

September 2022 Release Notes

Version 3.0.34

This release includes important updates regarding the release of signed clinical notes to the patient portal, updates to messaging workflows, and many other important enhancements and fixes.

Cures Act update: enable the release of signed clinical notes to patient portals

The 21st Century Cures Act requires EHRs to enable the release of signed clinical notes to patient portals. Last year, [we shared instructions](#) detailing how to manually download clinical notes from iKnowMed and upload them into your patient portal.

In 2022, we are introducing functionality to help practices automate the release of signed clinical notes to patient portals from iKnowMed.

[Starting in January 2022](#), your practice was able to begin determining which clinical note template types would be sent to patient portals once the notes were signed.

The next step, enabling the **Release to Patient Portal** practice preference, is now available (Super User access required). Your practice's patient portal plays a role in when you should enable it.

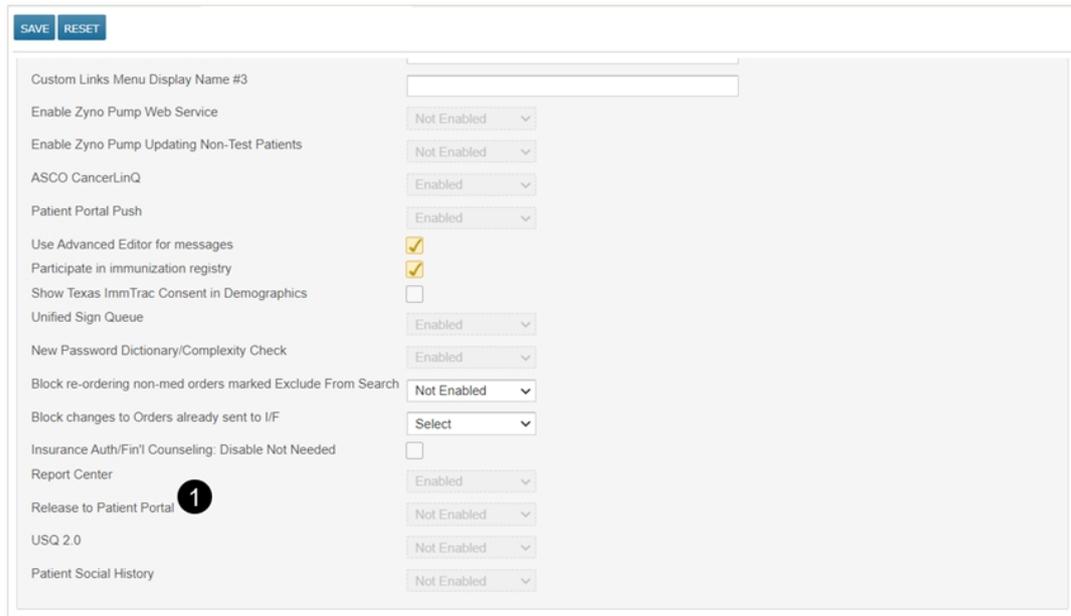
- **Practices using My Care Plus** can enable the preference now. Even when enabled, signed clinical notes (on the practice-designated template types) will only start being sent after the September iKnowMed release on Sunday, Sept. 17, 2022.
- **Practices using Navigating Care** will be informed as soon as the portal is able to accept signed clinical notes from iKnowMed.

Getting Started

Signed clinical notes **will not** be released to the patient portals unless a practice Super User enables this setting in **Practice Preferences**.

To turn on this setting:

1. Go to **Admin > Practice Preferences**.
2. Under **Other Features**, set the **Release to Patient Portal** setting to **Enabled** (see callout 1).
3. Save the change.
4. Be sure to log out and back in again for the update to take effect.



