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3.0.29 Release Notes

Feb 2022

iKnowMed Generation 2 version 3.0.29 introduces great new updates to the Problems tab. Additionally, we've added workflow improvements to USQ, Clinical Notes, and other often-used features.

Chart more easily in the new Problems tab

The new Problems tab includes features to improve data capture, such as:

- Charting information on one screen automatically generates ICD-10 codes, eliminating clicks.
- Adding metastatic sites, diagnosis, and ICD-10 codes all at once.
- Marking frequently used problems and IDC-10 codes with star icon as a favorite.
- Documenting alcohol and tobacco use and apply those HCC codes for correct billing.

For more information, watch the video below or visit our Frequently Asked Questions and Updated Problems Tab User Guide.

“Batch” select all patient data to transfer from one provider to another in USQ

When reviewing the Unified Sign Queue (USQ), some providers find patients mistakenly assigned to them for review.

Prior to this release, this data needed to be moved individually to the appropriate provider. Now, all items for a patient can be moved to the correct provider at once - saving time and clicks.

Select a patient in the queue and click **Batch Transfer This Patient** in the middle panel to initiate the process (see callout 1).

Flower, Tiger Lily

Providers: Seth Fillmore MD, zzMolin, m1 (F), zzSimmons, PFC (F), Anderson, Lolita (F), Madeline, Orders (F), McGullicuddy, Lucille D. (F), ZZShewale, Yogita (F), ZzNichols, Dragon (F), ZZWard, Deena (F), **Flower, Tiger Lily (F)**, ZZCrist, YvonneRN (F)

Patient Info: Sex: Female, MRN: zzflowertigerlily, DOB: 7/7/77 (44), Height: 64 in, Weight: 150 lb, BSA: 1.73 m2

Next Visit: Breast cancer, female, Non-small cell L...

Allergies: Penicillins...

Attending MD: Pink, Doctor

Contact: 3025555555 (Home)

Insurer: AETNA

Batch Transfer This Patient 1

Focused Orders:

- Hgb A1c 11/30/21
- 0.40% NaCl, RBC osmotic fragility 3/18/21
- CBC 8/31/20
- CT 8/31/20
- PET/CT scan 8/31/20

Hgb A1c Test Results:

Test (Units) [Reference Range]	Date/Time
Hgb A1c (%)	11/30/2021 12:28 PM
7.2	

Source: Blood, **Status:** -, **Ordered by:** -, **Date of Service:** 11/30/21

Comment: -, **Laboratory:** -, **Reported:** 11/30/21

Specimen: -, **Rec'd:** -, **Tech:** -, **Reviewed:** -

Interpretation: Satisfactory Stable Im Abnormal - requires action

A dialog box will appear, allowing users to select which of the patients' items to transfer, i.e., all labs, images, orders, or other documents, as well as which provider should receive the transfer (see image below).

Clicking the **TRANSFER** button sends these items to the selected provider's queue.

Batch Transfer

Patient: Flower, Tiger Lily (Female/44 - 7/7/77 - zzflowertigerlily)

Transfer:

- All Labs
- All Images
- All Orders
- All Other Documents

From: Doctor Pink MD

To: Fillmore, Seth

Buttons: CANCEL, TRANSFER

Filter and print results by date to improve workflow efficiency

It is not uncommon for oncology patients to have hundreds of results over time; therefore, users often need to quickly and easily filter results to only display or print those of interest.

To meet this need, **Results** filtering capabilities now include a date filter (see callout 1). Use the **Result Date** filter to refine results by all dates, a single date, or a date range.

After filtering the list, users can view the results of interest or print them using the batch printing option on the lower left side of the screen.

The screenshot shows the 'Results' tab in the iKnowMed interface. The 'Filter Criteria' section includes checkboxes for 'Lab', 'Imaging', and 'Other Services', all of which are checked. The 'Abnormal Filter' is set to 'All'. The 'Lab Category' is set to 'No Filter - Show All'. The 'Result Date' filter is set to 'Date Range' with 'From: 2/15/2016' and 'To: 9/15/2016'. A search bar is present with the text 'Search Description/Result Name' and a 'SEARCH' button. Below the filter criteria is a table of results with columns for 'Flg', 'Result Name', 'Description', 'Result Date', and 'Date of Entry'. A single result is shown: 'H CBC w/ man diff' with 'Result Date' 09/14/2016 and 'Date of Entry' 09/14/2016. A callout '1' points to the 'Result Date' filter.

