

Ontada Health: e-Registration Release Notes

August 7, 2025

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

View packet/form sending rules in admin tools

We're introducing a new feature in the Ontada Health admin tools to help practices more easily view their configured rules for sending forms and packets to patients.

What's new

Under **Support Tools**, a new section called **Forms/Packet Sending Rules** will allow authorized users to review the specific logic their practice has set for automatically sending e-Registration packets/forms. This feature reduces the need to contact your Ontada Health Account Manager to check or confirm rule configurations.

Accessing Forms/Packet Sending Rules

Access to this feature is permission-based and managed through the **User Roles and Permissions** Excel sheet. The sheet includes a new **Form Sending Rules** column where you can choose from the following access levels:

- **None** – No access
- **View** – View all configured form/packet sending rules in detail

	A	B	C	D	E	F	G	H	I	J	K
1	G2 Username	Action	General Queue	Forms	Patient Support Tools	System Outbound Review	Practice Support Tools	Patient Impersonation	Announcements	Form Sending Rules	
2	TestUser	Add Permissions	Full	Full	Full	Full	Full	Full	Full	View	
3											
4											

Using Forms/Package Sending Rules

Users with **View** permission can open the **Forms/Package Sending Rules** section and view a list of all established rules, including the rule name, packets and forms impacted, practice locations, appointment types, assigned providers/resources, date created, and date last updated.

Rule Name	Packets and Forms	Locations	Providers	Appointment Types	Created/Updated
1PT Testing in QA - Round 2	2 Forms	Central Region-Boulder Clinic	Eugene Wheeler, MD	3 Appointment Types	07/01
^&* custom forms	3 Packets	San Francisco Medical Oncology	MDUno ZZWho, MD	3 Appointment Types	07/01
enabled	General Consent Packet and Compass...	Fremont	Doctor AlphaTest, MD	3 Appointment Types	07/01
#\$# enabled	General Consent Packet and Compass...	Fremont	Doctor AlphaTest, MD	3 Appointment Types	07/01
Forms only QA Packet	CCCN - Preparation for Diagnostic Im...	Fremont	Kalpana R	3 Appointment Types	07/01
Forms only QA Packet	CCCN - Preparation for Diagnostic Im...	Fremont	Kalpana R	3 Appointment Types	07/01
only QA Packet	3 Packets and 2 Forms	Fremont	Kalpana R	3 Appointment Types	07/01
PT Testing in QA - Round 3	Performance Packet-updated	2 Locations	2 Providers	MD	07/01
QA Packet	3 Packets and 2 Forms	Fremont	Kalpana R	3 Appointment Types	07/01
- Round 3	Performance Packet-updated	2 Locations	2 Providers	MD	07/01
Standard Forms only - PT Testing in QA - Ro...	Performance Packet-updated	2 Locations	2 Providers	MD	07/01
Standard Forms only QA Packet	3 Packets and 2 Forms	Fremont	Kalpana R	3 Appointment Types	07/01

28 results | 1 2 | 15 per page

Clicking a rule opens a detailed view in a new window. At the top, a summary banner outlines the rule.

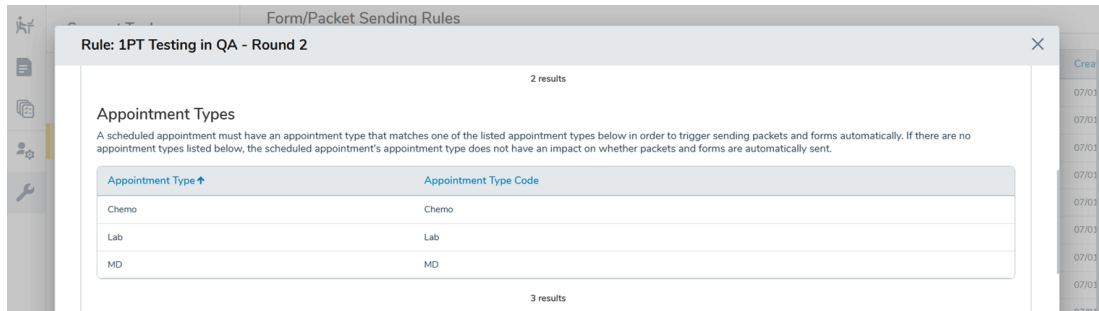
The window then breaks the rule down into the following sections:

- **Packets and Forms:** Shows all forms affected, with descriptions, last updated date, version number, and the ability to hover over the form icon to view forms included in a packet.

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

2 results

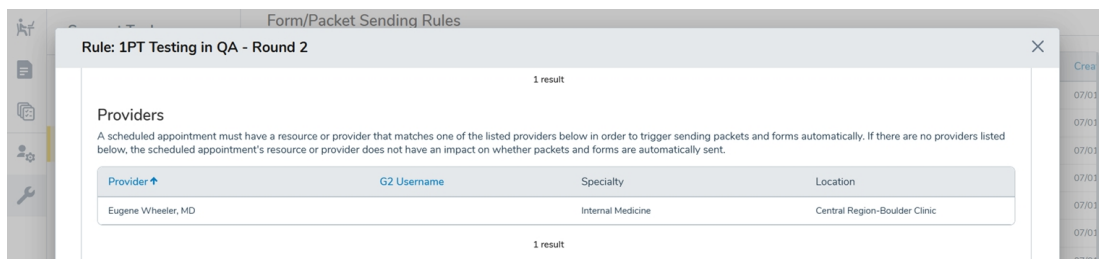
- **Appointment Types:** Lists appointment types that must be scheduled for the rule to trigger.