The screenshot shows the 'Practice Preferences' settings page. At the top left, there are 'SAVE' and 'RESET' buttons. The settings are listed on the left, and their current status is shown on the right. The 'Release to Patient Portal' setting is highlighted with a red circle and the number 1. The settings are as follows:

Setting Name	Current Status
Custom Links Menu Display Name #3	[Empty text field]
Enable Zyno Pump Web Service	Not Enabled
Enable Zyno Pump Updating Non-Test Patients	Not Enabled
ASCO CancerLinQ	Enabled
Patient Portal Push	Enabled
Use Advanced Editor for messages	<input checked="" type="checkbox"/>
Participate in immunization registry	<input checked="" type="checkbox"/>
Show Texas ImmTrac Consent in Demographics	<input type="checkbox"/>
Unified Sign Queue	Enabled
New Password Dictionary/Complexity Check	Enabled
Block re-ordering non-med orders marked Exclude From Search	Not Enabled
Block changes to Orders already sent to I/F	Select
Insurance Auth/Fin'l Counseling: Disable Not Needed	<input type="checkbox"/>
Report Center	Enabled
Release to Patient Portal	Not Enabled
USQ 2.0	Not Enabled
Patient Social History	Not Enabled

Releasing signed clinical notes by template type

In January 2022, practices were given the ability to designate which types of signed clinical notes should be released to the patient portals.

After a Super User enables the **Release to Patient Portal** practice preference, your practice can begin this process.

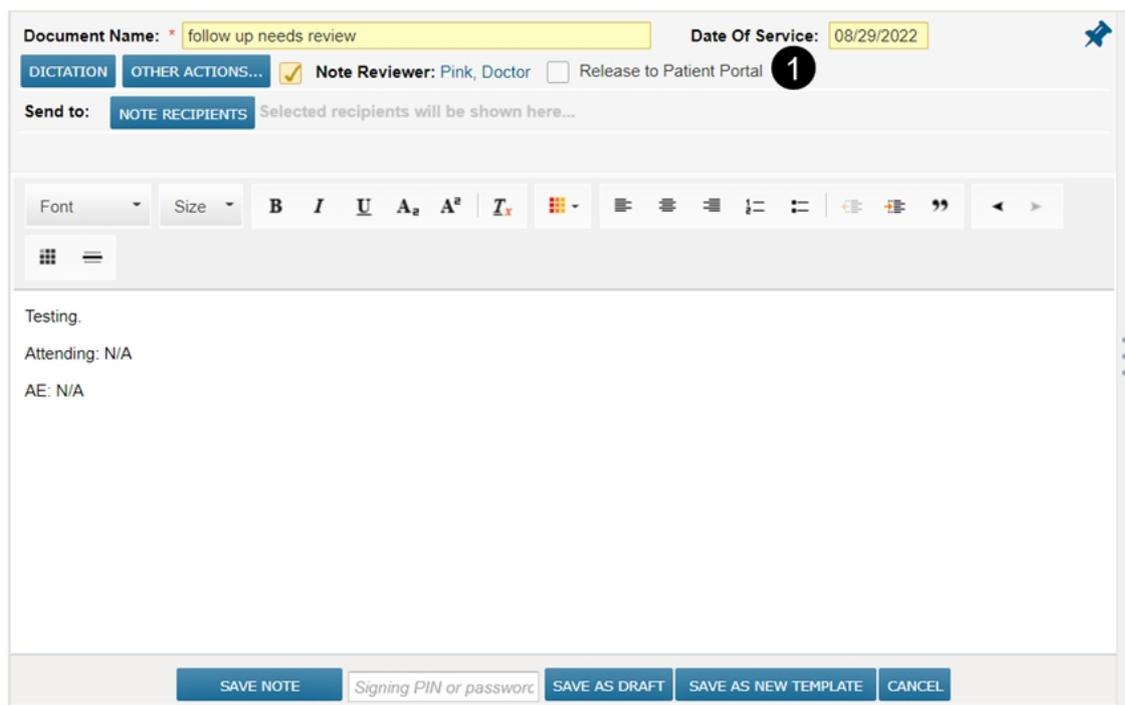
NOTE: Any clinical note templates created after the September release will not be set to release to patient portals. Practices must manually activate this setting if they wish for these types of signed notes to be automatically sent to patients.

For more information and step-by-step instructions, view the [January 2022 release notes](#).

Releasing signed clinical notes on an individual basis

Any clinical note template set to **Signed Note Available in Portal** will automatically activate a new box in a note called **Release to Patient Portal** (see callout 1). Providers can always uncheck this box to keep a note from being released to the portal, as needed.

This setting allows your practice to comply with state laws that call for withholding certain types of notes when appropriate.



