

# November 2023 Release Notes

Version 3.41

This release brings important updates to the iKnowMed Generation 2 login experience as we prepare for Okta, continued improvements to the Orders Queue, and important fixes.

## Updated login experience in preparation for Okta integration

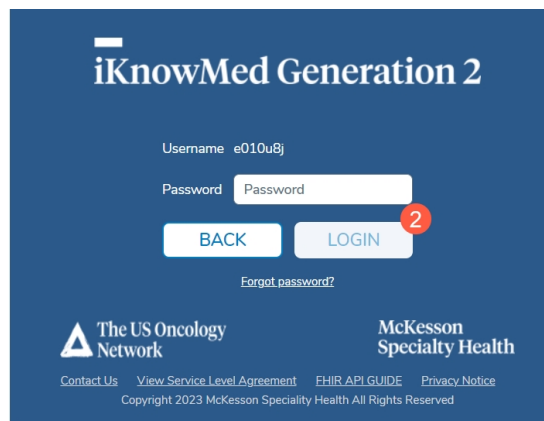
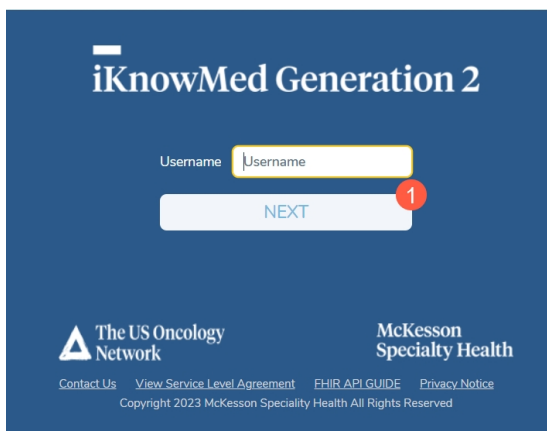
We've introduced an update to your login experience, paving the way for Okta integration. Here's what you need to know:

### What's changing?

After this release, the iKnowMed login process will now have two steps:

1. Enter your username on the first screen and click the Next button (see callout 1).
2. Enter your password on the second screen and click the Login button (see callout 2).

**NOTE:** Your username, password, and login policies will remain the same after this release. Once your practice changes over to Okta, they may change.



## Why the change?

While this may seem like a minor inconvenience now, it's an essential step toward our Okta integration. Okta is an industry-leading identity management service that simplifies how you access Ontada applications.

## The Benefits of Okta Integration

- **Enhanced Security:** Okta's security measures will fortify the login process, ensuring your data remains safe and sound.
- **Faster Sign-In:** Once Okta integration is complete, signing in will be quicker and more straightforward than ever before.

## The First Step in Integration

The adjustments to the iKnowMed login screen mark the initial phase of this change. After your practice starts using Okta, you'll enjoy a host of benefits:

- **Single Sign-On:** Use the same username and password to securely access all your Ontada applications once they onboard Okta services.
- **Simplified User Management:** Your IT staff will no longer need to create, manage, and map user accounts across various applications.

We understand that change can be challenging, but this upgrade is designed to make your Ontada experience smoother and more secure. Your Account Manager will work with your practice to guide you through this change and answer any questions you may have.

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## Continued improvements to the enhanced Orders Queue

In this release, we made several more enhancements to improve the workflow and experience of those working in the enhanced Orders Queue. Here are the key changes:

### Improved visibility with Latest Queue Note

A new section called Latest Queue Note has been introduced to the Update History panel within the orders worklist. This section showcases the most recently added queue note at the top, while previous notes are displayed below it in the Update History section (callouts 1 and 2).

The screenshot displays the 'Orders Queue' interface. At the top, there are navigation tabs for various functions like 'eRx Message', 'Admix', 'Attach Documents', etc. A search bar is present for patient names or IDs. Below this, there are filter options and a list of orders. The main area shows a patient's details and a list of orders with their status (e.g., STAT, ASAP). The 'Update Selected Orders' section allows for filtering by location and date. The 'STAT/ASAP/Add-On' section shows a list of orders, and the 'Update History' section provides a log of recent updates.

## Improved Orders Queue filters

To meet the needs of larger practices using the enhanced Orders Queue, we made the following refinements to the default settings when the Filter button is selected:

- **Order Date:** The default Order Date filter is now set to Today instead of the last 14 days, ensuring quick access to the most current orders (callout 3).
- **Perform Date:** The default Perform Date filter is extended to the Next 30 Days, granting users greater flexibility in planning and executing orders (callout 4).
- **Ordered From Location:** The default Ordered From Location filter now aligns with the user's logged-in location instead of displaying **All** locations. To further simplify the selection process, this filter now only displays In Clinic options (callout 5). External locations have been removed from this list as orders cannot originate from external locations.
- **Restore Default Filters:** When selecting the Restore Default Filters option, the refined settings outlined above will be automatically applied, ensuring consistency and aligning the queue with the most useful criteria for effective order management (callout 6).