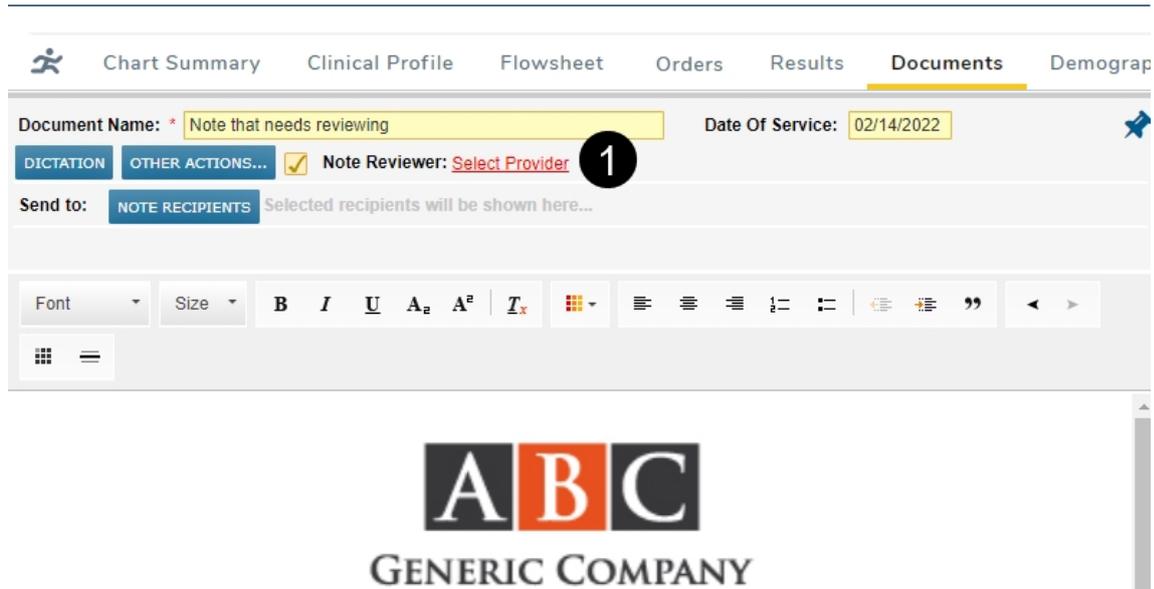
Flg	Result Name	Description	Result Date	Date of Entry
H	CBC w/ man diff		09/14/2016	09/14/2016

Easily select note reviewer when patient has multiple attendings

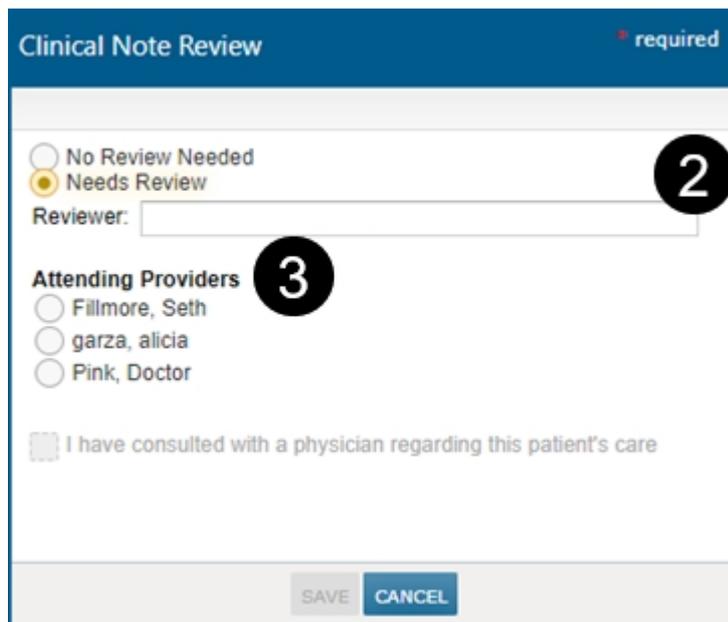
Users can easily select the appropriate physician reviewer for notes in a template that requires review, even when multiple attendings are assigned to a single patient.

