

Ontada Health Release Notes

October 9, 2025

We're releasing several updates to the Ontada Health experience to improve usability for practices and patients.

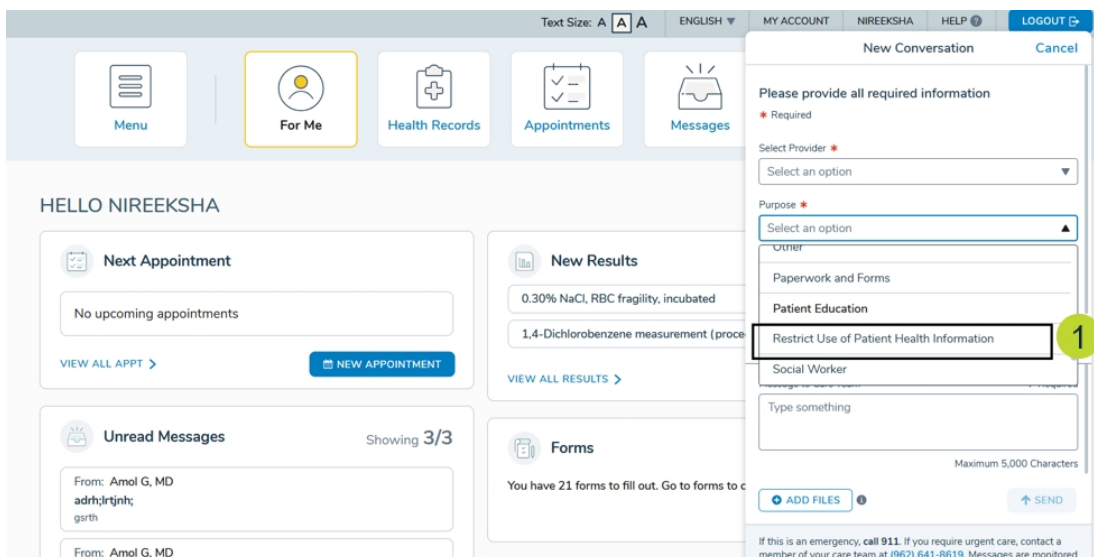
Patient and caregiver chart restriction requests

Patients and caregivers can now request a restriction on the use of a patient's PHI directly through the portal. This new workflow can also help practices track and document PHI restriction requests more efficiently.

NOTE: Note: Practice users, please refer to your internal policies and procedures on how to address and manage your patients' requests for restrictions.

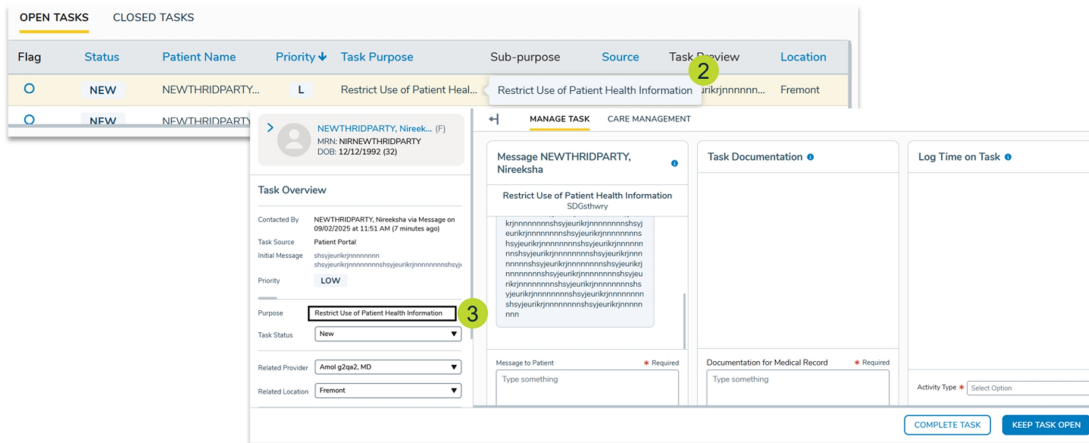
How patients request a chart restriction

- Patient and caregivers can compose a message to the practice and select **“Restrict Use of Patient Health Information”** as the **Purpose** option (callout 1).

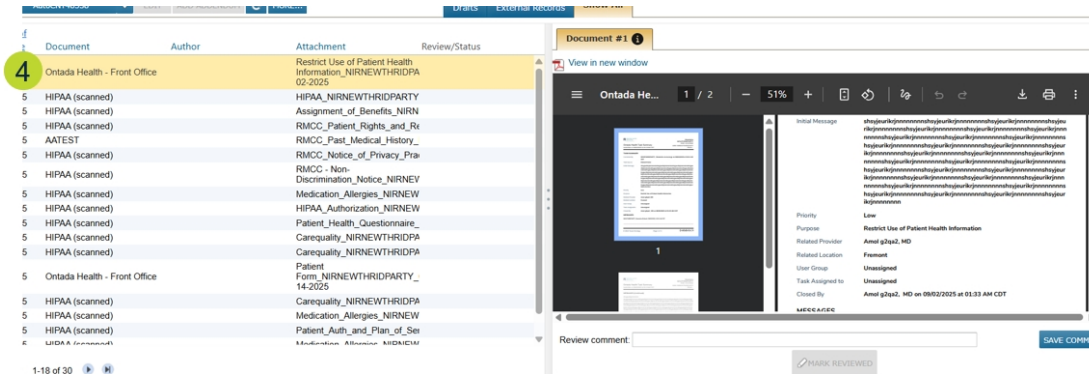


- Submitting the message automatically creates a task in the practice's **General Queue** with the purpose listed as **“Restrict Use of Patient Health**

Information” (callouts 2-3).



- Once the task is completed and closed, a **Task Summary PDF** is generated and saved to the patient’s **Documents** tab in their chart (callout 4).



Updates to appointment notifications

Appointment notifications will be improved to reduce message fatigue and keep patients informed of upcoming visits, especially those visiting your practice multiple days per week.

Patients will receive appointment reminders 5 days, 2 days, and 1 day before their next upcoming appointment. If patients have more than one appointment that matches with the sending cadence, appointment reminders will only be sent for the next upcoming appointment.

For example, if a patient has an appointment 2 days away and an appointment 5 days away, they will only receive an appointment reminder for the appointment that is 2 days away. Once the appointment that is 2 days away passes, the patient will receive appointment reminders for the next upcoming appointment that is 5 days away.

If patients have more than one appointment on a single day, appointments will be grouped into a single appointment reminder.

Additional enhancements

- The **diagnosis date** shown for a condition in the portal will now display the date from the **Date of Diagnosis** field from the Clinical Profile > Problems tab of the patient's chart. Previously, this date was pulled from the last modified date. This update ensures patients see the accurate diagnosis date for their conditions.
- We're improving the custom date range option for downloading test results. Before, patients could only select a start and end date that were both within 1 year of the current date. After this release, patients can select **any start date**, as long as the end date is within **1 year of the chosen start date**.
- **Report export format:** CSV is now the preferred format to generate Ontada Health reports. Excel may not work consistently, so always use CSV for reliable exports.