November 2024 Release Notes

Version 3.48

New feature to archive clinical notes

We're introducing a new clinical notes archive feature that helps practices manage clinical notes more efficiently by allowing authorized users to hide or unhide notes, even if the note is signed with an addendum (locked).

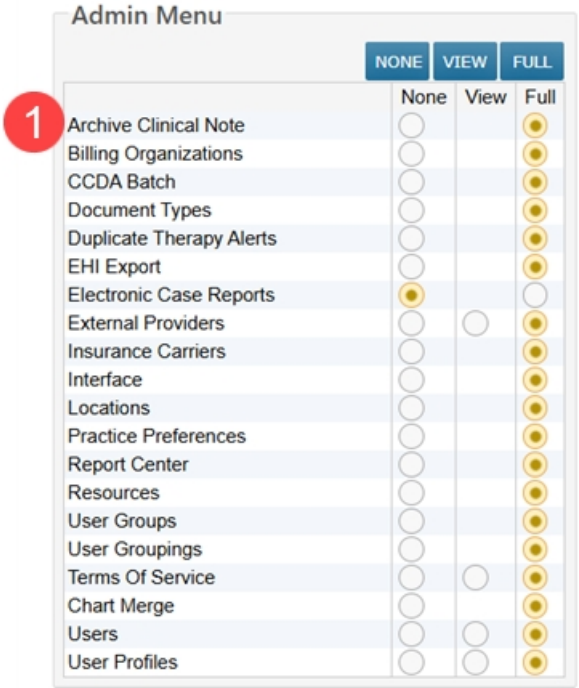
This simplifies the charting process, making it easier to organize notes while keeping a complete record of all actions taken. Practices no longer need to rely on workarounds or external support to manage note visibility, giving them more flexibility and control over patient documentation.

How to set permissions

1. Go to **Admin** > **Users**.
2. Select a user and click the **Edit User** button to adjust their settings.
3. Select the **Permission** page.
4. Under **Admin Menu**, set the new **Archive Clinical Note** permission (callout 1) as follows:
   - **NONE**: User cannot view archive/unarchive options or access archived notes.

© Ontada 2024. All rights reserved.

- **FULL**: User can archive/unarchive notes and view archived notes.



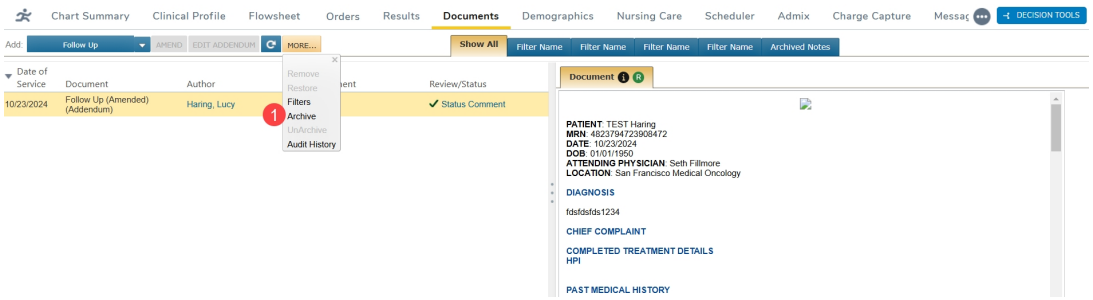
5. Save your changes to enable this feature.

To make these changes to a group of users, follow the Help site instructions that explain how to apply a specific user profile to one or more user accounts.

