April 2024 Release Notes

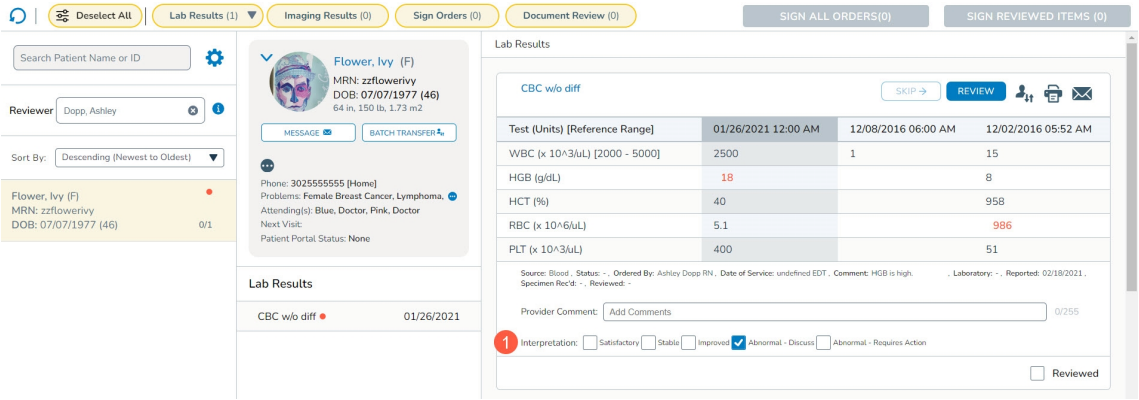
Version 3.44

This release introduces enhanced flexibility in order settings, allowing for customization of default new order dates to better meet the needs of practices and individual users. Curbside Connection is now available in Clear Value Plus to improve accessibility and awareness among physicians treating patients with rare conditions. Other improvements include enhanced filtering options in the Orders Queue, streamlined documentation of patient history, and simplified billing procedures, alongside fixes addressing discrepancies in medication lists and errors in accessing molecular results.

Enhancements to the Unified Sign Queue

Fewer clicks with updated Interpretation selection

We updated the Interpretation section of each result in the queue. Instead of a drop-down box, we condensed the selections into a single line of checkboxes (callout 1). This update reduces the number of clicks required to select interpretations, making the signing process more efficient and user-friendly.



Patient portal status aligned with patient banner

The system has been updated to synchronize patient portal status across the patient banner and the Unified Sign Queue. The patient demographics section, located in the middle column of the queue, will now mirror the status displayed in the patient banner (callout 1).

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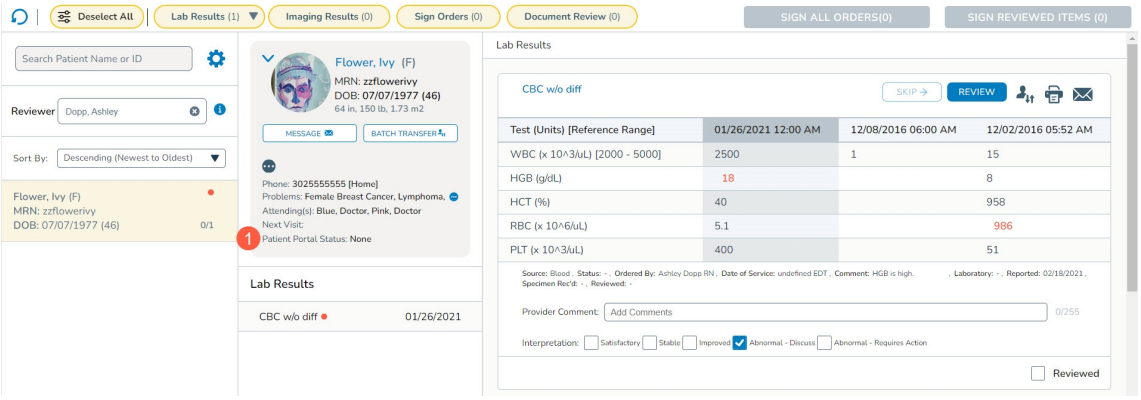
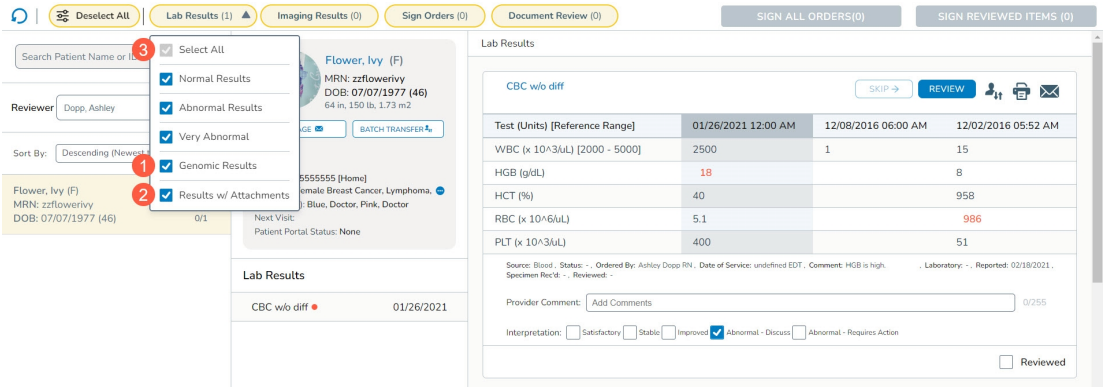


New options in the Lab Results filters

We added two new filtering options in the Lab Results section of the queue: Genomic Results and Results with Attachments. With these additions, users have more control over the results they wish to review and sign off on.

