

September 2025 Release Notes

Version 3.52

Document Social Determinants of Health in patient charts

We're introducing a **new Social Determinants of Health** section in the **Clinical Profile > Patient Hx** tab of the patient chart.

This feature was developed to support compliance with the 21st Century Cures Act and lays the groundwork for structured SDOH data capture within the EHR. While foundational, the current tab content **does not fulfill requirements for quality measures within Value-Based Care programs such as MIPS and EOM**.

It also does not provide any out of the box reporting capabilities, which limits its use for tracking or aggregating SDOH data across populations.

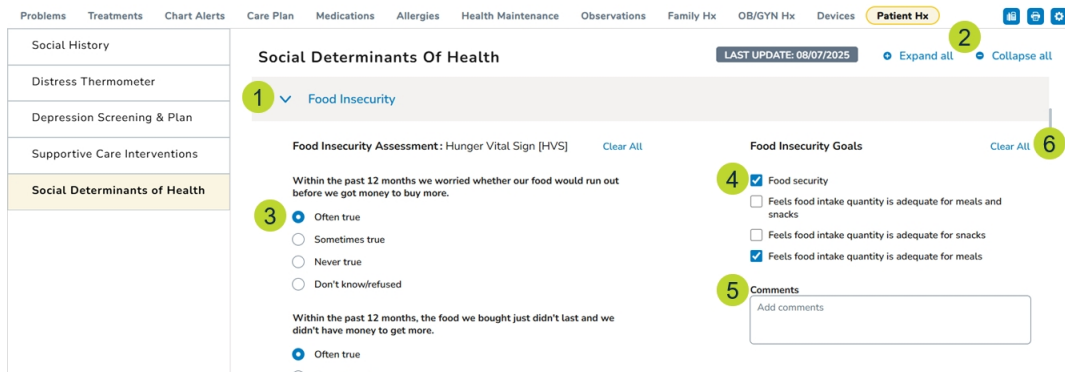
This is an initial step toward broader interoperability and data integration. Additional tools and enhancements will be necessary to support comprehensive documentation, reporting, and measure compliance.

For guidance on best practices and to understand how this feature aligns with Value-Based Care initiatives and measures, please contact your Transformation Lead or VBC Account Manager.

Key features

- **22 standardized categories of social determinants**, each with options for:
 - Assessment
 - Intervention
 - Comments up to 255 characters
- Interactive documentation:
 - Click a category to document details (callout 1) or use the **“Expand all”** or **“Collapse all”** options at the top of the page (callout 2).

- Use **radio buttons**, **checkboxes**, or the **free text Comments box** depending on the category (callouts 3-5).
- A **"Clear All"** option is available to remove selections (callout 6).



- **Scoring logic** in specific categories (e.g., Food Insecurity) helps determine if intervention is needed (callout 7).

Interpretation

7 Total Score: 2 - Household is at risk for food insecurity.

Comments

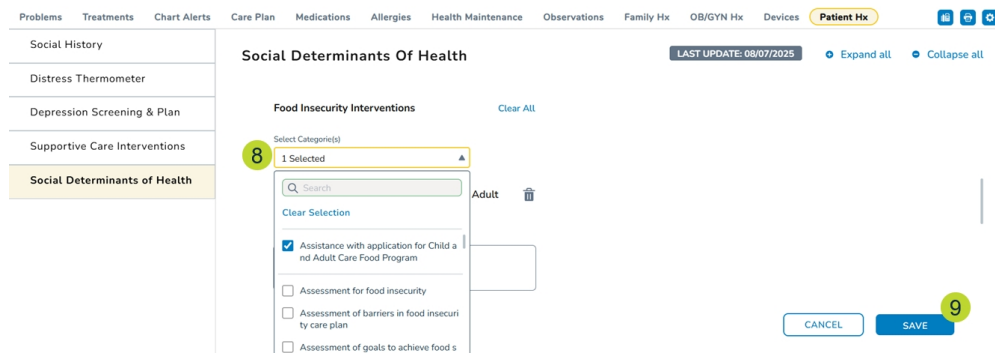
Add comments

- **Search** for an intervention or scroll through the list (callout 8).