How use archive/unarchive notes

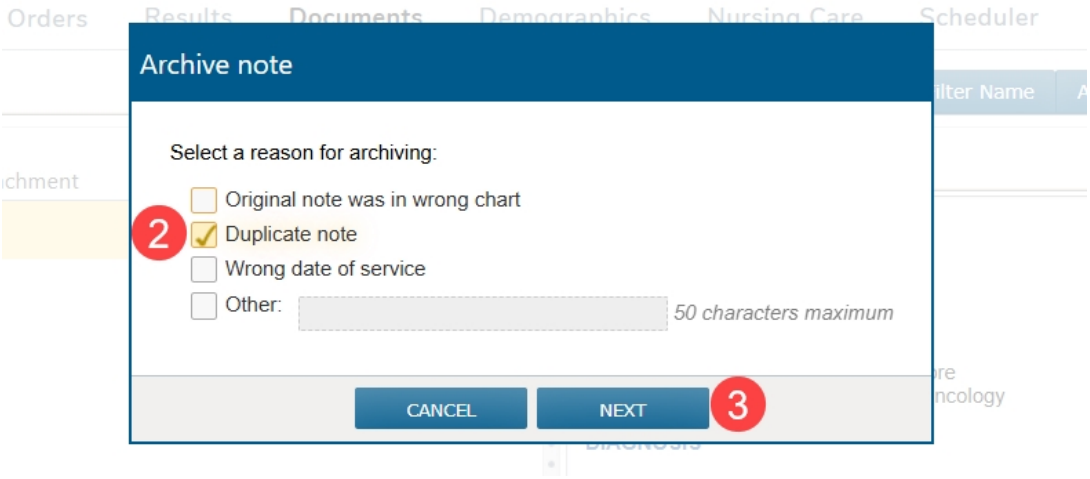
Archive a note

1. Open the patient's chart and go to the Documents tab.
2. Select a note, click the More button, and choose Archive from the drop-down (callout 1).

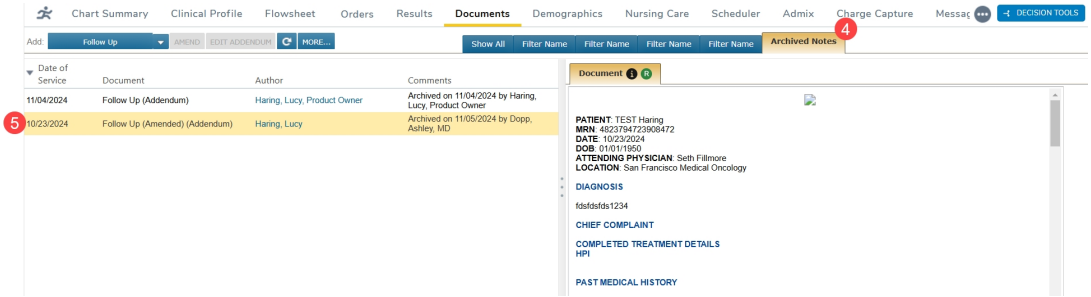


3. In the pop-up window, choose the reason for archiving and click the Next button (callouts 2-3).

© Ontada 2024. All rights reserved.

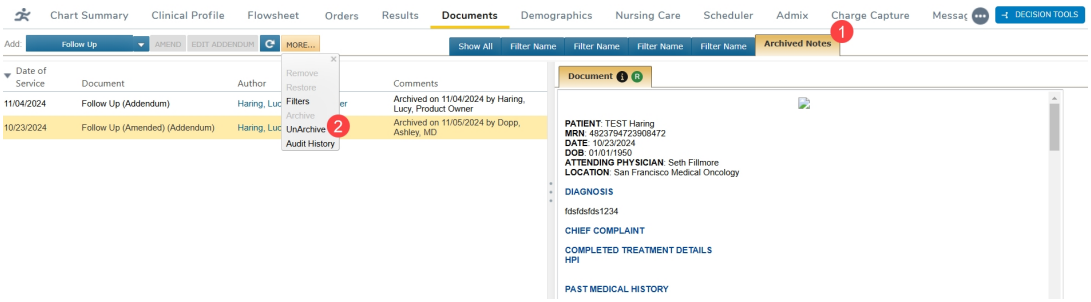


4. This will move the note to the new Archived Notes tab (callouts 4-5).



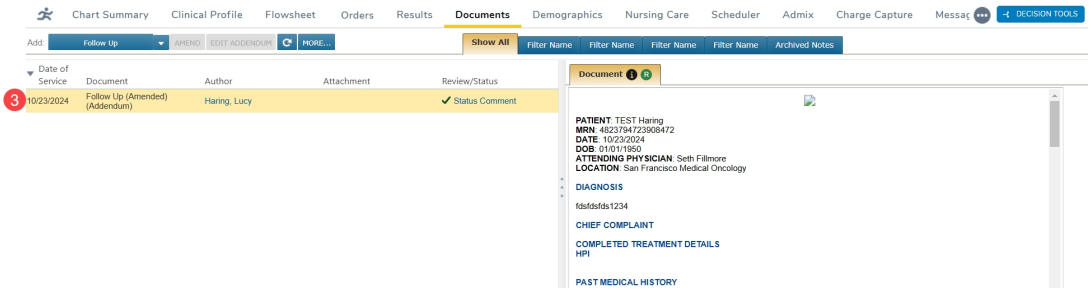
Unarchive a note

1. Go to the new Archived Notes tab (callout 1).
2. Select the note you wish to restore, click the More button, and choose Unarchive (callout 2).



