CHS
Complete HealthCare Solutions, Inc.

Release Notes Version 2.0.59

IMPORTANT – The first time a practice is opened in UnifiMD after this update (first person in your office to log in Monday morning) a "Please Wait" message will appear on the screen after you type in your username before typing in your password that says, "Executing script 1.0.0.536.sql.txt". This message may stay on your screen for up to 30 seconds. It is running a script to optimize the way data is stored and read in the system. It is normal for it to take some time, please just be patient and wait for it to disappear so you can type in your password. Again, only the first person to log in will see it, the rest of your staff will not. If you do not see this do not worry, it's possible CHS logged in and opened your practice first during the upgrade process on our servers.

New Features / Enhancements:

2025 EHR Certification Maintained

- We are very happy to announce that this version of UnifiMD has a new feature available for users who wish to pay to turn it on. For UnifiMD to be a certified EMR as of January 1, 2025, we had to add the ability for our clients to create or connect to outside sources that have created decision support interventions based on criteria in a patient's chart. For example, when a patient has diabetes, it would remind you to verify items such as foot and eye exams.
- The ability to set up your own interventions is now available in this system, as well as the ability to connect to a third-party program of your choice that may offer such intervention alerts. Though this ability to connect is required by certified EMRs as of 1/1/25, there does not yet appear to be any third-party programs available yet to connect to. Once we become aware of available options, we will reach out with information.
- For now, if you want to see how the program would allow you to create your own rules, please reach out. If you become aware of a third-party program for Prediction Decision Support Intervention (PDSI) and want to have this connection turned on, again, please reach out to Carey Penna at the office for information and pricing.

Software Optimization:

- Several areas of the database have been optimized to both speed up areas of the program that were slow, and to remove Out of Memory errors that some end users were experiencing. The volume of those errors some users were experiencing is expected to be much less with this version than prior.

Chart tabs:

- For all patients with an active Portal account, you can now see this information in two places without going into the demographics area of the chart
  - On the bottom left of the Chart if the patient's portal is active, you will see a green light indicator and the words PORTAL ENABLED regardless of where you are in the chart.
  - In the patient search screen you can add the "Portal?" column using the column chooser under the name header.
- ONLY on the Medications and Allergy tabs – the indicator light on those tabs will always show the same color as the "Current" subtab making it easier to see accurate info without looking at the subtabs.
- Under Configuration > Layouts > Chart tabs, users can choose which subtabs they see underneath each main tab in the chart. The same way you can select which tabs you see as default, you can also now choose which subtabs you see by unchecking those tabs. Note that the main tab (typically called Current or Summary) cannot be hidden and neither can the deleted subtabs.
- Tasks opened from outside of the chart itself (Dashboard and Tools > Tasks) now have a button called **Open Chart** that allows the user to quickly open that patient's chart on a new tab (assuming a patient is attached to the Task).

Lab Results:

- The Unreviewed Labs module is no longer a pod available to add to the Dashboard. This area should be accessed from the Notifications area on the menu ribbon on the Notification area that can be added to your dashboard.
- Under Reports, the button labeled Unreviewed Labs is now called **Unsigned Labs** for consistency in the Program. Its function has not changed.
- Color coding has been added to lab results based on flag
  - New column has been added to the Lab Abnormal Flag screen, several standard flags have been default colored to blue, red, orange or yellow according to severity. Users can change those colors to be different, to remove the color, or to add colors to other custom Flags you may have set up in your practice.
  - This color shows next to the flag inside the lab result and on the lab result tab itself

Messages:

- In a message, macros can be added manually if they are not in a guide buy right clicking in the body of the message and choosing new "pull macros" item from the list
- When composing a new message, users can now choose to attach items from the patient's chart (Progress notes, Letters and Multimedia) to the email. To do so, a patient must be attached to the message. Once that is done, to the right of the Patient chart is a new button called Select Items to Attach. This button will open a window similar to what you see in Print Full Chart where you can select the items you want to attach.

Multimedia:

- A column has been added to the Multimedia screen that displays the user login name who scanned the document.