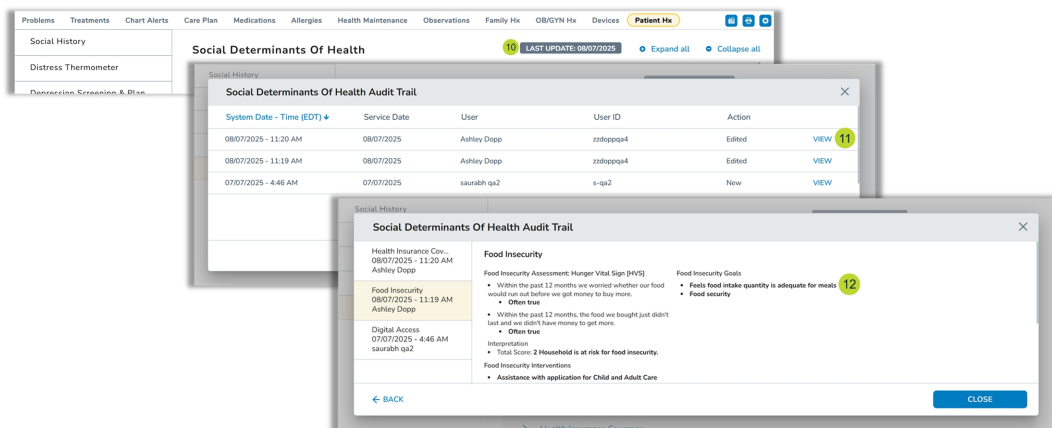
NOTE: If a patient needs a referral as an intervention, please continue to order referrals via the Orders tab.

- **Save each category individually** after completing documentation (callout 9).
- **Partial completion is supported**; not all categories or fields are

required.



- Audit trail
 - A **"Last Update"** badge appears at the top of the page (callout 10). Clicking the badge opens an **audit trail**.
 - See when updates were made, by whom, and what actions were taken.
 - Click the **"View"** option for detailed change history (callout 11), with updated items shown in bold (callout 12).



- [CCDA integration](#)
 - Any documented social determinants, interventions, and goals will be displayed in the CCDA generated for the patient.

Enhancements to custom links

Add up to eight custom links

Previously, practices could add up to three custom links under **Admin > Practice Preferences > Other Features**. After this release, you'll now be able to configure up to **eight** custom links, providing more flexibility to include the tools and resources your practice uses most often.

Once configured, all links will appear in the **Links** menu in the top navigation bar of iKnowMed. To set up or modify your custom links, be sure to enter the full web address (callout 1) and the display name you'd like users to see (callout 2).

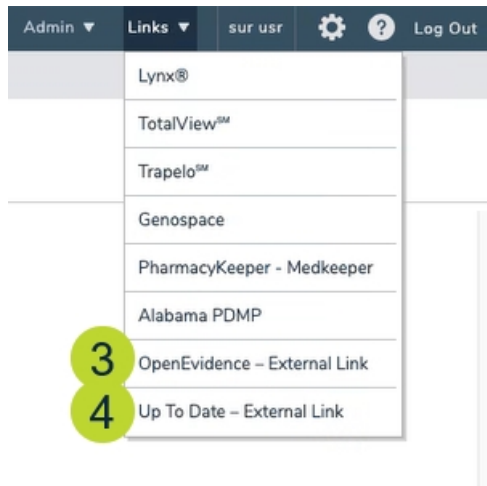
Custom Links Menu URL	Custom Links Menu Display Name
https://g2qa.mckesson.com/ehr/app.jsp	custom links #1
https://www.nccn.org/	NCCN Guidelines
https://www.openevidence.com/api/auth/login	Open Evidence
https://www.uptodate.com/login	Up To Date

OpenEvidence and UpToDate custom links

Two of the eight available custom links will be prepopulated with links to trusted clinical decision support resources* (callouts 3-4):

- [OpenEvidence](#)
- [UpToDate](#)

NOTE: If your practice already has UpToDate configured as a custom link, it will appear twice in your Links menu after the release. You may manually remove the duplicate so that only one link is displayed for your practice users.



We are adding these links because starting **Sunday, Sept. 7, 2025**, clinicians with an NPI will have access to **OpenEvidence**, a leading medical information platform that offers free access with account creation.

OpenEvidence will be added as a new clinical reference, in addition to **UpToDate**. UpToDate access will continue through the rest of the calendar year for all iKnowMed users.

NOTE: The link to UpToDate will remain visible in the Links menu for users, as well as continued access through the Quick Action menu, also known as the Running Man menu.

IMPORTANT: Notice Regarding Third-Party Applications and Services - When you click on a link embedded in our software to access an external or third-party application or service, you are leaving the iKnowMed platform. Please be aware that once you navigate to a third-party provider, the terms, conditions, and privacy policies governing your interaction may differ from those of Ontada. Ontada is not responsible for your activities, interactions, or any transactions with third-party providers. Any services, information, or products provided by external applications are outside of our control, and Ontada does not endorse, warrant, or guarantee their content or offerings. We encourage you to carefully review the terms and conditions, as well as privacy policies, of any third-party provider before proceeding. It is your responsibility to ensure that you understand and agree to those terms when accessing external services through our software.