**Filters**
✕

Filter Presets ⓘ [Restore Default Filters](#) 6

Custom Filters

Create New Preset

<p><b>Order Date</b> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">3</span> <span style="float: right; background-color: #333; color: white; padding: 2px 5px;">TODAY</span></p>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Select All             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Central Region             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">5</span> <input checked="" type="checkbox"/> Central Region-Boulder Clinic             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Central Region-Boulder Clinic GYN             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> alaska             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Alpha Shawn Test             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Chemo Chair 12             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Fremont             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Hariharan M             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Hzemdmph             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> Ikltqsq             </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> karina             </div>
<p><b>Perform Date</b> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">4</span> <span style="float: right; background-color: #333; color: white; padding: 2px 5px;">NEXT 30 DAYS</span></p>	
<p><b>Perform Location</b> <span style="float: right; background-color: #ccc; padding: 2px 5px;">ALL</span></p>	
<p><b>Ordered From Location</b> <span style="float: right; background-color: #333; color: white; padding: 2px 5px;">FILTERED</span></p>	
<p><b>Ordering Provider</b> <span style="float: right; background-color: #ccc; padding: 2px 5px;">ALL</span></p>	
<p><b>Order Type</b> <span style="float: right; background-color: #ccc; padding: 2px 5px;">ALL</span></p>	
<p><b>Queue Status</b> <span style="float: right; background-color: #ccc; padding: 2px 5px;">ALL</span></p>	
<p><b>Advanced Filters</b> <span style="float: right; background-color: #ccc; padding: 2px 5px;">ALL</span></p>	

CANCEL
APPLY

- Perform Location:** The Perform Location filter list has been reorganized for ease of use. **Unspecified location** now appears at the top, followed by **In Clinic** and **Out of Clinic** locations. This grouping allows for convenient selection of all in-clinic or external locations at once (see callouts 7-9).

### Filters ✕

Filter Presets i [Restore Default Filters](#)

Custom Filters

Create New Preset

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<b>Order Date</b> <span style="float: right;">TODAY</span>	<input checked="" type="checkbox"/> Select All
<b>Perform Date</b> <span style="float: right;">NEXT 30 DAYS</span>	
<b>Perform Location</b> <span style="float: right;">ALL</span>	<input checked="" type="checkbox"/> Unspecified Location
<b>Ordered From Location</b> <span style="float: right;">FILTERED</span>	<input type="checkbox"/> In clinic
<b>Ordering Provider</b> <span style="float: right;">ALL</span>	<input type="checkbox"/> NHO Lincoln
<b>Order Type</b> <span style="float: right;">ALL</span>	<input type="checkbox"/> NHO Support Center
<b>Queue Status</b> <span style="float: right;">ALL</span>	<input type="checkbox"/> Out of clinic
<b>Advanced Filters</b> <span style="float: right;">ALL</span>	<input type="checkbox"/> Advanced Medical Imaging #6688
	<input type="checkbox"/> Arthritis Center #0961
	<input type="checkbox"/> Beatrice Community Hospital #6531
	<input type="checkbox"/> Bryan Medical Center EAST Campus #5177
	<input type="checkbox"/> Bryan Medical Center PINE LAKE Campus #5177
	<input type="checkbox"/> Bryan Medical Center WEST Campus

CANCEL
APPLY

## Automatic assignment of Perform Location

If a patient's preferred treatment location has been designated in their Demographics tab, the queue will default to that location as the Perform Location when In Clinic is selected as the Location Type (see callouts 10 and 11).

Search Patient Name or ID

**FILTERS** 10 Orders

Filter Presets Custom

Sort By Order Date (Newest to Oldest)

- Gen03\_Patient03 (F) STAT
- Gen02\_Patient02 (F) STAT
- Gen01\_Patient01 (F) ASAP
- test\_reg (F) 10/12/2023
- reg1\_test (M) 10/12/2023

**Gen03\_Patient03 (F)**  
 abcdef4563  
 01/01/1986 (37 yo)  
 95 cm, 1.03 kg, 141 mg  
 (10/10/2023)

PHONE

Address: Test Lane, Hustone, TX, 56321

Email:

Problem(s):

Insurance:

Attending:

Allergies:

Next MD Visit:

Group By Order Date (Oldest to Newest)

STAT/ASAP/Add-On

CBC w/ auto diff

Iron

CMP

Thursday, October 12, 2023

CBC

Select All Orders

**Update Selected Orders:**

10 Location Type: In Clinic  11 Perform Location: Central Region-Bk  Perform Date: MM/DD/YYYY  Queue Task:  Update Status:  Queue Note:

**STAT/ASAP/Add-On**

CBC w/ auto diff

Ordered By: Charan, Padma on 10/12/2023 Perform Date: STAT (Thursday, October 12, 2023)

Type: N/A  
Location: N/A

Iron

Bill to: Insurance Perform Date: ASAP (Thursday, October 12, 2023)

Ordered By: Charan, Padma on 10/12/2023 Type: N/A

Add chart comments Location: N/A

## Enhanced Visibility with Order Queue Status

The Orders Queue Status from the new Orders Queue is now displayed in the Orders I/F queue to improve order handling (callout 1).

