Release Notes Version 2.0.57

New Features / Enhancements:

Immunization guide groups:

- Users can now make Immunization Guide Groups and apply those to patient charts:
  - When creating a new immunization guide, the group code and name are not required, you can create new guides that are individual immunizations still
  - If you add multiple tabs, then the group code and name become a requirement
  - When recording a new immunization for a patient, you can choose to add individual immunizations as prior or choose a group to add several tabs at once
  - Tabs will be named the names of individual immunizations
  - If a group is added to a patient, the user can manually add or delete individual tabs using the New and Delete buttons on the top right are of the screen
  - In the lookup screen to choose an immunization, the user can use the filters on the right side to view only Individual Immunizations, Groups, or All

Patient lookup and chart layout:

- On the dictionaries menu ribbon, under Patients, the system will store your most recently opened 10 charts to go back and reopen quickly. This is stored per user.
- Under Layouts > Chart Tabs, users can choose to rearrange the order of the tabs they want to view in the chart.
  - You can drag and drop the tabs from one row to another and from left to right within a row.
  - A new button at the bottom right has been added that toggles between Hide Hidden Tabs and View Hidden Tabs. This allows you to Hide the tabs you have unchecked to preview how it will look in the chart. If you want to add back in a chart tab you had previously unchecked, click the View Hidden Tabs button to bring it back and allow you to add the check and add the tab to your custom view.
  - Once a chart tab view is created, users need to select that view in their User Preferences screen.

Patient chart / vitals:

- Changes to vitals tab and addition of custom vitals:
  - Posturals has been pulled off the basic vitals tab and moved to its own tab.
  - To create custom vitals, go to Configuration > Patient Customer Fields > Patient vitals (note that custom vitals fields cannot be named the same as any basic vital field
  - If you add custom fields, a new tab will then appear in the patient's chart between Posturals and Deleted called Custom
  - Macros can be made in notes to pull those custom vitals into your notes.
  - Copy and Insert can also be used in Notes to pull in custom vitals data
  - Note that the Use Last Entry button only uses the information on the basic tab, not posturals or custom tabs

Bulk Image Importer:

- Due to issues with overwhelming folder sizes, the ability to archive items after importing has been removed. Once you import using this tool, the document you imported is removed from its original location (Import Directory).
- When using the bulk image importer, the Name column can now be modified from this screen so that you can rename the file from what it is set at upon import to something you'd rather it be named in the multimedia screen.
- If you have multiple scans in the list to import to the same patient, after searching for and choosing the patient one time, on scans further down the list, simply click the new drop-down arrow to see recently selected patients in this window. This saves the time of searching for that patient on multiple lines, allowing you to just click the drop down and choose them after searching only once. The drop-down button and list of names resets after closing the window.

User Preferences:

- A user preference has been added to allow each user to set their own zoom percentage default setting for Notes. It is found on the *Note, Lab, text Lab Signatures* tab of User Preferences. Changing this setting to something other than 100% will cause all new notes created, and prior notes viewed to open at that percentage. You can change it as needed on an individual note, it is simply the default setting.

Lab results:

- Opening lab results screens, particularly those with a large volume of results, has been sped up
- Users can now send messages from lab results and text lab results
  - The unsigned lab tab now has two new buttons called **Message** and **Sign and Message**.
    - Users can now select one or more than one lab result (for the same patient), click the Message button, and the new message window will open with the lab results displayed
    - Clicking the Sign and Message button will open the signing window for the password to be entered and THEN open the new message window, behaving as above
  - The unsigned text lab tab also has the same two buttons
    - Difference: user will be prompted and asked if you want to include the report details in the body of the message before the message window opens
  - The Message button has also been added to the Lab Results and Text lab Results tabs inside a patient's chart and can be used the same way as described above without the ability to select multiple labs at one
  - Note that messages for Pathology (or similar types) which do not contain a result value but contain a note will not display the note in messaging.
- Provider / Assign to provider changes in Lab Results and Text lab results
  - Lab Results and Text lab Results screens have been changed to look and behave the same:
    - Assign to Provider is now present in both screens
    - Assigned to Provider is now a column available to add to your view in both unsigned labs and unsigned text lab tabs
    - With Assign to Provider now added to the Lab Result screen, all current labs in the system now have the provider under Ordering Physician duplicated in the Assign to Provider field. New results will be linked to the Assigned to Provider
    - Assign to provider field is a drop-down item with multi select
    - The other 3 physician fields now have a magnifying glass and a red X, the code does not display, only the name shown in the gray box if a name is selected

