Profile Mac: Version 3.1 to 3.2 Upgrade

The upgrade to version 3.2, from 3.1, is likely to take slightly longer than the standard version 3.1 upgrades. However, as it is a new release version, there are some key points which should be reviewed, or considered, before undertaking the version 3.1 to 3.1 upgrade; as well as actions which should be taken once the upgrade finishes.

Key Points Summarised

- **Must be on Profile v3.1c3 or later before upgrading to Profile v3.2**
- Email is moved into the database – this will take time (a few minutes – maybe more if the clinic is a heavy user of Email)
- Tasks are moved into the database – this will take time (a few minutes – maybe more if the clinic is a heavy user of Tasks)
- Prior Approvals are moved into the database – this will take time (a few minutes per provider in the clinic)
- Overall allow one hour for the upgrade – although small clinics may only take 5 minutes. Those clinics with SSD drives on their server should see very fast upgrade times.
- **After Upgrade, User Groups MUST be setup to ensure Tasks are assigned to a group containing staff members and Emails are delivered to users in the represented Groups (Profile will warn users when attempting to use an empty User Group). See Tasks or Email topic sheets for details on setting up User Groups (which is located in the People and Places window)**
- Reminder: as with Profile v3.1, Profile v3.2 will not work with Mac OS X 10.4 Tiger

Mac OS X 10.4 Tiger is no longer supported

As we move forward in development, it will be necessary at times to discontinue support for the oldest version of the Mac operating system. Mac OSX 10.4, Tiger, will no longer be supported in Profile 3.1 as it cannot handle many of the new features appearing in Profile v3.1 and planned for future releases. Even before 3.1, Tiger users were unable to make use of useful Profile 3.0 features, such as native PDF display in Profile.

If you any of your clinic or home computers is currently running Tiger, they must be updated to a newer version of Mac OS X (Mac OS X 10.6 or higher is recommended)

Database Optimisation

First seen in Profile v3.1, a new option is available: database optimisation. This feature is selected by default at upgrade and ensures the database understands the performance of various approaches to finding data that Profile requests.

Approvals have been moved into the database

The changes that will be noticed are as follows:

- The Approval window now uses TokenEdit controls to enhance/simplify data entry
- Find Approvals window searches are now instantaneous and display more data

- A bug in v2 and v3 previously allowed Agency data to be stored without linking to an Alias. During the upgrade, any invalid codes will be moved to the Group Reference field.

Emails have been moved into the database

For a detailed description of the new features of Email, see the dedicated topic sheet. A brief highlight of features is as follows:

- Now supports sending to any number of Users or User Groups
- Provides Copy To field allowing email to External Providers and Patients while copying to Internal Users
- Behaviour consistent with Outlook and other modern Email programs
- Full Audit shows everyone's status with the Email (who has read, replied, forwarded, deleted). This Audit works for historic Email data as well.
- Supports Letter Templates and Print Variables
- Instantaneous loading of data
- Notifications of new email even when the Email window is not open

Tasks have been moved into the database

For a detailed description of the new features of Tasks, see the dedicated topic sheet. A brief highlight of features is as follows:

- Now supports assigning to a User or User Group
- Now supports linking to Patient data such as Correspondence, Notes, Problems, Approvals, Recalls, Invoices, Scripts)
- Provides "Take Over" allowing one user in a group to take ownership
- Provides "Return" allowing a "one click" dialogue between Sender and Holder
- Full Audit shows everyone's status with the Task (all changes made to all data). This Audit works for historic Tasks data as well.
- Instantaneous loading of data
- Notifications of new tasks even when the Tasks window is not open

Appointment Audit

Profile v2 and v1 had a primitive Appointment Audit, which displayed only who had altered the appointment comment. This feature was removed in Profile v3.0 with the knowledge a full audit feature would be available in an upcoming release. This feature is now here and offers everything users could want:

- Full Audit shows everyone's status with the Appointment (all changes made to all data)
- Review Audit an empty Appointment slot to see the history for all appointments that are or have been available at that time
- Review Appointment History for a Patient now offers two modes:
    - The list of past appointments

  - The list of all audit records for that Patient grouped by appointment and showing such detail as (for instance) if an appointment was set for the patient but subsequently changed to another patient's name

User Groups

Currently used only by Email and Tasks, this feature allows users to be placed in a variety of groups for easy assignment/sending. For instance: Nurses, Doctors, Front Desk. This feature is accessed from the People and Places window.