New fields to capture more complete patient information

We're expanding patient documentation options across iKnowMed to give you a clearer, more comprehensive view of patient health. These updates add new fields and functionality so you can capture important details, improve record accuracy, and share more meaningful information with care teams and community partners.

Demographics tab

We're adding several new fields in the **Demographics** tab to improve patient documentation and capture more complete information:

- **Tribal Affiliation** (callout 1): Document which Native American tribe the patient belongs to by typing into the field to search or selecting from a dropdown list.

The screenshot shows the 'Demographics' tab in the iKnowMed interface. The navigation bar includes: Chart Summary, Clinical Profile, Flowsheet, Orders, Results, Documents, Demographics (highlighted), Nursing Care, Scheduler, Admix, and Charge Capture. The Demographics section contains several fields:

- Previous name (e.g. Maiden Name)
- Last date of use of previous name
- DOB / Sex: 07/07/1940, Female
- Sexual Orientation: --Please Select--
- Gender Identity (check all that apply): Male, Female, Female-to-Male (FTM)/Transgender
- Marital Status: --Please Select--
- Multiple Birth: ?
- Birth Order: --Please Select--
- Mothers Maiden Name
- Preferred Pronouns: Unspecified, She/Her/Hers, He/Him/His, They/Them/Theirs
- Preferred Language
- Ethnicity: Add Ethnicity
- Race: Add Race
- Tribal Affiliation: Add Tribal Affiliation (highlighted with callout 1)
- Tribal Affiliation dropdown: Alabama-Quassarte Tribal Town

- **Current Sex** (callout 2): Choose an option from the dropdown to document how the patient currently identifies their sex.

This screenshot shows a different view of the Demographics tab. The navigation bar is the same. The Demographics section includes:

- Sexual Orientation: --Please Select--
- Gender Identity (check all that apply): Male, Female, Female-to-Male (FTM)/Transgender, Male/Trans Man, Male-to-Female (MTF)/Transgender, Female/Trans Woman, Genderqueer, neither exclusively male nor female, Additional gender category or other, please specify: Choose not to disclose
- Current Sex: Female (highlighted with callout 2)
- Mothers Maiden Name
- Preferred Pronouns: Unspecified, She/Her/Hers, He/Him/His, They/Them/Theirs, Other
- Tribal Affiliation: Add Tribal Affiliation
- Tribal Affiliation dropdown: Alabama-Quassarte Tribal Town

- **Additional Care Team Members** (callout 3): Document other providers treating the patient, including those who are not iKnowMed users.

Demographics

External ID
 Contacts
 Providers
 Edit View Inactive Provider History

Internal Providers Add Provider External Providers Add Provider

3 Additional Care Team Members Add Care Member

Name * John Smith
 ID Number :
 Member Role * Primary care physician
 Location :
 Phone :
 Email :

SAVE CANCEL

- **Insurance** (callouts 4-9): Enter additional insurance details using the new fields for Member ID, Patient Relationship to Subscriber, Group Name, Group ID, Plan Name, and Plan ID.

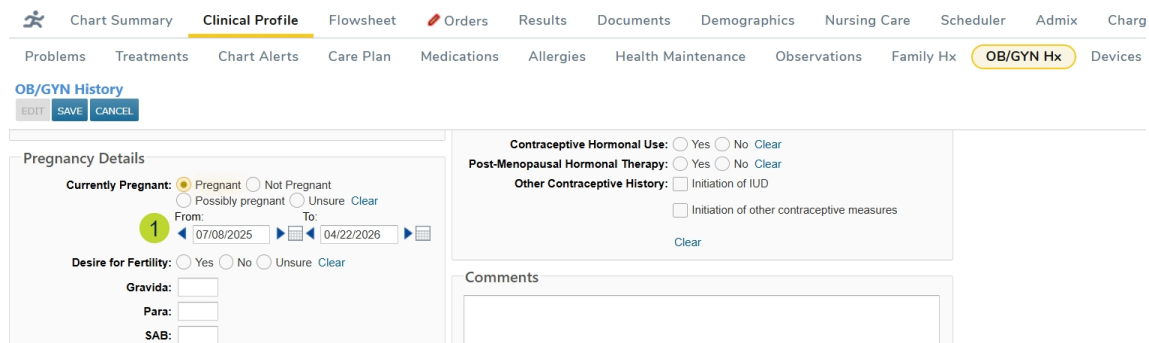
Add Insurance * required

Document Type : Patient insurance v
 Type * Primary v
 Insurer's Name * AETNA
 Policy Number : W1280806
 Insured Name : Joan Applegate
4 Member ID : 3002945727
 Subscriber Name : Joan Applegate
 Subscriber ID : 49582
5 Patient Relationship to Subscriber * Self v
 Effective Date : 01/01/2025
 Expiration Date : 12/31/2025
 Medicare Part A? : Yes No Unknown
 Medicare Part B? : Yes No Unknown
6 Group Name : Aetna
7 Group ID : 94580734
8 Plan Name : Aetna PPO
9 Plan ID : 3857578
 Select a File : Choose File No file chosen