    - If one of those 3 providers is mapped from an in-coming lab result and is not a provider in the practice list, it displays the name in the gray read only area.
    - Lab Information area has been made slightly smaller, with the scroll bar allowing users to view hidden information
    - When assign to Provider is blank in Error Reconciliation it will appear red. Ordering Physician is no longer required and won't display red
- Lab Text signature workflow changes have been made to no longer allow any user to review a text report, only providers
  - The "sign" check box and white box that records who signed it inside of the result on the top right have both been removed with new method of signing described below and the "Signed by" record stored on the bottom left of the screen for reference.
  - <u>Recommended</u> workflow:
    - Double clicking on a report line will open the report (without opening the chart first)
    - The sign button being clicked on this screen will prompt for the provider signature and then advance to the next record for reviewing. Until the provider closes this screen, clicking the Sign button will sign without prompting for a password each time
    - If the provider would like to skip one report, either click Cancel to go back to the unsigned text lab screen - or - click next or previous buttons. If you do not click Sign on a specific report, that report will remain unsigned.
    - The items are removed from the review bin as they are signed without the need to close and reopen as in prior versions.
  - Alternate workflow 1:
    - In the Unsigned Text Labs tab a check box column has been added on the left side to select labs. Checking one or many and then clicking the new Sign button on the bottom will prompt for provider signature and sign all results selected <u>without opening and reviewing them</u>. Once signed, all that were selected will be removed from screen
  - Alternate workflow 2:
    - From inside the chart, a provider can also manually Sign a result using the Sign button at the bottom of the result itself.
  - The New and Delete buttons at the top right of the Text Lab results window have been removed as Text Lab Results never have more than one tab as discrete labs do.

Multimedia:

- Deleted items from multimedia are no longer deleted from the system, they are moved to a deleted tab after prompting for a reason.
- Multimedia items that were signed off on are also allowed to be moved to the deleted tab where they were not allowed to be deleted at all in prior versions
- When using the Import function in multimedia, the document that is imported remains in its original location, making it difficult for users to tell if someone was imported or not and clogging up the folder location users import from. With this version, after importing the file is deleted from its original location.   The following note has been added to the import screen alerting users of this change: *The imported file will be deleted from its current location*
- A new button has been added to the multimedia screen called Print PDF. You can select an item from this window and use that button to print the selected file with a standard header area added to the top right of each page.
  - Note that this only works for one item from the window and if you need to combine multiple items into one PDF and print it you should use the Print Full Chart feature under the reports menu ribbon.

- Users can now view an item inside Multimedia screen by double clicking instead of needing to click the View button

Messaging:

- Patient name has been added to the columns in the messaging tool so you can see the patient the message is attached to (if there is one chosen)
- The FW and RE notations at the beginning of messages have been removed so that you can group by the message subject and have the chain of messages fall together. Simply drag the subject line up to the top to group by it. This will work this way on the messages tab in the chart as well as in the messaging tab.
- When a patient completes an online form in Updox the message that returns to the office now displays "This form was completed by your patient inside the Updox portal" in the message body so you know what this message is about.
- The print layout for Messages has been rearranged to look neater, remove duplicate information and add other fields to pull standardly.
- Print layout on messages has been changed to remove the duplication of the subject line and add a header of patient information when printing a message.

