been submitted.
- The Office Visit Detail C-225 Report no longer kicks you out of the program when running the report.

- The Staff Portal Account Info C-273 Report has been corrected to show updated login information when staff has logged in from the Mobile app.
- The COVID-19 Test Results C-275 Report has been corrected to display Passed results.
- The COVID-19 Isolation/Quarantine C-278 Report has been corrected to show the date for Tested Positive field.
- A NEW Import History C-287 Report has been added to provide import results, with status and the type of import.
- The Event Detail 2003 Report has been corrected to no longer display an error.
- The Glucose Charting 2005 Report has been corrected to show all Medical Procedure Admin events for Diabetic care.
- The Items Logged 2007 Report has been corrected to show comments for all events.
- The Screening Compliance Detail 2011 Report no longer shows students listed twice.
- The Health Services Statistics 2104 Report has been corrected to show all events for the source data CSV.
- The COVID-19 Cases by Campus 2115 Report has been corrected to no longer show an error message when generating the report.
- The Medical Problem Detail/Summary 5006 Report has been corrected to show Medical Alerts and the description.
- The Scheduled Medications Summary 5013 Report has been corrected to no longer show an error message when generating the report. The clear button has been fixed to clear all selections in the search criteria.
- The User Statistics 6102 Report has been corrected for the Login History.
- The Immunization Group Letters no longer shows an error when generating the PDF version of the letters.
- The Medical Problem Detail C-123 Report was updated to pull student records based on the Medical Alert start and end date.
- For districts that have purchased Advanced Reporting, the date field criteria have been corrected for events.
- Medical Problems Comments were added to Advanced Reporting. This is an additional product add on, not part the standard SHM subscription.
- For districts that have purchased Advanced Reporting, we have added the left outer join from Events by Track Year for Sessions.

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V6.4.1 Release Notes

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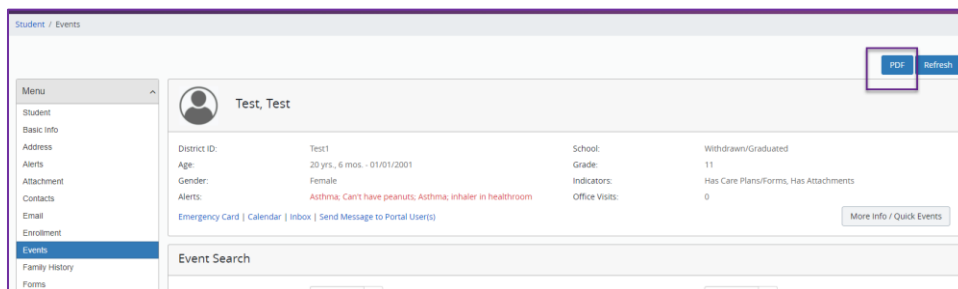
This release is for School Health Management and Health Portal which includes new features and enhancement and defect corrections.

Specific Health Portal updates for new and existing features:

- The Health Portal mobile app now has enabled with Biometrics, to allow users the option to login using Face ID, Fingerprint ID, or a PIN. The options will depend on the user's phone capabilities.
- A Status has been added to the History tab, to reflect the results of the Daily Questionnaire in the Web application. This will be updated in the Mobile application in the next release.
- If a portal user has no notifications set Account Details, the user can successfully login.

Specific updates for new and existing features include:

- The 2021 NY Health Examination Form has been updated with the following corrections: The student demographics are read only, the tabbing will go in the order of the fields, and there is a fillable date field for Lead. Please note that a new version of the form must be downloaded in the [Feature Library](#) and previously saved forms won't have these updates.
- A new PDF button has been added to the Student Profile → Events to give the user the ability to mass print all event details related to the student. This will be determined by the selection criteria that is chosen in the Event Search.



- Medical Procedure Admin and Medication Admins have a new field to select the schedule if the Administration is also a PRN. When a user completes a PRN, they can associate the schedule related to it, so the item will be removed from the To Do List. Please note, the event

must be saved first, before the Schedule field shows. Once the schedule has been selected, click save and the item will be removed from the To Do List.

Medication Admin

Label with red color and * is required field.