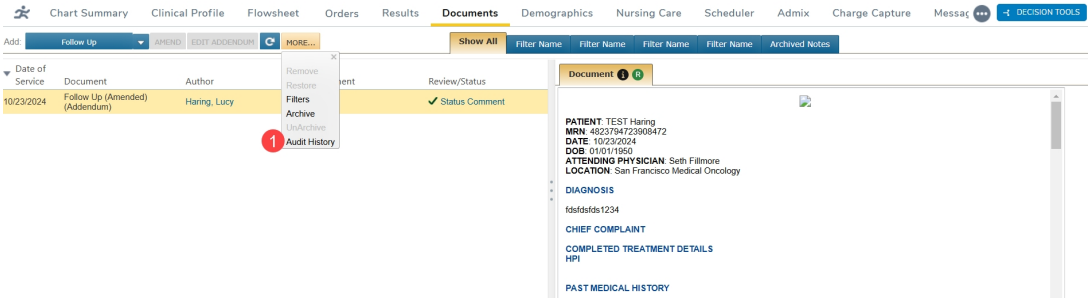
© Ontada 2024. All rights reserved.

3. The note will be returned to the main notes list (callout 3).

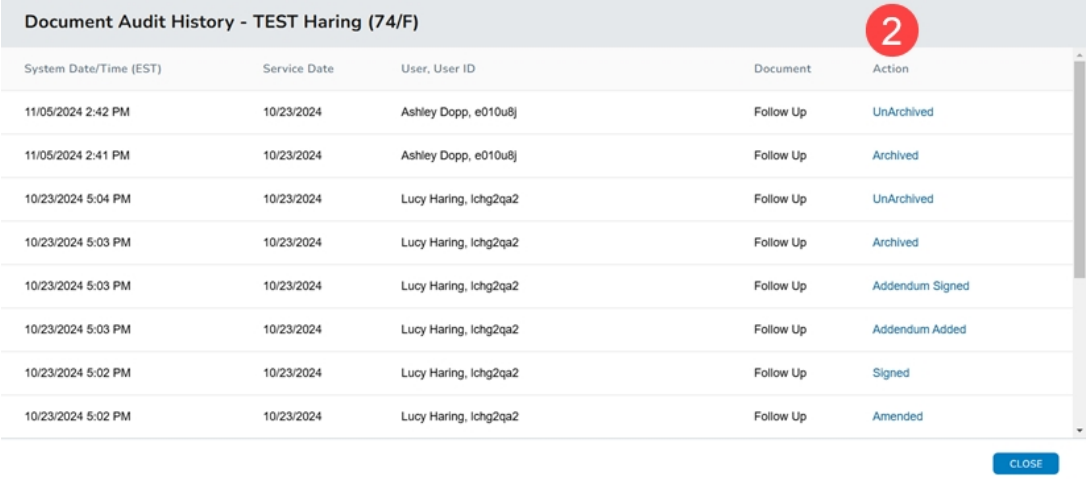


Audit trail for archiving/unarchiving actions

1. All actions are still logged in the audit trail. To view the audit trail, click the More button and select the Audit History option (callout 1).



2. The archive and unarchive actions will be captured under the Action column (callout 2). Click on an entry to view more details.