Dashboard:

- In the scheduling pod of the dashboard the seconds column has been removed from the appointment time and AM or PM added in its place. (EX: 07:00:00 now shows as 07:00 a.m.)

Program wide:

- The "advanced filters" box at the top of all search windows is now hidden to allow for more space on the screen (example: Find Patient window). There is a new button at the bottom of the window called **Show Adv. Filters** if you would like to see / use that area. The button will change to read **Hide Adv. Filters** once opened so you can minimize it again.
- The location of where the help menu files are stored has been moved as it was causing issues viewing it from a multi-tenant environment.
- For program consistency, the menu button for "Flow Charts" has been moved from the Configuration tab to the Guides tab, and corresponding User Group settings moved as well.
- The pop-up warning in patient warnings can no longer be formatted, for program consistency, only the standard font in other pop ups will be used in the custom patient warnings used.
- The skins area of the program has been renamed to themes. To address some performance issues many of the complex skins have been removed. Upon upgrade users who had a skin that was removed will be set to "Basic".
- A new dictionary of medical terms has been added to the spellcheck dictionary, causing fewer words to be unrecognized. Be aware new drug names will still need to be added, but only once, as all words added by your user are now stored after saving once, regardless of the server you connect to in a multi-server environment such as CHS Hosted.

Audit Trail report changes:

- A column called Patient Chart has been added to the report
- The Patient Code search box has been renamed Patient Chart (what it always searched for, just had a misleading label on it)
- A button has been added to the bottom of the screen called Open Chart. This will open a new tab for the highlighted patient's chart. Closing the chart tab will return you to the audit report.

Problems:

- When using the Smart Search button to add a diagnosis code that is not currently in the system, the window now instead of leaving the user back on the Find Diagnosis window, closes completely back to the Add Problem window with the new code displayed there, saving a few clicks and the need to find the newly added code in the window.
- If a diagnosis code has been marked inactive in UnifiMD under the Coding > Diagnosis Codes item, you will now see that code in bold with the word inactive beside it in the following screens to bring the provider's attention to it and avoid an inactive code being sent to your biller:
  - Active Problems tab in the patient's chart
  - Inside the add new problem window
  - When using the history button to choose an active problem
  - In the note if the user does choose an inactive code

Patient Look up:

- The **Reset** button on the Find patient window has been moved to the bottom of the screen for program consistency.

Guides:

- An error will display when creating Note Codes that tells the user they have a bad List, DEL or PARA marker in the Note Code Guide

- When inserting Clinical Assessments via a History placeholder, the name of the guide now displays above the Item name and date.
- Under Note Guides > Note Types, a new column has been added called "Signature Required". By default, all notes have that box checked. If you have a Note Type that should not require a signature or generate a superbill, you can uncheck that box (or create a new Note Type for this purpose). notes with this type:
    - Will not pop up asking for a signature
    - Will note create a superbill
    - Will show a Note Status on the dashboard and in the chart of **No Sig Required**
    - Will not display under Practice Unsigned Notes

Superbills:

- In the electronic superbill screen, the Status field has been moved to the end of the row, closer to the Send to HL7 and Send to Lytec area.
- When either Export to HL7 or Send to Lytec are checked and the user clicks Save, Apply, or Apply New, the status will automatically change to "Complete" for you now.
- When creating a superbill from the schedule pod of the dashboard, the date of the appointment now pulls in as the date of service on the Note, instead of showing "today's date" as that date.
- A new Status of VOID has been added to the menu drop down for Superbills. Superbills with a status of VOID will not show on the electronic superbill list but can be viewed by using the filter on the status column if needed.

Notes:

- The error box at the very bottom of Notes and Letters has been removed from view to allow more real estate on the screen. It will appear if there is an error to display still, but not all the time.
- When creating a Note from the schedule pod of the dashboard, the provider attached to the appointment now pulls in as the provider on the Note, instead of the default provider set for that user.
- From all unsigned notes areas:
    - The user can now open the note by double clicking on it. ***From this area only***, the note will open in EDIT mode. If another user is in the note, it will ask you to open in read only.
    - ***From this area only***, when in that open Note, a new button has been added called <u>Open Chart</u> on the right side of the screen to allow the user to quickly refer to the chart before signing the Note.

