Updated UI Handout

Wednesday, January 11, 2017   12:01 PM

Epitomax Demo of Updated User Interface (Bogus Test Client Barney Miller Used for Demo Purposes)

Epitomax Home Page:

QA or Production System - Where am I?

Before, you would need to hover over your browser tab in order to see what schema you were logged into, QA or Production.
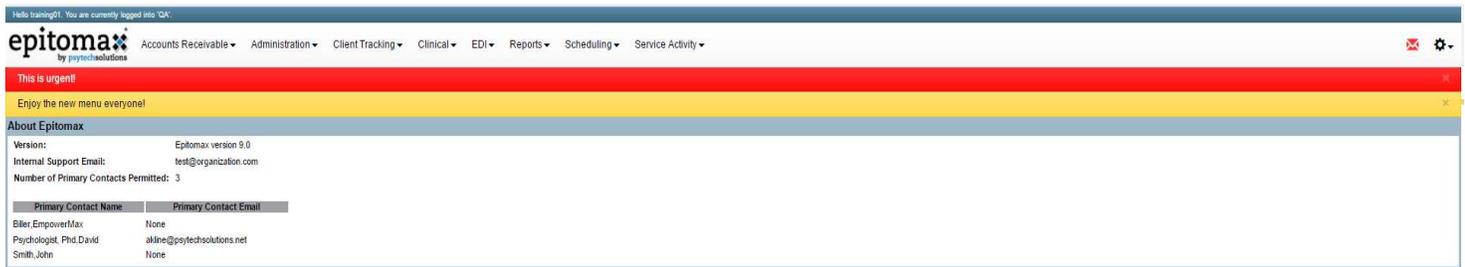

After, there is a message as part of the menu header that lets you know immediately what schema you're logged into.

Page Itself:

Responsive to screen size, browser re-size, zoom, using Epitomax on tablet PCs and mobile devices.

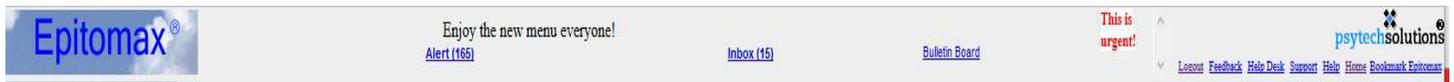Default Size:

Mobile/Browser Re-Size Look:

Logo:

New look and feel for our logo. The logo STILL takes you to the home page and refreshes the page.

Menu Header - Combined Menu and Header:

Before:

After:

- The Alert, Inbox, Bulletin Board and Direct links are now located in the Envelope section.
  - The envelope - that will change colors depending on whether you have messages or not. If you do NOT have messages/Alerts, it will be **black**. If you have messages, it will be red (like it is on the screen capture).
- The Logout, Feedback, Help Desk, Support, Help, Home, Bookmark Epitomax links are located in the Cogwheel section.

Bulletin Board:

Before, the Bulletin Board information used to be just in black and would scroll across the screen if you designated it to.
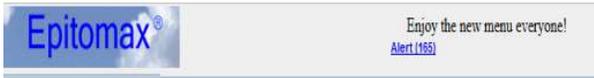
After, the Bulletin Board is colored Bright Yellow and is attention-grabbing so the message really does not need to scroll. It stays on the screen, also. The Bulletin Bar is closeable but will reopen once a user logs back into Epitomax.

Epitomax System Alerts:

Before, the Urgent Alert Message from Epitomax [if there was some sort of system issue for customers] was a tiny, red message.

After, the Alert is colored Bright Red, and is an eye catching bar that stays across the top of the screen where everyone will notice it.

Menu:

The Sections and Pages have moved from the left-hand toolbar to a top menu.

- This provides more screen real estate for one to be able to see pages.
- This is also a sleeker menu.
- Drop downs instead of the toolbars are a more modern approach to menu items.
- Makes Epitomax able to be used on mobile devices.

Something you may or may not be familiar with - In the drop down menus, the items are alphabetized by default. With the original layout, there were times when you would need to set the pages order yourself in Administration - Security Maintenance.

- You can no longer set your own order; customers seemed to want menu items in alphabetical order by default so we thought it more helpful to default it that way now for them.

You activate and deactivate sections (drop downs) and pages (menu items) the same way for users as you always have in Security Maintenance.

Reports are now ALL under the Reports drop down menu. You would previously have to go to different sections in the toolbar to find them.

If you historically used the "Customer Satisfaction" section, this will now be called Client Satisfaction and is located under the Client Tracking drop down menu for you to be able to record your client complaints in the same place where you work with the rest of your client menu items.

Pages:

Before, pages such as Client Record and Episode would be hidden/shown based on where you were in your navigation of the client's chart.

If you were in a client record, you could ONLY then see the Client Record page.
If you were in a client's episode/admission, you could ONLY then see the Episode page.

After, now you can actually search by a client record or episode and the menu items are ALWAYS shown. This makes it a lot easier to navigate and quickly get to where you need to be in Epitomax to work with a particular client.

- The Client Search looks the same, which will make it familiar to use.
- [If you know exactly which client's record you want to access] You can search by Client Record now, which puts you right into the Patient Record tab.
- You can search by Client Episode now, which puts you right into a particular Admission for the client.
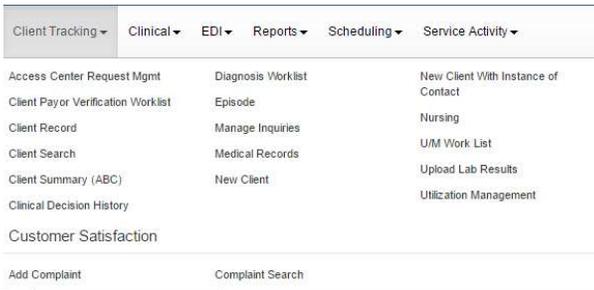
Pages will be shown as Clickable Buttons below the menu:

(Alerts show up also; they still DO popup if you want them to.)
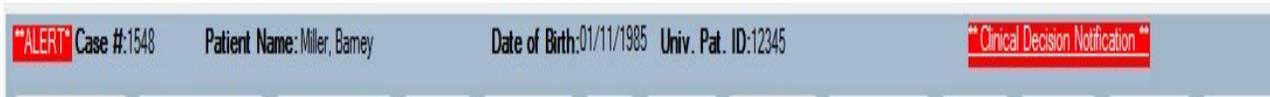

- Displays Name, Case #, DOB, Universal Patient ID (if the client has one) and any Alerts the client has.

- Displays Admission Type/Program, Status (if Closed), Date of Admission and Date of Discharge (if Closed).

This replaces the original Patient Record and Admission Headings:

Clicking on the X to close a particular Admission button (when you have multiple admissions) you will be directed back to the Episode Search (in case you want to choose another Admission to work with). If you do not have multiple Admissions/Episodes, you will be directed right back to the Patient Record Level. Clicking on the X to close the Patient Record button will take you back to the Client Record Search [same as if you went to Client Tracking - Client Record].

⭐ This is super helpful if you're interrupted mid-stream or need to check Account Inquiry to see if they have a balance or Service Activity Reporting to see what services they have had - you can easily see the client and case number.
⭐ If you're in another area of the system and close the Patient Record button, it does NOT take you to the client's search. It ONLY takes you to the client search when you're in the client record information.

Disabled Buttons:

This is a good example: Any time a button gets disabled like *after you sign a form*, the fade will occur. Or while updating the client's record, the buttons will be disabled until the record updates.

Additional Comments:

- Our release date is 02/06/17.
- We will also be releasing documentation and training videos for the updated user interface.