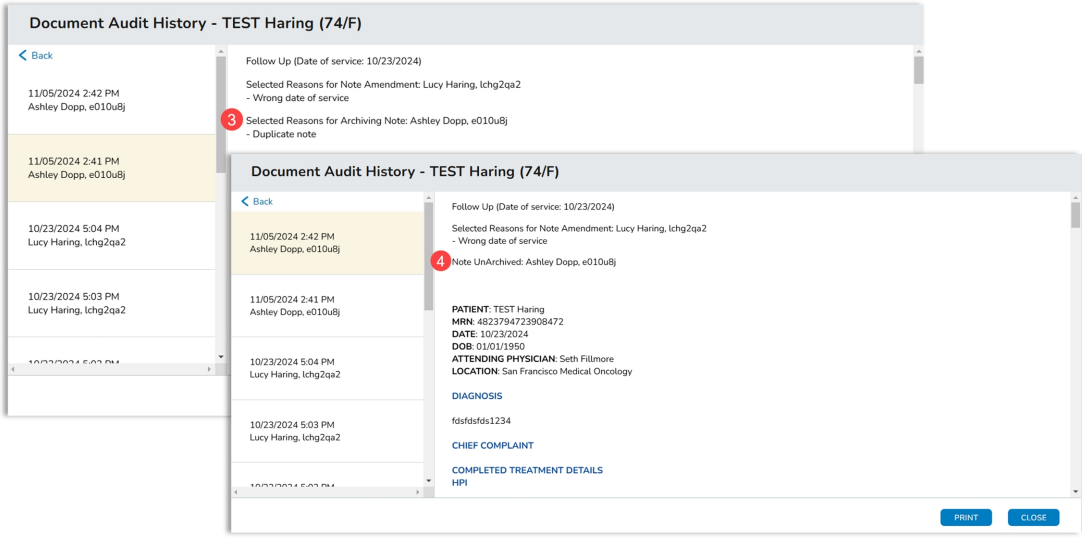


System Date/Time (EST)	Service Date	User, User ID	Document	Action
11/05/2024 2:42 PM	10/23/2024	Ashley Dopp, e010u8j	Follow Up	UnArchived
11/05/2024 2:41 PM	10/23/2024	Ashley Dopp, e010u8j	Follow Up	Archived
10/23/2024 5:04 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	UnArchived
10/23/2024 5:03 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	Archived
10/23/2024 5:03 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	Addendum Signed
10/23/2024 5:03 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	Addendum Added
10/23/2024 5:02 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	Signed
10/23/2024 5:02 PM	10/23/2024	Lucy Haring, lchg2qa2	Follow Up	Amended

3. For archived notes, the Selected Reasons for Archiving Note section will display the details of the action along with the user's name (callout 3).
4. For unarchived notes, the details will indicate Note Unarchived and include

© Ontada 2024. All rights reserved.

the user who made the change (callout 4).



Send notes via Direct Exchange from the Notes Review queue

Users can now easily send notes requiring review by an external provider through direct exchange messaging directly from the Notes Review queue, in addition to the previous option of sending via fax.

This will help streamline the process of sharing reviewed notes with external providers and reduce the need for manual selection of sending methods, improving communication workflows.

Direct exchange requirements

The system will automatically select direct exchange as the send method if the following conditions are met **(otherwise, it will default to fax)**:

1. The practice has enabled **Direct Exchange Messaging** by checking the "Allow to Send Documents" box under **Practice Preferences** > **External Provider Direct Exchange Messaging Configuration**.
2. The external provider is set up in **Admin** > **External Providers** with a valid direct exchange address.
3. The send method aligns with the **Preferred Contact Method** for the external provider:

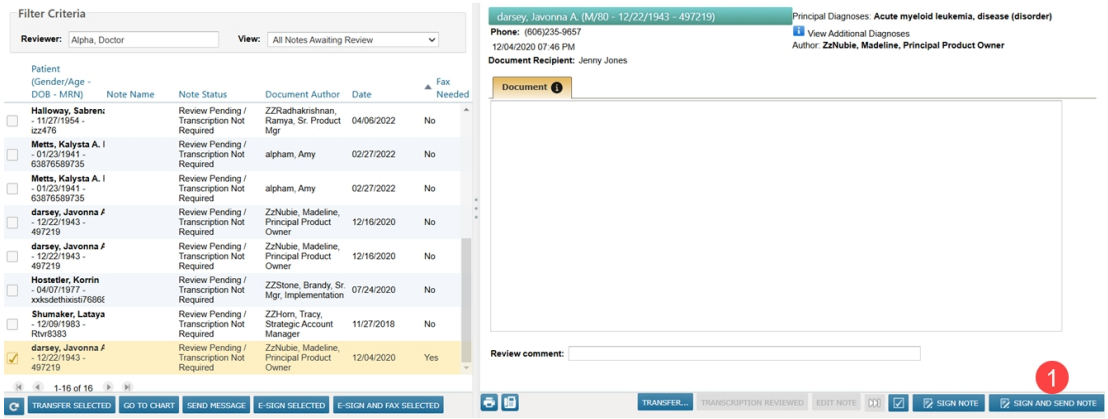
© Ontada 2024. All rights reserved.

