Release Notes Version 2.0.54

Bug fixes:

Chart related items:

- Warnings with a start date in the past could not be saved, even if just trying to edit it and add an end date, this has been corrected
- Some tabs when marked inactive in Defaults > Patient data were still showing in the chart, this has been corrected
- Emergency contact fields in the patient file in Lytec were not crossing over to UnifiMD and are now
- From the associations tab in Lytec: Provider, Referring Physician and Outside PCP were not updating in UnifiMD if changed in Lytec, they now update if changed
- Blood pressure units were displaying the wrong label and is now corrected to mmHg
- In a patient's chart, only tasks with a status of Completed were showing in the chart, this has been corrected, and all status tasks now display.

Lab results related items:

- The column heading for Category under Guides > Lab Guides > Text/Image Results > Lab report name was called Type instead of category and has been renamed correctly
- When creating a new Lab Guide and moving the lab names from the Available Column to the In Template Column, they appeared as inactive until you saved it and went back in, this has been corrected, and they appear as you add them now.
- If a lab result comment was longer than 600 characters, the system would not accept the result and not tell you why it was not passing – that limit has been increased to 2,500 and if one comes in longer than that it will display an error in red font alerting you to the reason and to call support to have it manually addressed

Security and user preference related items:

- When a user mistypes their password wrong too many times the system was logging 7/19/19 as the locked date, this has been corrected
- Number of invalid log in attempts now accurately counts down, it was not counting correctly in prior versions

Electronic superbill related items:

- When selecting which diagnosis codes were to be attached to each procedure code in the electronic superbill screen under the selections tab, the diagnosis code numbering was multiplying on each line (only a visual issue, not affecting actual units or dollars), this has been corrected
- On the diagnosis Code tab of the electronic superbill, the checkbox filters for laterality are now working, those were being ignored in the previous version
- On the diagnosis code tab of the electronic superbill, the "search text" field will now clear each time you exit a superbill so the next time it is not still searching for your last item.

- If a procedure code has a modifier defaulted on it, the modifier was not pulling onto the electronic superbill automatically, this has been fixed so that modifier attached to a CPT code under Dictionaries > Coding > Procedures will now push to the electronic superbill and then to your PM system.

Miscellaneous items:

- Providers marked as inactive were showing in the send provider direct message screen and the new appointment screen, they do not show in those locations any longer.
- Adding and removing items from the quick access toolbar was not saving after logging out, this has been corrected
- The field for patient name in print layouts was printing lastname,first name with no space. A space has been added after the comma
- Chart Summary report was printing the patient's name in the "provider name" field, this has been corrected
- When a user adds the Auto Filter row in the Note Code button inside a Progress Note, it will remain visible until you choose to hide it again, prior to this version the user would need to keep choosing to show each time they opened that screen.
- In custom fields that were created with a grid format, users can now delete individual rows from the grid, this was not working in prior versions
- The filter by provider and resource drop downs in the schedule on the dashboard were not always working accurately, this has been addressed

Enhancements:

Important workflow related item with DrFirst:

- Problems now can be added into UnifiMD and pushed to DrFirst instead of the other direction. This change has been made for a few reasons:
    - The method of searching for diagnosis codes inside DrFirst is not ideal, it is very hard for most offices to find the code they are looking for. This way, you choose the correct code from inside UnifiMD to use in your note / send to billing.
    - You control active diagnosis codes inside your UnifiMD database instead of seeing ICD10 options in DrFirst that are not complete and therefore not able to be used on claims.
    - Remember to use the Smart Search button inside the diagnosis code lookup screen if there is a code you cannot find in your own list and add it to UnifiMD.
- There are already additional changes being made to this for the next release including:
    - Making the find diagnosis code screen larger
    - Adding a favorites filter checkbox to the find diagnosis code screen
    - The code beside diagnosis code in the New Problem screen will be the ICD10 code instead of the system generated code that appears now
    - If you would rather wait for the above items, feel free to continue adding problems into DrFirst instead until the next update, at which time this change will be forced and problems will no longer be able to be added into DrFirst directly.

Chart related items:

- The created date of the warning has been added to the pop-up warning window
- Care Plan Status fields are now a drop down of commonly used statuses. You can customize those under Configurations > Defaults > Template Data > Care Plan Status tab

- In the demographics window, an Apply button has been added that saves the information in that window without closing it. (The OK button will save and close as it always has.)
- The state filter in Patient search screens changed to a drop down, but still allows for free type
- When searching for a patient chart, the first name and last name fields now search by "begins with" instead of "contains". All other fields still search by "contains".
- On the Health Maintenance tab, the Edit and Delete buttons have been renamed Edit Schedule Date and Delete Schedule Date to more clearly represent their function
- Inside of the demographics screen, deceased check box and date of death have been added to right side and if you use Lytec as your PM system, that info crosses from Lytec to UnifiMD
- The inactive check box was moved over to that same right hand side area of the demographics screen and will cross over from Lytec to UnifiMD if you use Lytec as your PM system
    - Customers with other PM systems can use those fields manually inside UnifiMD
    - Note that deceased does not remove the patient from search lists as you may still need access to them for billing, etc. and we recommend marking them inactive when you are done and want to remove them from search screens.
- Items have been rearranged in the chart to allow for the chart lock to be removed from the patient as a whole and multiple users to be able to work in a patient at the same time.
    - *Chart Capture* button has been removed from left side of screen
    - Bottom left side of window note area has been labeled *Sticky Note* and that as well as the Image in the top left have their own save button above the sticky note.
    - *View hidden* button has been moved to bottom right of chart
    - *Save and Close* button has been removed from bottom right as each tab has their own save button now so there is no need to Save the chart as a whole
    - Two users can now work in the same chart, but will find some tabs are locked while one user is working in it – letters, notes, and any custom tab
    - Note that demographics screen is still read only for a second user who logs into it
- Prenatal tab has been added
    - User group must be given access to access this, it is off by default
    - Users must add tab to chart tabs layout, it is off by default
    - Basic usage:
        - Summary tab pulls info in
        - Green plus sign top right of tab adds a pregnancy tab
        - Problems Pull in at the top
        - LMP is a required field top center section. EDD calculates based on that field
        - After delivery, add that into top right section
        - Bottom section: add a row at each appt but clicking new on bottom left and adding a row, EGA calculates based on LMP, provider pulls from appt, vitals pull from today's vitals, labs pull from today's labs, rest of info to the right are free type fields, Appt pulls in next scheduled appt