Before this release, the system chose the reviewing attending despite patients having multiple attendings. To avoid sending notes to the wrong provider, users must now select the appropriate reviewer from the list of attendings.

Note templates with the **Needs Review** option turned on will display a **Select Provider** link in the **Note Reviewer** field when a patient has more than one attending (see callout 1).



Selecting this link opens a window where users can search for a provider or choose one from the list of Attending Providers (see callouts 2 and 3).



When editing these notes, users can change the assigned reviewer simply by clicking on the provider's name in the **Note Reviewer** field and choosing a new attending.

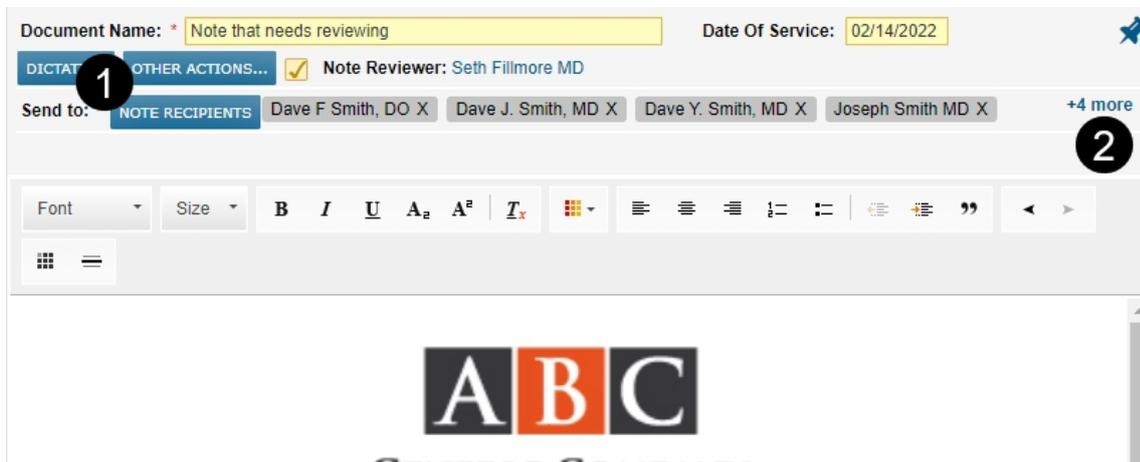
Amending these notes once they're signed clears the **Note Reviewer** field. Users must re-select the reviewer by checking the **Note Reviewer** box and choosing an attending.

Easily add and identify note recipients with enhancements to documents functionality

In iKnowMed Generation 2 version 3.0.28, we introduced the **#CopyForwardRecipients** functionality to save providers a step by automatically adding recipients from the most recently sent note to the current note.

To further improve this experience, we changed the name of the edit button to **NOTE RECIPIENTS** to clarify the purpose of button (see callout 1).

We also enhanced the appearance of the **Send to** line. If note has more than 4 recipients, the first 4 recipients will show in the **Send to** line and the others can be viewed by clicking the view more option (see callout 2).



Eliminate need to reenter dose units when ordering prescriptions

Prescriptions with dose form, dose units, and dispense units out of sync are likely invalid and may be rejected by the pharmacy. These discrepancies cause inconvenience to the patient, extra processing for the pharmacy, and rework by the physician.

In iKnowMed Generation 2 version 3.0.29, the system warns users when a mismatch exists between these fields before the order is saved (see callout 1).

02/09/2022 Atorvastatin Oral, 20 mg tablet required

1 Warning
 1. Dose form unit, dose unit, and dispense units do not match

Rx Formula Dose **QUICK SIG PICK** **SHOW DRUG FORMS** Research Option: --Please Select--

Research Planchard 53/F MRN: capresearch DOB: 06/14/1968 Ht: 64 in Wt: 99.1 lb
 Addr: n/a, n/a, n/a n/a Ph: n/a

Atorvastatin Oral, 20 mg tablet, 1 tablet orally daily . Dispense 90 Capsule, Refills: 3 Benefit 0

Form: 20 mg tablet | Dose: 1 | Unit: tablet

Route: orally | Frequency: daily | PRN:

Instructions: Instructions replace required fields | Instructions to Pharmacist:

Characters used: 22 (Max for eRx=140)
 Allow substitutions

Dispense: 90 | Unit: Capsule | Refills: 3 | Duration: 90 days

Do Not Bill Drug Do Not Bill Administration Prior Authorization #

Location, Chart Comments and Problems

Fill Method: eRx --Please Select-- Print Rx - local form printer Prescribe only - no print | Add Pharmacy

Prescribing Location: San Francisco Medical Oncology

Does not appear on Rx Chart Comments:

Associated problems: Female breast cancer * (C50.911 Malignant neoplasm of unspecified site of right female breast) **HCC** | Create a new problem

Formulary Alternatives: Loading...
 REPLACE WITH ALTERNATIVE

There may be times when users expect a mismatch, such as with eyedrop orders; therefore, the system still allows users to continue by selecting the **OK** button on the orders screen.

After selecting the button, a new warning appears to notify users that the order is incomplete or contains errors (see callout 2). Users must acknowledge the warning to continue.

By selecting **NO**, users can return to the previous screen to correct the mismatch, if needed. Users may also select **YES** to move forward with the order to account for exceptions.

macist

2

Order Incomplete

This order is incomplete or has warnings or errors. Continue ?

YES **NO**

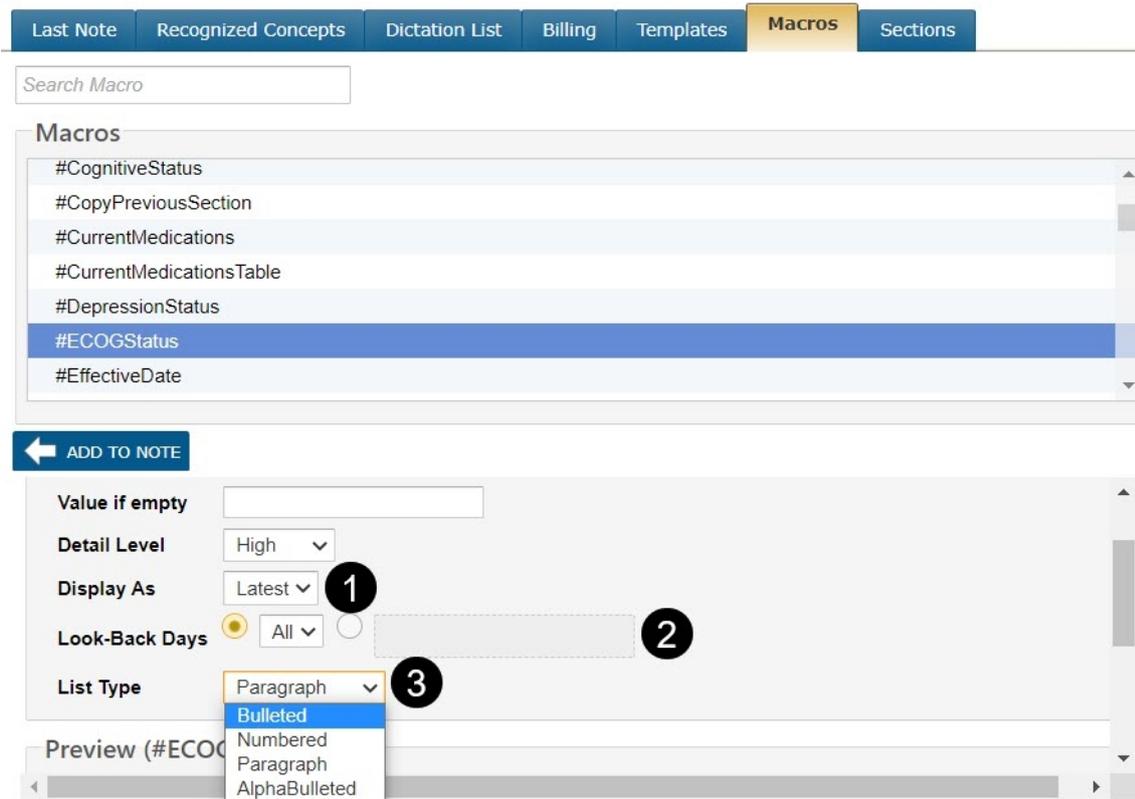
Performance Status macros reset to always show most recent value

New parameters have been added to the ECOG, Karnofsky, and Lansky performance status macros which allow increased flexibility in displaying performance scores and give research teams a higher degree of functionality when displaying scores inside clinical notes.

