

5.4.0.1 EHR Release Notes for Client Distribution

Release Summary

Version 5.4 delivers significant compliance and clinical enhancements, including the full **HTI-1-2025** branch for EHR certification. The release advances FHIR/USCDI v3 interoperability, adds Social Determinants of Health (SDOH) workflows, expands demographics for equity reporting, and introduces Electronic Case Reporting (eICR).

What customers will notice: SDOH forms and goals are now available in the encounter; demographics include tribal affiliations, occupation/industry, and sexual orientation (certification specs); online scheduling supports provider selection; and the portal uses the new Infix theme and branding. Provider import, barcode options for labs, and route sheet improvements streamline admin workflows. Notable fixes address SSO payment processing, scheduler warnings, and HL7 integration (phone normalization, character encoding, notes handling).

Client Facing Changes Details

• New options with patient demographics

- Added Deceased Date, Preferred Name, Gender Identity, Sexual Orientation, Preferred Pronouns, Tribal Affiliation, and Guardian

These modifications are causing the Demographic view to display the red triangle even if required information is complete. That view was replaced with the Patient Summary multiple years ago, and the demographic view is no longer supported.

DEMO VIEW:

PATIENT SUMMARY:

To enable and disable views, click on the pencil icon at the bottom left of a patient chart and Enable/Disable the Patient Summary and Demographic Summary.



NOTE: For Preferred Name and Pronouns, this will be enhanced to display in a more useful location but is currently just visible inside the patient demographic edit screen

Race & Ethnicity: For certification, we are required to list this as 1 entry, but some interface that we have are still requiring it as 2. Our development team made some modifications to satisfy both scenarios. The default will display with the main race options, and the Ethnicity selection at the bottom. Selecting both will be required for clients submitting immunizations to LINKS.

The screenshot shows a form titled "Race & Ethnicity" with a dropdown menu set to "Choose one or more races or ethnicities". Below this are several sections with checkboxes: "Sexual Orientation" (Refused to Answer), "Pronouns" (American Indian or Alaska Native, Asian, Black or African American), "Tribal Affiliation" (Asian), "Mother's Maiden Name" (Native Hawaiian or Other Pacific Islander), "Emergency Contact" (White, Other Race), "Guardian" (White, Other Race), "Related Contact" (White, Other Race), "Injury Date" (Hispanic or Latino), "Financial Class" (Not Hispanic or Latino), and "Legacy Balance".

If you click on one of the races, the options will expand. See 3 examples below

The first example shows a list of checkboxes for Asian sub-groups: Asian, Asian Indian, Bangladeshi, Bhutanese, Burmese, Cambodian, Chinese, Taiwanese, Filipino, Hmong, Indonesian, and Tagalog. The second example shows checkboxes for Black and African American sub-groups: Black, African American, African, Botswanan, Ethiopian, Liberian, Namibian, Nigerian, Zainian, Bahamian, and Barbadian. The third example shows checkboxes for White and other European sub-groups: White, European, Armenian, English, French, German, Irish, Italian, Polish, Scottish, and Middle Eastern or North African.

LINKS BUG FIX: At start of this release, we learned the immunization submissions to the LINKS registry were failing, missing the patient ethnicity segment. The root cause was a conflict introduced by HTI-1 certification, which consolidates Race and Ethnicity into a single combined field on the demographics screen. The LINKS registry (and most third-party immunization registries) continue to require Race and Ethnicity as two separate HL7 entities. The fix preserves the unified display for users while correctly splitting the values behind the scenes when constructing HL7 messages for LINKS submission.

Clients who report LINKS will continue to have to enter something into ethnicity AND race.

For Ethnicity, LINKS only accepts Hispanic/Latino or Not Hispanic/Latino

To make it easier for them to see and get to the ethnicities, the team collapsed all the sub-ethnicities under their respective groups. They can still click on any group to see all the individual choices.