- If **Direct Message** is selected as the provider's Preferred Contact Method, the note will be sent via **direct exchange**.
- If **Fax** is chosen, the note will be sent via **fax**, even if the provider has a direct exchange address.
- If the Preferred Contact Method is **unknown**, the system will default to **direct exchange**.

> **NOTE:** To ensure successful delivery, it is recommended to set the external provider's **Preferred Contact Method** to either **Direct Message** or **Fax**. This can help ensure the notes are delivered as expected.

Signing button updates

- **New Button Label**: The action button has been retitled from "SIGN AND FAX" to "SIGN AND SEND" (callout 1) to indicate that users now have the flexibility to send the note via fax or direct exchange, depending on the provider's contact preferences.
- **Dynamic Button Activation**: The SIGN AND SEND button activates once recipients are selected for the note. If no recipients are chosen, the button remains grayed out and unclickable.
- **PIN Entry and Note Status**: Upon clicking the SIGN AND SEND button, the user will be prompted to enter their PIN. After PIN entry, the note will be signed, sent to the selected recipients, and marked as reviewed.



© Ontada 2024. All rights reserved.

Capture supportive care interventions directly in iKnowMed

The new Supportive Care Interventions section in the Patient Hx tab of the patient chart is designed specifically for social workers and nurse navigators. This addition enables you to capture all charting information within iKnowMed, eliminating the need for external systems.

By centralizing supportive care documentation, your practice can enhance team collaboration and record-keeping efficiency.

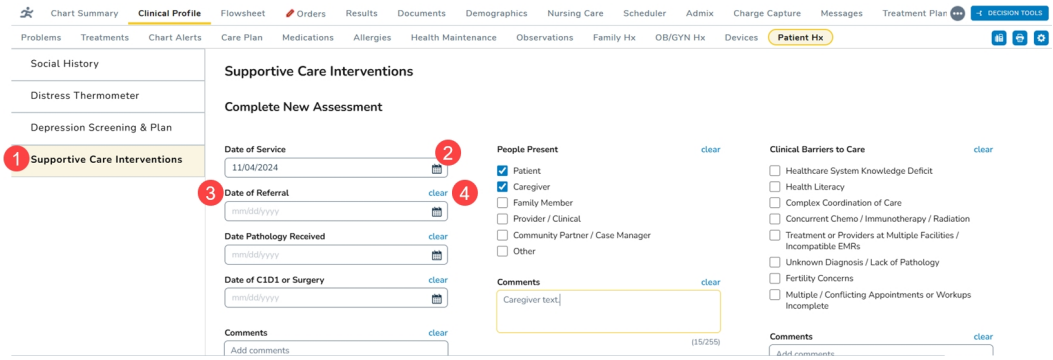
> **NOTE:** Self-service reporting for Supportive Care Interventions will be available at a future date, allowing you to generate customized reports based on the data captured in this section.

How to use Supportive Care Interventions

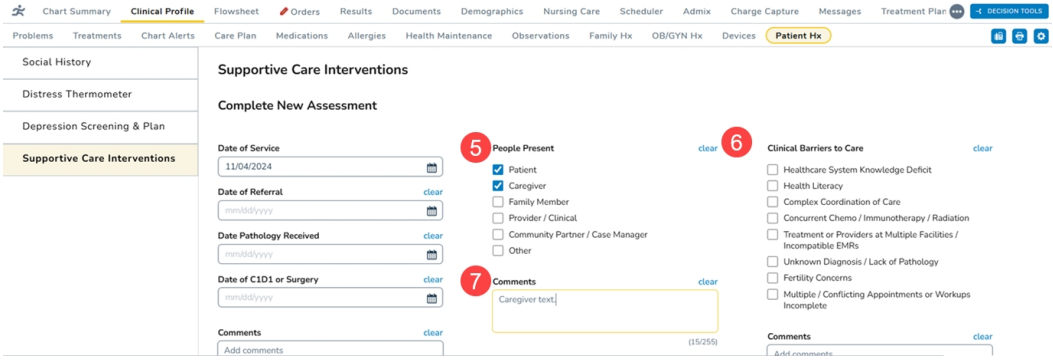
1. **Navigate to the new section.**
   - Open a patient chart and go to **Clinical Profile** > **Patient Hx**.
   - In the Patient Hx tab, select **Supportive Care Interventions** from the left-hand menu (callout 1).
2. **Capture key visit information.**
   - The top of the page includes fields for essential visit details, like **Date of Service**, which defaults to today's date but can be changed as needed (callout 2).
   - Complete other relevant date fields, such as **Date of Referral**, **Date Pathology Received**, and **Date of C1D1 or Surgery** as needed (see callout 3 for example).
   - Select options as needed or skip categories if not applicable. Use the