The screenshot displays the iKnowMed interface for patient Jennifer Zztest (53 / F). The top navigation bar includes tabs for 'Other Documents', 'Notes Review', 'Sign Orders', 'Admix', 'Attach Documents', 'Outbound Fax', 'Ins. Auth/Fin. Counseling', 'OCM Patient List', 'Orders Queue', and 'Orders I/F'. The 'Orders I/F' tab is active.

On the left, the 'Filter Criteria' section shows 'Patient: Zztest, Jennifer (DOB: 01/01/1970)' and 'Perform Date Range: 10/12/2023 to 10/12/2023'. Below this is a table of orders:

Perform Date	Patient (Gender/Age - DOB - MRN)	I/F Status	I/F Status Date
10/18/2023	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
11/04/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
10/28/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
10/21/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
10/14/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
10/07/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		
09/16/2022	Zztest, Jennifer F/53 - 01/01/1970 - 42016		

On the right, the 'Update Selected Orders' section shows '1 order' with a checkbox for 'Include all statuses'. Below this is the 'Orders' section for a 'Basic Metabolic Panel (1 Week)' order. A callout box (callout 1) is overlaid on the 'Order queue status' field, displaying:

**Order Queue Status:**  
 Pharmacy Review Not Applicable  
 Madeline Nubie ( 10/12/2023 03:23 PM )  
 Scheduling Complete  
 Madeline Nubie ( 10/12/2023 03:22 PM )

## Improved appointment management with Visit List and PMS integration

An enhancement to the way iKnowMed handles appointments in the Visit List, improving workflow and providing more flexibility in managing patient appointments, will be rolled out to practices not currently taking advantage of this functionality:

- **No Show Status Integration:** iKnowMed now seamlessly integrates with your PMS to accept and display a No Show status in the Visit List (callout 1). This means that iKnowMed will no longer automatically cancel appointments when a patient is marked as a No Show, allowing you to retain the appointment information and making it easier to reschedule or take appropriate action without any data loss.
- **Automated Checked In Status:** When your PMS sends a checked in or arrived status, iKnowMed will now automatically select and display the Checked In status in the Visit List (callout 2), streamlining the patient check-in process and ensuring the Visit List is always up to date.

If you are not seeing status updates from your PMS, even though you check in and/or no show patients as part of your workflow, you may need to reach out to ensure this is a functionality that your PMS supports. If your practice prefers not to use these new features, please contact your Account Manager to have it turned off.

Visit List											
Date	Region	Location	Resource	Patient	Patient Tracker	Status					
11:15AM (09:15AM PDT)	zzlast, zzfirst (05/14/1957 zztest14053104201c)	OV/LAB	Demo	San Francisco Oncology	Track Patient	EDIT	Checked In		Enter comments	<input type="checkbox"/>	
12:20PM (10:20AM PDT)	zzlast, zzfirst (05/14/1957 zztest14053104201c)	CHEMO	Chair 10	San Francisco Oncology	Track Patient	EDIT	Checked In	2	RITUX	<input type="checkbox"/>	
01:30PM (11:30AM PDT)	zzlast, zzTest1 (08/25/1970 zzTest1zzLast)	OV	Demo	San Francisco Oncology	Track Patient	EDIT	No Show	1	Enter comments	<input type="checkbox"/>	

## Additional Enhancements (A-Z)

### Permission screen

In anticipation of the §170.315(b)(10) Electronic Health Information export regulation outlined in the 21st Century Cures Act, we are introducing a new permission that will provide control over a feature that will be added in a future release.

**Access Control:** On a user's Permission screen, go to the Admin section and set the EHI Export permission to Full. Users with this permission enabled will be able to access the EHI Export option in the Admin menu from the top navigation when it is added in a future release.

**Note:** By default, this permission will be set to None.

### Worklist Queues > Attach Documents

Previously, users could open individual attachments within the Attach Documents queue in separate windows. However, this functionality introduced unnecessary complexities and the risk of inadvertently uploading documents for the wrong patient. We've updated the system so that it now automatically closes the initial window when you choose to open a second item in a new window, improving practice efficiency and mitigating the risk of errors.

## Fixes (A-Z)

### Admix tab

Previously, admixture dispense details were sometimes duplicated. This duplication resulted in redundant charges, creating confusion and inefficiencies in the workflow. We successfully resolved this issue, and users can now expect to see dispense details and charges exactly as intended, without any duplicates.

## Worklist Queues > Notes Review

A defect was identified in the Notes Review queue, where attempting to sign off on notes following edits would cause the screen to freeze. However, if there were no edits to the note, the sign-off process proceeded successfully. In this release, we have resolved this issue. Now, regardless of whether edits have been made to a note or not, you can complete the sign-off process in the Notes Review queue.