Social/Family History:

- A new field has been added to the Drug Use area of Social History called Name. This field is customizable by practice. It allows you to specify the type of drug the patient uses.
  - To create the names your practice wishes to add to the drop-down menu inside of the chart, go to Configuration > Defaults > Patient Data.
  - Click on the Social History tab and then the Recreational Drug Name tab.
  - Under the name column add the drug names you wish to have as options in your practice. Click OK to Save.
  - These will now be options in the charts when adding or editing a drug use item on the social history tab.
- In family history, the Name field is no longer a required field when adding a family member to the top half of the screen, instead Name OR Relationship is required. If the user does not enter anything in Name field, relationship value will be copied into Name field (as a name is required when entering info in bottom half of screen) upon saving.
- Added the ability to make items in social history inactive (except the Martial & Employment status tab). Inactive items will not pull into notes, a filter at the bottom of each tab allows for showing or hiding inactive items, and a column shows if the items are inactive if you have them displaying.
- Items in social history can now be set to inactive (except the marital and employment status)
  - inactive items will not pull into notes when pulling social history
  - To set an item as inactive, click edit and click the inactive checkbox
  - A filter has been added to the bottom of the tab to show inactive and defaults to not showing

Notes / Note Guides:

- When creating note guides, the F5/F6/F7 keys now function as shortcut keys for creating DEL/PARA/LIST items accordingly.
- Users can now push the Clinical Assessment names and results out from a note using a macro to the Clinical Assessment tab. As each office who uses this has customized names and results, you will most likely need assistance from CHS to add this to your Note guides. Please reach out if you would like us to help with this.
- A Print button has been added to the options on the right-side panel when viewing a note or letter.

ePrescribing:

- DrFirst has a new feature that allows you to prescribe complex medications and titration sigs more clearly. To pull these into UnifiMD correctly, changes were made for those type scripts to pull the information into the Extended Sig field. Changes were made to the layouts, notes and history markers to pull the info accurately into charts and notes.

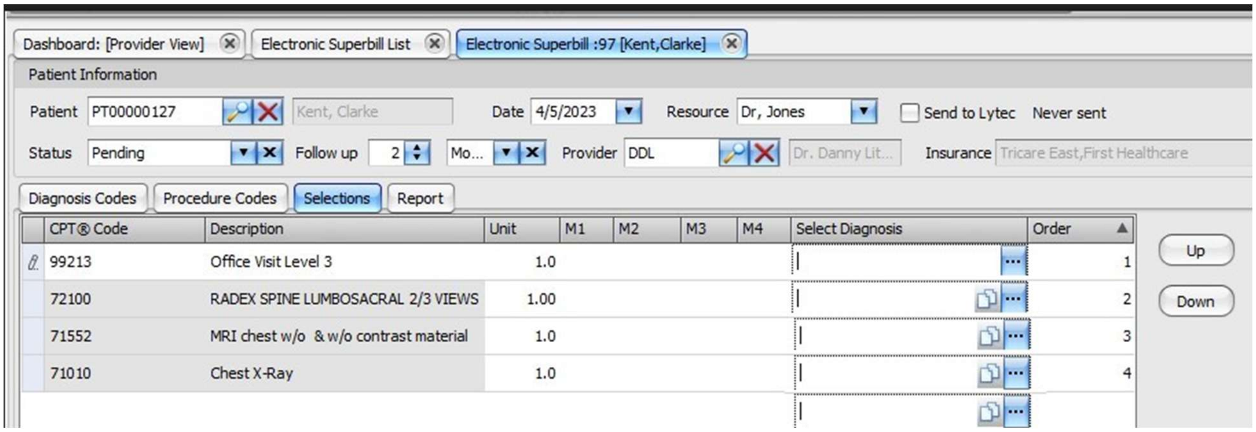
  *** If you would like this feature to be turned on for you after this UnifiMD release, please reach out to support and we will have DrFirst make the needed setting change for you ***

HL7 Interface changes:

- Enhanced functionality has been added to the HL7-ADT interface for Unifi for customers who import patients from something other than Lytec (i.e. Medisoft) to allow for more items to be mapped from the patient file into UnifiMD demographics, most notably new insurance companies. This will not be active the moment the upgrade is complete but will require a CHS Support Tech to manually add that to your system. They will be completed over the few weeks following production upgrade.

