OpenVPMS User Projects Minutes October 2011

Meeting minutes

The meeting was informal and these minutes are set out according to key areas rather then any particular order ☺

Under Discussion

1. Integrated Visit Editor

Submitted by tony on Mon, 20/06/2011 - 17:17
Total cost estimate: $4500
Due date for completion of this stage: 30/06/2011
Current Percentage Funded: 0.00%

- o Tony re-introduced the concept of a combined visit editor which shows invoicing, reminders, medical records all simultaneously.
- o It was discussed how such a detailed project might be best discussed in the forums.
    - i. Screenshots were considered.
    - ii. Demos with sample ideas were also discussed but may not be practical.
    - iii. The formation of a working group was also discussed.
- o **It shall remain Under Discussion**

2. New Visit Invoice Selection

Submitted by tony on Mon, 20/06/2011 - 17:51
Total cost estimate: $0
Due date for completion of this stage: 20/06/2011

- o Had limited support at the meeting.
- o We had almost no large animal representation and it was mentioned that this was a feature most applicable for them.
- o **It shall remain Under Discussion**

3. All filter headers in application are fixed in the screen and do not scroll with the content below

Submitted by Matt C on Sat, 20/08/2011 - 09:51

Forum: http://www.openvpms.org/forum/medical-records-arrows-nextprev-page
Jira: Not Jira'd yet

- o This still has good support from users.
- o The developers have actually reviewed the feature (the editor of this agenda had some out of date info!) and given two options.
- o It should be noted these only apply to Medical Records. It was discussed if it should be applied to all areas and Tim advised this would be "non-

trivial", in other words A LOT of work. So Medical records are the main focus now.

- o Option 1: $520 but might result in some wasted space in the screen as Tim will need to guess the space to leave for the filters.
- o Option 2: $1510 Will result in less wasted space but is more expensive.
- o **It shall remain Under Discussion**

4. *Automatic Order Generation*

Submitted by tony on Mon, 22/08/2011 - 08:54

- o There was support for this project but little in the way of extra detail to be added.
- o If there is nothing more to add then Tony may move it to Developer Review and get it costed with a specification of his own.
- o **It shall move to Developer Review**

5. *Schedule blocking*

Submitted by Matt C on Wed, 02/09/2009 - 22:48
Forum: http:// www.openvpms.org/forum/staff-time

- o It was suggested that this could be redefined to provide for recurring appointments.
- o Using recurring appointments the users present felt that it would be possible to "block" the schedule easily.
- o The ability to create a recurring appointment will be specified as;
  - o Daily, Weekly, Monthly, Yearly
  - o The number of recurrences as Infinite or Defined (eg. Once, twice etc)
  - o When editing/deleting a recurring appointment it should be
    - Visible in some way (eg. A symbol).
    - Prompt the user if the change should occur for all instances.
- o If there is nothing more to add then Tony will move it to Developer Review and get it costed with a specification of his own.
- o **It shall move to Developer Review**

6. *OpenVPMS Internationalization*

Submitted by tanderson on Sat, 05/03/2011 - 17:00
Due date for completion of this stage: 05/04/2011

- o No new input on this project.
- o **It will stay in Under Discussion**

Developer Review

1. New style of document selector
Submitted by Matt C on Tue, 07/09/2010 - 22:39
Forum: http://www.openvpms.org/forum/new-type-document-selector
Jira: http://jira.openvpms.org/jira/browse/OVPMS-1085

- o This was revised after discussion. It was suggested that the project just achieve one simplified aim which would be to allow documents to be linked to one or more worklists/schedules. This would allow users to customise the documents they selected from during Check-In and other workflows.
- o Point 2 (the print button) was removed from the specification as the recent changes to printing options in Templates made it redundant.
- o **We have created a JIRA and will keep you informed regarding costings.**

2. Invoice notes linked to Medical records
Submitted by Matt C on Thu, 09/09/2010 - 17:52
Forum: http://www.openvpms.org/forum/invoice-notes-record-history
Jira: http://jira.openvpms.org/jira/browse/OVPMS-1086

- o There was some tacit support for this feature.
- o **We have created a JIRA and will keep you informed regarding costings.**

3. SMS Project - Appointment reminders
Submitted by Matt C on Sat, 24/07/2010 - 12:25
Forum: http://www.openvpms.org/forum/courtesy-sms-reminders-future-appointments
Jira: http://jira.openvpms.org/jira/browse/OVPMS-957
- o Part 1 – SMS Beginnings has absorbed quite a bit of the scope of this feature. A user will be able to be SMS'd from the Customer summary when Part 1 is delivered. Standardised SMS messages could be achieved by using Macros (eg. Reminders etc)
- o Therefore the discussion led to this being redefined as sending a batch set of appointment reminders for a particular day.
- o There was little support for this feature and it was slated for being Cancelled.
- o However there was strong support from one user so it has been kept alive with this new definition.
- o Please indicate your support for this one in order for it to go to Devoper Review or make suggestions if this is not what you had in mind.
- o **This project has been moved to Under Discussion.**