Document Name: * follow up needs review Date Of Service: 08/29/2022

DICTIONATION OTHER ACTIONS... Note Reviewer: Pink, Doctor Release to Patient Portal 1

Send to: NOTE RECIPIENTS Selected recipients will be shown here...

Font Size B I U A₂ A² T_x

Testing.
Attending: N/A
AE: N/A

SAVE NOTE Signing PIN or password SAVE AS DRAFT SAVE AS NEW TEMPLATE CANCEL

Navigate while messaging using pinned chart messages

As requested, providers can now compose or reply to messages regarding a patient and access the patient's chart at the same time.

When choosing to compose or reply to a message inside a patient's chart, the messaging feature will be pinned on the left side of the screen. The patient's chart will move to the right, keeping it accessible and clickable throughout the messaging process.

This enhancement only applies when messaging is accessed from:

-
- Envelope icon on the patient banner
 - Documents tab
 - Results tab
 - Interval Summary

NOTE: Only one feature at a time can be pinned in the EHR. This means that the messaging feature will not pin if another feature in the patient chart is already pinned. In those cases, the messaging feature will continue to display in a pop-up window.

View regimen details without regimen ordering permission

Clinicians, billing, and other office staff can now access regimen details, without needing permission to order regimens. The access is granted if the user account has the new **Regimen > View** permission or **Regimen > Full** permission (see callout 1).

With this permission, users will see the cycle day approval status and business insurance status when clicking the regimen treatment day cell on the flowsheet. Additionally, the links to **Print Scheduled Orders**, **Print Treatment Day Approval**, **View Regimen Properties**, and the **Audit History** will be accessible (see callouts 2, 3, and 4).

NOTE: Since regimens contain medication and other types of orders, a user cannot have view or full regimen permission if they do not have at least view or full permission for creating other types of orders.

1 Edit user detail - Dopp, Ashley

User Details

Permission

Preferences

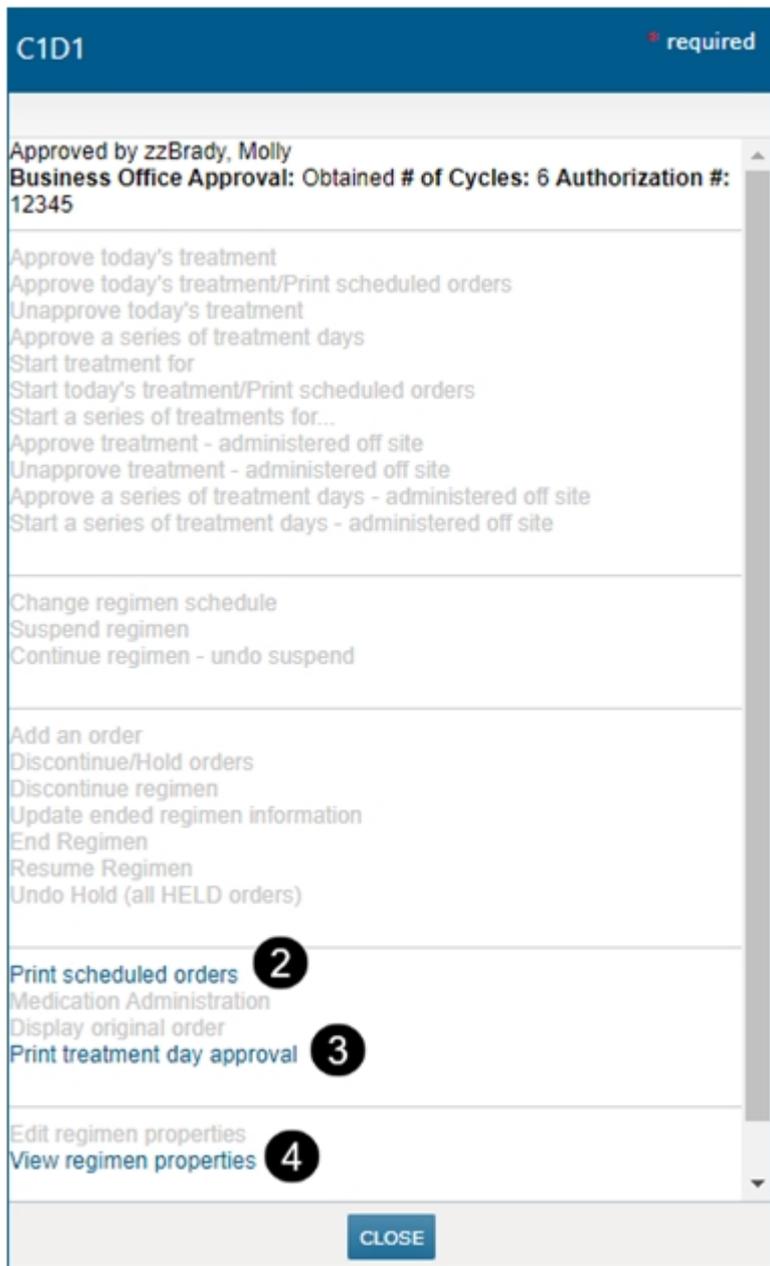
Visit List	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unfinished Charting	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Patient Chart			
	NONE	VIEW	FULL
Admix	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chart Summary Library	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Clinical Profile	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Demographics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Flowsheet	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Nursing Care	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
CDS Tools	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
New Problem List	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Results	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Results, Interface	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Vitals	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Medication Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Non-Medication Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Regimen Orders	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Worklist Queues			
	NONE	VIEW	FULL
Admix	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Attach Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
eRx Message	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Imaging	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Ins. Auth/Fin. Counseling	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Lab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Notes Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Orders Queue	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Interface Orders Queue	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Admin Menu			
	NONE	VIEW	FULL
Billing Organizations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
CCDA Batch	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Document Types	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Duplicate Therapy Alerts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
External Providers	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Insurance Carriers	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Interface	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Locations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Practice Preferences	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Report Center	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Resources	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Groups	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Groupings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Terms Of Service	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chart Merge	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Users	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Profiles	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Manage Menu			
	NONE	VIEW	FULL
Clinical Note Templates	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Clinical Trials	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Dispensables	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Inferences	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Labs/Imaging & Services	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Medications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Order Sets	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Orderable Groups	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Problem Groups	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Problems	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