Save and Close Save Cancel Audit

Test, Test

District ID: Test1 School: Withdrawn/Graduated
 Age: 20 yrs., 6 mos. - 01/01/2001 Grade: 11
 Gender: Female Indicators: Has Medications, Has Care Plans/Forms, Has Attachments
 Alerts: **Asthma; Can't have peanuts; Asthma; inhaler in healthroom** Office Visits: 0

Emergency Card | Calendar | Inbox | Send Message to Portal User(s) More Info / Quick Events

Examiner*: Admin, Admin Date*: 7/28/2021
 Time In*: 03:27 PM Time Out: Now 5m 10m 15m
 Referred By*(T): Parent/Guardian Location*(T): Health Office
 Sensitive Outside
 Plan or Service: Select Plan or Service Recorded By: HMTech
 Schedule: Select a Schedule
 6:50AM - Albuterol Inhaler

Detail History

- A NEW Audit log button has been added to the Health Portal → Portal User accounts screen. This will allow Admins users to see what changes were made to user accounts.
- The HELP link in the ? Menu has been removed. All Help articles can be accessed in Frontline Support in the Learning Center.
- The ½ hour increment has been removed from the To Do List.

To Do List

Lock CSV PDF Quick Admin Refresh

Show/Hide Filters

Show 5 entries Search:

Time	Date	Information	Action
12:00 PM	07/12/2021	Test, Test Type: Medical Procedure Administration Home: Withdrawn/Graduated More Info	Open

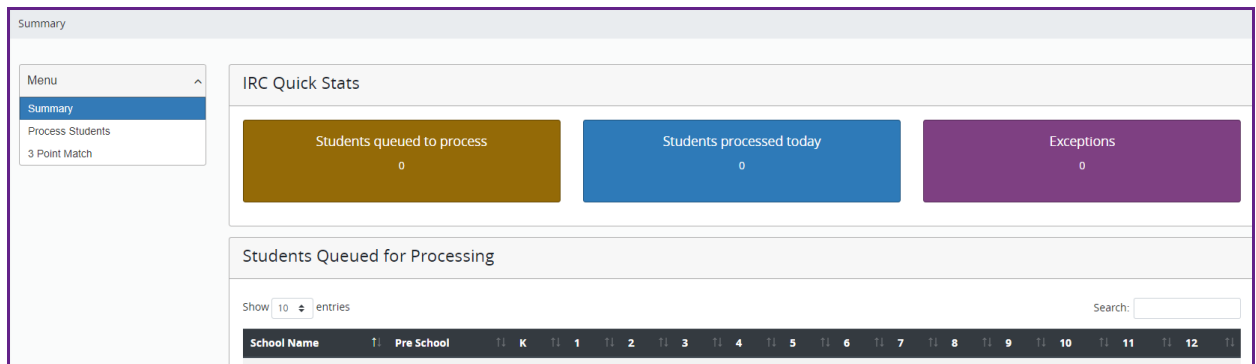
- The *Delete* link for Pending Items has been removed for any events that a user hasn't created in pending.
- Districts that import staff, will now have the ability to assign more than one school in the Basic Info tab of that person's profile.
- The label for the link to the calendar in the person search in the upper right has been changed to Student Calendar.

Reports / Person Search

Search Tammie Lollis-Mitchell, RN Administrators

Full Name	Details	Action
Test, Test	Home School: Withdrawn/Graduated District ID: Test1 Birth Date: 01/01/2001 Grade: 11 Gender: Female Gender Identity:	View Profile Office Visit Student Calendar

- A new system parameter was added to Import Settings and Default Values. If a district wants to import staff IDs for Teachers as part of the Contact Tracing feature, the *Import Class Teacher by Staff ID* setting would need to be checked to enable this functionality.
- Any Daily Health Check retakes will now appear in the Portal Form Response tab in the person's profile. Any retaken results will be shown with a strike through.
- The COVID-19 Questionnaire Dashboard has been updated to reflect the enhancement to allow multiple school assignments, mentioned above.
- In Administration→Form Designer, the name of the COVID-19 Case Management has been corrected to reflect the event name displayed in Quick Events.
- The audit log in the Immunizations Identification tab has been corrected to no longer show birthdate if no changes were made to this field.
- For districts who have purchased the Immunization Registry Connection, this feature has a NEW security setting for enablement, in Roles→Maintenance→Immunization Registry. When this feature is enabled, 3 new pages have been added to provide information about the number of students ready for processing, the total processed today and the number of exceptions.