Notes related items:

- The patient's name now appears on the note tab when a note is opened form in the chart or from the unsigned notes screen
- When a user clicks save and sign inside a note, the cursor focus will be in the password field
- Additional macros have been added for referring physician phone numbers and fax numbers.
- Tracking of completed progress notes has been added to the schedule section of the dashboard
    - A column has been added to the schedule pod of the dashboard called note status
        - No note – no note has been started for this appt
        - Unsigned – note has been started but not signed

    - Signed – note has been signed
    - Co-Sign – note is waiting on co-signature
  - Until it reaches a status of signed the line will appear red
  - The system matches a note with the same provider and date as an appointment with that provider and date
  - Note that this feature will not show a status at all if a patient has 2 appts on same date with same provider
  - The provider signing the note must be the same as the provider in the appt for this feature to work

Lab results related items:

- In a text/image lab, the Review check box on the top right has been changed to be called "sign" and now when checked, the bottom left display will change from Not Signed to Signed
- View button has been added to the Text/Image Results tab to allow you to set user security to allow for viewing without editing.
- Patient chart look up box at the top of the Lab Results screen has been removed as it was redundant, you are already in the patient's chart
- When a result comes back to the office and is placed in the text/image results tab, the order will now be completed as follows:
  - User Guides > Lab Guides > Text Image Labs/Results > Lab Report Names – new column added called Order Guides, this is a drop down of order guides in the database
  - Users must match up the Lab Report Names in use with the corresponding Order Guide in your database
  - When a result is saved into the Text/Image Results tab, the system will look for a matching order on the orders tab and mark the order status as complete.

Orders related items:

- The date column in the incomplete Orders screen was removed as there are 2 date columns
- Incomplete Orders window now opens as a tab and the order and/or patient that opens from that area also opens as a tab, allowing you to move around easier and move on to the next order faster than having to reopen the window each time.
- When adding multiple orders to one patient order, the tabs now display the name of each order from the Description box instead of being labeled Order 1, Order 2, etc.
- Order Guides can now be made inactive
- When you print an order from inside the patient's chart, a prompt will ask if you want to change the status to "sent"

Security and user preference related items:

- Under User preferences, on the Note, Lab, Text Lab Signatures tab you can check a box to turn off the automatic spellcheck that runs when you sign a note (and still run it when you want to manually in the note)

Faxing related items:

- From within a note or letter, an option has been added to the bottom of the list of items under Fax To called Fax to Custom – this brings you to the fax screen with the To section blank so you can free type the name and number you want to send to
- When viewing a letter or note you now can fax from within that window
- In faxing screen, the Copy to patient button has been renamed "Copy to Patient Multimedia"

- In faxing screen, a new button has been added called "Copy to Patient Text/Image". This button will open the find patient window. Once selected, this will open a Patient Text lab window with the attachment prefilled in that screen, allowing you to add any other pertinent info before saving.
- Forward and sign off has been added to faxes area. Click Copy to Patient button, select a patient and category, and click the new button called OK and forward. This will attach the fax to the patient's chart and then open a message screen with the patient selected and attachment attached, allowing you to FW to a user for sign off. The completed sign off can be seen on the multimedia screen
- When you "copy to patient" from faxing window you can now change the name of the file at the time of saving instead of having to save it and go back in to rename it

Electronic Superbill related items:

- In User preferences, User Defaults tab, under the Electronic Encounter Form Defaults section, options have been added to allow each user to decide if they would like to default the following:
    - View superbill upon signing to manually save
    - Auto save superbill without viewing
    - Do not create electronic superbill for this note
  - Upon upgrade all users are defaulted to the 3rd option – please log in and change your default preference once upgraded
  - When signing a note, the Signature window now has the same 3 options listed above. Your default choice is selected for you, but you to change it for this note if needed.

Miscellaneous items:

- The numbers in the notification area now show as red if the number in parenthesis is not a 0
- When you scan or import into multimedia tab you can now change the name of the file at the time of saving instead of having to save it and go back in to rename it
- Print button added to Clinical Summary screen to allow users to print this screen quickly, accurately including only the boxes selected in the section at the top of the preview screen
- Unsigned notes notification area now shows a count based on the provider assigned to the user in the providers tab, giving a more accurate count of unsigned notes specific to that provider rather than all providers in the practice.