



Release Notes Version 2.0.63

A few of the more exciting features are in red font in this release 😊

New features/enhancements:

Dashboard:

- In the scheduler pod of your dashboard, you can now add a column for **Note Title** to a user's view.
- From the Task Tool and the Task Module that may be on your dashboard, we added a check box called "Include Future Tasks". Checking this will display tasks that have a start date in the future. Leaving it unchecked will hide those items from your task list.
- Notifications shown on the dashboard seemed to cause an increase in network demand, slowing down other portions of the program and other programs on the server. Changes have been made to the coding to lower that demand and stop that from happening.

Chart Summary:

- The following Chart tabs are now available to add as modules to your Chart Summary. If you are unsure how to do so and would like help, please reach out to support.
 - Clinical Assessments
 - Care Plan
 - Implantable Devices
 - Tele-health
 - Tasks
 - Messages
 - Prenatal

ePrescribing:

- The DrFirst window now opens larger and centered on the screen by default.
- The DrFirst window can now be minimized to toggle back to UnifiMD and allows the user to work in the EMR and then go back to that screen.
 - The only thing you can't do is open DrFirst for a second patient while one is open. If you try to, a warning will tell you so. Clicking OK on the error will maximize the DrFirst window previously opened for you to finish work in and close before choosing another patient.

Chart:

- In the patient search window, the following fields have been added to the column chooser for users who wish to add these columns to their view:
 - Within the **Private Band** you can add columns for Gender, Sexual Orientation and Sub Ethnicity

- A new band now can be added called **Insurance** that you can pull Name, Start date and End date beneath.
- When a patient chart is open, at the bottom left (beside the Portal Enabled alert if you use the portal), is a new field labeled **Next Visit**: This field will display the date and provider of the next appointment upcoming for this patient (that does not have a status of Canceled or Rescheduled).
- A new Print Layout Type has been created called Patient Face Sheet.
 - A default Patient Face Sheet has been created and added to all client databases, however it can be changed; reach out to support if you need assistance doing so.
 - Places to print it from:
 - The scheduler pod of your dashboard by right clicking on an appointment
 - Demographics screen using the new button in the bottom right of the window
 - Patient search window using the new button at the bottom of the window
 - Reports menu
 - As an additional page under Print Full Chart by checking the new "Face Sheet" checkbox.
- When recording vitals in metric measurements, grams have been added to the display for weight to allow for more granular measurements.
- Patient warnings enhancements:
 - When creating or editing a warning, the user is no longer able to change the patient, as you are performing this from inside a patient chart. The display at the top of the window has been modified accordingly
 - An inactive check box has been applied to the Warning
 - An Edit button has been adding, allowing the user to edit or inactivate it from the pop up directly.
 - In the patient warning window, a column has been added that displays if the warnings are active or not
 - In the patient warning window, a check box has been added that defaults to not showing Inactive warnings, but can be unchecked if the user would like to view them
- Frequently used Diet and Supplement items (under Social History tab) can now be added to a stored list to choose from a drop down. Users can still type freely in those boxes, but if you'd like to add frequently used items to a list you can do so under Configuration > Defaults > Patient > Social History tab > Diet tab
- The Insurance tab in Demographics has been rearranged to allow for easier viewing and to add subscriber fields sometimes required on lab orders. There are now 3 sub tabs for Primary, Secondary and Tertiary insurance information.
 - If the subscriber is also a patient in the system, choose the relationship first from the drop down and then choose from the Insured Patient magnifying glass to fill the information under the subscriber section. If they are not a patient, free type the information into that area.

Growth Chart enhancements:

- **New Growth Chart for Down Syndrome added**
 - Choose this growth chart to use for a specific patient by simply checking the box at the bottom of the Vitals tab labeled "Down Syndrome Growth Chart"
- **New Growth Chart for premature babies added**
 - Choose this growth chart to use for a specific patient by simply checking the box at the bottom of the Vitals tab labeled "Fenton Growth Chart"
 - As soon as that box is checked a window will pop up requiring you to enter the child's gestational age at birth in the format WW/DD (weeks and days). Clicking OK will display the corrected age on the bottom of the Vitals tab, which will be used in plotting the points on the chart.
 - This chart is only used until the child reaches 50 weeks, and then the system will use the standard growth chart (2-20 years tab), even if the check box remains checked.
- Changes to the standard growth charts:

- The 0-36 months tab has been replaced with the updated WHO 0-24 months tab
- If any vital entry recorded is outside of the plottable area of the graph, it will not print that plot point (rather than what it was doing prior and printing it off the graph portion of the page). If that happens, a warning will pop up stating:
 - You have entered vital data that is outside of the growth chart plottable points. Click Cancel to go back and correct the data or OK to proceed with saving these values.
- If there are more plot points on a growth chart page than the written-out grid boxes provide lines for, once the grid is full, typed out dates and measurements will not print, though the plot points will appear on the chart.
- **Hovering over the plot points on the growth chart on your screen will now display the date and measurement**
- All primary plot points are dark blue circles now for better visibility. If more than one exists on a page red and then green are added to the view.
- **When the growth chart opens, it will be on the correct page for the current age of the patient. Users can flip to other pages, but it will default to the correct page.**
- The patient name and date of birth print on the top of each page of the growth charts

Faxing:

- When composing a fax, the character limit in the message section of the fax cover sheet has been increased to 4,000 and a counter added below that box that tells how many characters you have left to type.
- To allow for more space for that window, the To and From sections have been re-arranged a bit to make the free text area larger.

Notes / Letters:

- **The Compare feature that has been in Notes for years has been added to the Letters tab as well. Users can now use the Compare button to open a prior letter in a side by side, view and copy items from the prior letter to the new one, make changes or add to it, and then close the preview and save the new Letter.**
- Keyboard shortcuts have been added to UnifiMD to Capitalize a word or the first letter of a word. These can be used when typing in a Note or Letter and also can be added to verbal commands in Dragon dictation software. If you need assistance in adding those, please reach out.
 - After highlighting a word, CTRL + SHIFT + A will capitalize the entire word
 - After highlighting a word, SHIFT + F3 will capitalize the first letter of the word

Labs:

- In the Unsigned Labs window, on both the Labs and Text/Image Labs tabs, users can add the patient Date of Birth as a column in their view if they would like to select it from the Column Chooser.
- In the Unsigned Labs Tool, currently there is a button called "Open Patient & Lab" on the Unsigned Lab tab and a button called "Open Patient & Text Lab" on the Unsigned Text Lab tab. Currently those open the patient's chart with the lab result opened on top of / in front of it. Changes have been made as below:
 - **Open Patient's Lab Results** - Clicking this opens the patient chart of the row highlighted on the Lab Results tab without opening the lab result itself.
 - **Open Patient's Text / Image Results** - Clicking this opens the patient chart of the row highlighted ON the Text / Image Results tab without opening the lab result itself.
 - Also, on the Unsigned lab tab double clicking a row now opens the lab result window (the same behavior the Unsigned Text Lab tab has now)

