

July 2022 Release Notes

Version 3.0.33

Version 3.0.33 introduces the first step in our vision for iKnowMed interoperability. Additionally, there are common workflow enhancements and quality of life improvements across the application.

First steps towards iKnowMed interoperability

Interoperability facilitates organized and effective data exchange between health information systems. The ability to share the most up-to-date patient medical records, regardless of the health system, not only reduces costs but also improves patient care and enhances patient outcomes.

In the July 2022 release, we are introducing the first steps towards iKnowMed interoperability using the Carequality framework. Carequality enables nationwide care coordination by giving your practice the ability to communicate electronically and seamlessly with your community partners.

Getting started

The first step to preparing your practice for participation in the Carequality framework is to sign the Carequality service agreement in iKnowMed.

NOTE: This agreement may only be signed by one individual at your practice, and the agreement may only be signed once. Signing the agreement automatically starts to onboard your practice for enrollment in Carequality.

Your Ontada Account Manager will reach out to help your practice sign the agreement and begin the onboarding process.

Opting patients in and out of the Carequality network

After your practice is successfully enrolled in the Carequality network by our engineering team, you may begin to discuss with patients or their personal representatives if they agree to participate in the network.

Your patients may all be enrolled in the Carequality network depending on your state's laws. Regardless of those laws, you may manually opt patients in and out of the network based on their preferences.

To manually opt patients in and out of the network:

1. In the patient's chart, go to Demographics.
2. Under Patient Preferences, there is a new Carequality consent section.
3. You may edit this permission to opt the patient in or out based on their preference or based on the preference of their personal representative (see callout 1).
4. Be sure to save your changes.

The screenshot shows the 'Patient Preferences' section of a patient's chart. Under the 'Consents' heading, there is a 'Carequality' section. The 'Practice Carequality default selection' is 'Patients enrolled by default'. The 'Patient Carequality consent' dropdown menu is open, showing options: 'No selection (patient is enrolled by default)', 'Patient Opt In', 'Patient Opt Out', 'Personal Representative Opt In obo Patient', and 'Personal Representative Opt Out obo Patient'. A callout box labeled '1' points to the 'No selection (patient is enrolled by default)' option. Other sections include 'Treatment Location' (San Francisco Medical Oncology), 'Hospital', 'Laboratory', 'Pharmacy', 'In House Testing Allowed' (Please Select), 'Preferred Facility', 'Patient Reminders' (Opt Out of Reminders), and '3rd Party application access' (Yes). There are 'SAVE' and 'CANCEL' buttons at the bottom.

Find regimens associated with your location

We enhanced the Regimens logic so that search results will be limited to the regimens available at your logged-in location and that meet the diagnosis and other filter criteria.

A regimen will only be available to your location if the regimen template is not associated with any location at all, or if the template is specifically associated with your location or region. For example, if Regimen A is associated with the East location, Regimen B is associated with the West location, and Regimen C is not associated with any location, when you log into the East location, your regimen search will only find Regimens A and C. It will not find Regimen B.

NOTE: This update only applies to practices that do not use the Clear Value Plus decision support tools when ordering regimens.

The screenshot displays the iKnowMed Generation 2 interface for patient Test zggarcia (57 / F). The top navigation bar includes the patient's name and a search bar. Below this, the patient's profile is shown with a warning icon, a mail icon, and key information: DOB: 01/01/1965, MRN: testzggarcia, Attending: Multiple, Dx: Anemia, and Dx: Breast. The main navigation tabs include Chart Summary, Clinical Profile, Flowsheet, Orders (highlighted), Results, Documents, and Demographics. A secondary navigation bar shows counts for New Orders (0), Medications (0), Regimens (0), Order Review, Order History, and Drafts. The Regimen Search section is active, showing a search for 'Thrombocytopenia *' with a 'SEARCH FOR REGIMENS' button. Below this is a 'Filter regimen list' field. The Drafts section contains one entry: 'TOI- PRBC Transfusion' with 'Show Details', 'REMOVE', and 'ORDER' buttons. The Regimen History section lists several regimens: 'TOI- Taxol (175mg/m2)', 'TOI- Arsenic Trioxide', 'TOI- 5FU/Cisplatin', 'TOI- FOLFOX6, Modified', 'TOI- AC', and 'TOI- Avastin 5mg/kg', each with a 'Show Details' button. A message on the right states: 'There are no regimens currently selected. Please'.

