



## Release Notes Version 2.0.56

### Bug fixes:

#### Chart related items:

- In prior versions going to Tools > Dr First section > Website > Patient would return an error; this has been corrected.
- When tabbing through the fields in patient demographics, the order of fields the cursor would go to next, was off in a few areas. This has been corrected to go from top to bottom, left to right accurately.
- On the chart summary tab, if a user changed the width of the columns or removed any columns from the Vitals pod to customize the view and then added a new vital entry, the view was resetting back to the default, this has been fixed.
- On the chart summary tab, if a user changed the width of the columns or removed any columns from the Health Maintenance pod to customize the view and then clicked refresh or closed out and went back in, the view was resetting to the default view, this has been fixed.
- On the problems tab of the patient chart, a spelling mistake has been corrected under "Last Reviewed By"

#### Note related items:

- When a LIST marker was invalid in a note guide, upon saving the user was prompted with an error that the LIST marker was Red and the question asked if you wanted to leave it as Red – those words have been corrected to Yellow
- If a user tried to save a Note with no date in the header, an error would pop up with the date of 1/1/1753. This error message has been corrected to simply state that date is a required field to save the note.
- Macros that add pronouns or sex dependent prefixes to letters were not putting a space before the pronoun or prefix (ex: **AsMr.** Sample's primary health care provider, it is my belief that due **tohis** chronic medical...)
  - This has been corrected to display as: **As Mr.** Sample's primary health care provider, it is my belief that due **to his** chronic medical...

#### Messaging related items:

- When replying to a portal message from a patient an error would pop up that "There must be one name in To, CC or BCC" even though there was one. This has been corrected.
- In prior versions, when reading messages inside a chart the message would be marked as read (unbolded) once *any* user read it. The system now marks as read per user so that if User A reads it in the chart, it stays bold in User B's inbox until read by that user.
- Messages back and forth from a user inside UnifiMD and a patient through their Updox portal were not displaying appropriate page breaks and hard to read. This has been corrected and now a line break shows between replies making it easier to read.

- Some offices were seeing extreme slowness when opening the program if their user had a large volume of messages and that pod was on their dashboard. While a manual script was run to fix those clients, this version has that fix embedded so it will not happen to future clients either.
- When a patient completed a form in the Updox portal and sent it back to the practice, the message to the practice had a strange string of words in the body "This is a maskpoaling IntTestentionally". This erroneous line has been cleared from the message body.

#### Order and Order Guide related items:

- Users were unable to Delete Order Guides from their system. This has been corrected and now Order Guides never used in a patient chart can be deleted allowing you to clean up orders you may not want to see in your dictionary of guides.
- The pop up that would ask when loading an order screen "Loading orders from a Guide will lose the changes you have made" no longer appears.
- In Order guides, New from Existing button was giving an unhandled exception error, this has been fixed
- In Order guides, Export and Export Selected were not working at all, this has been fixed (not needed in typical office use, made for CHS to copy order guides from an existing practice to a new one).
- In Order guides, when importing from another practice it will no longer duplicate order guides that already exist in the current database (not needed in typical office use, made for CHS to copy order guides from an existing practice to a new one).
- In prior versions if you print multiple lab orders by highlighting multiple and clicking Print Selected, the system was printing each order on its own page. Now, *if the multiple orders are set to use the same Order Form*, they will print on the same page.
- When you create a new order guide and enter an *assigned to user or group*, the system was creating an incomplete order in that user or user group that was blank. This has been corrected and will no longer happen. If you have a blank order like this in your incomplete orders report, please call support to have it removed.
- If an attachment was selected in the New Order screen, checking the Print Order check box was displaying an error, this has been fixed.
- Trying to attach a pdf to an Order from Multimedia was not displaying the patient's multimedia attachments to allow for selecting one, this has been fixed.
- When adding an Order, clicking Apply button before OK was causing the Order to not display correctly in the Orders tab, this has been corrected now and any combination of Apply and OK buttons work fine.

#### Miscellaneous items:

- Clicking the refresh button from a custom tab or the Prenatal tab would bring the user to the Chart Summary tab. It will now refresh the tab you are on and not change the view.
- At one office, a client had 2 versions of the same provider set up in their PM system, with only the code different but the full title the same. This was causing the providers on appointments to be confused when crossing over to UnifiMD. This has been corrected and now the CODE of the provider is what determines what provider is attached to an appointment even if the name is the same.
- In prior versions, to have access to access clinical assessments in the chart a user had to have access to clinical assessment *guides*. This has been corrected.
- When adding a letter to a patient's chart, users were unable to click the X on the tab or cancel and were forced to save it. This has been corrected, and you can now close out without saving.