How to use the new filters

- The **Genomic Results** filter allows users to narrow their queue to only display patients with genomic results, making it easier to focus on genomic data analysis and interpretation (callout 1).
- The R**esults with Attachments** filter is designed to display only patients with results that include attached documents, excluding genomics) (callout 2). This can be useful for reviewing lab results accompanied by additional documentation.
- To further enhance usability, there is also a new **Select All** option at the top of the filter (callout 3). This update allows for the selection or deselection of multiple filters at once, making it easier and faster to locate and review specific results requiring attention in the queue.



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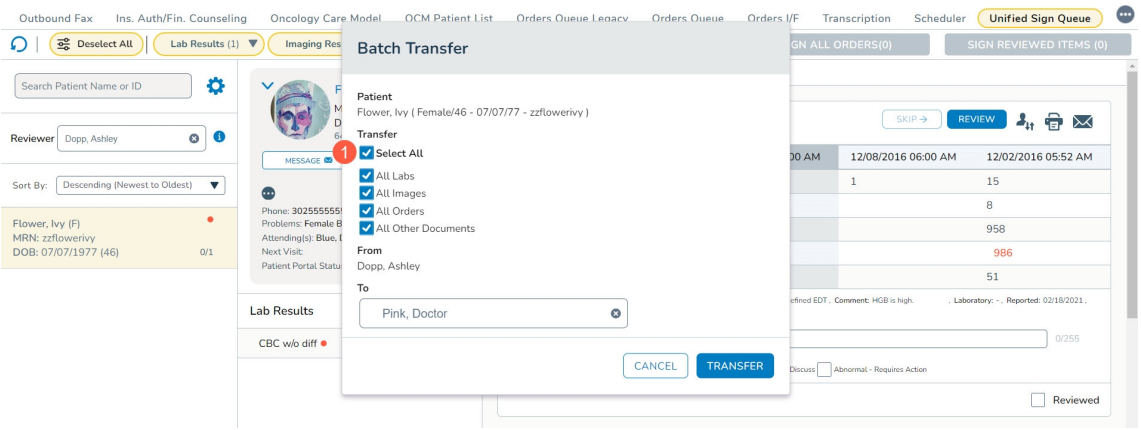
New Select All option in Batch Transfer

We added a new Select All option at the top of the Transfer options in the Batch Transfer window (callout 1). This option allows for the selection or deselection of multiple items at once, making it easier and faster to choose items to transfer to another user.



New clinical note macro for NCCN Distress Thermometer

A new NCCN Distress Thermometer macro will be available to add to your clinical notes, streamlining the process of capturing a patient's details directly into notes and eliminating the need for manual data entry.

How to use the #NCCNDistressThermometer macro

1. Access the Macro: From the top navigation, select Manage > Clinical Note Templates to edit or create a new clinical note template or visit the Documents tab within a patient chart and launch a new note template to select the new macro.
2. Locate the Macro: Navigate to the Macros tab and use the search bar to find the #NCCNDistressThermometer macro (callout 1). Alternatively, scroll through the alphabetical list of available macros (callout 2).
3. Customize the Parameters: Tailor the macro to your needs by adjusting the following parameters (callout 3):

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- Label: Enter header content for the macro content (optional)
- List Type: Choose the format in which the macro content will be displayed (e.g., bulleted, numbered, paragraph, or alpha bulleted).
- Show Comments: Choose to display any comments recorded for the NCCN Distress Thermometer in the Patient Hx tab.
- Detail Level: Select from high, medium, or low detail levels.
  1. High: The note will display the Observation Date; Distress Level; items recorded for Physical Concerns, Practical Concerns, Emotional Concerns, Social Concerns, and Spiritual or Religious Concerns; and the Plan.
  2. Medium or Low: Medium and Low will only show the Observation Date, Distress Level, and Plan.
  3. If transitioning between detail levels (high, medium, or low), the macro will automatically adjust the displayed information accordingly.
  4. Value if Empty: Determine what will be displayed in the note if no data has been recorded for the patient's distress thermometer.

4. Preview the Content: Review the content appearance in the clinical note before finalizing (callout 4).
5. Add to Note: Once parameters are set, click Add to Note to display the macro content (callout 5).