Dynamic order dates in the Insurance Authorization Worklist

The column in the **Ins.Auth/Fin. Counseling** worklist previously labeled **Order Date** is now labeled **Order Modify Date** (see callout 1).

For rows with a status of **Not Obtained**, this date updates each time the order is edited. For regimen orders this includes edits to the regimen properties, schedule changes, adding orders, and edits to any of the orders in the regimen.

For rows with any other status, the **Order Modify Date** will be the date when the item transitioned from **Not Obtained** to its current status.

Before this release, the order date column displayed the date the order was originally created and did not dynamically change. Now, this date is more useful to the insurance authorization staff as it helps them to understand when the order changed.

Notes Review Sign Orders Admix Attach Documents Outbound Fax **Ins. Auth/Fin. Counseling** Oncology Care Model OCM Patient List Orders Qu

Filter Criteria
For faster results, select a short date range and one status

Patient: Search Patient Name or ID

Ordered Date: [Dropdown]

Planned Start Date: Next 2 weeks

Business Office Status:
 Obtained
 Not needed
 Not obtained
 Declined
 Off label
 Pending
 Archived

Reset APPLY FILTERS

Anderson, Lolita (F/62 - 04/02/1960 - 6243232123456789) + ADD ALERT AUD

Order: CT brain w/o contrast

Prim. Ins.: AETNA Insurance Start Date: 05/03/2021 Insurance End Date: 07/02/2022

Diagnosis/Problem: Non-small cell lung cancer (disorder) * Date of Dx:

ICD10: Not Documented

Appropriate Use Criteria:
Guideline: Neck Pain
CDSM Status: Incomplete Launch CDSM

Outcome: May be appropriate Decision Details AUC Alternatives

UCI:
Modifier: MH
G Code: <n/a>
CPT Code: 72130, 70470, 72127, 72129, ...

Business Office Status:
Select Authorization: [Dropdown]

Status: Not obtained
Insurance: [Select]

Reference #: [Text] Contact: [Text]

Notes:

Order Details

Patient (DOB-MRN)	Order	Physician	Start Date	Status	Order Modify Date
Anderson, Lolita (04/02/1960 - 6243232123456789)	CT brain w/o contrast	ZzDoctor, ZzMadeline	07/05/2022	Not obtained	07/05/2022
Anderson, Lolita (04/02/1960 - 6243232123456789)	Abraxane D1,8,15 + Carboplatin Q21D	ZzNubie, Madeline	07/12/2022	Not obtained	06/30/2022
Patientfa, Testfa (01/01/1970 - testfa)	Afatitinib Q30D	Purple, Doctor	07/16/2022	Not obtained	06/16/2022
Flower, Magnolia (07/07/1977 - zzfloermags)	Atezolizumab + Bevacizumab BIOSIMILAR + Paclitaxel + Carboplatin Q21D (Part 1 of 2: Induction)	zzMosley II, William	07/07/2022	Not obtained	06/16/2022
zzlssac, Dragon (07/07/1977 - zzlssacDragon)	Paclitaxel + Carboplatin + Bevacizumab (15 mg/kg) Q21D (Bevacizumab Continuation)	zzlssac, zzVictoria	07/06/2022	Not obtained	06/15/2022

GO TO CHART SAVE

Find STAT and ASAP orders more easily in the Insurance Authorization Worklist

STAT or ASAP orders now appear in the **Ins.Auth/Fin. Counseling** worklist in red font. These orders will appear first in the list by default. If you change the default sorting, the STAT and ASAP orders will remain in red font but the orders will still sort according to your selection.