SAVE CANCEL

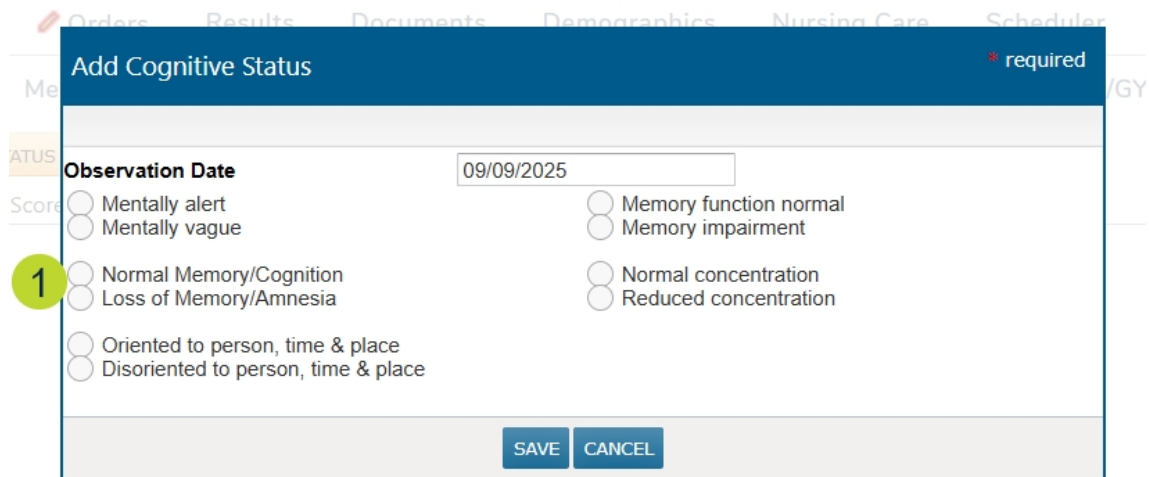
Clinical Profile > OB/GYN Hx

You can now document the full pregnancy timeline for patients. When selecting **Pregnant** under **Pregnancy Details**, new **From** and **To** date fields allow you to record the start and end dates of the pregnancy (callout 1).



Clinical Profile > Observations

Two new observation options, **Normal Memory/Cognition** and **Loss of Memory/Amnesia** (callout 1) will be available when documenting a patient's cognitive status, allowing you to more precisely capture the condition of the patient's memory.



Clinical Profile > Problems

When creating a new problem or editing an existing problem, you can now mark the problem as a **Health Concern** (callout 1) to indicate that this problem is a health concern when sharing your patients' most up-to-date medical records with your community partners.

The screenshot displays the 'Clinical Profile' section of the iKnowMed interface. The main heading is 'Breast cancer, female'. Below this, there are several fields: 'Problem (required)' with the value 'Breast cancer, female', 'Date of Diagnosis' as '12/04/2017', 'Status' as 'Active', and 'Comment' which is empty. A 'Details' section provides further information: 'Stage: IIA, Tumor Type: T3, Node: pN1a, Metastasis: M0, ER Status: Unknown, PR Status: Unknown, Histopathologic Type: Mixed ductal and lobular', with a 'View More' link. At the bottom, the 'ICD-10 (required)' field is populated with 'HCC C50.311 - Malignant neoplasm of lower-inner quadrant of right female breast'. To the right of the main form, there is a search bar containing 'Breast cancer, female' and two checkboxes: 'Pr' (checked) and 'Health Concern' (checked). A tooltip above the 'Pr' checkbox states 'Shows this problem as a Health Concern for interoperability.' A yellow circle with the number '1' is positioned near the 'Pr' checkbox. At the bottom right, there are three buttons: 'SAVE & CLOSE', 'CANCEL', and 'NEXT'.

Enhancements to CCDA Export

We're expanding the **CCDA exports** to include more information from the patient chart. These updates improve the clarity and completeness of patient records.