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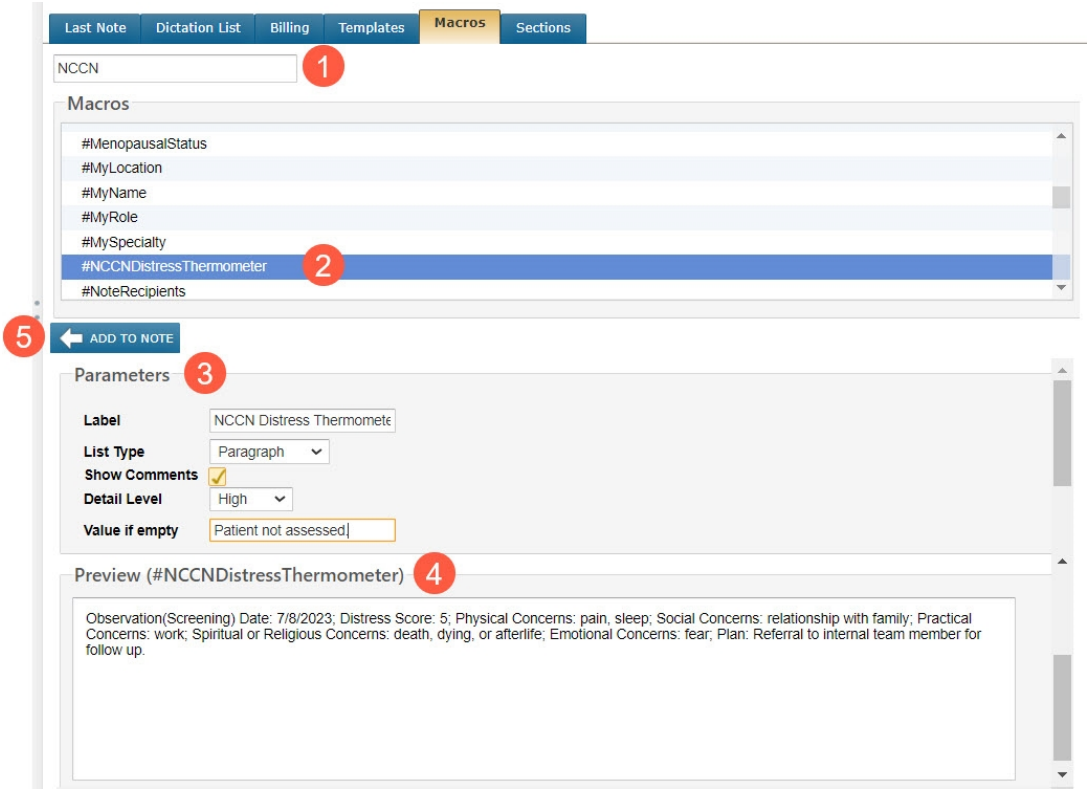

Improved interoperability with more comprehensive information in the Progress Note CCDA

We enhanced the Progress Note CCDA within iKnowMed to include sharing more comprehensive patient information with your community partners.

Now when a Carequality partner requests patient information, the Progress Note CCDA will include notes electronically signed by users designated as APP, Physician Read-only, or APP Read-only in iKnowMed. This expansion ensures that a broader range of healthcare providers' input is captured and shared accordingly.

We also updated the Progress Note CCDA to include Procedures in the Progress Note. Previously, only Evaluation and Management (E/M) visits were included. This ensures that a more detailed overview of the patient's medical encounters is provided to assist in informed decision-making by receiving healthcare providers.

Access full molecular results for more in-depth biomarker analysis

After this release, users accessing the Molecular Results sub-tab and selecting the Tabular Data option (callout 1), will be presented with a comprehensive view

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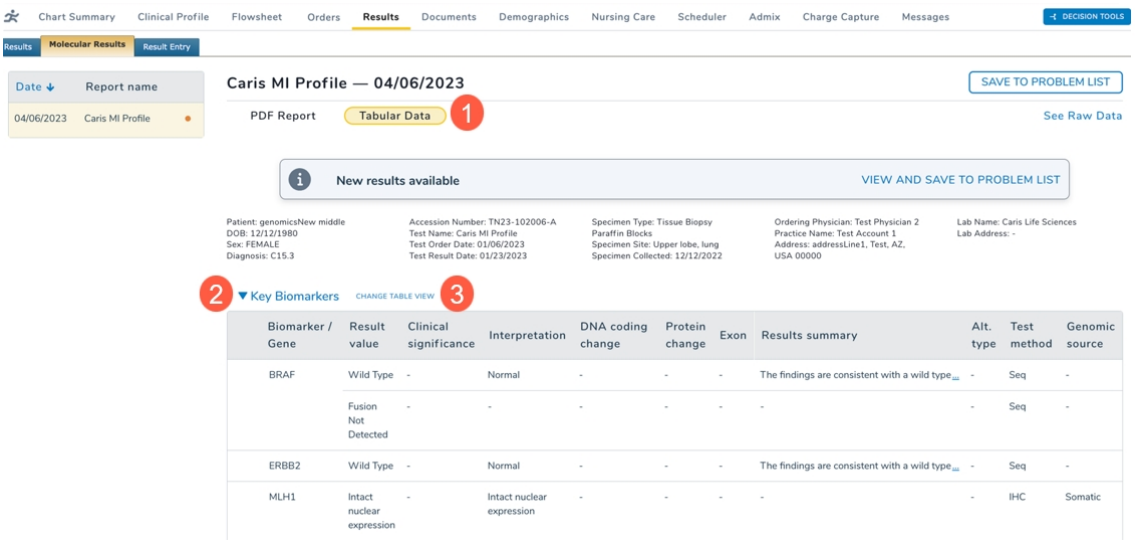
of all biomarker results obtained from the lab vendor, including key biomarkers.