- When opening a Text/Image Result with an attachment, the name of the attachment is now blue and underlined, making it more visually obvious to the end user that it is a link that can be clicked to open and view the attachment.
- In the Text/Lab Results screen from inside a patient chart, the SIGN button has been changed to SAVE & SIGN, allowing the user entering a result to save it while inside the screen instead of having to save it and go back in to sign it. Note that if there are multiple tabs open, it will only sign the one the user is on.
- In the unsigned labs and text labs screens:
 - The Expand All button has been removed
 - The Collapse All button now collapses all on the screen instead of all under the one open result.
- In the chart on the Lab Results tab:
 - The Collapse All button now collapses all on the screen instead of all under the one lab result.
 - The Review button has been removed
 - The "Move to Historical" button has been removed, and the action now must be done as a right-click action. Doing so allows users to multi-select lines to move to Historical.
 - On the Historical tab, the Review button has been removed
 - The Move to Current button has been changed to a right click action. Doing so allows users to multi-select lines to move to Current.
- Adjustments and enhancements to Text Lab Results windows
 - The window that opens when viewing a Text Lab Results will auto-size so all information is viewable even on a smaller laptop screen
 - The tack in the top right corner to view or hide the header has been changed to a button that reads Hide Header when it is present and View Header when it is hidden.
 - When the header is collapsed, along with Name, you can also see the Report Name, Report Date, and Report Comment.
 - The system will remember the last way each user viewed a Result and will stay Visible or Hidden accordingly
- An office can now choose to make lab results that come in from an interface move to the patient's chart directly without needing to be signed. There are some offices who do not want to sign lab results and allowing them to build up in the system without being signed can slow down the program. If you'd like to make this change in your database, please reach out for someone in support to assist as this must be done by an admin user.
 - The bottom of the lab result in the chart will read "Recorded without signing" in place of "Signed by (user) on (date)"
 - Note that the user who makes the change will show in the audit trail of the EMR.
 - This is a per provider setting, so CHS can turn this on or off for individual providers within the interface settings when you request it be changed.
 - Changing this setting requires each provider in the office who wishes to make this setting change sign a Waiver
- From both pending orders in the notification area and incomplete orders under the reports menu, users can now right click and change the status of an order. Multi-select will also work for this feature.
- In the unsigned labs screen, users can add a column (using the column chooser feature) called Previous Value. This column will display the most recent result value of that same lab for that patient so the provider can compare before signing off on the lab result.
 - This field has not been added to the Lab Results chart tab itself, though we are aware people have asked for it to be. A patient with hundreds of labs in their chart creates a massive amount of calculations for the system to perform before that tab can be opened. We have decided speed is more important than that field existing there at this time, and will continue to investigate ways to add it in the future. If you need training on ways to filter that screen to allow comparison of previous values in other ways, please reach out to support.

Messages:

- When clicking the **Copy to Notes** button in a message, the patient's name and date of birth, as well as the username and time stamp will automatically now be pasted at the top of the message being created, saving the user from needing to type that information for the person the message is being sent to.

eSuperbills:

- To prevent users from sending duplicate electronic superbills to their billing system, the following changes have been made
 - The apply button has been removed from the superbill screen as clicking it and then Save caused 2 to send.
 - If users click Save and there is a date in either the Sent to Lytec or Sent to HL7 fields, a pop up will appear as below:
 - **This superbill has already been sent to your PM system on [insert the date and time from the record]. Are you sure you want to proceed?**
Clicking Yes will send a new message to the PM system and it will create an additional bill. If you are doing this to correct an error click YES and contact your biller.
Clicking No will close this screen, will not save any changes and will not send an additional bill to your PM system.
 - Users should read it carefully and decide what their intention is when they see it

Care Plan:

- Under practice settings a new tab called "Care Plan Review dates" allows you to change the 30, 60, 90, 120 standard review dates to something that applies more to your practice
- In a chart under those dates is a new button called "Create review tasks" and a drop-down list of users to create tasks for. Choosing a user in the office and clicking that button will create a task for each of those 4 dates x days before the due date. That number of days before is also set in the "Care Plan Review dates" tab mentioned above.
- Once tasks are set for a care plan, the words "Tasks have been created on (date)" will appear.
- Offices can now decide how many tasks (and review dates if that feature is used) they want to utilize in their office. The default is 4 (originally 30,60,90, and 120 days if they have not been customized), however if you want fewer, that can now be changed in the practice settings by inactivating one or more.

Health Maintenance Age Update Tool:

- A new Tool has been added to UnifiMD for offices who use Health Maintenance guides that are based on AGE. This tool when used, will run through all patients and find those who have "aged out" of the guides applied to their chart already and need new guides applied.
 - For example, a pediatric office might have guides for infancy (0-11 months), early childhood (1-5 years), middle childhood (6-10 years), etc. When they were entered into UnifiMD as a new patient at age 5, the HM guide for early childhood would have applied and the items associated with it. Now, a year has passed, they are 6, and the next guide should apply.
 - To ensure the HM Guides will be included in the tool and process correctly, you must first open and verify the information in the below areas on each active guide in your database:
 - Go to Guides> HM> HM Guides
 - Open an Age/Sex Template
 - Click the criteria button and ensure that if items on the Age/Sex tab should be used as criteria for this guide they are entered here correctly
 - Also ensure if Age/Sex should not be applied to this guide they are blank on that tab