- **SDOH options added:** Please let our team know if you'd like to configure any of these options
 - Assessment, Goal & Intervention, Problem
 - Assessment section: Option to enable SDOH questionnaires. Uses LOINC code. Item would file into SDOH box in chart
 - Goal section: is under the plan once enabled, and uses ICD-9 or SNOMED codes
 - When inputting a patient problem, there is an option to select if it is SDOH

Testing box

- New lab category for Clinical Tests
- Checkbox “Image Expected?” now says “Diagnostic Image”

Additional options added to the Health Status Assessments (Evaluations in History section)

- Smoking (12 SNOMED codes as options)
- Function (LOINC codes as options)
- Cognitive (LOINC codes as options)
- Disability (LOINC codes as options)
- Pregnancy (pregnant, not, intent, unknown as options)

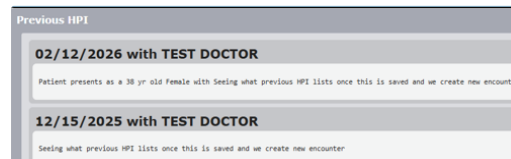
Problems section now has the option for Date of Diagnosis and Resolution

Reconciliation Screen: Enhancements were made to the to be more user friendly with progress bar and help

Patient Portal Enhancements

- New **Privacy** tab under “Your Preferences” . Patients can request restrictions on demographic data
 - Selected data is excluded from Portal View and CCDA. This is a certification requirement.

- **Previous HPI:** Provider name added to the Previous HPI display



SOFTWARE FIXES

- Financial field no longer rounding with insurance deductibles
- Fix for advanced forms cutting off in the portal
- Added provider selection to online scheduling
- Route sheet improvements: Appt Date on separate line from Appt Time to prevent overlap with provider name

CERTIFICATION REQUIRED CHANGES

General Changes

- User Interfaces and Core Features
- Patient Demographics
- Added support for Date of Death, Tribal Affiliation, Sexual Orientation, Gender Identity, Related Person, and Occupation.
- Clinical Notes updated to meet CDA standards
- Care Team Member updated to meet CDA standards
- Laboratory Information updated to meet CDA standards
- Health Insurance updated to meet CDA standards
- Added Coverage Status, Coverage Type and additional Health Insurance Identifiers
- SDOH added to meet CDA standards
- Assessment, Goal, Problem, Intervention
- Support for non-imaging or non-laboratory Clinical Tests
- Support for function, cognitive, and disability Health Status Assessments
- Support for Diagnostic Imaging Test and Reports
- Enhanced test selections and flag for diagnostic images
- Support for tracking Medications and Medication
- Enhanced updates to Medication fulfillment status
- Updated Problems to track include Date of Diagnosis and Date of Resolution
- Regulatory Compliance 170.315(a)(5)
- CDA Enhancements
- Updated to meet standards C-CDA V2.1 Release 4.1.
- Regulatory Compliance – Transition of Care 170.315 (b)(1)
- Case Reporting
- Added functionality to support Sending and Receiving Case Reports.
- Regulatory Compliance – Case Reporting 170.315 (f)(5).
- Medications, Allergies and Problems Reconciliation
- Improved and clarified the user interface.
- Updated to meet USCDIV3 standards.
- Patient Portal :Added a method for a Patient to request restrictions of Patient Demographic data (USCDI data). A new tab “Privacy” can be found under “Your Preferences”:
- Any checked items are removed from the Portal View and also from the VDT CCDA.

- Regulatory Compliance – 170.315(e)(1)
- Regulatory Compliance
- 170.315(a)(5) – See User Interface and Core Changes

Interoperability Updates

- FHIR Interface updated to meet V3 standards
- Compliance with USCDIV3 and US Core 6.1
- CDA enhancements aligned with C-CDA V2.1 Release 4.1

Regulatory Compliance

- **Demographics 170.315 (a)(5):** Update to meet USCDIV3 and US Core 6.1 standards
- **Transition of Care (b)(1):** Updated workflows
- **Case Reporting (f)(5):** New functionality for sending and receiving case reports
- **Medications, Allergies, and Problems Reconciliation:** Improved UI for clarity
- **Patient Requested Restrictions 170.315(e)(1):**

Patient Portal Enhancements

- New **Privacy** tab under “Your Preferences”
- Patients can request restrictions on demographic data (USCDI)
- Selected data is excluded from Portal View and VDT CCDA