By default, users are directed to the Key Biomarkers view (callout 2), ensuring quick access to essential data. For a more detailed examination, users can switch to the full results view by simply clicking on Change Table View (callout 3).

This enhancement provides access to the analysis of more biomarker data for a more insightful experience.



Customize tasks to fit your practice's needs in the new Orders Queue

Administrative users with access to Practice Preferences may update the list of tasks used in the new Orders Queue. Go to the Additional Enhancements for more information on where to locate these preferences. A maximum of 15 tasks, whether active or inactive, can exist.

Inactivate or rename tasks

All tasks, except Scheduling, may be inactivated or renamed by clicking the pencil icon (callout 1).

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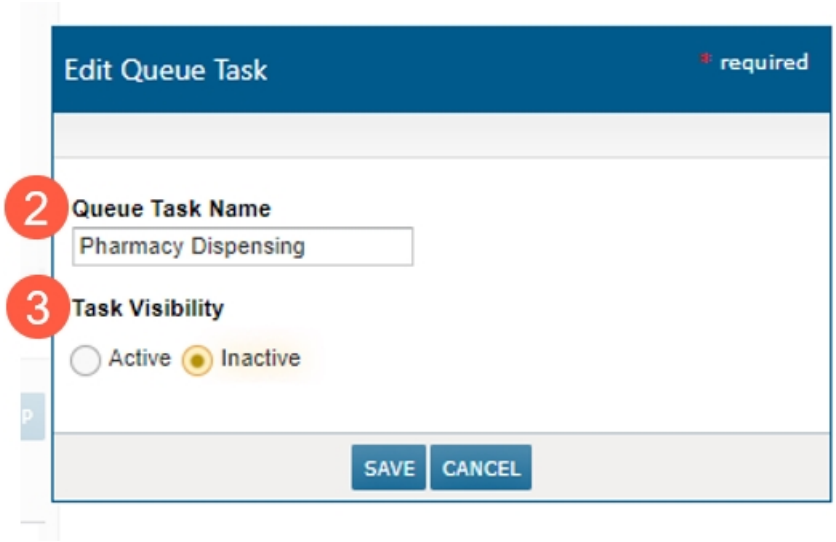
In the pop-up window, enter a new name in the Queue Task Name field (callout 2) or update the Task Visibility (callout 3) to activate or inactivate the task.



Reorder the tasks

To change the sequence of the list of tasks, check the box next to a task (callout 1) and click either Move Up or Move Down (callout 2).

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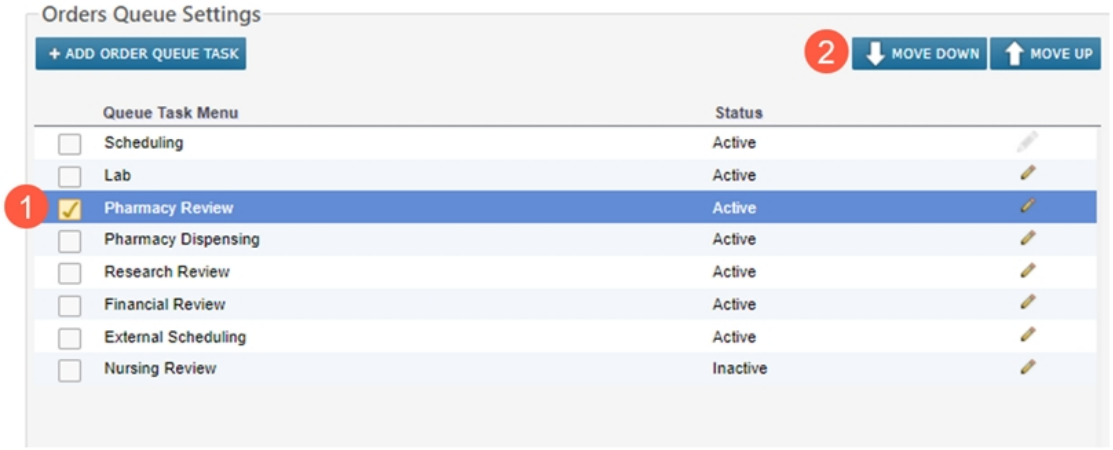

Add new tasks

To add new tasks, click the Add Order Queue Task button (callout 1).

In the pop-up window, enter a name with 30 characters or less in the Queue Task Name field (callout 2). Choose whether the task should be Active or Inactive under the Task Visibility field (callout 3).