Notes Review Sign Orders Admix Attach Documents Outbound Fax **Ins. Auth/Fin. Counseling** Oncology Care Model OCM Patient List Orders Qu

Filter Criteria
For faster results, select a short date range and one status

Patient: Search Patient Name or ID

Ordered Date: [Dropdown]

Planned Start Date: Next 2 weeks

Business Office Status:
 Obtained
 Not needed
 Not obtained
 Declined
 Off label
 Pending
 Archived

Reset APPLY FILTERS

Tree, Aspen (F/67 - 10/23/1954 - app123) + ADD ALERT AUD

Order: PET scan, whole body

Prim. Ins.: AETNA Insurance Start Date: 01/01/2017 Insurance End Date: 03/20/2021

Sec. Ins.: United Healthcare Insurance Start Date: 05/04/2020 Insurance End Date:

Diagnosis/Problem: Breast cancer * Date of Dx: 01/31/2019

ICD10: Malignant neoplasm of lower-inner quadrant of left female breast C50.312

Appropriate Use Criteria:
Guideline: <n/a>
CDSM Status: Incomplete Launch CDSM

Outcome: Unknown/Not Applicable Decision Details AUC Alternatives

UCI:
Modifier: MH
G Code: <n/a>
CPT Code: 78813

Business Office Status:
Select Authorization: [Dropdown]

Status: Not obtained
Insurance: [Select]

Order Details

Patient (DOB-MRN)	Order	Physician	Start Date	Status	Order Modify Date
Tree, Aspen (10/23/1954 - app123)	PET scan, whole body	Pink, Doctor	07/13/2022	Not obtained	07/13/2022
Flower, Apple Blossom (04/22/1960 - appleblossom)	PET scan, whole body	Pink, Doctor	07/13/2022	Not obtained	07/13/2022
Tree, Aspen (10/23/1954 - app123)	PET scan, whole body	Pink, Doctor	07/13/2022	Not obtained	07/13/2022
Anderson, Lolita (04/02/1960 - 6243232123456789)	Abraxane D1,8,15 + Carboplatin Q21D	ZzNubie, Madeline	07/19/2022	Not obtained	06/30/2022
Patientfa, Testfa (01/01/1970 - testfa)	Afatitinib Q30D	Purple, Doctor	07/16/2022	Not obtained	06/16/2022

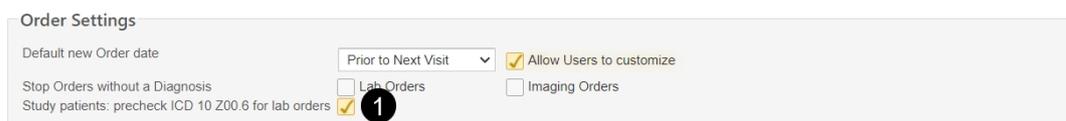
Automatically add ICD-10 Z00.6 to lab orders for patients participating in clinical trials

We know that most payers require practices to add ICD-10 code Z00.6 to claims for labs when a patient is participating in a clinical trial. To reduce errors and

ensure more accurate billing, practices can now opt to have the Z00.6 code automatically checked in the **Associated Problems** sections of these orders.

To turn on this feature:

1. Go to **Admin > Practice Preferences**.
2. Under **Order Settings**, check the box next to the new **Study patients: precheck ICD 10 Z00.6 for lab orders** option (see callout 1).