New options when exporting a CCDA

When exporting a CCDA, the **Print Summary Report** window now lists the following sections to include in the export:

- Assessment & Plan
- Goals
- Health Concerns

- Health Insurance Information

Print Summary Report
required

Release Information

Requested by: * Patient ▼

Provided to: * Patient ▼

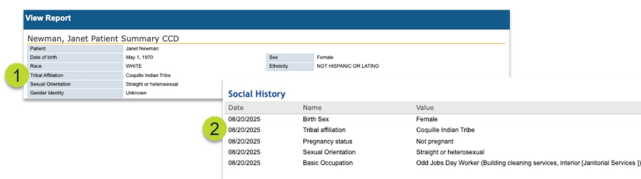
Uncheck boxes to exclude patient data:

<input checked="" type="checkbox"/> Allergies	<input checked="" type="checkbox"/> Health Concerns
<input checked="" type="checkbox"/> Assessment & Plan	<input checked="" type="checkbox"/> Health Insurance Info
<input checked="" type="checkbox"/> Care Plan	<input checked="" type="checkbox"/> Implantable Devices
<input checked="" type="checkbox"/> Cognitive Status	<input checked="" type="checkbox"/> Medications
<input checked="" type="checkbox"/> Diagnostic Results	<input checked="" type="checkbox"/> Problems
<input checked="" type="checkbox"/> Decision Aids	<input checked="" type="checkbox"/> Procedures
<input checked="" type="checkbox"/> Functional Status	<input checked="" type="checkbox"/> Smoking Status
<input checked="" type="checkbox"/> Future Lab Orders	<input checked="" type="checkbox"/> Unreleased Results
<input checked="" type="checkbox"/> Goals	<input checked="" type="checkbox"/> Vital Signs

CREATE REPORT
CANCEL

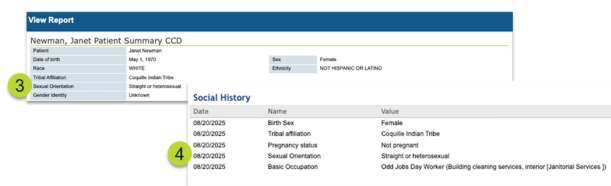
What's new and updated in the CCDA

- **Tribal Affiliation** (callouts 1 and 2)
 - A new field is available in the **Demographics tab > Patient Information** section.
 - This information will also appear in the CCDA under both the **Demographics** and **Social History** sections.

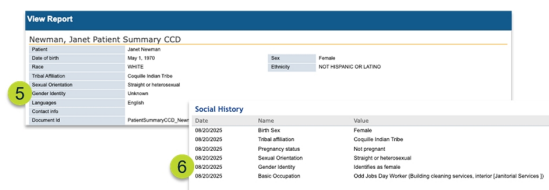


- **Sexual Orientation** (callouts 3 and 4)
 - Existing field in the **Demographics tab > Patient Information** section. Now included in the CCDA under the **Demographics** and **Social History**

sections.



- **Gender Identity** (callout 5 and 6)
 - The existing Gender Identity field in the **Demographics tab > Patient Information** section is now included in the CCDa under the **Demographics** and **Social History** sections.

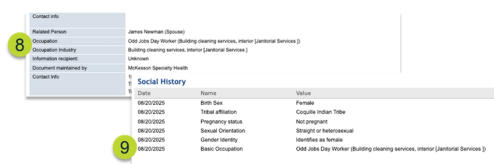


- **Pregnancy Status** (callout 7)
 - Information recorded in the **Clinical Profile > OB/GYN Hx > Pregnancy Details** section, including the new From and To dates for pregnant patients, will now be included in the CCDa under the Social History section.

Social History

Date	Name	Value
08/20/2025	Birth Sex	Female
08/20/2025	Tribal affiliation	Coquille Indian Tribe
08/20/2025	Pregnancy status	Not pregnant
08/20/2025	Sexual Orientation	Straight or heterosexual
08/20/2025	Gender Identity	Identifies as female
08/20/2025	Basic Occupation	Odd Jobs Day Worker (Building cleaning services, interior [Janitorial Services])

- **Occupation and Occupation Industry** (callouts 8 and 9)
 - Occupation and industry information recorded in the **Clinical Profile > Patient Hx > Social History** section will display in the CCDa under the **Demographics** and **Social History** sections.



- **Care Team** (callout 10)

- The CCDA export has been enhanced to include information from the new **Additional Care Team Members** field in the Demographics tab, including those who are not iKnowMed users.