## Enhancements / New features:

### Chart related items:

- Vital record entries now display on the bottom right of the screen the user who entered the vitals and the user who last modified that vital entry.
- Removed APPLY button from several tabs inside the patient chart as the button was not needed since all items are saved before they appear on the tab, therefore the button was causing confusion and an extra unnecessary click for users
- Added the following fields to the print layout for Chart Summary:
  - Patient full address (line 2, city, state, zip)

### Task related items:

- Users can now add a Task from the Task tab in a patient's chart by clicking the New Task button on the bottom of that tab.
- Users can now add a new Task regarding a patient from Inside of a Note by clicking New button on the right side and then New Task
- A new status has been added to Task items. Cancelled is now an option you can change the status to that will remove it from your task list under Tools > Tasks as well as on your dashboard. All task statuses still show in the patient chart.
- The % complete box has been removed from the Task window.
- A new column has been added to the Assign Task drop down of User Group, this will allow you to click on that header, sort by that column, and assign all "Nurses" as an example at one time.
- The Assign To window in Tasks has been made longer to show more people when assigning.

### Notes related items:

- The units (mmHg) have been removed from the systolic value for blood pressures when pulled into notes so that instead of 120 mmHg / 80 mmHg, it will now display as 120 / 80 mmHg
- *If a superbill is created from a note* and there is no CPT code selected, a pop-up message will appear letting the user know **No CPT codes have been selected from within this note** with 2 options:
  - Proceed and add manually to superbill – this option will open the superbill screen on the procedure code tab, even if you have the setting set to not open
  - Go back and add to note – this option will close the signing window without signing it, even you added your signing pin before clicking OK

### Appointment related items:

- Several changes in appointment screens for users who schedule here and not in their PM system:
  - The previous and next appointment bars between resource columns have been removed
  - The "value" field inside of an appointment and set inside of reason codes has been removed
  - The X's beside the drop-down items inside of an appointment were not functioning to clear the value in that box, this has been fixed
  - The extra tab settings and quick access toolbar buttons on the schedule tab have been removed as they were not used and took up space
  - When right clicking on an appt, "show time as" and "label as" options have been removed as they were not used and caused confusion on the color coding of the appt based on reason

### Orders related items:

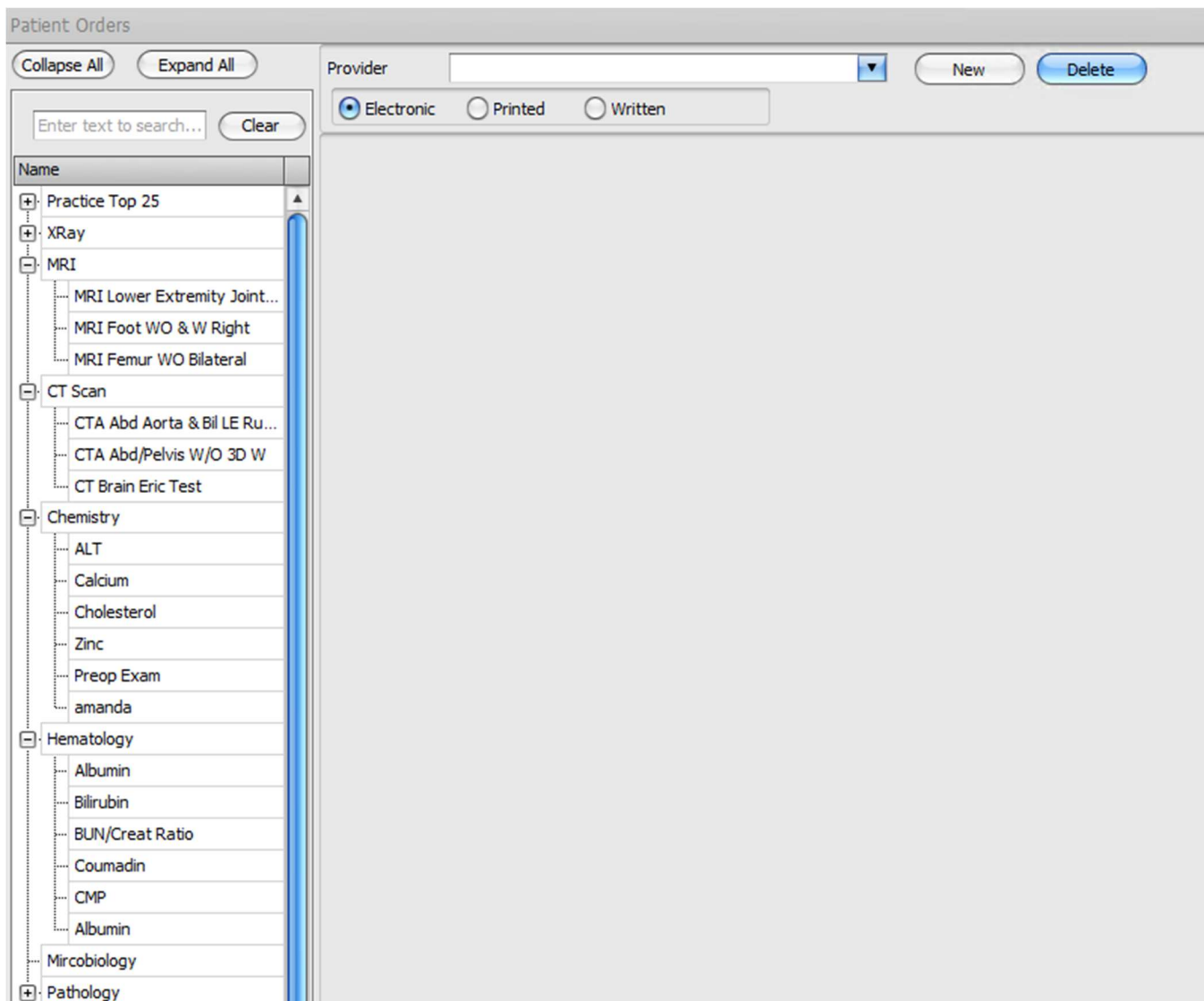
- **Order Tree creation – significant change, be sure to read and call if you need training on this topic**