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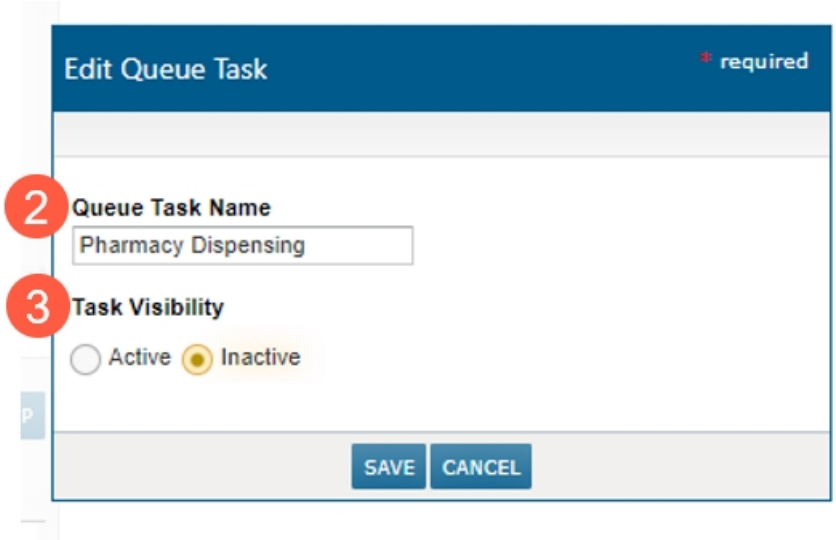
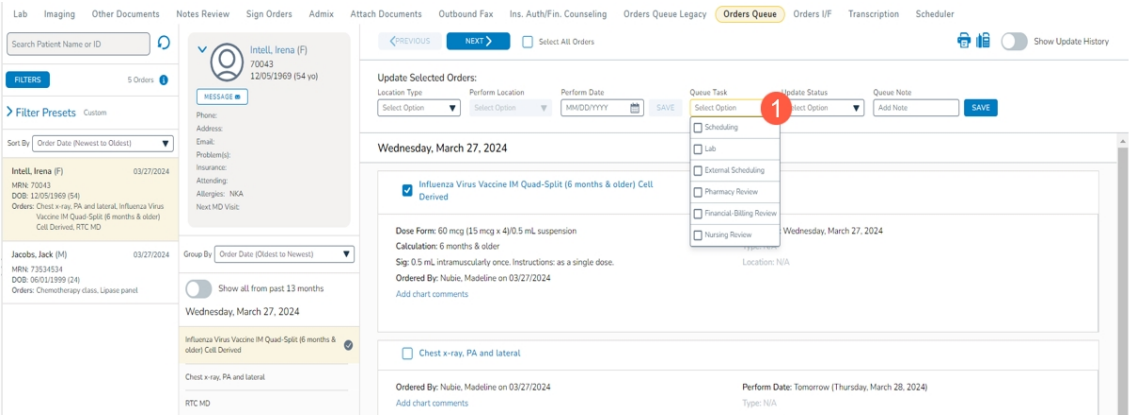


After saving the changes, the new task will be added to the bottom of the list.

> **NOTE:** If you plan to make multiple updates to the task list, keep the newly added tasks inactive until you have completed the other updates.

View your changes

Once all changes are complete, the Queue Task drop-down in the new Orders Queue will match the changes made in Practice Preferences (callout 1).



Additional tips and tricks

- Practices not yet using the new Orders Queue should set up their preferences before the queue is enabled.

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- Orders created after a new queue task is added will have a “Not Started” status for the new task.
- Orders created before a new queue task is added will not have any status for that task by default. The new task and its status can be applied to that order after creation.
- If a queue task was applied to an order and that queue task is later inactivated, the Update History section will continue to show when the task was applied.
- A queue task that has been inactivated will automatically be removed from any previously defined Filter Preset. If that task is later reactivated, it will be added back to the Filter Preset.

Find orders from custom groups more easily in the new Orders Queue

Filters in the new Orders Queue have been updated to move the Advanced Filters option to the Order Type section with the new name of **Custom Groups** (callout 1).

By default, the **Select All** option (callout 2) will be selected so that the queue displays all order types and all custom groups.

How to locate orders by type

To find orders for a particular order type, check the corresponding box on the Order Type tab, such as Prescriptions.

To find orders for a particular custom group, check the corresponding box on the Custom Groups tab, such as Referral Custom Group.

To find orders for a particular order type as well as orders in a particular custom group, select the desired items on both tabs. For example, check the corresponding boxes for both Prescriptions and Referral Custom Group.

The system does not support finding orders in a Custom Group that are also a certain order type. For example, the system will not allow you to find Prescriptions only in the Referral Custom Group.