- Be sure there are no overlapping age ranges between all of the guides that have an age range in the criteria.
- For all age-based guides, ensure these 2 check boxes on the main screen of the guide are CHECKED:
 - Include in HM Update Tool
 - Apply automatically to patients who fit the criteria
- Running this tool will move the items related to the past age-based guide to the historical tab and add the new age-appropriate guide to the Current tab on all patients in that age range.
- If you have UnifiMD installed locally in your office or hosted by someone other than CHS, reach out to CHS for us to grant access to one of your users to run this tool, then decide on a schedule to run it at a time *when no one is in the program* (CHS recommends at least once monthly). To do so, go to Tools> HM Update Tool. All you do is click it, read the warning and click OK, then wait for it to complete.
- If you have UnifiMD hosted by CHS and use age-based HM Guides in your office, we will run this tool for you once a month behind the scenes. Simply let us know you are interested in having it setup.

Logs:

- Dr First ANS logs and Updbox logs were clearing out completely once they reached 10,000 rows. This logic has been changed to clear out anything older than 30 days but never empty the log file completely. This will assist CHS in troubleshooting in this area.

Updbox patient portal:

- A setting has been added inside of UnifiMD that allows a practice to turn on automatic uploading of CCDAs (chart updates) to Updbox upon signing of a Note or Lab Result.
 - For offices who use the Updbox patient portal, if this setting is configured, anytime a Note or Lab Result is signed, UnifiMD will automatically upload a full CCDA update to Updbox that the patient can view under their “Health” tab in Updbox.
 - If you would like to turn this feature on, please reach out to our support team for assistance.

Multimedia Storage Setting:

- For customers who have UnifiMD installed on their local office server, a setting has been added to allow for external storage of multimedia items. This setting allows the items in multimedia to be stored outside of the database on a shared drive within the office. If a current client wants to make this change in their setup, please reach out to support for assistance. Users will also want to ensure this directory is backed up if this change is made. Again, this does not apply to CHS Hosted customers.

UnifiMD Services renamed:

- There are 6 services that run with UnifiMD – for clients not on CHS Hosted Servers, be aware they have been renamed to all begin with “UnifiMD” at the start of them, so they are listed together in the services window. If you have any process that relies on the system services, be aware of the name changes in this version.

Bug fixes:

Dashboard:

- On the dashboard, columns were not consistently remembering the column width and positions when a user signed out and back in. This has been corrected.

Chart Summary:

- An issue has been corrected that was not allowing users to create new Chart Summary layouts with a custom name like "Nurses" for example. You could create them and let the system autogenerate a code but now can also save it as a name you would like to use instead.

General:

- Throughout the program, when in a search field, using the delete key was not consistently working as expected. Now all search fields will behave as expected when using the Delete key and remove the letters/numbers to the right of the cursor, even if in the middle of a word or date.
- A few areas of the program were improved visually:
 - In the Clinical Encounter screen if you have more rows than fit, the bottom of the scroll bar was cut off and not usable
 - In Text/Image Results, in the report data, there was no carriage return after the last comment, leaving the user no way to see the bottom line of the report without deleting some blank lines up above
 - If a user has Patient Demographics on their chart summary screen, the bottom few rows were being cut off
 - In the Overdue Health Maintenance pop up, if there were more items than fit the display the scroll bar was being cut off to allow access to the bottom row.
- **Date fields in UnifiMD have been cleaned up for a more consistent performance throughout the program. In all date fields in the program:**
 - **Date fields will accept either of these formats:**
 - **8 digits dates without slashes (ie 01051986) OR**
 - **Type the slashes and not need to use leading zeros on single digits months and days (ie 1/5/1986)**
 - Users can backspace to the beginning of the date field
 - If a date field is required, it will default to today (instead of 01/01/1900 as it was in prior versions)
 - If a date field is not required and the user types it incorrectly, it will clear the field
- In certain scenarios the filter applied to one patient when adding, for example, lab results using the history placeholder in a note, would stick and be applied to the next patient, making it appear as if they have no lab results because that prior filter does not apply to this patient. This has been corrected so that filters applied to one patient are cleared when you go to the next.

