Ontada Health e-Registration Release Notes

April 17, 2025

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

New Patient Intake Summary PDF

Practices will receive the new Patient Intake Summary PDF after a patient completes electronic intake forms. This PDF provides a consolidated view of patient-provided information, helping practices quickly review key details in a single document without navigating multiple forms.

How it works

- **Expanded Content**: The PDF consolidates information from multiple forms, eliminating the need to review each form separately. Included forms:
    - Patient Information
    - Past Medical History
    - Medications and Allergies
    - Social Habits
    - Lifestyle and Work
    - Preventative Care and Reproductive History
- **Clear Disclaimer**: A statement at the top of the PDF clarifies that this document summarizes patient-provided information and advises users to check the patient's chart for a full record.
- **Streamlined Format**: The PDF uses a single column for each table of responses provided by the patient and reduces excess white space, making it more concise while maintaining readability.
- **Automated Generation:** Once a patient completes at least two intake forms, a summary PDF is automatically generated at 1:00 a.m. CT on the day of the patient's appointment and sent to the Documents tab in iKnowMed.
- **Smart Delivery**: A summary PDF will not be generated if the patient does not complete any forms, and only one PDF will be created per day, even if the patient has multiple appointments.

MISSOURI CANCER
ASSOCIATES

Bag Pack
DOB: 09/09/1990
MRN: BPQ1234
Phone: -

Patient Intake Summary
Generated on 03/14/2025 at 08:02PM EDT

This is a summary of the patient-provided information. Please review the patient's chart for a comprehensive view of the patient's information.

Hormones

Are you currently using any form of hormones (ex: testosterone replacement therapy)?	Yes
Please specify	ds

Sexual Health

Have you experienced impotence (Erectile Dysfunction)?	Yes
Do you have any sexual health concerns (reduced sex drive, pain during intercourse, etc.)?	Yes
Please specify sexual health concerns. (optional)	sd

Immunizations

Date of Last Pneumonia Vaccine	03/05/2025

Date of Last Flu Vaccine	03/05/2025
Date of Last HPV Vaccine	03/05/2025
Date of Last Hepatitis B Vaccine	03/05/2025

1st Covid-19 Vaccine

Date	03/05/2025
Manufacturer	Moderna

2nd Covid-19 Vaccine

Date	03/05/2025
Manufacturer	Janssen/Johnson & Johnson

Latest Covid-19 Vaccine Booster

Date	03/05/2025
Manufacturer	Pfizer/BioNTech

Screenings

Date of Last Colonoscopy	03/05/2025
Date of Last Mammogram	03/05/2025

Statuses provide visibility into sent forms

To prevent duplicate forms from being sent when patients schedule additional appointments for different specialties (e.g., radiology), we're introducing new statuses in the Send Forms queue. These statuses will display in the following locations:

- The **Sent Forms** table under Bulk Actions > Send Forms > Sent Forms.
- The **Sent Forms Summary** window when sending forms from the Sent Forms page, in a new **Status** column in the **Patients** table.

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New sent form statuses

Note: When describing a form as "blocked" below, this refers to forms that were *not sent because the patient previously completed the form within the past 90 days.* The 90-day timeframe can be configured by your practice as needed.

- **PARTIALLY SENT (callout 1):** Appears when some, but not all, forms in a batch are blocked from being sent.
    - Applies when multiple forms are sent to a patient, but at least one is blocked.
    - Appears if a single form is sent to multiple patients, but at least one of patient's form is blocked.
    - Appears if multiple copies of the same form are sent to multiple patients and some of the forms are blocked.
    - **Hover message:** "These forms were not sent to this patient because they have recently been completed: Form Name, Form Name..."

- **NOT SENT (callout 2)** – Appears when all forms in a batch are blocked.
    - Applies when a single form sent to one patient is blocked.
    - Applies if multiple forms are sent to a patient and all are blocked.
    - Applies if multiple copies of the same form are sent to multiple patients and all are blocked.
    - **Hover message:** "All forms were not sent because they have recently been completed: Form Name, Form Name..."

- **SENT (callout 3)** – Appears when no forms are blocked (existing behavior).

Automatic replies for text messages

Patients who reply to text messages from Ontada Health e-Registration will now receive an automatic response.