No change is required to existing notes unless you would like to take advantage of the greater details now available (see callouts 1-3).

These parameters include:

- **Display As:** The default option is set to **Latest**, which maintains the previous behavior of the macro. The new selection is **List**, which allows either single or multiple values to be displayed.
- **Look Back Days:** When set to **ALL**, users will see all documented performance scores. Users can also set the number of days the system will display. For example, if “0” is selected, only scores documented on the date of service for the clinical note will display.
- **List Type:** Users have the choice to display the scores in a bulleted, numbered, paragraph, or alpha-bulleted style.



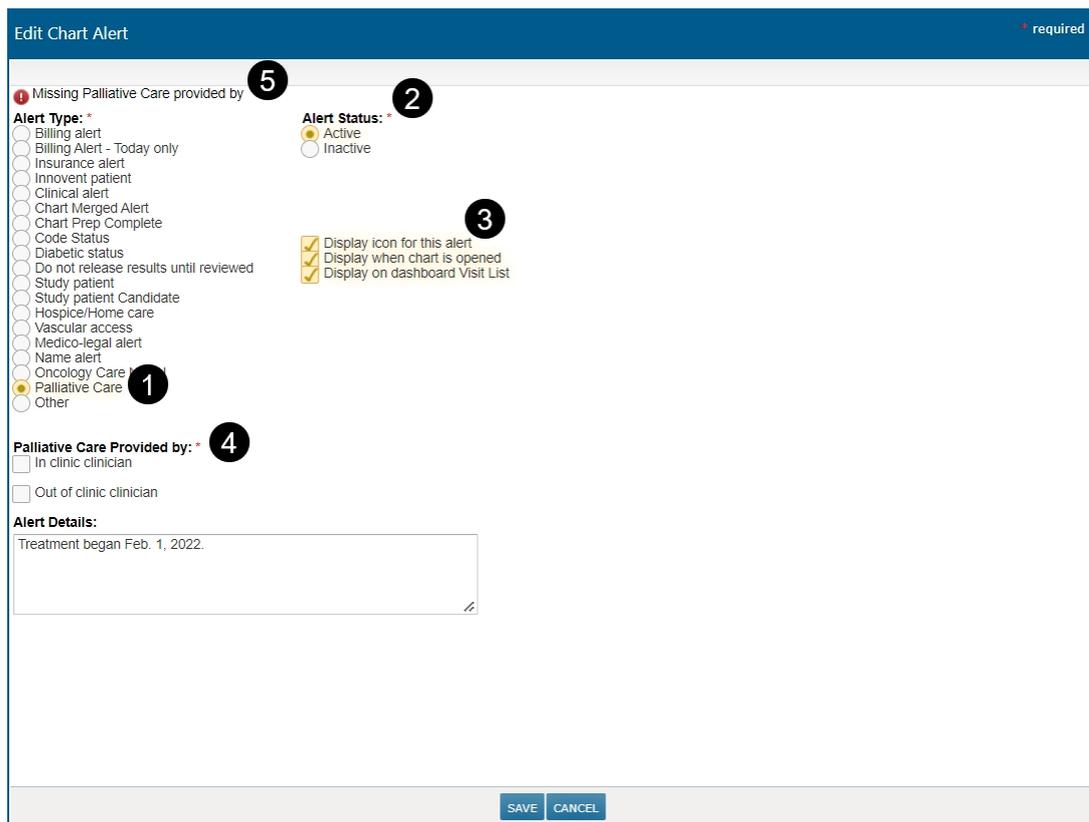
New palliative care chart alert provides visibility into patients receiving palliative care services

We've introduced a new palliative care chart alert that allows users to see which patients are receiving palliative care services. The alert will also assist practices with reporting by providing an exclusion for palliative care patients in the appropriate value-based care quality measures (MIPS 236 and MIPS 238).