Order Settings

Default new Order date: Prior to Next Visit Allow Users to customize

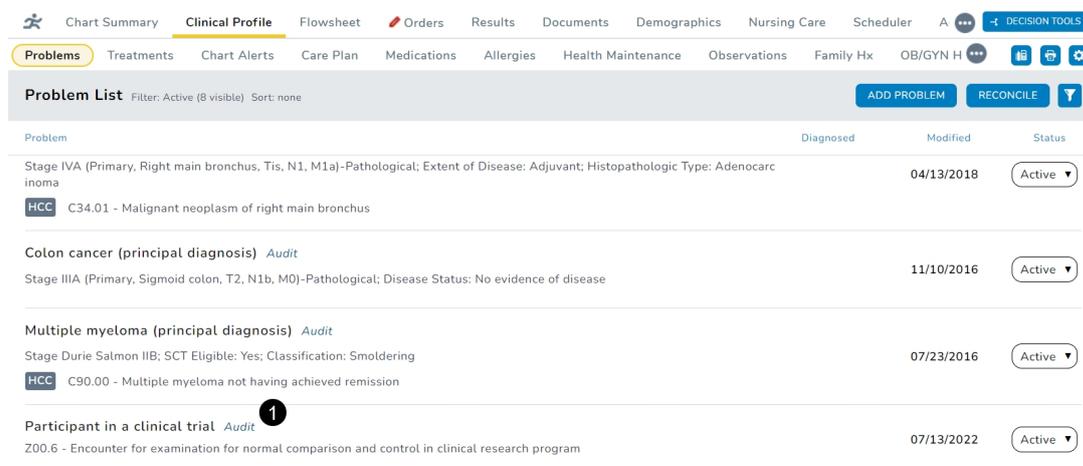
Stop Orders without a Diagnosis: Lab Orders Imaging Orders

Study patients: precheck ICD 10 Z00.6 for lab orders 1

3. Save your changes.
4. Log out and back in for the update to take effect.

To use this feature:

1. Open the chart for a patient participating in a clinical trial.
2. Navigate to **Clinical Profile > Problems**.
3. Add the Z00.6 code to the patient's **Problem List** (see callout 1).



Problem	Diagnosed	Modified	Status
Stage IVA (Primary, Right main bronchus, Tis, N1, M1a)-Pathological; Extent of Disease: Adjuvant; Histopathologic Type: Adenocarcinoma HCC C34.01 - Malignant neoplasm of right main bronchus		04/13/2018	Active
Colon cancer (principal diagnosis) <i>Audit</i> Stage IIIA (Primary, Sigmoid colon, T2, N1b, M0)-Pathological; Disease Status: No evidence of disease		11/10/2016	Active
Multiple myeloma (principal diagnosis) <i>Audit</i> Stage Durie Salmon IIB; SCT Eligible: Yes; Classification: Smoldering HCC C90.00 - Multiple myeloma not having achieved remission		07/23/2016	Active
Participant in a clinical trial <i>Audit</i> 1 Z00.6 - Encounter for examination for normal comparison and control in clinical research program		07/13/2022	Active

4. Ensure that the patient also has an active study patient chart alert (see callout 2).

Chart Summary | **Clinical Profile** | Flowsheet | Orders | Results | Documents | Demographics | Nursing Care | Scheduler | A [Decision Tools]

Problems | Treatments | **Chart Alerts** | Care Plan | Medications | Allergies | Health Maintenance | Observations | Family Hx | OB/GYN H [Icons]

Chart Alerts [ADD ALERT ...] [EDIT] [REMOVE] Filter: All Statuses | Alert Type: All | [AUDIT HISTORY]

<input type="checkbox"/>	Alert Type	Details	Alert Status	Icon/Popup	Date
<input type="checkbox"/>	Clinical alert	patient needs benadryl over 30 minutes	Active	Y/N	12/13/2016
<input type="checkbox"/>	Code Status	Do Not Resuscitate, signed 3/15/16	Active	Y/N	03/28/2016
<input type="checkbox"/>	Insurance alert	NO AUTH REQUIRED PER HUMANA CPT 99213 OFFICE VISIT CPT 85025 CBC DATE OF SERVICE 12/01/16	Active	Y/N	12/15/2016
<input type="checkbox"/>	Insurance alert	PA good thru 1/1/19	Active	Y/N	04/18/2018
<input type="checkbox"/>	Oncology Care Model alert	Episode 1 date range 9/1/16 - 6 months	Active	Y/Y	06/02/2016
<input type="checkbox"/>	Other	PLEASE DO NOT USE THIS PATIENT. USING FOR DEMO. November 2018 Taylor	Active	Y/Y	05/08/2018
<input type="checkbox"/>	Study patient	Study ABC, Screening in progress,	Active	Y/Y	09/01/2021

5. Navigate to the **Orders** tab and place an order for any lab.
6. Notice that the Z00.6 code is now automatically added to the Associated problems section (see callout 3).