This applies to text messages sent for:
- A newly assigned form
- A form reminder

- A confirmation that a form was completed

The automatic reply will state: *"This SMS address is not monitored. For Ontada Health's Technical Support, please call 1-855-887-6788. For other assistance, please call your office."*

Patients will receive only one automatic reply per day, no matter how many times they reply within that day.
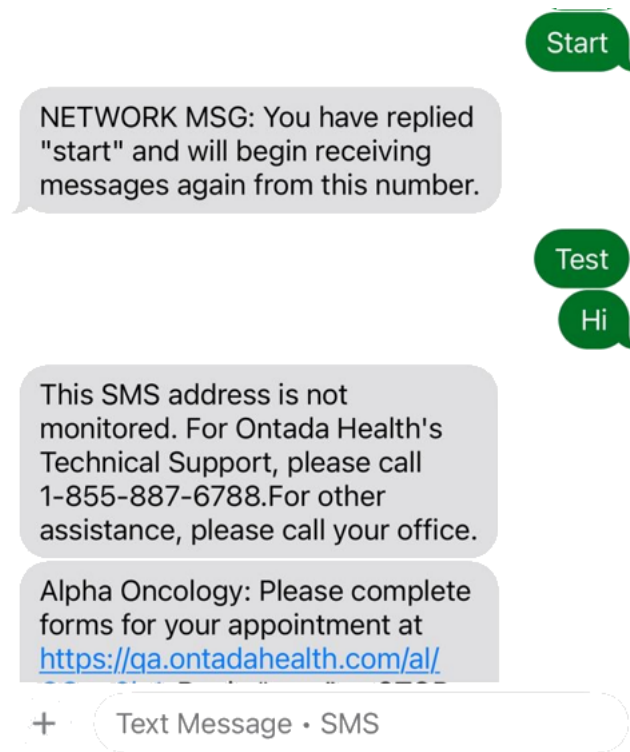
Help link added to patient experience

After successfully authenticating their identity and entering the e-Registration experience, users can access help through two options: a **Help** button located at the top of every page (callout 1) and a **User Help Content** link at the bottom (callout 2).

When patients click either of these options, they will be directed to our enhanced Help site at https://patientportal.help.ontada.com.

The Help site offers step-by-step instructions on accessing and using the e-Registration experience, a search field to quickly find relevant topics, and a menu for easy navigation to key help articles.

New Sent Forms Report

The **Sent Forms Report** can help practices track e-Registration form activity and ensure staff are utilizing the system effectively.

Key features

- Displays all sent forms, including those sent to both restricted and non-restricted patients.
- Provides details on when a form was sent, who from the practice sent it, patient information, form name, and form status.
  - **Note:** The Sender Location column will display "N/A" until the May 2025 release. After that release, the column will automatically populate with the sender location information.
- Shows up to **1,000 rows** in the report view. To access all results, users can download the **Excel version** of the report.

This new report enhances visibility into form completion workflows, helping practices monitor and optimize their workflows.

Sent Forms Report

Time Sent	Sender Username	Sender Name ↑	Sender Location	Patient MRN	Patient Name	Patient Treatment Location	Form Name	Form Status
03-17-2025 11:38:49 A…	amolg2qa2	Amol g2qa2	N/A	AP2459056	L6261303, AutoP…	Fremont	Consent for Patient Ph…	Completed by Patient
03-17-2025 09:47:56 A…	amolg2qa2	Amol g2qa2	N/A	AP5137983	L2270153, AutoP…	Fremont	Consent for Patient Ph…	Completed by Patient
03-17-2025 09:13:31 P…	Ashwinig2qa2	Ashwinig2qa2QA…	N/A	sixhundred	sixhundred, acco…	Xmiyjvyv	zzDO NOT SEND - Me…	Delivered, But Not Star…
03-17-2025 09:09:12 P…	Ashwinig2qa2	Ashwinig2qa2QA…	N/A	sixhundred	sixhundred, acco…	Xmiyjvyv	zzDO NOT SEND - Me…	Completed by Patient
03-17-2025 02:05:14 P…	Ashwinig2qa2	Ashwinig2qa2QA…	N/A	sixhundred	sixhundred, acco…	Xmiyjvyv	zzDO NOT SEND - Me…	Withdrawn by System -…
03-17-2025 01:48:02 P…	Ashwinig2qa2	Ashwinig2qa2QA…	N/A	sixhundred	sixhundred, acco…	Xmiyjvyv	zzDO NOT SEND - Me…	Completed by Patient
03-17-2025 01:30:29 P…	Ashwinig2qa2	Ashwinig2qa2QA…	N/A	sixhundred	sixhundred, acco…	Xmiyjvyv	zzDO NOT SEND - Me…	Withdrawn by System -…

1-20 of 25 rows

Additional enhancements

Sent Forms

- The Appointment/Due Date filter on the Sent Forms page now matches the time zone used in the Appointment/Due Date column of the table. The time zone is determined by the iKnowMed location selected by the user upon login. This means that both the filter and the table will consistently display dates and times in the user's local time zone.

Reports

- All reports will now show a maximum of 1,000 rows in the report view. To access all results, users can download the Excel version of the report.
- All reports will now default to display data from the last 7 days. To view more data, users can still use any available date range filter to view data from a 30-date range.