Notes and Tasks:

- Practices now can turn off signature requirements based on note type. This is done by going to Guides > Note Guides > Note Types. There is a new column called Signature Required. By default, all previously existing note types require a signature.
- A new note type has been added to all practices called Patient Message. The intended use of Patient Message is for the new feature of Copy to Notes from messages (which is explained below). This note type can also be used for saving phone calls, nurse visits, anything you want without requiring a signature. If the practice has note guides for these various documenting proposes, you can go to Guides > Note Guides > Note Guides, select the guide and update the note type to the Patient Message or something new that the practice created.
- Copy to Notes and Copy to Tasks buttons have been added to the top of all message's screens:
    - Messaging Tool – from the main screen when a message is selected
    - Messaging Tool – when a message is open
    - In a patient's Chart – when message is open

    - From Dashboard – when message is open
- When selecting 'Copy to Notes' button, the details in the message are copied into a new note for the patient who is attached to the message. The note has a title of **Patient Message** and the Type of **Patient Messages**. The note will remain open to allow the user to document additional details in the note. This note will not require a signature. This feature will only work if a patient is attached on the message.
- When selecting the 'Copy to Tasks' Button, the details in the message are copied to a new task for the patient who is attached to the message. The task screen will remain open to allow the user to add to it and assign the task accordingly. This feature is not dependent on a patient being attached to the message.
- When either action above is performed, the system will record a user and date stamp next to which item was completed so the user can identify that further action was taken on this item.

Vitals:

- When printing growth charts:
    - The current option has been renamed "Growth Chart Selected" and prints dates that are highlighted, one or many.
    - A new option has been added called "Growth Chart All" that prints all the dates without having to take the time to multi-select them all.

Faxing:

- Fax cover sheet changes:
    - The Print cover page check box is now defaulted to on and can be unchecked if a user does not want a cover page to send with a particular fax
    - A lookup box has been added to the right of that check box that will show the fax cover sheet that is set as the default for the practice, however if an office has created multiple fax cover sheets, they can select a different one as desired.

Printing:

- From the Print Full Chart screen, when choosing items to include, an X has been added to the upper right corner to close the window as users were sometimes unsure how to close the window (clicking outside the selection window anywhere)

Orders:

- New order status of "Cancelled" now exists.   Under the Orders tab, there is now a sub tab called **Completed / Cancelled**. Changing an order status to one of those two options moves it to that tab. <u>Note</u> - users who wish to utilize this new function will need to add the new tab under your Chart Tab Layous screen
- Users can now change the status of an order easier by:
    - Right clicking and choosing Change Status
    - Using Ctrl or Shift keys to multi select and then Right Click and Change Status
- Orders placed together now open together when viewing or editing any one of them

Demographics:

- A new field has been added to the patient demographics screen called "Other Chart #". This field exists for offices to use as needed in their office to manually add a chart # that is not UnifiMD's chart

#. Some people may want to keep the local hospital MRN#, some may want to record a practice management system's chart # if it is not integrated with UnifiMD. It is simply a place to record a different chart # if you need one. This column then can be added to your columns using the right click, column chooser option, allowing you to search for a patient by that new custom number.

Bug Fixes:

Entire Program:

- The Skin (newly renamed "Theme" in this version) that your user selects will now stay with your user across servers in a multi-server environment such as CHS Hosted so you don't have to select it each time you connect to a different server.

Unsigned Labs:

- In unsigned Text Labs screen, if the user groups by certain column headers, and then double clicks on the header the system would throw an unhandled exception error. This has been corrected.

Tasks:

- The task statuses a user selects in the task pod of the dashboard determines the statuses you see in the patient chart on the Task tab. This has been corrected, and all statuses show on the task tab of the chart regardless of filters on the dashboard. Tools > Tasks does hold the same status filter as the dashboard still. This is intentional to avoid needing to set that in two places.