Prior to Next Visit CBC w/ auto diff Prior to Next Visit from 07/13/2022 (Status: Draft) [required]

Next Available: 9 Days, 10 Days, 11 Days, 12 Days, 13 Days, 14 Days

Next Visit: 8 Weeks, 9 Weeks, 10 Weeks, 11 Weeks, 12 Weeks

Next Visit with MD: 8 Months, 9 Months, 10 Months, 11 Months, 12 Months

Next Visit with RN: 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31

Day before Next Visit: Every [] Days, Weeks, Months

Day before next MD visit: Starting [] In [] Week(s)

Day before next visit: Starting [] In [] Week(s)

Day before next visit: Starting [] In [] Week(s)

1 week prior to next visit: Starting [] In [] Week(s)

2 weeks before next visit: Starting [] In [] Week(s)

1 week prior to next visit: Starting [] In [] Week(s)

2 weeks before next visit: Starting [] In [] Week(s)

PRN: Starting [] In [] Week(s)

Standing order: Starting [] In [] Week(s)

Per Protocol: Starting [] In [] Week(s)

Per RN: Starting [] In [] Week(s)

Schedule at Patient Convenience: Starting [] In [] Week(s)

Return on Completion: Starting [] In [] Week(s)

2 weeks after completion: Starting [] In [] Week(s)

Associated problems Create a new problem

- Alcohol use
- Colon cancer *
- Estrogen receptor positive status [ER+] (Z17.0 Estrogen receptor positive status [ER+])
- Female breast cancer * (C49.0 Malignant neoplasm of connective and soft tissue of breast, face and neck) **I06**
- Multiple myeloma * (C90.00 Multiple myeloma not having achieved remission) **I06**
- Non-small cell lung cancer (disorder) * (C34.01 Malignant neoplasm of right main bronchus) **I06**
- Pancreatic cancer * (C25.2 Malignant neoplasm of tail of pancreas) **I06**
- Participant in a clinical trial (Z00.6 Encounter for examination for normal comparison and control in clinical research program) **I06**

Order Instructions

Chart Comments

Location

Ordered from Location: San Francisco Medical Oncol

Perform Location: Unspecified

Type: Select

Location: Search Locations

Bill: Insurance Research Do Not Bill (Other Reason) Clear

Enhanced clinical note audit history helps meet CMS audit requirements

We updated the **Audit History** on the **Documents** tab to ensure practices can comply with Centers for Medicare & Medicaid Services (CMS) regulations during a CMS audit.

When viewing the **Audit History** for a clinical note, users will now see a button that allows them to print the history (see callout 1).

We also hyperlinked the statuses in the history, so users can click each one and see the exact changes made (see callout 2).

Document Audit History - Evergreen Tree (45/F)				
System Date/Time (CDT)	Service Date	User, User ID	Document	Action
07/07/2022 5:15 PM	07/07/2022	Lucy G2QA Haring, lhaipha	Follow Up	Signed ²
07/07/2022 5:15 PM	07/07/2022	Lucy G2QA Haring, lhaipha	Follow Up	Amended
07/07/2022 5:15 PM	07/07/2022	Lucy G2QA Haring, lhaipha	Follow Up	Replaced
07/07/2022 5:15 PM	07/07/2022	Lucy G2QA Haring, lhaipha	Follow Up	Signed
07/07/2022 5:15 PM	07/07/2022	Lucy G2QA Haring, lhaipha	Follow Up	Added

PRINT CLOSE ¹

If the note was signed, the recorded history also displays the signee's first name, last name, credentials, signing date, signing time, and time zone (see callout 3).