Electronic Superbill:

- **For users who do not create the note on the day of the appointment this change is very important to understand:**
  - If that is your workflow, be sure moving forward, to change the Date of Service field at the top of note to the date of the appointment at the start of the note. This will then make the CPT and diagnosis codes inserted into the note pull the appointment date and therefore crossover to the superbill with the appointment date (instead of today's date as it did in the past, causing codes to not push).
- In the electronic superbill, on the Selections tab, the Select Diagnosis Code column has had a few changes:
  - The select diagnosis column is now read only, you cannot free type in that area, avoiding typing wrong codes that may be inactive
  - The … button on each line is visible at all times for clicking. In prior versions users were required to click in the box to get that box to activate.
  - Inside the … button, the Up and Down buttons now work correctly, they were behaving odd at times in prior versions.
  - Inside the … button you can click the box at the top of the select column on the far left to quickly select all
  - A copy button (2 pieces of paper to the left of the …) has been added to all lines but the top one. Clicking that button will copy down all the diagnoses on the line above the one you click on. If you can use the same codes as the line above for this bill, you do not need to click the … and select them all on each line, you can simply click the copy from above button on each line.



- Modifiers can be pushed to the superbill by changing the Problem Macro as in the example below and entering up to 4 modifiers separated by commas:
- <New Problem> { ProblemType :Procedures} { DateIdentified : Keyboard } { ProblemDescription : EP Physical Exam 12-17} { ProcedureCode : 83036} {Modifier: 25,34,G7,98} <End New Problem>

Bug Fixes:

Prescriptions:

- In the last version UnifiMD was incorrectly allowing scripts added in DrFirst to be deleted from inside of UnifiMD itself. This has been corrected and a pop-up message added to remind users to delete medications from DrFirst only.

Custom tabs:

- When creating a general type custom clinical tab, an error message about a subscription would pop up and could be ignored and passed by but was an annoyance that has been fixed.

Notes:

- When a user edits a note, it creates an audit and shows the history in the audit button. If you change data and compare inside the audit button, the information shows as green. However, if something is **removed**, the removed information was not displayed. This has been corrected, and the removed info now shows in red.
- Macros inside Para and List markers were not pulling the data, but the note code itself, this has been fixed.
- Some note guides that pull in a large amount of info at the time of starting the note were taking longer than acceptable times to load the note. This has been remedied and sped up.

Superbills:

- Duplicate superbills were being created in this scenario: When the provider has their preference set to "view superbill upon saving" or "auto save superbill", and they EDIT a note that has already been signed and sign it again.
    - This has been fixed so that duplicate superbills are no longer created.
    - However, if the note was already signed and a superbill exists already, and the note edit includes adding or changing a diagnosis code or CPT code, the radio buttons on the right at the time of signing are greyed out and a pop-up alerts you that "The superbill was already created, please be sure to inform your biller of needed changes".
    - If the note edit happens before the superbill has been processed by your biller, any code updates will be reflected in the superbill, even though the pop-up message will appear.

Reports/printing:

- Some users, when printing very large files using Print Full Chart, were getting an unhandled exception error. This has been corrected.

Messaging:

- When a message with a patient attached was sent to multiple people, the messages tab on that patient would record a row for each person the message was sent to. Now the message tab shows one row per message, with recipients listed and separated by a comma.
- In the messaging Tool, settings made to column widths and sort by groups were not saving when a user closed out and reopened the program, this has been fixed, and those settings now save as how the user last set them.

Interfaces:

- In a Text Lab interface, the assign to provider field was not mapping, this has been corrected.

Users:

- Creating a new user was displaying the password in the audit report, this information is no longer displaying in the audit report.