- In order guides, you can add each guide to an order tree (grouped by category) or a Top 25 (per practice) – using the two new check boxes at the top of the Order Guide screen called “Order Tree” and “Practice Top 25”
  - Checking **Order Tree** will group all Orders with that check box and the same category together for ease in ordering, therefore choosing a Category is required
  - Checking **Practice Top 25** will add that order into the Top 25 group visible when adding an order
  - Note that you **can** add a guide to both an Order Tree and the Top 25

Sample Order added to Order Tree and Top 25:

- In the Order Tree lookup screen there are now two columns that show the guides are in the order tree or the top 25 grouping – they are read only here, but sorting by different columns in this screen will help you to easily find guides that may need to be placed into a group but are not yet
- After setting up your Tree Categories and Top 25 - When adding an order to a chart:
  - There is a search box at the top left-hand side to search for guides (any part of the word) that are in the Top 25 or a category – as well as a clear button to clear your search, expand all and collapse all buttons
  - You can also manually collapse and expand sections using the + and – boxes
  - At the bottom of that left side is a Look Up button that opens the (previously found at the top) Lookup screen for guides that may not be in the Tree on the left side
  - To add a guide to the tabs, simply double click on that guide on the left side (or from inside the Lookup window). To remove a tab added incorrectly, click on that tab and use the delete button at the top

(Unrealistic) example of what an office order tree may look like:



- Added the following fields to the print layout for printed orders:
  - Patient's secondary insurance info (name, address, insured id, etc.)
  - Patient address line 2, city, state, zip, mobile phone
  - Reason
  - Facility
  - Provider NPI #
  - Diagnosis codes 4-6

Messaging related items:

- Spellcheck has been added to the messages tab. It is on for all users by default. If you do not want to have the system automatically check your spelling when composing messages upon clicking Send, you can turn it off for your user under Configuration > Users > User Preferences > Note, Lab, Text Lab Signatures tab – in the bottom section. If you turn it off here, you can still manually tell the system to check spelling by clicking the button in the compose message window.
- Users can now send a Message from the Messages tab in a patient's chart by clicking the New Message button on the bottom of that tab.

- Users can now send a Message regarding a patient from Inside of a Note by clicking New button on the right side and then New Message

Immunizations related items:

- The order of the fields on the immunization screens below have been changed to an order that flows more smoothly
  - Guides > Immunizations
  - Patient Chart > Immunizations tab
  - Defaults > Patient > Immunization
- Added the following fields to the print layout for immunizations:
  - expiration date
  - ordering provider
  - CVX
  - Administered By
  - Complete Status
  - Facility
  - Location
  - dose
  - unit
  - VFC
  - NDC Number
  - Procedure Code
  - Diagnosis Code
  - Administration Notes