The Process Students tab allows a user to move students from the Available Students section, those whose records haven't been pulled from the registry in the bulk pull process. A user can move the students to the Queued Students section to request those records to pull from the state registry. The 3-point match tab allows a user to select more than one student at a time, to ignore the 3-point match for those records.

- The Immunization Registry Audit has been updated to include the user who manually added the record and doses.
- The Audit Log for events has been fixed to display any changes made to the event.
- A new link to a validation report has been added to the Import/Export Config Dashboard to assist with troubleshooting for imports.

- The enrollment tab has been corrected in the student profile to display all records if a user has over 500 schools assigned to their user account. The page was limiting the view when there was a large amount of schools assigned to a user.
- The Insurance tab in the student profile has been corrected to save all updates made to the page.
- The examiner label for Counseling Sessions has been updated to Clinician.
- Event Attachments will now show in the Student Profile Attachments tab. The folder names will be the events they were added to, so all attachments can be accessed in one area in the Student Profile.
- Billing Manage Approvals *Approved By* field list has been corrected to show SHM user accounts, to properly assign the desired person to manage approvals.
- The Do Not Bill check box in Maintenance Medication has been corrected so that when the box is checked, it will show that way in Medication Administration.
- A rule in Claim Rules “Do Not Bill Group Events if Unchecked” has been changed from to “Bill Group Events.”
- A new message in the top right of the Nursing Service Plan of Care tab in the student profile was added to indicate the Plan of Care needs to be saved before Goals/Objectives can be added to the student’s record.
- The MBH Progress Note expand feature has been corrected to show data from the event.
- The MBH COC has been updated to move all comments to the history, after they have been saved.
- A new feature has been added to the Health Check Config to enable a question to be added to the Daily Health Check of “Have you been fully vaccinated for COVID-19?” if the answer is yes, then a health check is not required. If the answer is no, then a health check is required. This can be enabled in Administration → Health Portal → Portal Forms: Health Check Config. Please note that the Gather Prescreen Location checkbox must be checked, when enabling this new prescreening question.

Portal Form / Health Check Config

Label with red color and * is required field.

Save

Menu
Form
Languages
Reminder Config
Health Check Config

Daily COVID-19 Health Check

Reminders: Health Check Document: True

Health Check Config Do not show the questionnaire for people who are in isolation/quarantine

By setting to "Active": **a.** on screen confirmations will appear upon submission **b.** Email notifications will be received by designated administrator as well as survey participants.

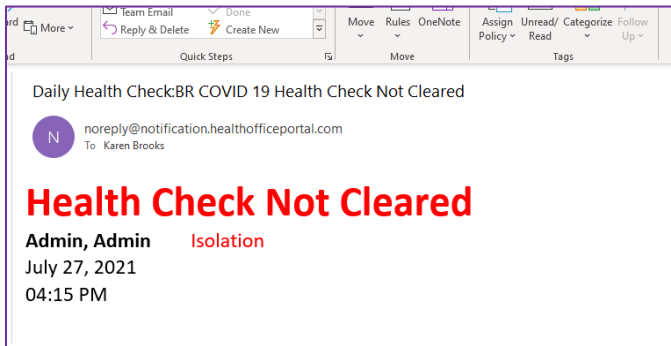
Pass Confirmation Fail Confirmation Not Required Confirmation

Gather Prescreen Location Info (Enabling this field will display the prescreening to gather the location info used to calculate whether or not a health check is required)

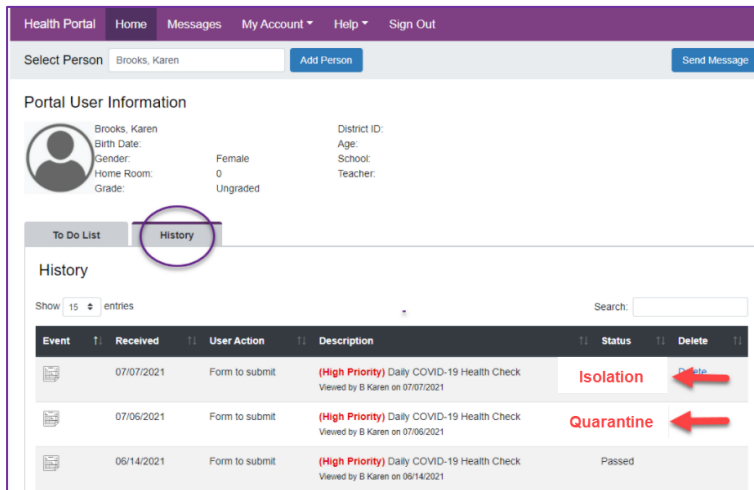
Questionnaire not required if person has been fully vaccinated. (Enabling this field will display the prescreening to gather the answer to whether or not the person is fully vaccinated.)