© Ontada 2024. All rights reserved.

Clear link to remove any selections (callout 4).



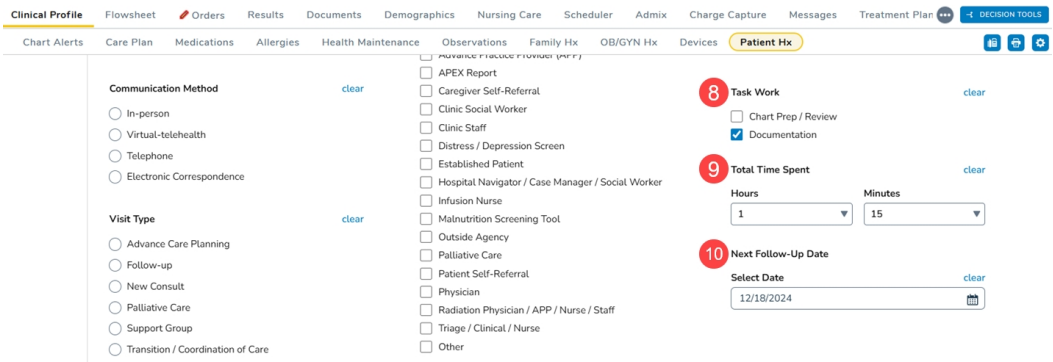
3. **Document appointment details.**
   - Use categories like **Communication Method**, **People Present**, **Referral Source**, and **Clinical Barriers to Care** to capture detailed appointment information (see callout 5 for example).
   - Select multiple options as needed or skip categories if not applicable. Use the **Clear** link to remove any selections (callout 6).
   - Each category includes a **Comments** box to enter any additional details manually (callout 7).



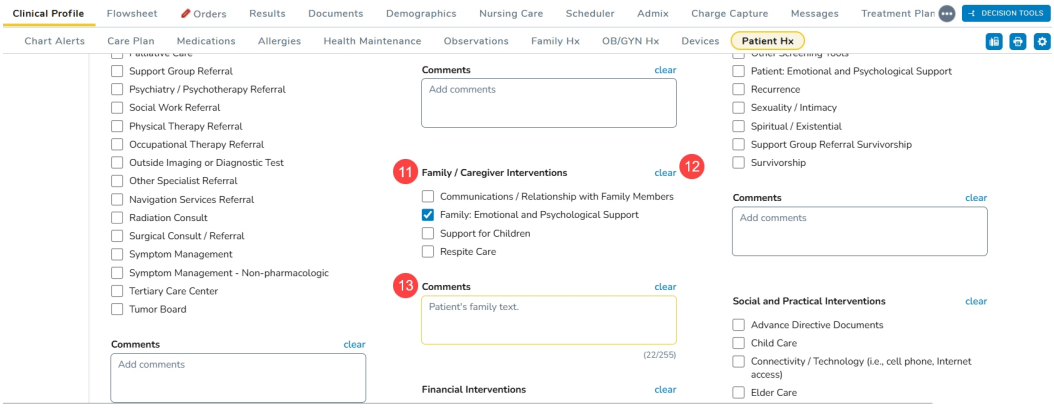
4. **Track tasks and time spent, if needed.**
   - In the **Task Work** section, check the relevant boxes to log the types of tasks performed (callout 8).
   - Use the drop-downs to record **Total Time Spent** in hours and minutes for each task (callout 9).
   - If a follow-up appointment is required, enter the appointment date using the

© Ontada 2024. All rights reserved.

date picker (callout 10).

