



## Release Notes Version 2.0.62.11

As explained in early January, there was a mandated deadline for all certified EMRs to update the format of exported CCDAs to the new USCDI Version 3.1 by December 31, 2025. However, due to the government shutdown and EMRs' inability to access the certification testing tools during that period, the deadline was extended by 60 days. As a result, this 2026 1<sup>st</sup> quarter update is largely items related to the new CCDA version update. **As of February 6, 2026 UnifiMD has retained its certification status with ONC by updating to all required HTI-1 standards.**

### **New features/enhancements:**

#### Dashboard

- In the scheduler pod on the dashboard, the address column has been renamed "address line 1" as that is what information it pulls. Also Address line 2, city, state, and zip have been added to the column chooser screen for any users who would like to add those to their view on the dashboard
- On the scheduling pod of the dashboard, left and right arrows have been added beside the date to allow the user to easily flip back and ahead one day at a time.

#### Labs

- The Quick Add button has been removed from the Order Questions during the patient order entry work flow. If you need to add Order Questions to your database it should be performed under the configuration itself to ensure accuracy in linking it to the answers.
- When adding codes for text/image lab results, and using the Add Text Cross Reference Button, the Type column is now required. Previously, leaving this field blank caused some incoming reports to fail processing.

#### Faxing

- From inside a previewed PDF of a fax, the user can now Copy to Multimedia or Text/Image without needing to close the preview and then take those actions. This saves a few clicks and closes the preview once the action has been completed.

## eSuperbill

- Inactive resources no longer display in the drop down on a new superbill, but are still available to choose when running a superbill report.
  - When in user preferences, if you try to save with an inactive resource selected, you will get a warning message to change to an active option

## Messages

- You can now right click on an attachment in a message opened from all locations you can access messages in the system, and choose Save to Multimedia, Save to Text Image Labs, or Import CCDA. In prior versions those options were only available from the main messaging tab.

## Referring Physician search

- Under Dictionaries > Other > Referring physicians, all address and phone related fields have been added to the column chooser and to the display as a default for all users.

## Multimedia Review Bin

- In the Multimedia Review bin, the default zoom setting has been set for all users to "Fit Width". If a user changes it to another setting, it will stay as that on all documents until you change it back manually or close the review bin and reopen it.

## **Bug fixes:**

### General

- When going to Config > Defaults > Patient Defaults > Vitals > Temperature Location - Temperature was spelled incorrectly on the column header
- Users set to not have access to the Updox portal were still seeing the Updox portal icon, this has been corrected.

### Orders:

- A certain workflow in some offices was causing Orders to duplicate and add multiple tabs of the same order when adding to a patient chart. This workflow has been found and can no longer occur so that in the future users will not see that happening. If you run across any of that behavior after this update, please reach out to support.

### Lytec to UnifiMD Interface

- Setting changes were made on CHS Lytec and UnifiMD Hosted clients that should drastically decrease the amount of times patients stop crossing (other than for valid situations where required fields are missing in Lytec).

## Lab Results Interface

- When there are a lot of HL7 messages from a lab interface in the Error Directory and the user opens "Text Cross Reference List" the system would throw an Unhandled Exception error and freeze. This has been corrected and the behavior is no longer occurring.

**USCDiv3 CCDA update items** – The items below were all required to be added into the system for certification. Some of you will not use any of them right now but may be required to in the future. Some of you may find some of them useful now in your office. Please review them all and reach out for more information on any if needed.

### Important Definition for those of you not familiar with Social Determinants of Health (SDOH)

Key areas such as housing, transportation, and food security have been recognized as critical, non-clinical factors influencing up to 80% of health outcomes. They are now increasingly integrated into EHRs to improve patient care and reduce costs. While often trapped in unstructured notes, SDOH data is now being formalized to help providers address such topics directly within workflows.

## Clinical Assessments

- A new Clinical Assessment type has been added called "Disability Status" for use with that type of SDOH recording. This should be selected for creating that type of CA Guide.
- In a Clinical Assessment Guide, a new check box has been added called "Calculate Count". This box should be checked if the answers to the questions you are building in the Clinical Assessment need to have a score attached to them. Examples include Hunger Risk Survey and PHQ-9. This has been added as requirement for the new USCDiv3 CCDA export, however clients may find it useful for other situations as well.
  - When a CA has that box checked, a new Data type exists called "Drop down list with value". When you choose that data type, the options in the List column have a Value associated with them. Example (Always = a score of 2, Sometimes = a score of 1, Never = a score of 0)
  - Once you configure all of those items in the Guide, when using it in a chart and clicking the Calculate button at the bottom left of the screen, the total of the values will display the total score for the answers provided above. This value will also show at the top of the column for that date on the Clinical Assessment tab in the chart.
  - If you want to use this feature and need help configuring it, please reach out to the CHS Support Team
  - Added the ability to import and export the following from one database to another (needed for SDOH recording to be setup in a practice)
    - Clinical Assessment Answers
    - Clinical Assessment Guides

## Care Plans

- New fields have been added for Care Plan Goals (stored under Template Defaults Data) for use when exporting SDOH Goals to the new USCDiv3 CCDA export.
- A due date column has been added to each line on the Care Plan Goals tab.
- On the Referrals tab of Care Plans, an Active Problems button has been added to select the patient diagnosis "reason for referral".
- In Care Plans, a new field called "Referral Destination" has been added to select the type of place the patient is being referred to.
- A new field called Care Plan "Member Type" has been added to locations in the program per requirements from the new USCDiv3 CCDA export.
  - In the Provider file
  - In the Referring Physician file
  - In the Care Plan Provider screen if the Type is Other (that info pulls from the provider or referring provider if that is the type chosen)
  - When choosing a Care plan Provider Type of other, a phone # box will also display for populating (that info pulls from the provider or referring provider if that is the type chosen)

## General

- The new USCDiv3 CCDA format has been set to upload to both Updox portal and MeldRx for clients who use either of those products. There is nothing for you to do and no effect on what your patients see in their portal.
- The new USCDiv3 CCDA format has been set to upload to an HIE from Clinical Encounters if you are set up with one for your office.

## Demographics

- Tribal affiliation has been added to the new USCDiv3 CCDA export
- A type of unknown was added to Sex options in patient demographics. In the background declined has been added to any that are left blank. These two new options have been added to the new USCDiv3 CCDA export
- More options have been added to the existing "Occupation" and "Occupation Industry" fields in patient demographics to align with the new USCDiv3 CCDA requirements. New coding has also been added in the background of the program to send appropriately per USCDiv3 requirements.
- A new field called Sub-Ethnicity has been added in the patient demographics screen. It is only available when the Ethnicity is set to Hispanic and allows for a more specific Ethnicity to be chosen from the approved list according to the new guidelines of the USCDiv3 CCDA export.

## Lab Results and Orders

- Specimen source in Lab Guides now requires a SNOMED code for mapping to the new USCDiv3 CCDA export. This field has been added to UnifiMD for recording.

## Social History

- Pregnancy Status has been added as a display field in the top section of the summary tab.
- The Social History subtab called "Marital & Employment Status" has been renamed "Social History Details"
- On this tab, Pregnancy Status and Pregnancy Intent have been added with drop down lists of acceptable answers for the new USCDiv3 CCDA export