To add this alert to a patient chart:

1. Go to the patient's **Clinical Profile**.
2. Select the **Chart Alerts** page.
3. Click the **ADD ALERT** button.
4. In the **Add Chart** Alert window, select the new **Palliative Care** alert type (see callout 1).
5. By default, the alert is active, and all three display options are turned on (see callouts 2 and 3). Amend these settings as needed.

6. Choose if this care is provided on-site, off-site, or both in the **Palliative Care Provided by** required field (see callout 4).
7. If this field is not completed when saving the alert, an error message will appear at the top of the window prompting you to make a selection (see callout 5).
8. Enter any additional **Alert Details** if needed.
9. Save your changes.



This alert will now display in all selected locations as a hand and heart icon (see callout 6 for example) to denote when a patient is receiving palliative care.



Prevent users from removing a signed clinical note from a patient chart

We've tightened security around signed clinical notes, making it impossible to remove a note from a patient's chart once it's been signed. The rules have not changed if a note is amended or has an addendum, but once it's signed, it cannot be removed.

The note's original author can still remove text from a signed note if it is no longer needed by selecting the **Edit** button, removing the text in the note, and saving the changes.

Users can also hide previous versions of notes by visiting their user settings, going to **Preferences > Other**, and checking the **Hide Replaced Clinical Notes** setting (see callout 1).

This setting removes all versions of the note except for the most recent. Unchecking this setting allows users to see the original version and all amended versions of a note.

The screenshot shows the 'Edit user detail' page for 'Haring, Lucy G2QA'. The 'Preferences' section is active, and the 'Other' tab is selected. Under the 'Clinical Notes' heading, the 'Hide Replaced Clinical Notes' checkbox is checked and highlighted with a red circle and the number 1. Other settings include 'Default new order date' set to 'Use practice default', 'Unfinished Charting' with 'Hide Pain Care Plan Column' unchecked, and 'Patient Search' with 'Include "Merged" patient status charts in search results' unchecked. The 'SAVE' and 'CLOSE' buttons are visible at the bottom.

Improved behavior for pending faxes in Outbound Fax Queue

New measures were put in place to automatically move faxes stuck in **Pending** for more than 10 hours to **Failure** in the **Outbound Fax Queue**. This change clarifies the **Pending** status and allows users to resend from the queue.

In addition, we will be clearing all items which were previously stuck in **Pending** and sending them to **Failure**. After the release, you may see an increase in the overall **Failure** count for your practice. Account managers communicate specific numbers to practices.

Additional Enhancements

Location (A-Z)	Details
Clinical Profile > Problems	<p>Additional enhancements have been made to the updated Problems tab, including:</p> <ul style="list-style-type: none"> • Change the status of a problem using the new drop-down feature in the Status column on the Problems List. Users can change the status of a problem to active, inactive, resolved, and removed using this drop-down. If a problem is set to resolved, users can enter the date of resolution. • Favorite a problem after adding it to the Problems List by clicking the gray star next to its name in the left-hand column. <p>For more information on these updates, visit the Updated Problems Tab User Guide.</p>
Manage > Clinical Trials	<p>We added the Lansky performance scale as a Performance Status option in the Clinical Trials Detail window. This update allows clinical trial managers to use the Lansky performance method for pediatric oncology trials.</p>
Orders tab	<p>The system no longer clears the form, dose unit, dispense quantity, and unit fields when correctly ordering a brand-name medication and unchecking the Allow Substitutions box. These fields will only clear when users set the dosage form for the brand to one not available. This update permits users to place orders for brand-name medications as needed so that the pharmacy does not substitute them for a generic.</p>
Visit List	<p>The printed Visit List now displays comments from the PMS Comments column to help practices avoid workflow disruption.</p>

Fixed Defects

Location (A-Z)	Details
Charge Capture Report	We fixed a defect that resulted in a blank charge capture report when a patient received certain medications ordered in tablet or capsule form.
Clinical Profile > Problems	We fixed a defect that resulted in inference groups being rearranged. Under the Details section, the order of all the inference groups is now static.
Documents tab	We fixed a defect causing slow loading times of the audit history when trying to view the edited, added, or amended version of a note.
Worklist Queues > Ins. Auth/Fin. Counseling	We fixed a defect that resulted in an incorrect regimen start date appearing in the worklist after users edited the regimen's properties, including a change to the cycle start day. This fix applies the correct start date, making it easier for users to find regimens in the worklist.