October 24, 2024 – Automatic weekly patient portal refresh

2024 · https://www.primaryrecord.com/docs/october-24-2024-automatic-weekly-patient-portal-refresh/

Enhancements

- Automatic weekly patient portal refreshes for all premium customers. As soon as this was available to Primary Record as a service from EHR systems like EPIC and Oracle, we added it for you, our customers. This means that if users select a large window for the refresh (like one year), the health information will automatically be updated in all the connected profiles.
  Users will also have the opportunity to disable automatic refreshes. We know that it may not be appropriate to refresh data from a system that you don't visit often or for a single procedure visit.
- Profession users can now export a large list of clients from their CRM or Case Management systems and then upload that list as a CSV file. This should make onboarding to Primary Record much quicker and more accurate.
- Branding updates to the Professional profile for selecting colors. This is done in preparation for invoicing and billing functions coming soon to Professional accounts (stay tuned)
- Professional users can now bulk assign groups.

Bugs or Issues

- Improved error messages with more details for sending invitations
- Seeing a blank screen while navigating from Labs by Date was resolved