View regimen properties for all regimens

Users can now view regimen properties for all regimens as opposed to just ended or discontinued regimens. On the treatment day menu, select **View Regimen Properties**. The properties include basic information about the ordered regimen as well as the **Clear Value Plus Decision Details**, as shown below.

Patient Regimen Details * required

Regimen Name * (as it will appear on the flowsheet)
 Docetaxel D1 + Carboplatin D1 + Trastuzumab D1 (TCH) Q21D 1b Trastuzumab D1 Q21D (D)

Cycle * **Starting On** * **Order Created** **Start Date**
 21 6 1 1 02/22/2018 02/22/2018
 Length # of Cycles Cycle Day

Changes to the regimen schedule will take effect from C1D1 (currently, 11/07/2018) to end of the regimen

Patient Height / Weight **BSA**
 (01/17/2020): 170.18 CM / 83.91 KG 1.99 m2

Associated Problem * **Line of Therapy** * **Stage** **Treatment Intent**
 Female breast can. Adjuvant SA Select

Regimen Comments **Instructions to Ordering Provider**
 To be given with Docetaxel D1 + Carboplatin D1 + Trastuzumab D1 (TCH) Q21D 1b Trastuzumab D1 Q21D (Trastuzumab Only) and be followed by Docetaxel D1 + Carboplatin D1 + Trastuzumab D1

Clear Value Plus Decision Details
 Decision recorded by ZZGray, Rob on 02/22/2018 [View Decision Details](#)
 Value Pathway
 NCCN Guideline

Emetic potential: Emetic Risk: High (>90%)
 FN potential: Febrile Neutropenia (FN) Risk: High (>20%)

References
Patient Education
 Docetaxel + Carboplatin + Trastuzumab (TCH)

Estimated Infusion time
 2 hours, 30 minutes

Requires Financial Approval

Ordered from Location* Central Region-Souder Clin

Perform Location
 Unspecified-to be completed by Scheduler
 Specified
 Type Select Location Search Locations