4. Allow switching of payment type on finalised payments

Submitted by Matt Young on Mon, 02/08/2010 - 20:45
Jira: http://jira.openvpms.org/jira/browse/OVPMS-925

- o There was VERY strong support for this feature but it remains a sticky one.
- o The suggestion was that this only be possible;
  - o By Administrators
  - o For payments dated after the related Till was last closed.
- o **This project has remains in Developer Review. The new comments have been added to its JIRA by Tim and are being discussed.**

5. Future dated messages as reminders using the new message alert

Submitted by Matt C on Thu, 02/09/2010 - 23:38
Forum: http://www.openvpms.org/forum/revisitfollowup-messages-and-clinician-patient-lists
Jira: Not Jira'd

- o **This project has been Cancelled after discussion.**

Seeking Funding

1. SMS Project - The first steps
Submitted by Matt C on Tue, 06/10/2009 - 23:21
Total cost estimate: $3820
Current Percentage Funded: 65.10%
Forum: http://www.openvpms.org/forum/sms-project
Jira: http://jira.openvpms.org/jira/browse/OVPMS-902 (Part 1)
- **This project has been moved to Completed.**

2. SMS Project - Reminders
Submitted by Matt C on Sat, 24/07/2010 - 12:20
Total cost estimate: $1510
Current Percentage Funded: 10.0%
Forum: http://www.openvpms.org/forum/sms-project
Jira: http://jira.openvpms.org/jira/browse/OVPMS-951
- There was strong support for this feature.
- After a discussion it was suggested this be moved back to Developer Review.
- The issues raised were;
  - Grouped reminders – how to handle merged data?
  - Needs to include the ability to specify a method to allow users to have different mechanisms of delivery for different reminder counts. (eg. First reminder is Mail, Second reminder is SMS.)
- **This project has been moved to Developer Review.**

3. Email Enhancements
Submitted by Matt C on Tue, 06/10/2009 - 23:00
Total cost estimate: $2830
Current Percentage Funded: 34.80%
Forum: http://www.openvpms.org/forum/clickable-links-customer-contacts
Jira: http://jira.openvpms.org/jira/browse/OVPMS-905
- Strong support.
- Now all we need is the money to get it going!
- **This project remains Seeking Funding.**

4. Medical Records display order
Submitted by tony on Tue, 23/08/2011 - 12:19
Total cost estimate: $685
Current Percentage Funded: 14.60%
Forum: http://www.openvpms.org/forum/medical-records-and-upgrade
Jira: http://jira.openvpms.org/jira/browse/OVPMS-1069

- Strong support but not gonna get in 1.5 given current state of funding.
- **This project remains Seeking Funding.**

5. Change Preview button in Estimations to Print button

Submitted by Matt C on Wed, 27/01/2010 - 09:35
Total cost estimate: $685
Current Percentage Funded: 14.50%
Forum: http://www.openvpms.org/forum/reprinting-estimations
JIRA : http://jira.openvpms.org/jira/browse/OVPMS-924
   - o **This project has been Cancelled after discussion.**

6. Text filter on Summary tab of Patient Medical Records

Submitted by Matt C on Mon, 07/12/2009 - 17:08
Total cost estimate: $1510
Current Percentage Funded: 8.70%
Forum : http://www.openvpms.org/forum/keyword-filter-patient-histories
JIRA : http://jira.openvpms.org/jira/browse/OVPMS-913
   - o Some tacit support for this one. Enough to keep it active… but it might be a tough road to get 100% funded.
   - o **This project has remains Seeking Funding.**

7. Save last cheque details for Customer

Submitted by Matt C on Thu, 09/09/2010 - 17:44
Total cost estimate: $520
Current Percentage Funded: 0.00%
Forum: http://www.openvpms.org/forum/cheque-details-save-client-record
Jira: http://jira.openvpms.org/jira/browse/OVPMS-974
   - o **This project has been Cancelled after discussion.**

8. Direct Editing of documents using Milton (Part 2)

Submitted by Matt C on Mon, 27/09/2010 - 09:21
Total cost estimate: $5140
Current Percentage Funded: 10.00%
Forum: http://www.openvpms.org/forum/permanently-attaching-patient-letters-medical-records
JIRA : http://jira.openvpms.org/jira/browse/OVPMS-977