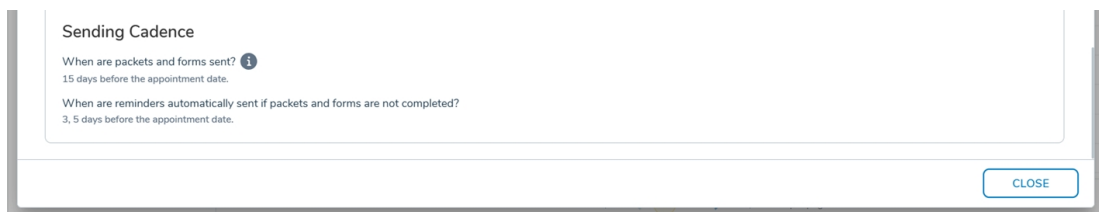
- **Locations:** Lists practice sites where the appointment must be scheduled for the rule to trigger.



- **Providers:** Lists which providers/resources must be assigned for the rule to activate.



- **Sending Cadence:** Shows when forms/packets are initially sent and when reminder messages are triggered if a patient hasn't completed them.



Auditing Forms/Package Sending Rules access

Users with Ontada Health reporting access can monitor and manage who has access to this new feature through existing reports:

- The **Current User Permissions Report** will include a **Form Sending Rules** column that shows who has **None** or **View** access. This column can be sorted and filtered for easier auditing.

Current User Permissions Report

Username	Name	General Queue	Forms	Patient Support Tools	System Outbound Review	Practice Support Tools	Patient Impersonation	Announcements	Form Sending Rules
1provider	1prov ider	None	None	None	None	None	None	None	None
aaabbb	aaab aabb	Full	Full	Full	Full	Full	Full	Full	View
aadluv	Barry Bonds	Full	Full	Full	Full	Full	Full	Full	None
abct	abct abctt	Full	Full	Full	Full	Full	Full	Full	View
abhjeetsu	abhjeetsu abhjeetsu	Full	Full	Full	Full	None	Full	None	None
accounty	accounty accounty	Full	Full	Full	Full	Full	Full	Full	None
accountyy	accountyy accountyy	Full	Full	Full	Full	Full	Full	Full	None

- The **User Permissions History Report** will track any changes to a user’s permissions for **Form Sending Rules**, including when access is added, changed, or removed via the **Permission** column.

User Permissions History Report

Date/Time Changed	Username	Name	Permission	Previous Value	New Value	Changed By
07/16/2025 13:52	e010u6j	Ashley Dopp	Form Sending Rules	NONE	VIEW	e010u6j
07/16/2025 13:52	e010u6j	Ashley Dopp	Announcements	FULL	FULL	e010u6j
07/10/2025 07:25	aaabbb	aaab aabb	Patient Support Tools	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	Announcements	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	General Queue	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	System Outbound Review	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	Form Sending Rules	NONE	VIEW	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	Forms	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	Practice Support Tools	NONE	FULL	amol92qa2
07/10/2025 07:25	aaabbb	aaab aabb	Patient Impersonation	NONE	FULL	amol92qa2
07/08/2025 07:51	UNyiof	yiof bvso	Forms	NONE	FULL	amol92qa2
07/08/2025 07:51	UNyiof	yiof bvso	Patient Support Tools	NONE	FULL	amol92qa2
07/08/2025 07:51	UNyiof	yiof bvso	Practice Support Tools	NONE	FULL	amol92qa2
07/08/2025 07:51	UNyiof	yiof bvso	General Queue	NONE	FULL	amol92qa2

Form progress saved for patients

To improve patient experience and reduce the risk of lost information, the system will automatically save patients’ form progress every 30 seconds.

What’s new

- If a patient navigates away from a form (e.g., to the Assigned Forms page) or if the session times out, their progress will be automatically saved.
- If a patient switches the language while completing a form, their progress will be preserved, and the form will refresh in the newly selected language without needing to start over.

Important exceptions

Progress will **not** be saved on the current page if:

-
- The patient clicks the back button or arrow in their browser.
 - The patient closes their browser before submitting.

In these cases, any information entered will be lost, and the patient will need to restart the form.

Additional enhancements

- The medication search experience will be updated to help patients select the most accurate medication information. Patients searching for medications will now **see the single drug option** before any combination drug names.
- To improve usability and clinical accuracy, the PDF version of the PHQ-2 and PHQ-9 depression screening forms will be reverted to the Likert Scale, allowing practices to quickly assess total scores and determine whether further evaluation or treatment may be needed.
- Practices can save and upload the user roles and permissions file in either **CSV UTF-8 (Comma delimited)** or **CSV (Comma delimited)** format, providing more flexibility in file handling.