Confirmation Message:
Health Check Not Required

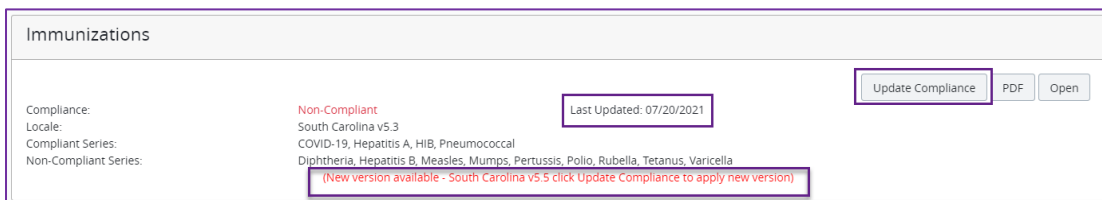
- A new feature has been added if the Health Check when a person is in Isolation or Quarantine, when the email is shared. This also applies to the mobile application when shared.



- A new status of Isolation or Quarantine will be displayed in the Health Portal History tab.



- A NEW button called Update Compliance has been added under the Immunizations section that allows for updates on the student profile and compliance card. This will enable users the ability to trigger the immunization calculation if the Last Updated date is before the last calculation. A new notification will appear if an immunization file has been uploaded to your site, but the recalculation hasn't been completed on the student record you are viewing.



- The Form Designer has been corrected so Billing fields will always appear at the top of the event, for those districts utilizing SHM Billing features.
- The Staff Questionnaire PDF and CSV for the COVID Questionnaire Dashboard is no longer showing blank and will not include staff who are in Isolation or Quarantine.
- The search date range has been corrected to properly reflect the selection in the Student Profile Portal Form Response tab.

- When choosing a school with no students in the dropdown on the COVID-19 Dashboard, the user will not be logged out of the program.
- A reminder has been added to the Dashboard-->To Do List to follow up on a COC if 30 days have passed, a reminder messaging saying Complete RAD.

Specific updates for Reports:

- The Schools by Users C-048 Report has been corrected to only include faculty user accounts.
- The Events Detail C-052 report has been corrected and will no longer direct the user to the login page when generating the report.
- The COVID-19 Historical Results C-277 Report will now have the Username associated with the portal account, a new filter has been added to run either All, Active Only, or Inactive accounts. A new status of Isolation or Quarantine has been added instead of Not Taken, given the user is in Isolation or Quarantine.
- The COVID-19 Isolation/Quarantine data C-278 Report has been updated to pull data based on the *Date approved to return to school* is within the date range search criteria.
- A NEW report called Questionnaire Retake C-290 is now available to show retakes of users as Pass-Retake or Failed-Retake. The report will show all other attempts thereafter and will be logged as Passed or Failed.

	A	B	C	D	E	F	G	H	I	J
1	School	Grade	PersonTy	DistrictID	StateID	FullName	6/1/2021	6/2/2021	6/3/2021	6/4/2021
2	Archive/V	1	Student	FL002		McGovern Child2	Pass-Retake	Not Taken	Not Taken	Not Taken
3	Archive/V	1	Student	FL002		McGovern Child2	Failed	Not Taken	Not Taken	Not Taken

- The Events Summary 2004 Report description has been corrected to fix a spelling error for *summarized*.
- The Scheduled Medication Summary 5013 has been corrected to no longer produce an error message when generating the report.
- The School Statistics 6101 Report has been corrected to show Pending Items for students and staff.
- The Plans and Service table for Advanced Reporting has been corrected to accept special characters in the data.