View Report	
Newman, Janet Patient Summary CCD	
Patient	Janet Newman
Date of birth	May 1, 1970
Race	WHITE
Tribal Affiliation	Coquille Indian Tribe
Sexual Orientation	Straight or heterosexual
Gender Identity	Unknown
Languages	English
Contact info	
Document Id	PatientSummaryCCD_Newman_20250820_1217_04.805 2.16.840.1.113883.3.623
Document Created:	August 20, 2025, 12:17:04, MST
Care Team	Doctor Alpha, Sr. of Alpha Oncology Role: Attending Physician Member ID: 333333333 Address: 123 Mission Street San Francisco, CA 94105 Tel (Work Place): 415-111-1111 Cynthia Jones Role: Primary care provider ID: 123456 Address: 123 Main St. Anywhere, TX 78756 TX Telephone: 713-888-8888 Email: cynthia.jones@anywhere.com Author Alicia Garza, Alpha Oncology

- **Related Person** (callout 11)
 - Contacts/Next of Kin information recorded in the **Demographics tab > Contacts** section are now included in the CCDA under the **Demographics** section.
 - Displays the person’s **first and last name** and their **relationship to the patient**.

Informant	Doctor Alpha, Sr. of Alpha Oncology
Contact info	
Related Person	James Newman (Spouse)
Occupation	Odd Jobs Day Worker (Building cleaning services, interior [Janitorial Services])
Occupation Industry	Building cleaning services, interior [Janitorial Services]
Information recipient:	Unknown
Document maintained by	McKesson Specialty Health
Contact Info	10101 Woodloch Forest The Woodlands, TX 77380, USA Tel (Work Place): 800 381 2637

- **Fill Status and Indication for Medications** (callouts 12-13)
 - The Medications section of the CCDA now includes two new columns:
 - **Fill Status** – shows the state of medication dispensation.

- Indication – shows what the medication was prescribed to treat.

View Report

Diagnostic Results

Date	Type	Test	Units	Lower Limit	Upper Limit	Result	Flag	Comments	Status	Ordered By	Specimen Source	Lab Address
01/06/2025		0.30% NaCl RBC fragility, incubated	%			12					Blood	

Medications Administered

Date	Name	Route	Dose	Frequency	Instructions	Start Date	End Date	Status
NONE								

Medications

Date	Name	Route	Dose	Frequency	Instructions	Start Date	End Date	Status	Fill Status	Indication
07/18/2025	ceftriaxone 100 MG/ML Injectable Solution	intramuscularly	100.0 mg	every 12 hours		07/18/2025		active	PARTIAL_FILL	Fever
07/18/2025	ceftriaxone 100 MG/ML Injectable Solution	intramuscularly	100.0 mg	every 12 hours		07/18/2025		active	NOT_FILLED	Fever
07/16/2025	ceftriaxone 100 MG/ML Injectable Solution	intramuscularly	100.0 mg	every 12 hours		07/16/2025		active	FILLED	Fever

Patient Education

Date	Type	Value
NONE		

• **Disability Status** (callout 14)

- Disability status questions and responses from the **Demographics tab > Patient Information** section will display in the CCDA under the **Functional Status** section.

14 Functional Status

Date	Name/Question	Score/Answer
08/20/2025	Are you deaf, or do you have serious difficulty hearing?	No
08/20/2025	Are you blind, or do you have serious difficulty seeing, even when wearing glasses?	No
08/20/2025	Because of a physical, mental, or emotional condition, do you have serious difficulty concentrating, remembering, or making decisions?	Asked But Declined
08/20/2025	Do you have serious difficulty walking or climbing stairs?	Yes
08/20/2025	Do you have difficulty dressing or bathing?	Asked But Unknown
08/20/2025	Because of a physical, mental, or emotional condition, do you have difficulty doing errands alone such as visiting a physician's office or shopping?	Not Asked

• **Social Determinants of Health** (callouts 15-17)

- Assessments, interventions, and goals from the **Clinical Profile > Patient Hx > Social Determinants of Health** tab will display in the CCDA under the **Procedures** section.

15 Assessment and Plan

Date	Assessment	Value
08/20/2025	Hunger Vital Sign: TotalScore	1 - Household is at risk for food insecurity.
08/20/2025	Hunger Vital Sign: Within the past 12 months, the food we bought just didn't last and we didn't have money to get more.	Never true
08/20/2025	Hunger Vital Sign: Within the past 12 months we worried whether our food would run out before we got money to buy more.	Sometimes true

16 Procedures

Date	Category	Name	Instructions	Status
08/20/2025		Assistance with application for food pantry program		

17 Goals

Date	Goal	Author
08/20/2025	Feels food intake quantity is adequate for meals and snacks	Patient

• **Mental Status** (callout 18)