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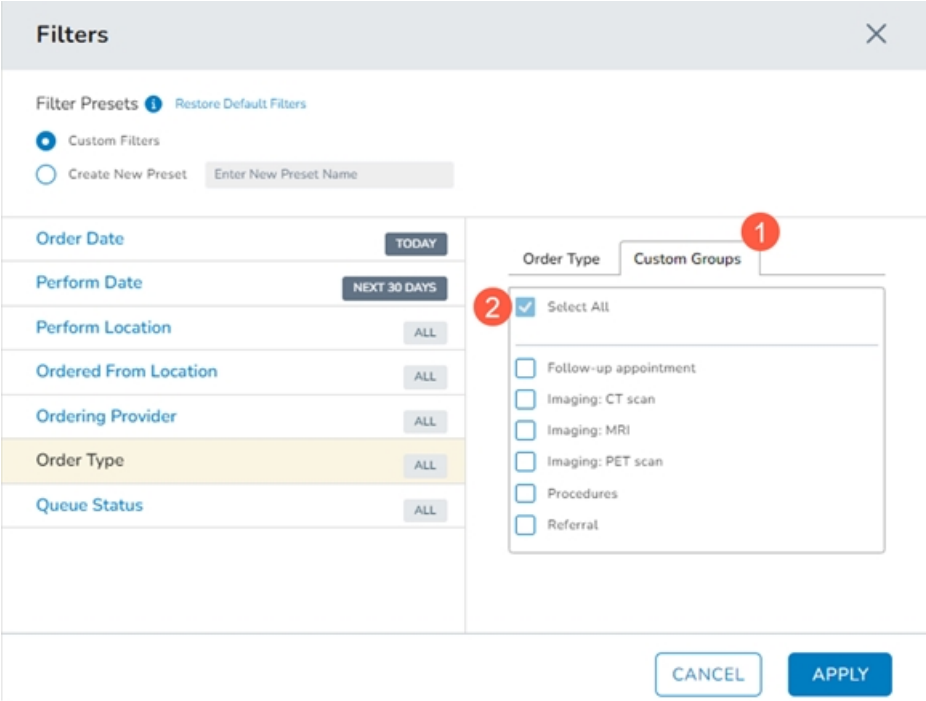

Enhancements to the Patient List widget

In this release, we made several enhancements to the Patient List, including a new filter for patient insurance and the ability to edit an existing patient list. We also added a new user permission for the Restricted Patient List functionality that facilitates administrator control over access to patients on a list.

New Insurance filter

The new insurance search filter allows users to create a patient list by selecting one or multiple insurances to include as a search filter in patient list creation.

How to filter by a specific insurance

1. Begin typing the name of the insurance in the Insurance field (callout 1) and the system will display results that correspond to the letters in your search.
2. Use the checkboxes to select one or multiple insurances from the drop-down (callout 2).
3. To search for more insurances, backspace or clear your previous search letters and begin typing again to see another list of insurances to choose from.
4. Selected insurances included as search criteria for the patient list will be

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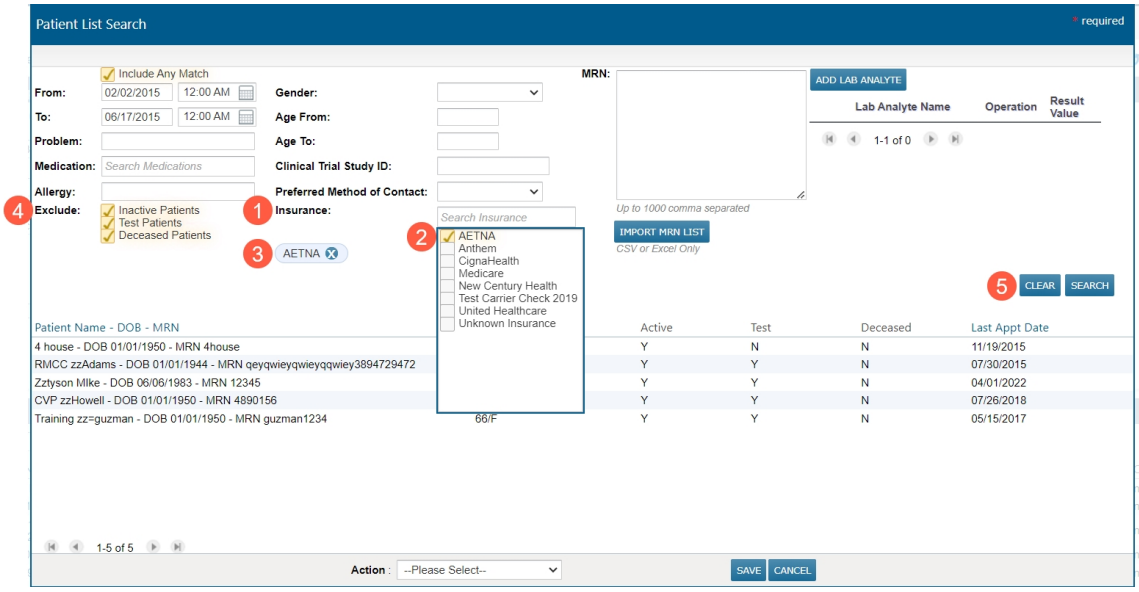
displayed below the filter. You can remove them using the X next to each name (callout 3).

Tips for using the Insurance filter

- Selecting no insurance or not using the filter means the system will provide a list of patients that meet all the other criteria selected, and insurance will not be considered.
- Selecting one insurance will generate a list of patients that have only that insurance active as their primary, secondary, or tertiary insurance in Demographics.
- Selecting more than one insurance will include all patients that have one or all selected insurances as active for their primary, secondary, or tertiary insurance in Demographics.
- Selecting all insurance is the same as selecting no insurance and is not recommended.