   - o Despite great work to date to get Part 1 completed, the recent changes to Letters (much larger character allowance) has meant that this project has lost it's support.
   - o **This project has been Cancelled after discussion.**

9. New Customer column in Investigations workspace

Submitted by Matt C on Sun, 15/08/2010 - 11:32
Total cost estimate: $355
Current Percentage Funded: 4.60%
Forum: http://www.openvpms.org/forum/investigations-display
Jira: http://jira.openvpms.org/jira/browse/OVPMS-962

   - o Despite being the smallest project and having enough support not to cancel it, this one hasn't moved.
   - o **This project has remains Seeking Funding.**

10. Allow "Vaccination due date" to be shown on patient forms

Submitted by Matt C on Fri, 19/11/2010 - 08:09
Development Project Status: Seeking Funding
Total cost estimate: $520
Current Percentage Funded: 0.00%
Forum: http://www.openvpms.org/forum/vaccination-due-date-merge-field
Jira: http://jira.openvpms.org/jira/browse/OVPMS-768

- o There was support for this feature.
- o However after discussion it was suggested this be moved back to Developer Review.
- o I have failed to record the issues raised that meant that it need Developer review but might have related to grouped reminders.
- o **This project has been moved to Developer Review.**

11. Follow up task lists enhancements

Submitted by Matt C on Fri, 17/09/2010 - 09:16
Total cost estimate: $1180 -> 0
Current Percentage Funded: 0.00%
Forum : http://www.openvpms.org/forum/revisitfollowup-messages-and-clinician-patient-lists
JIRA : http://jira.openvpms.org/jira/browse/OVPMS-975

- o After a decent discussion this whole feature was redefined as follows;
  - o Create a special worklist for Follow Up
  - o Add a Follow Up button to Patient Summary that automatically creates a task in Follow Up list.
  - o Pressing this button shows a dialog where the user selects the date of the followup.
    - ▪ The default date is todays but it is selected and can be overwritten immediately.
    - ▪ Date shortcuts can be used (eg. -2w)
- o **This project has been moved to Under Discussion so users can add to this initial redefinition.**

12. Support for other customer and patient form content types

Submitted by Matt C on Mon, 26/10/2009 - 16:05
Total cost estimate: $1180
Current Percentage Funded: 0.00%
Forum: http://www.openvpms.org/forum/adding-new-template
JIRA: http://jira.openvpms.org/jira/browse/REP-6

- o Enough support to stay alive.
- o **This project remains Seeking Funding.**

13. Product Template Visit and Invoice notes

Submitted by tony on Mon, 20/06/2011 - 17:35
Total cost estimate: $850
Due date for completion of this stage: 30/06/2011
Current Percentage Funded: 0.00%
Forum: None
JIRA http://jira.openvpms.org/jira**/browse/OVPMS-1000**

- o Enough support to stay alive.
- o **This project remains Seeking Funding.**

14. Create a default Deposit account for a practice location

Submitted by Matt C on Mon, 16/05/2011 - 23:18
Total cost estimate: $520
Due date for completion of this stage: 16/05/2011
Current Percentage Funded: 0.00%
Forum: http://www.openvpms.org/forum/default-deposit-account-when-when-clearing-till
JIRA : http://jira.openvpms.org/jira/browse/OVPMS-1041

- o **This project has been Cancelled after discussion.**

15. Create a default Deposit account for a practice location

Submitted by Matt C on Mon, 27/09/2011 - 22:55
Total cost estimate: $850
Current Percentage Funded: 0.00%
Forum: http://www.openvpms.org/forum/libreoffice-and-input-fields
Jira: http://jira.openvpms.org/jira/browse/OVPMS-1074

This project arose from the situation where currently documents linked to products are all processed on commit of an invoice.

This prevents letter documents being generated, as parameters cannot be prompted for.

When a document is selected that has a letter template with parameters, support will be added to pop up a dialog to prompt for the parameters.
If there is more than one letter with parameters, multiple dialogs will be displayed, one after the other.

Public pledges can be made to this forum topic or email me directly by clicking here (link only works in the forum).
Development will not commence until fully funded.