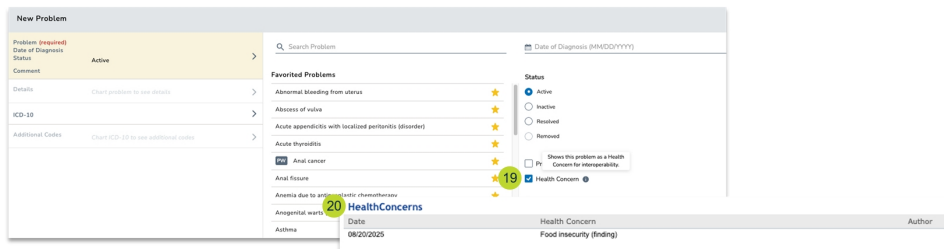
- The CCDA **Mental Status** will include all possible statuses documented in the **Clinical Profile > Observations > Add Cognitive Status** feature, including the new Normal Memory/Cognition and Loss of Memory/Amnesia

statuses.

18 Mental Status

Date	Value
08/20/2025	Normal Memory / Cognition
08/20/2025	Normal concentration
08/20/2025	Memory function normal
08/20/2025	Mentally alert
08/20/2025	Oriented to person time and place

- **Health Concerns** (callouts 19 and 20)
 - The CCDA **Health Concerns** section will include problems from the patient’s chart if the new **Health Concerns** box is checked in the **Clinical Profile > Problems** tab.



- **Health Insurance** (callout 21)
 - A new CCDA section will display patient insurance information recorded in the **Demographics tab > Insurance** section. This includes the new fields available in the Demographics tab for Member ID, Patient Relationship to Subscriber, Group Name, Group ID, Plan Name, and Plan ID.

View Report

21 Health Insurance

Date	Coverage Status	Coverage Type	Relationship to Subscriber	Member Identifier	Subscriber Identifier	Group Identifier	Payer Identifier
03/12/2025	Active	Primary	Self	LS394LF	G34	123455	SSAF
08/22/2024	Active	Secondary	Spouse	87PO44U	N46	123343	XXCK
08/22/2024	Inactive	Primary	Self	8798LLL	K23	293148	POJK
08/22/2024	Inactive	Secondary	Spouse	7L73L30	B78	899488	RJOX
04/22/2024	Inactive	Primary	Self	KTN3458	N67	349444	ROIE
04/22/2024	Inactive	Secondary	Spouse	23048RK	W43	897789	ULKE
04/22/2024	Inactive	Secondary	Spouse	O398K45	P88	090993	LSLI

New Practice Preference for future prior authorization integration

As part of our efforts to support automated, electronic prior authorization workflows, a new practice preference titled, **Electronic Prior Authorization** will be added in this release (callout 1).

Five9 Integration	Enabled
PMO Integration	Enabled
Mandatory ICD10 Documentation	Enabled
Use Association of Public Health Laboratories Data Agreement	No
VBC Task Management	<input checked="" type="checkbox"/>
AI Scribe	Enabled
1 Electronic Prior Authorization	<input checked="" type="checkbox"/>

This preference is designed to prepare your practice for future integration with third-party tools that help automate prior authorization tracking and management.

The preference will be **visible to all admin users** but will appear as **disabled by default** as **only super users** can enable this setting.

At this time, no functionality is tied to this preference. It is being introduced in advance of upcoming enhancements that will allow practices to integrate with electronic prior authorization vendors. We will share more details about the electronic prior authorization feature in a future release.

Updated NCCN Breast Guidelines care plan for genetic counseling

An updated **NCCN Breast Guidelines** care plan will be available in the **Clinical Profile > Care Plan** section of the patient chart. This care plan can be used to document whether a patient with breast cancer needs to be referred for genetic counseling based on the most recent NCCN guidelines.

Enabling the care plan

Before using this care plan, it must be turned on for your practice:

1. Go to **Admin > Practice Preferences**.
2. Scroll to the **Other Features** section.

3. Set the **NCCN Breast Guidelines** preference to **Enabled** (callout 1).

Other Features	
Advance Care Planning	Enabled
Brand Drug HCPCS Lookup	Not Enabled
Innovent Disease Management	Enabled
Oncology Care Model	Enabled
1 NCCN Breast Guidelines	Enabled
Serious Illness Care	Enabled

Key features

- **Assessment** tool to document both **Single Indication** and **Family History Indication** based on NCCN criteria.
- When adding a care plan to the patient's chart, choose the **NCCN Breast Guidelines** option as the care plan **Type** (callout 1).

Care Plan Medications Allergies Health Maintenance Observations Family Hx OB/GYN Hx Devices

▼

e

1

Add Survey * required

Date of Service: 08/07/2025 12:27 PM

Type *: NCCN Breast Guidelines

User: Dopp, Ashley

SAVE CLOSE

Last Modified

- Under the **NCCN Guidelines Needed** section, document whether the patient has already completed genetic counseling or needs to be screened based on the assessment (callout 2).
- Select applicable factors for the patient under **Single Indication** (callout 3) and/or **Family History Indication** (callout 4).

