SMS APPOINTMENT REMINDERS RELEASE NOTES

VERSION 2.2.1

NEW FEATURES

New Filter Default

The new default behavior for a filter that does not have a value selected is to only include appointments that have the PLAAR components populated. When no values are selected for a recurring Appointment Reminder Filter, an appointment (Event or Service) that does NOT have an entry for that PLAAR component will NOT receive a reminder.

Note - this is a significant change from the prior default behavior. In SMS version 2.1.2 and earlier, empty or Null components are included by default. These must now be explicitly included.

Including Null Component Values

A *No Code Entered* value is available to select for each filter that explicitly includes Null Appointment Component Values (empty PLAAR fields) in the results. When *No Code Entered* is selected, appointments that DO NOT have an entry for that PLAAR component can still be included in the recurring Appointment Reminder job.

- When the *No Code Entered* value is the only selection in the Reminder filter, both populated and unpopulated PLAAR fields for that component are included in the results.
- When other values are selected in addition to the *No Code Entered,* the results are limited to No Code OR a Code that matches a selection.
- For example, selecting *No Code Entered,* ADP, and CM for the Program Codes Filter will limit the results to only those appointments that have:
    - No Program entered, ADP, or CM
    - All other Programs will be excluded

To maintain existing job functionality the upgrade script populates the Filter drop-downs with the No Code Entered value and any existing codes for each recurring appointment reminder in the database.

Excluding Component Values

When the *Exclude selected values* checkbox is selected, appointments with the codes displayed in the corresponding filter drop-down will not be included in the results. Appointments that match on any of the other, non-excluded codes for that PLAAR component can receive a reminder.

Selecting both *No Code Entered* and the *Exclude selected values* checkbox results in the default behavior. A reminder will be sent to an appointment with components that have a code while excluding those with components that are blank.

Remember that there is an 'AND' relationship between the PLAAR filters. The appointment must be included in the results for all five filters to receive a reminder.

Attendance Filter and Cancelled Appointments

Due to the change in the default behavior, the Attendance filter setup will be noticeably different for existing jobs after upgrading.

- *No Code Entered* will be selected to maintain the inclusion of appointments that have a blank attendance component - this is the same for all filters.
- The Attendance Filter will also be populated with all Attendance Codes that were NOT previously excluded.
    - Attendance codes were configured for exclusion in the Global Setup configuration for CDT agencies.
    - The Appointment Cancel Text section of the echo.er_config view could be altered to exclude Attendance Cancelation codes for EV agencies.
- For Example, an agency uses (5) Attendance codes (OTH, PEND, HERE, NS, CANC) and two of these are excluded (NS, CANC).
    - In versions 2.1.2, if the Attendance filter was left empty in the reminder job, an appointment scheduled with an attendance code of OTH, PEND, HERE, or left blank would qualify for a reminder.
    - In version 2.2.1, if the Attendance filter is left blank:
        - Appointments with no codes WOULD NOT qualify for a reminder. AND
        - Appointments with any code, including CANC or NS, WOULD qualify for a reminder.
    - To maintain the pre-upgrade functionality the Attendance Filter for the example agency would look like the following image after upgrading to version 2.2.1:
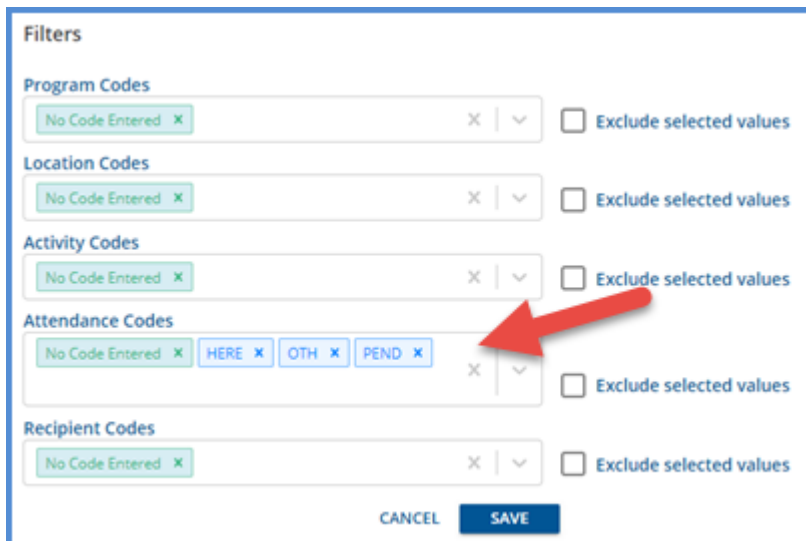
After upgrading to version 2.2.1, all cancel codes will be managed through the SMS application UI. The SMS application will not be affected by the Cancelled Appointments Codes defined in the Global Setup in CDT OR the echo.er_config view used by EV.

BUG FIXES

Ticket #	Description
APTR-75	The full installation script has been updated so that the Communication column for EV reminders is created as a char(36) data type.
APTR-76	Duplicate messages are no longer sent for Events that are turned in to Services, EV only.
APTR-90	All Clients query in Scheduled Reminder updated to respect job commtype and validate for an open Episode.