Faxing:

- In the last version, if you opened a fax with multiple pages and deleted a/some pages, clicked "Copy to Patient Multimedia", the fax that was copied to multimedia would still contain all the original pages, the deleted ones included. This has been addressed in this version, so the deleted pages do not save.
- Clients who do not pay for the faxing module of UnifiMD were able to use it in last update, and this has been corrected. If you want to add this module to UnifiMD for your office, please reach out for a quote.
- Additional logging has been added to capture reasons faxes may not pull into UnifiMD for a few days then when they do, they duplicate. This only happened once for one client and has been remedied.

- The "Please Wait, Fetching message..." pop up when faxes download into UnifiMD was holding up some users from working while it was present on the screen. Several changes were made in the process of how those download to make it run faster and to allow users to work while it runs in the background without interrupting your work.
- With a certain workflow for a handful of clients, faxes were not pulling into UnifiMD before being archived in the Updax fax portal itself. This has been corrected. A piece of this fix involves users not being allowed to delete an incoming fax without viewing it first.
- Some PDFs when trying to fax from Multimedia were throwing an unhandled exception error. It was due to elements contained in those PDFs. The reader was updated in UnifiMD so that the error does not occur and they can now be faxed without issue.
- Some users were having the unread fax count in the toolbar notification area show incorrectly. The script that pulls that information has been updated to display the counts correctly.

Notes / Letters:

- When using the macro { NextPendingScheduleStartTime } the time was pulling into the note in 24 hour military format. This has been corrected to print in 12 hour standard time.
- When using the history placeholder of ActiveProblemAll.Auto the data was previously pulling into the note in alphabetical order and ignoring the Order a user may have set for the problems. This has been corrected so that if you do set an Order in the Problems, they will pull into the note in that order.
- The macro that pulls {NextPendingScheduledStartTime} used in a letter was pulling in the next scheduled appointment with a status of Rescheduled instead of Pending. This has been corrected.
- When using a history placeholder for vitals, the position names for Postural Blood Pressures were not pulling into the note and now are.

eSuperbill:

- An unknown workflow at a few client offices was causing the primary and secondary insurances listed in the patient demographics to display at the top of the electronic superbill in reverse order. This has been corrected.

Health Maintenance:

- In prior versions, if a Health Maintenance (HM) Item accidentally had a date or status added, the user could not remove that information. To address this, a Delete Status button has been added that only allows the data to be deleted if it was entered using the Set Status button, not if it was pulled from a mapped chart tab. Only users in the "Office Administrator" User group have access to this button by default.

Clinical Assessments:

- Data entered into a Clinical Assessment from a drop-down list of choices could not be cleared in the prior version. An X has been added to the right of the selections now, allowing the user to remove the choice if needed.
- When a large volume of data was present in Clinical Assessments, the system was lagging in that area of the chart. This issue has been addressed, and the slowness is no longer occurring.

Bulk CCDA Export:

- When using the Bulk CCDA export Tool, inactive providers now display in the drop-down list. They were not displayed in prior versions.

Lab Results:

- In rare cases, PDFs that come in with lab results that are base 64 embedded were not displaying the PDF without manual intervention. This has been corrected.

Orders:

- When creating a new Order Guide, if the user checked the box for "Print this order after clicking OK" the selection was not saving. This has been corrected and now saves and behaves as expected.

PM Interfaces:

- In patient demographic interfaces with some custom hl7 interfaces, the insurance company would pull into UnifiMD correctly on the initial pull, but if information was updated from the PM to UnifiMD later in a future message, the insurance company was sometimes removed. This has been addressed.
- In the sync of insurance companies from Lytec to UnifiMD, duplicate named insurance companies were not syncing over and being labeled "duplicates" in the log. This has been corrected, and they are only seen as a duplicate if the Code of the insurance company is the same.

Access and Audits:

- Access level settings giving users access to Edit Status and Set Status in Health Maintenance were not always behaving as expected.
- Users' access for Retrieve vs Edit Order Guides was not behaving as expected. This has been corrected for all users.
- When adding a new procedure category, the name can now be up to 50 characters (was only 20) and if you type one too long, the pop-up message is clearer than prior versions.
- Some areas of the audit trail report (regarding Clinical Encounters and custom tabs specifically) were not capturing the patient's name of whom the action was taken upon. This has been corrected (including audits in the past if rerun now).