In addition to the new insurance filter, the screen has had subtle adjustments to group criteria and buttons together. The exclude search criteria have been grouped under Exclude (callout 4), and the Clear and Search buttons have been moved (callout 5).



Edit an existing Patient List

Users can now edit an existing patient list by rerunning the search to change the results or changing the search criteria to alter the list of patients on the list. The patient list name is preserved, and if the list is applied to a user in User

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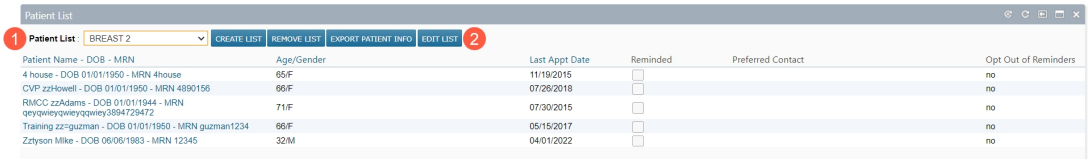
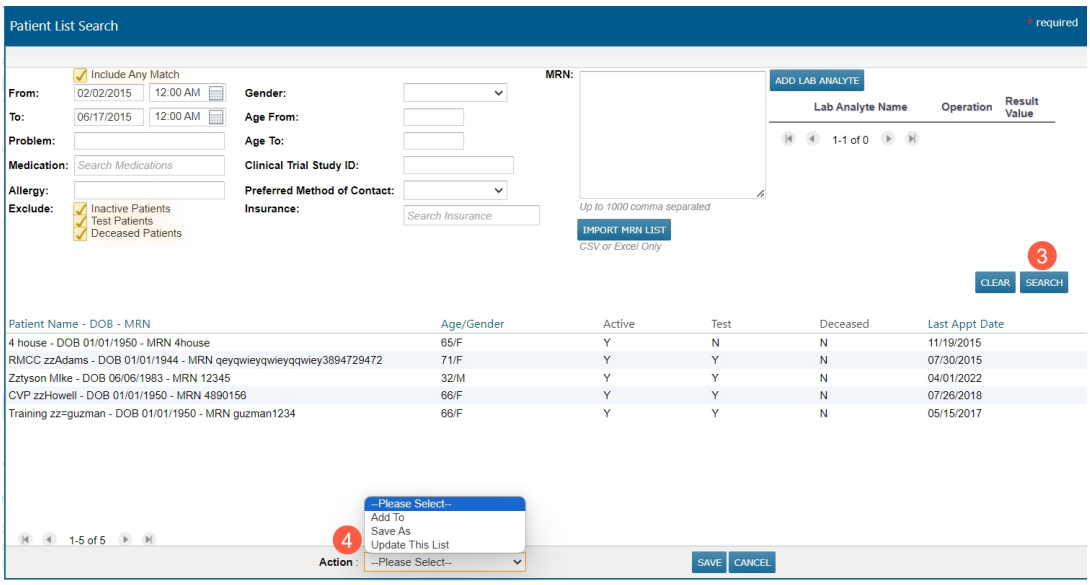
Permissions > Patient List Restrictions, the relationship to that user will be maintained even when the list is updated.

How to edit an existing Patient List

1. Go to the patient list widget and select the Patient List you want to edit (callout 1).
2. Click the new Edit List button (callout 2).



3. The patient list search window will open and load the existing list of patients and the search criteria used to generate it.
4. Keep the existing search criteria and click Search (callout 3) again to generate an updated list of patients who fit the existing criteria, or you change the search filters and click Search (callout 3) to change the list of patients.
5. To save your changes to the existing list, navigate to Action at the bottom of the screen and select the new Update This List option (callout 4).
6. Your changes will be saved, and the next time you want to update this list, it will load the search screen with the search criteria used to create this version of the list.



Control user access to patient lists

Before this release, users could access all patient lists associated with their accounts. Now, we have added user permissions that allow administrators to

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control whether a user can access specific patient lists.

User Permissions are a very important piece of restricting and allowing access to patients. This feature was designed to be used with users who do not need full access to the system, such as those who are part of a Revenue Cycle or Billing team and need to view patient information to follow up on claims denials or work through prior authorization workflows, but do not need to write clinical notes, select billing codes, or perform procedures or treatments for a patient.

The deny access feature prevents users from accessing the patients list as well as from searching for the MRN, DOB, or name of any patients in that list across all patient search areas in iKnowMed. However, areas where lists of patients are visible, such as a worklist queue, must have those permissions turned off separately for access to be denied.

When applying the Patient List deny access feature to a user, we recommend working with your account manager to determine the best settings to accomplish the type of access you are looking to achieve.