CANCEL

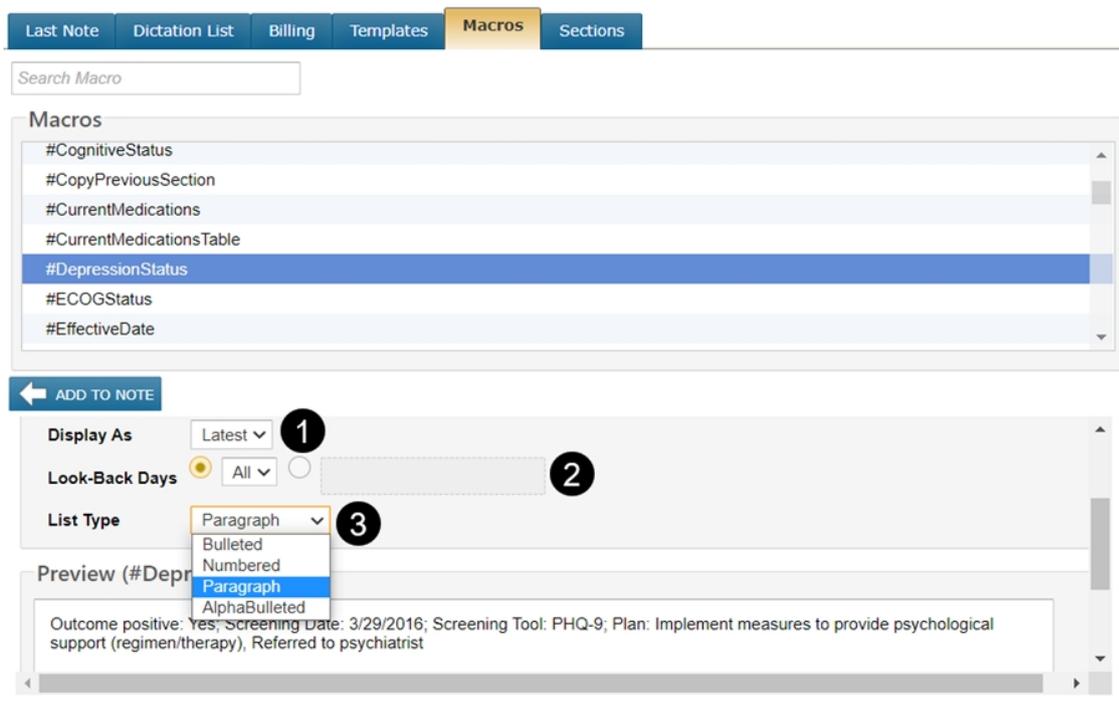
Depression Status macro resets to always show most recent value

New parameters have been added to the **#DepressionStatus** macro to 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.



Additional Enhancements (A-Z)

Documents Tab

If a clinical note is amended or edited after the Date of Service, users will be prompted to confirm that they want to update the macros. Macros will no longer auto-update.

Message Center

We received feedback from practices that it was difficult to search for **Direct Exchange** users to associate with the **From** field when sending **External Messages**. We updated this feature so that it is no longer a dropdown. Now users can search for other users by typing in a name and narrowing the list of direct exchange addresses for easier use.

Nursing Care tab and CCDA documents

For providers treating pediatric patients, iKnowMed Generation 2 will now capture and display the percentiles for the BMI, height for weight, and head circumference on pediatric **Growth Charts** based on the vitals entered and saved

by providers. iKnowMed Generation 2 will also include these percentiles on the **Clinical Summary**, **Clinical Chart**, or **Referral CCDA** attachments.

Fixed Defects (A-Z)

Documents Tab

The **#Problems** macro will now properly display **No Alcohol use** or **No Tobacco/Nicotine use** in a clinical note consistent with a patient's **Problems List**.

Worklist Queues > Unified Sign Queue

When a user cleared the **Unified Sign Queue** but did not close it, the queue would stay focused on the bottom of the list. This is now fixed, and the queue will focus on the top of the list, which will stop the system from prompting providers to sign off before viewing added items in the queue.

iKnowMed Mobile Updates

Enhancements

- The new Regimen card in the **Patient Chart** shows the regimen name, individual drugs, start and end dates, status, instructions, and dosage for the active regimen. Tap the card to view additional regimen information.
- User groups and individual users appear in collapsible sections when searching for recipients while composing a message, making it easier to find the desired recipient when a search returns many results.

Fixes

- An issue resulting in the incorrect column being highlighted when viewing lab results has been resolved.
- An issue resulting in the navigation bar becoming obscured while viewing documents has been resolved.