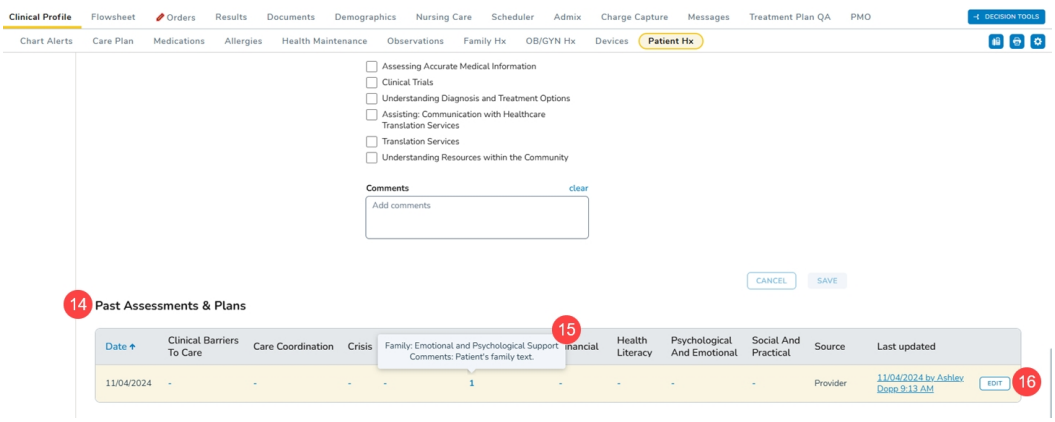


5. **Record any interventions.**
   - The bottom of the page lists interventions categories such as **Care Coordination Interventions**, **Clinical Nutrition Interventions**, and **Social and Practical Interventions** (see callout 11 for example).
   - Select multiple options as needed or skip categories if not applicable. Use the **Clear** link to remove any selections (callout 12).
   - Each category includes a **Comments** box to enter any additional details manually (callout 13).

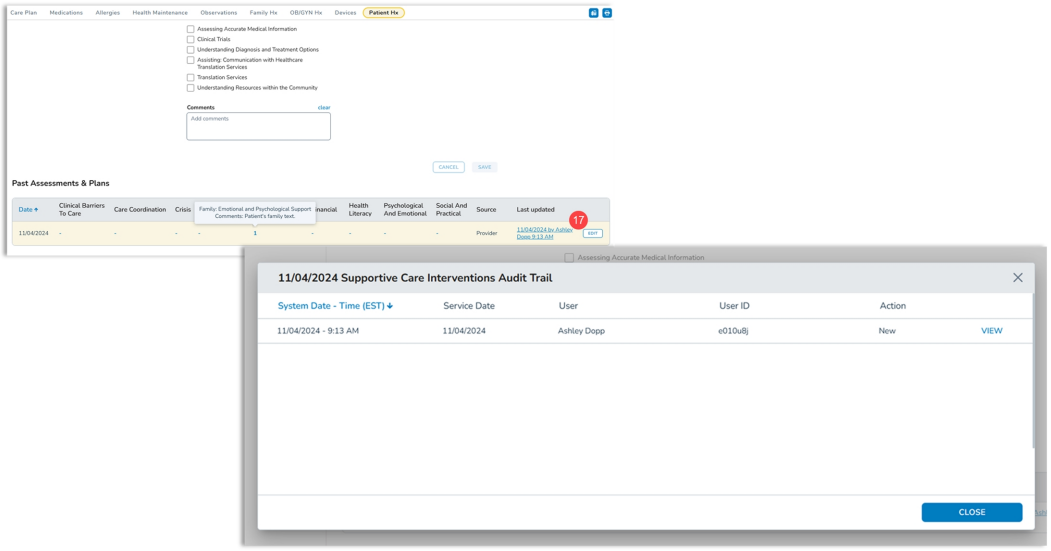


6. **Save and review entries.**
   - Once completed, save your changes.
   - The information will appear in the **Past Assessments & Plans** table (callout 14).
   - The table summarizes the number of items chosen per category. Hover over any entry to see a full list of selections (callout 15).
   - To add or update the information in the assessment, click the **Edit** button (callout 16).