New Features

1. Messaging

- It appears that users use messaging in a variety of ways including how much people use messaging (some using it a little and others using it a lot).
- A lot of people use Worklists (and to a lesser degree Schedules) to achieve the same purpose of messaging.
- There was a request for messaging to be expanded to include the ability to
    i. Reply - create a new message to the same sender.
    ii. Edit messages – change text and status
    iii. Add editing of the original message to the existing Forward method.
- There was a comment that tasks in Worklists already contain all this functionality and that having a Worklist assigned for messaging would achieve these goals.
- **This project has had a forum created (**http://www.openvpms.org/forum/more-flexibility-messaging**).**

2. Price Checks

- There was a request for the ability for any staff member to generate an estimate/invoice for the purposes of price checks.
- This temporary "Price Check" Invoice could then be assigned to a given Customer and Patient.
- This button for this feature would need to be readily available from the Schedules/Worklists.
- **This project has had a forum created (**http://www.openvpms.org/forum/price-checks**).**

3. New Note + Visit button

- The most common use of medical records is to add notes. If there is a note added without a visit (eg.Phone call etc) a Visit must first be created.
- There was a request for a new button in Medical Records that allowed a user to create a New Visit & Note with one click.
- There was also a suggestion that this button should also be present in the Patient Summary section so notes could be added from the Schedules (in the example of a phone call). But this note was removed given;
    i. The Patient usually needs to be found first
    ii. If the Patient is in the Summary view it is already in the Patient workspace.
- Elements to nail down:
    i. Will the new Visit inherit the date from the Note?

ii. How do we want the Visit Reason filled out? It was suggested it should say "Communication". What about just Blank and edit it later?
- **This project has had a forum created (**http://www.openvpms.org/forum/new-note-and-visit-button**).**

4. Copy and Paste appointments

- Allow users to Copy appointments using exactly the same method as current Cut & Paste.

5. Increase the size of the Invoice note

- Increase the character limit on the invoice note.
- Increase the physical space to write a note in the Invoice Editor.

6. Show available characters left in note fields

- Show how many characters are left when typing a note.
- Once limit reached, prevent further typing.

7. Add clinician to note header

- **This has been created and moved straight to Developer review for an estimate.**

8. Add "None" option to Payment Items

- Users explained that since there is a default selection for payment types occasionally that Payment type will be entered by accident.
- The request was that there was a "None" option in the Payment type list.
- A payment would still be rejected if the None option was still selected, forcing the user to choose one.
- Practices wanting to keep a different default (eg. EFTPOS) will still be able to do so.

9. Add a default value option for the Status in the Workflow – Messaging

- Currently Status defaults to Pending.
- A user wanted the option to set what this default value was.

10. Bug when entering Macros in Input Fields of Letters from Macro List

- Currently after a macro is entered from the Alt-M macro list the cursor gets locked.
- The exact details of this behaviour need to be further detailed before we send it to the developers as a bug report.

11. Add microchip to Summary View

- Add microchip number to this area for better visibility.

12. Show possible duplicate Customer/Patients

- o During adding a new Customer or Patient show possible Duplicates is an adjacent list.
- o The adjacent list could be populated with Customer/Patient Descriptions hence containing some ancilliary data.
- o Possible matching criteria could be;
  - i. Names (one of)
  - ii. Address elements
  - iii. Identities (Microchips, pet tags)
- o Issues may include performance and setting criteria for possible duplicates .
- o Duplicates should also be ranked by some index of similarity.
- o List should be limited to a number consistent with good performance.

13. Expand Investigations to include a mechanism for direct referral interactions.

- o Using this new feature Vets could send referral historys, summary letters and attachments to a referral vet using OpenVPMS.
- o The referring vets replys would automatically be linked to the relevant patient.
- o The system would need to be able to handle multiple communications.

14. Product information system.

- o This feature would allow a 3rd Party to provide key information via a link to a website etc that provides up to date product information such as;
  - i. MSD sheets
  - ii. Dispensing information
  - iii. Recommendations for use
- o Hills Pet food have already expressed an interest in this.

15. Invoice line item rounding

- o There was a request for an option to round invoice items at the level of each individual item.
- o This would need to be able to switched on/off
- o At the level of each product
- o Have a default state (ie. Either On/Off) set at Practice level for new Products.

16. DICOM image retrieval.

- o This feature would allow a OpenVPMS to retrieve a DICOM image using Patient unique IDs by clicking on a patient medical record and have it appear in a DICOM viewer on a workstation running OpenVPMS.

17. Price update workspace

- This feature would users to perform batch operations on their product database including;
  - Unit price updates by fixed or percentage amounts.
  - Fixed price updates by fixed or percentage amounts.
  - Filtering of the product set for batch operations by;
    - Name
    - Group
    - Type
    - Active/Deactive
    - Price Range
  - Price updates may be entered as "Versions" so that the old prices remain visible and a price history can be seen.

18. Mail merge workspace

- This workspace would allow users to
  - Create a list of Customers using a variety of criteria
  - Choose a document template
  - Merge the Customers to the template
- This can currently be done using Export As CSV features + a 3rd party application like Word/Openoffice but this solution is simpler and more elegant.