

# Ontada Health: e-Registration Release Notes

September 11, 2025

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

## Enhancements to packet/form sending rules in admin tools

### View username of provider or resource associated with the rule

We're adding a new **G2 Username** column to the **Provider** section of the packet/form sending details.

You can **view and sort** the column to quickly identify the usernames of the providers or resources that must be assigned for the rule to activate.

This enhancement provides clearer visibility into provider assignments, helping you manage and troubleshoot sending rules more efficiently.

#### Providers

A scheduled appointment must have a resource or provider that matches one of the listed providers below in order to trigger sending packets and forms automatically. If there are no providers listed below, the scheduled appointment's resource or provider does not have an impact on whether packets and forms are automatically sent.

Provider ↑	G2 Username	Specialty	Location
Eugene Wheeler, MD	Teottsth	Internal Medicine	Central Region-Boulder Clinic
Kalpana R	Kalpana_qs2_Aph	N/A	N/A

## Export rule details as an Excel file

You can also **download the details of a rule as an Excel file** for offline review or recordkeeping.

When viewing the details of a rule, click **Export Rule Details to Excel** in the upper right corner. The file will download to your computer for you to review or save.

**ⓘ** Packets and forms are automatically sent based on scheduled appointments.

- **Packets and Forms:** Packets and forms to be automatically sent to patients.
- **Appointment Types, Locations, Providers:** Appointments that match any of the listed appointment types AND any of the listed locations AND any of the listed providers trigger forms to be automatically sent. If an appointment only matches with some of these criteria (e.g. appointment type and location match with the listed appointment types and locations, but the provider does not match a value in the list of providers), then packets and forms are not sent.
- **Sending Cadence:** Specifies when packets and forms are initially sent and automatic reminders are sent if the patient has not completed all packets and forms.

[EXPORT RULE DETAILS TO EXCEL](#)

**Packets and Forms**  
The list of packets and forms that are automatically sent to a patient when this rule is triggered.

Packet/Form Name	Description	Last Update ↑	Version
Compass - Acknowledgement of Notice of Privacy Practices	Intake form capturing acknowledgment of receipt of the Notice of Privac...	01/08/2025	1
Compass - Assignment of Benefits	Intake form capturing consent for financial responsibilities.	01/08/2025	1

## Allow patients to refuse to complete electronic patient-reported outcomes (ePRO) forms

Practices will now have the option to allow patients to select “**I refuse to complete the Patient Health Questionnaire**” on the PHQ-2, PHQ-9, and NCCN Distress Thermometer forms. To enable this feature for your practice, please contact your Ontada Technology Account Manager.

Once activated, patients who choose this option can still successfully submit their forms. Refusal of the PHQ-2 or PHQ-9 does not block completion of other forms in the session.

The PDF version stored in the patient chart will clearly display the patient’s refusal.

[← BACK TO FORMS LIST](#)

**Patient Health Questionnaire New** 0% Complete

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**Consent to Participate** \* Required

The PHQ-9 is a short questionnaire that helps your care team understand how you’ve been feeling emotionally over the past two weeks.

Your participation is voluntary and should you choose not to participate, your decision will not affect your care.

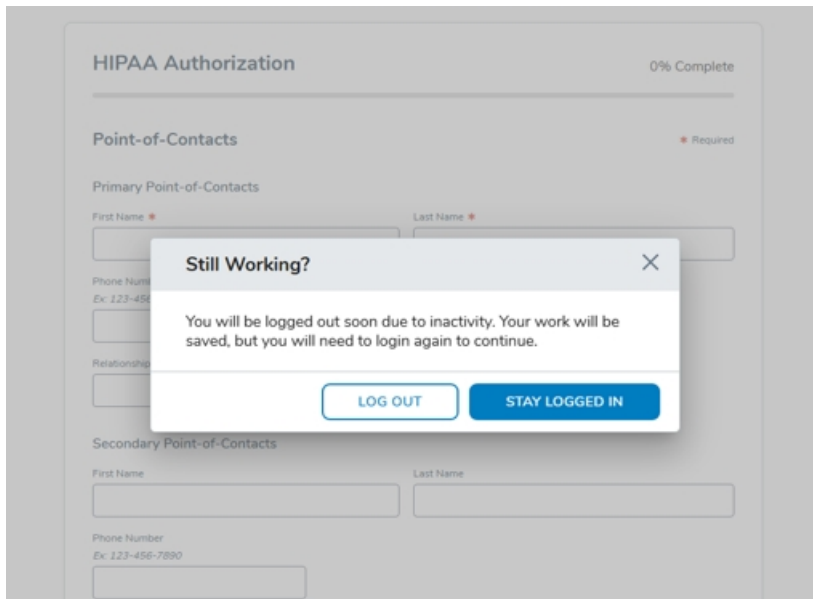
I agree to complete the Patient Health Questionnaire.  
 I refuse to complete the Patient Health Questionnaire.

[Clear Selection](#)

[SUBMIT](#)

## Automatic timeout warning on forms

Patients will now see a **pop-up warning after 27 minutes of inactivity**, reminding them that their session will time out in 3 minutes. If no action is taken, they will be automatically logged out after 30 minutes of inactivity. This update helps prevent lost data, incomplete registrations, and patient frustration, while reducing intake delays.



## Updates of Insurance Information form

We're making several enhancements to improve clarity and reduce patient confusion when completing the Insurance Information form.

### What's changing

- The section previously labeled **Drug Benefit Coverage** will be renamed **Prescription Drug Coverage**.
- The insurance card field name has also been updated from **Drug Benefit Coverage Card** to **Prescription Drug Coverage Card** and the following information message will be added to help patients enter the correct card information, "This is the card you would use at a pharmacy."
- **Medicare Part D** has been removed as an option for primary insurance coverage, since it cannot serve as a patient's primary coverage.
- For **Tricare policyholders**, new instruction text has been added to guide patients to enter their **DOD number** in the form.