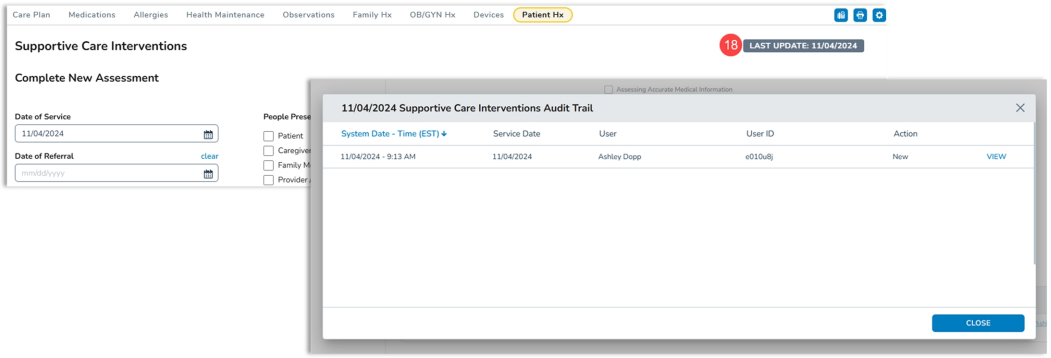
© Ontada 2024. All rights reserved.



- The **Last Updated** column displays who last edited the assessment and when. Click on an entry to view the full audit trail (callout 17).



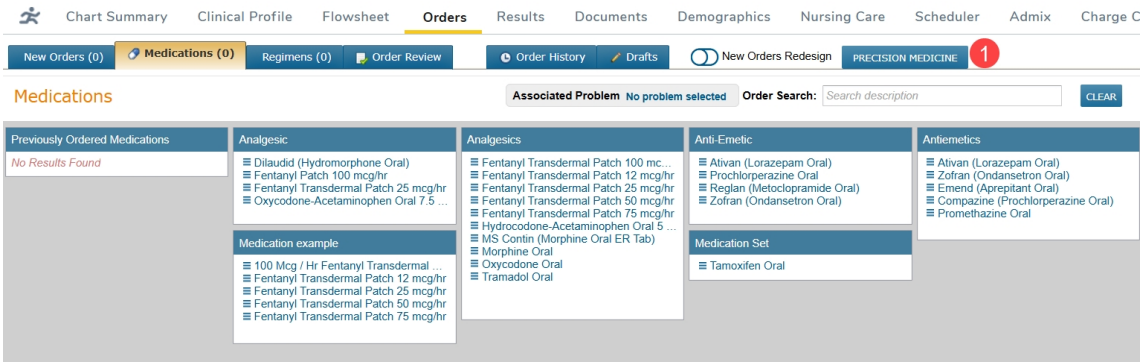
- You can also access the audit trail by clicking the **Last Update** badge at the top of the page (callout 18).



© Ontada 2024. All rights reserved.

Improved visibility of Precision Medicine button

We're making it easier to access and order molecular testing for practices with the Precision Medicine button enabled. The **Precision Medicine** button will be moved to a more prominent location on the **Orders** tab, alongside the other sub-tabs (callout 1).



Additional Enhancements (A-Z)

Clinical Profile > Chart Alert

We enhanced the Study Patient chart alert to improve visibility and facilitate better communication about clinical trial participation. Patients assigned this alert will now display a dedicated icon in the Visit List widget, patient banner, Orders queue, and Ins. Auth / Fin. Counseling queue. Users can view specific details about the patient's clinical trial status by clicking the icon.

Worklist Queues > Orders Queue

When cycles are added to a regimen, the regimen order will be routed to the queue. These can be found if the Order Date filter in the queue includes the date that the cycles were added.

Fixes (A-Z)

Documents tab

Previously, some lab values that included special characters, such as a period or a comma, pulled in by the #LabSection macro in clinical note templates were displaying incorrect data. This has been resolved, and lab values displayed by

© Ontada 2024. All rights reserved.

the macro will now match the original values as shown in the Flowsheet and Results sections.

Nursing Care > Nursing Procedure

Previously, some users could not save updates or additional details to procedures in the Nursing Care > Nursing Procedure tab. This release restores full functionality so users can save updated procedures as expected.

© Ontada 2024. All rights reserved.