SMS Texts

This feature has been improved in the following ways:

- Appointment SMS Texts now support any SMS Template
- Recall and Appointment Print Variables are now supported to allow details of that data to be provided in a Template (works for Letters as well, and for any window that supports Appointments and Recalls)

Notifications

Profile v3.2 provides rich integration with the Mac OS 10.8 and 10.9 Notification System, providing OS level notifications of key information:

- At logon, counts of unread Email, due Tasks and waiting Patients are notified
- New Email is notified, regardless of whether the Email window is open
- New Tasks are notified, regardless of whether the Task window is open
- Arrived Patients are notified, regardless of whether the Appointment window is open
- Clicking on the Notification opens the related data (new Email, etc)
- The Dock Icon badge/counter is now dynamically maintained to ensure it accurately represents the number of Emails, Tasks and Patients – again, regardless of whether the related windows are open
- If desired, Notifications can be turned off via a User Preference
- This feature is not supported for Mac OS 10.7 and earlier

Inventory System

Profile v3.2 provides a full Inventory/Stock Control system, which is integrated into the Financial System. For a detailed description of Inventory, see the dedicated topic sheet. A brief highlight of features is as follows:

- Supports Stock Lots (Batch/Expiry) for perishable items
- Any number of Stock Locations can be configured
- Providers Inventory Manager displaying current Stock Levels throughout the Clinic broken down by Stock Location or Stock Item
- Tracks Stock Levels and records Reorder and Max/Min thresholds
- Delivery, Movements (between Stock Locations) and Shrinkage (returns, damage, expiry, theft, etc) are formally supported
- Inventory Audit displays breakdown of all use – including Patients receiving items

- Exports to Text Files or Excel for easy management and analysis

Bar Code Reader

Profile 3.2 now supports bar code readers. Although principally intended for use with Stock as part of the Inventory System, a SKU (Stock Keeping Unit) number may be assigned directly to a Service Code allowing automation of non-Inventory based stock management, and services in general.

Problem List

The Problem List window has been modernised to support several new related features:

- The Problem ListView now fills the window – no edit controls are visible
- Adding or Editing Problems now displays in a separate "slide out" sheet window as seen with many other areas of Profile such as View Filters
- Adding new Problems is now supported from Enter Notes and EDI Inbox
- The edit window now uses Token Edit controls to assist with selecting disease codes

External Providers

Profile 3.2 significantly extends support for External Provider information:

- Street Address now available (previously on Postal Address was supported)
- Area Of Interest now available (and supported in the Search function)
- Website supported
- Mobile and Other phone fields are now separate
- Notes field provided to store relevant comments
- Support for Inactive – which when set excludes the External Provider from the lookup list
- Support for Preferred – which when set shows a Gold Star icon in the lookup window

NZULM Update

Profile 3.2 now provides a "three click" NZULM Update window.

1. Click once to Download the latest NZULM archive
2. Click once to Unzip the archive
3. Click once to Import the update files

Many Minor Improvements and Bug Fixes

- Inactive status on Service Codes, Users, External Providers data types now suppresses their availability in the new TokenEdit controls
- TokenEdit control now widely used and improved in function and performance
- Profile Server start-up time is reduced with new database max-ID process
- Print Page Range: previously ignored: now works for some types of documents (eg. Letters); it is still ignored for financial reports

- View Filters - anywhere view filters are used, the order of the filters in the popup menu can be changed using up/down arrows in the fitler edit window
- ImageView of Documents: upgraded to a new control (more modern/faster/better quality/less memory use) and now supports printing
- Sending Letters as PDF now supported by Send RSD option in the Letter window
- Disease Code search now searches for "any" of the text searched - great for finding the correct code - and database search is now 150 times faster (after the first found results are returned)
- Any Code-Based search now searches the databases about 50 times faster than before
- Email and Tasks broadcasts much more efficient - server side probably 1000-10000 times faster
- Red Dots are now shown to indicate there is information stored on Text Pages for Patient and User (and including Social, Family and Past Medical History)
- Service Codes now support a "Retain GMS/CGMS Line" checkbox which when a service code is added to an Invoice from the Appointments will keep the GMS/CGMS line rather than overwriting it
- Report: Provider Referral Report is again working - with more options than the past (and near instant processing)
- Report: Referral Report is again working
- Multiple EDI Inbox bugs fixed including the possibility of unintentionally saving completely unknown patient documents/results (DOB Unknown) for more than one patient under a single patient
- Work Centre is now more functional with full Tasks support and editing/updating as well as dynamic update of Attending Patients – showing “Arrived not Seen”, “Seen not Invoiced” “Previous Hour” and “Next Hour”