Messages:

- In messages, macros from the guide do not appear to work. They do after sending, but *appear* to not. This has been changed so that the macros pull in the info right away if the patient is selected before choosing the message guide.
- From a message, right clicking on an attachment and renaming it while in the process of saving it to multimedia now correctly saves the renamed file, where it was not in prior versions
- Messages printed from the dashboard were not printing the header information for the message that prints from messages printed from other areas of the program, this has been fixed.

Notes:

- In letters and notes, macros stored in the header or footer do not appear to work. They do after saving, but *appear* to not. This has been changed so that the macros pull in the info right away without the need to save first.
- Note and letter guides trying to use the { OrderingProvider } or { TextLabOrderingProvider } macros would throw an error, this has been corrected.
- At the top of the Note, when a user changes the Date of Service to be a date other than Today, the .TODAY history links and Today Items under the History button all were pulling today's date still. In this version that has been corrected to now pull the Date of Service from the top of the Note. The same change has been made for Letters as well.

Lab results:

- In unsigned labs screen, if the ordering or CC provider were providers from outside of the practice, their names would show inside the result screen but were not displaying in the unsigned window itself. This has been corrected.

- In text image lab results, the assign to provider field used to be required and in last update was not. This was causing the result to go to the patients' charts without going to the providers review bin. This has been corrected and is now working as it should.
- In the unsigned text labs window, if certain filters are applied to the window, when double clicking a lab to review it, in certain workflows the wrong patient's lab may open. A workaround was provided to help avoid this scenario until this update could be released and the fix implemented

Vitals:

- When recording head circumference in vitals, the value entered in inches displayed on the summary screen in feet/inches. This has been corrected to display in inches.
- Growth Chart Changes:
  - The screen opens larger by default and can be resized by the user
  - On page 2, head circumference was not plotting at all, this has been corrected
  - Weight was only including pounds and not ounces in the typed-out area at the bottom and not taking the oz into effect in the plotting either
  - Length field from Vitals has been added as a column users can choose to display on the vitals summary tab
  - Height was a required field to get the growth chart to print at all, this requirement has been removed
  - Users cannot record height and length on the same vital entry, an error will occur if you do.
  - Whichever value is used (length or height) will be plotted as Length on the Growth Chart

Superbills:

- If a superbill had more than 3 diagnoses attached to it some workflows would cause the order of the codes to change when using the "copy down" icon. This has been fixed.

Multimedia:

- When renaming a file in Multimedia screens, if dated today an error would up when saving the renamed file that the date cannot be greater than today, although the date was today in fact. This has been corrected to accept today and past dates and just not future dates.

Patient Charts:

- In Medications and Allergies tabs – when the user updates the Reviewed by date, the Current tab will now turn green if it has been reviewed inside the parameters set by the practice.
- If a user entered info into the sticky note section OR added a photo on the left side of the chart and did not Click the Save button an erroneous error would appear, even though it would save. This error is now gone.
- On the dashboard view, patients with an age between 1 and 2 years were displaying the d,m,y label incorrectly. This has been fixed.
- In certain workflows, patient warnings were appearing on the chart multiple times, this has been corrected.
- The vital date on print layouts (chart summary and printing vitals from the chart tab) was printing the date stored in the system that the vital entry was made or last modified, not the one that displays in the vital entry. That has been corrected so that changes made after the vital is recorded do not change what prints, and vitals imported into a system during conversion do not all display the date of the import.

PM System Interface:

- Updates made to the referring physician file in Lytec (for clients who that as their PM system) or to a patient's selected referring physician were not crossing over from Lytec to UnifiMD, this has been corrected.

Dr First:

- Medications entered into RCopia in a browser would not pull down into UnifiMD until someone opened Dr First from inside UnifiMD. This situation has been fixed, and meds will pull down into UnifiMD that were sent from the browser version (a) the next time someone opens DrFirst from inside UnifiMD or (b) in 5 minutes, whichever comes first.