Document Audit History - Evergreen Tree (45/F)

[Back](#)

07/07/2022 5:15 PM Lucy G2QA Haring, lhaipha	05/04/2021, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, Cardiology Consult, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, RTC MD, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, RTC MD, Perform Date: 06/06/2017, Associated problem(s): Female breast cancer * (C50.211) ; 01/30/2017, EKG, Perform Date: Prior to Next Visit, Perform Location: Central Region-Boulder Clinic, Associated problem(s): Female breast cancer * (C50.211) ; 01/30/2017, EKG, Perform Date: Prior to Next Visit, Perform Location: Central Region-Boulder Clinic, 10/27/2016, RTC MD, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, RTC MD/Lab, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, Therapeutic phlebotomy (procedure), Perform Date: 08/02/2016, Associated problem(s): Female breast cancer * (C50.211) ; 09/15/2021, CA 125, Perform Date: 10/20/2021, Associated problem(s): Female breast cancer * (C50.211) ; 09/15/2021, CBC w/ auto diff, Perform Date: 10/20/2021, Associated problem(s): Female breast cancer * (C50.211) ; 09/15/2021, CMP, Perform Date: 10/20/2021, Associated problem(s): Female breast cancer * (C50.211) ; 03/12/2021, CBC w/ auto diff, Instructions: Testing how this appears, Perform Date: 03/19/2021, Associated problem(s): Female breast cancer * (C50.211) ; 03/12/2021, CMP, Perform Date: 03/19/2021, Associated problem(s): Female breast cancer * (C50.211) ; 03/12/2021, LDH, Perform Date: 03/19/2021, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, CBC w/ auto diff, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, CBC w/ auto diff, Perform Date: 06/06/2017, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, CMP, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 05/02/2017, CMP w/ LDH, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, CBC w/ auto diff, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, CMP, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, Ferritin, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, Folate, serum, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, Reticulocyte count, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 10/27/2016, TIBC, Perform Date: 01/09/2017, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, Basic Metabolic Panel, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, CBC w/ auto diff, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, CMP, Perform Date: Prior to Next Visit, Associated problem(s): Female breast cancer * (C50.211)
07/07/2022 5:15 PM Lucy G2QA Haring, lhaipha	10/18/2016, CT, Perform Date: 10/19/2016, Associated problem(s): Female breast cancer * (C50.211) ; 10/18/2016, CT, Perform Date: 10/20/2016, Perform Location: Imaging Center, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, CT chest w/ & w/o IV contrast, Perform Date: STAT, Associated problem(s): Female breast cancer * (C50.211) ; 08/02/2016, PET/CT scan, whole body, Instructions: Every 6 months per protocol, Perform Date: ASAP, Associated problem(s): Female breast cancer * (C50.211)

Physician Name, MD

Send copy of note to:

Electronically signed by Lucy G2QA Haring RN 07/07/2022 03:15 PM PDT ³

(Amended) Electronically signed by Lucy G2QA Haring RN 07/07/2022 03:15 PM PDT
 Electronically signed by Lucy G2QA Haring RN 07/07/2022 03:15 PM PDT

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Additional Enhancements (A-Z)

Admin > Practice Preferences

The system now requires that your practices specify a default CrCl Formula to be used when ordering drugs such as Carboplatin. If your practice previously specified a preference, this will not be changed. If your practice has not previously specified a method, it will default to Cockcroft-Gault-Actual Body Weight. This change was made to prevent an application error that occurred when the formula was not specified.

Documents tab > Macros

We updated the **#Radiotherapy** macro to include the therapy end date if one was documented in the patient chart. If an end date has not been documented, it will not appear in the text.

Nursing Care Tab

The new **Incident To Details** section allows clinical staff to chart the evidence that **Incident To** physician was available during treatment. Clinical staff can also edit or remove this information for the **Date of Service** as needed. Lastly, this information will display on the Nurse Note for the physician to sign.

Practice Preferences > Physician Signature

Practices can now opt to send Nurse Notes to be signed by either the **Incident To Physician** or the **Attending Physician**. The preference is set to **Incident To Physician** by default if your practice already sends Nurse Notes for signing. You must manually update the preference if you wish the notes to be signed by the attending.

Results tab and Worklist Queues > Lab

Lab results now print with the name of the clinic the user logs into instead of the practice. If the user did not select or default to a location upon login, the practice name prints on the report instead.

Worklist Summary

As requested, we added the **Unified Sign Queue (USQ)** to the **Worklist Summary** for users with **View** and **Full** permission to the USQ.