NCCN Breast Guidelines (Date of service: 08/07/2025) required

Name: gen311, Test MRN: Testgen311 Location: Austin Oncology

2 NCCN Guidelines Needed

Clear Patient has already completed genetic counseling
 Patient needs to be screened for genetics below

3 NCCN Guidelines for Genetic Testing

3 Single Indication	Breast Cancer (Including DCIS) diagnosis ≤ age 50	<input type="radio"/> Yes	<input checked="" type="radio"/> No	Clear
	Triple Negative Breast Cancer diagnosed at any age	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Clear
	Male breast cancer diagnosed at any age	<input type="radio"/> Yes	<input checked="" type="radio"/> No	Clear
	A known mutation in the family	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Clear
	Ashkenazi Jewish	<input type="radio"/> Yes	<input checked="" type="radio"/> No	Clear
	Multiple primary breast cancers (diagnosed same or different times)	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Clear
	Breast cancer at any age and to aid in systemic treatment decisions using PARP inhibitors for breast cancer in the metastatic setting	<input type="radio"/> Yes	<input checked="" type="radio"/> No	Clear
4 Family History Indication	Breast cancer diagnosis at any age	<input checked="" type="radio"/> Yes		
	AND One or more relatives with Breast Cancer ≤ 50	<input type="radio"/> Yes		Clear
	OR One or more relatives with Ovarian, Male breast, Pancreas, or Prostate (metastatic, intraductal/ciribiform, high, or very-high risk) cancers at any age.	<input type="radio"/> Yes		Clear
	OR Three or more breast and/or prostate cancer diagnoses on one side of the family, including the patient	<input type="radio"/> Yes		Clear

- Indicate the **result** of the assessment (callout 5):
 - Referral recommended
 - Referral refused
 - Use **"Clear"** to update selections as necessary.
 - A **free-text "Comment"** field is available to capture any additional context up to 255 characters.
- Be sure to **Save** once all relevant information has been entered (callout 6).

5 Result of NCCN Guidelines

Patient should be referred for genetic counseling Yes No Clear

Patient refused genetic counseling Yes Comment: Clear

*NCCN Guidelines for Genetic Testing
 (Genetic/Familial High-Risk Assessment: Breast, Ovarian, Pancreatic, and Prostate Version 3.2025-March 6, 2025)

6

Additional Enhancements (A-Z)

Orders > Regimens

As part of preparing for a new **Launch and Learn** feature in Clear Value Plus, the **"Show definitions"** link is removed from the decision support prompts when creating a regimen for a patient from the **Orders** tab.

The **Launch and Learn** feature will provide a link within the decision support prompts that takes providers directly to relevant educational content at the point of questioning.

Worklist Queues > Attach Documents

We're updating the Audit Report in the Attach Documents queue to improve performance and prevent system slowdowns when generating reports.

Users will now be required to enter the name of a **User** or a **Patient** before the **Export to Excel** and **Print Report** buttons become active.

The date range will also be limited to a 15-day range to prevent performance issues. Any attempt to select dates beyond this range will automatically be corrected. Selecting a future date will trigger an error message.

As long as a User or Patient is selected and the date range is within 15 days, users can generate, export, or print the audit report as expected.

Fixes (A-Z)

Worklist Queues > Ins. Auth/Fin. Counseling

Previously, when a new order with a fuzzy date (such as *STAT* or *ASAP*) was added to the queue, it did not display in red when filtering the queue to view **Not Obtained** authorizations. This issue has been resolved, and these orders will now display in red as expected.

Worklist Queues > Orders Queue

This release includes the following fixes to improve the accuracy, reliability, and performance of the Orders Queue:

- Fixed an issue where the **Print** icon did not always work when attempting to print patient orders. Users can now print orders as expected.
- Corrected an issue where editing an order from the Flowsheet (for example, changing the Perform Date) caused the **Insurance Auth** status to change incorrectly in the Orders Queue. The queue will now retain the correct status regardless of where the order is edited.
- Resolved an intermittent issue where a newly created **Orderable Group** did not display initially display in the **Order Type** filter **Custom Group** list.
- To help the Orders queue load faster and perform better, if the preset filter from your last login session used a custom date range for **Order Date** or **Perform Date**, it will not be applied as your default filter when you log in again. The preset filter using a custom date range will need to be selected. The default

filter will be:

- Order Date = Today
- Perform Date = Next 30 days
- Location = Login location