How to control access to patient lists

1. Go to Admin > Users from the top navigation.
2. Choose a user from the list and click the Edit User button.
3. Under Permissions, scroll to the Patient List Restrictions section (callout 1).
4. Check the Exclude access to these patient lists option (callout 2).
5. In the search field, enter the name of the Patient List where access should be denied (callout 3).
6. From the results, select the list that contains the patients you do not want the user to be able to search for and view in iKnowMed.
7. To remove a list, click the X next to the name of the patient list (callout 4).
8. To allow access to a patient list, follow these same steps under the Allow access to these patient lists option (callout 5).

Tips for patient list access

- If a user has an allow list and a deny list associated with their account, and both lists have one or more patients in common, the system will always honor the deny access list first.
- The same patient list cannot be added to a user's allow and deny list. If a list is set as allowed for a user, it will not appear in the search as an option to deny access. The list would have to first be removed from the allow list before it can be added to the deny list.

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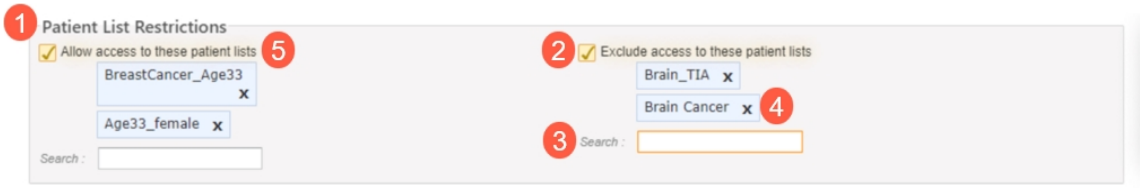
- If a new patient is created and fits the criteria for restriction on the patient list, users must update the patient list by rerunning the search and selecting the action to Update This List to include the new patient. This also applies to patients who no longer fit the search criteria.



Additional Enhancements (A-Z)

Clinical Profile > Care Plan

In the February 2024 release, newly created VBC Care Plans allowed a new order for a Dietary Consult for a patient to automatically update the status of the Dietitian Referral section to yes and add the referral date. After this release, existing VBC Care Plans will allow previous orders for a Dietary Consult to be automatically counted, ensuring all relevant information regarding the dietary consultation is documented and accessible.

Practice Preferences

Preferences related to orders have been moved to a new Order Preferences subtab on the Practice Preferences page. Order Settings, Order Reminder Settings, and Orders Queue Settings will now be updated from this area.

To update Order Settings, make the desired changes and save your changes. Changes to the other sections do not require saving. All changes will be effective when the user logs out and logs back in.

Fixes (A-Z)

Demographics

Users sometimes encountered an error when marking a patient deceased if the chart contained a regimen order with a fuzzy start date, such as Per RN. This has been fixed, and the error will no longer occur.

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Documents

Before this release, some practices encountered a "Failed to load PDF document" error message when attempting to access migrated treatment plans from iKnowMed EHR, also known as Generation 1 or G1. This has been successfully addressed and all migrated treatment plans are now readily accessible from the Documents tab.

Flowsheet

The flowsheet will no longer display empty columns for past or future appointments when there is no information to display in the column.

Order Sets > Bulk Update

We resolved an issue that prevented large practices from having multiple users simultaneously perform the Bulk Update function on Order Sets.

Worklist Queues > Other Documents

We resolved the issue that prevented documents imported from Carequality from appearing for review as intended. With this fix, all documents imported from Carequality will now be correctly visible within the queue for review, improving your workflow and eliminating potential delays.

Worklist Queues > Unified Sign Queue

- Previously, there was an issue with labs marked as Patient Portal Hold Until Reviewed under the Manage > Lab/Imaging & Services. Users noticed these results were not displaying the expected "Once reviewed, results sent to portal" message in the queue. This issue has been rectified, and lab results set to be “Held until reviewed” will now correctly reflect the "Once reviewed, results sent to portal" message.
- We addressed the concern affecting users with Full permissions for the queue, where the messaging, batch transfer, and printing options were grayed out and rendered inaccessible. This issue has been resolved and users with Full permissions can now access and utilize all functionalities within the queue as expected.

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- Practices encountered an issue within the queue affecting patients enrolled in clinical trials. Specifically, patients configured with a Study Patient chart alert were missing the clinically significant (CS) and not clinically significant (NCS) radio buttons on their results. This is now fixed, and patients with Study Patient chart alert will once again have the CS and NCS radio buttons under their results.
- Some users reviewing items in the queue experienced an issue when marking the last item as reviewed failed to prompt the screen to scroll to the bottom, resulting in the Finish Review and Sign button not being displayed. This has been fixed so that marking the last item as reviewed will now trigger the system to automatically scroll to the bottom of the screen, presenting the buttons as expected.

Coming Soon

Enhanced Treatment Plan

Starting **Monday, April 22, 2024**, you will have access to an enhanced Treatment Plan, streamlining your workflow with easy access directly from the patient's chart. An improved user experience helps you keep track of prior treatment plans with a dedicated section. Furthermore, edit or add information as needed using dropdowns, automatic answers, or manual data entry.

These updates give your practice the flexibility to tailor treatment plans according to individual patient needs and provide your practice with a thorough review of past decisions for more informed treatment planning.

For more information on the enhanced Treatment Plan, view the full release notes.

View Treatment Plan Release Notes

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