January 20, 2025 – Dashboard & Search

2025 · https://www.primaryrecord.com/docs/january-20-2025-dashboard-search/

Enhancements

Profile Dashboard and Navigation Improvements

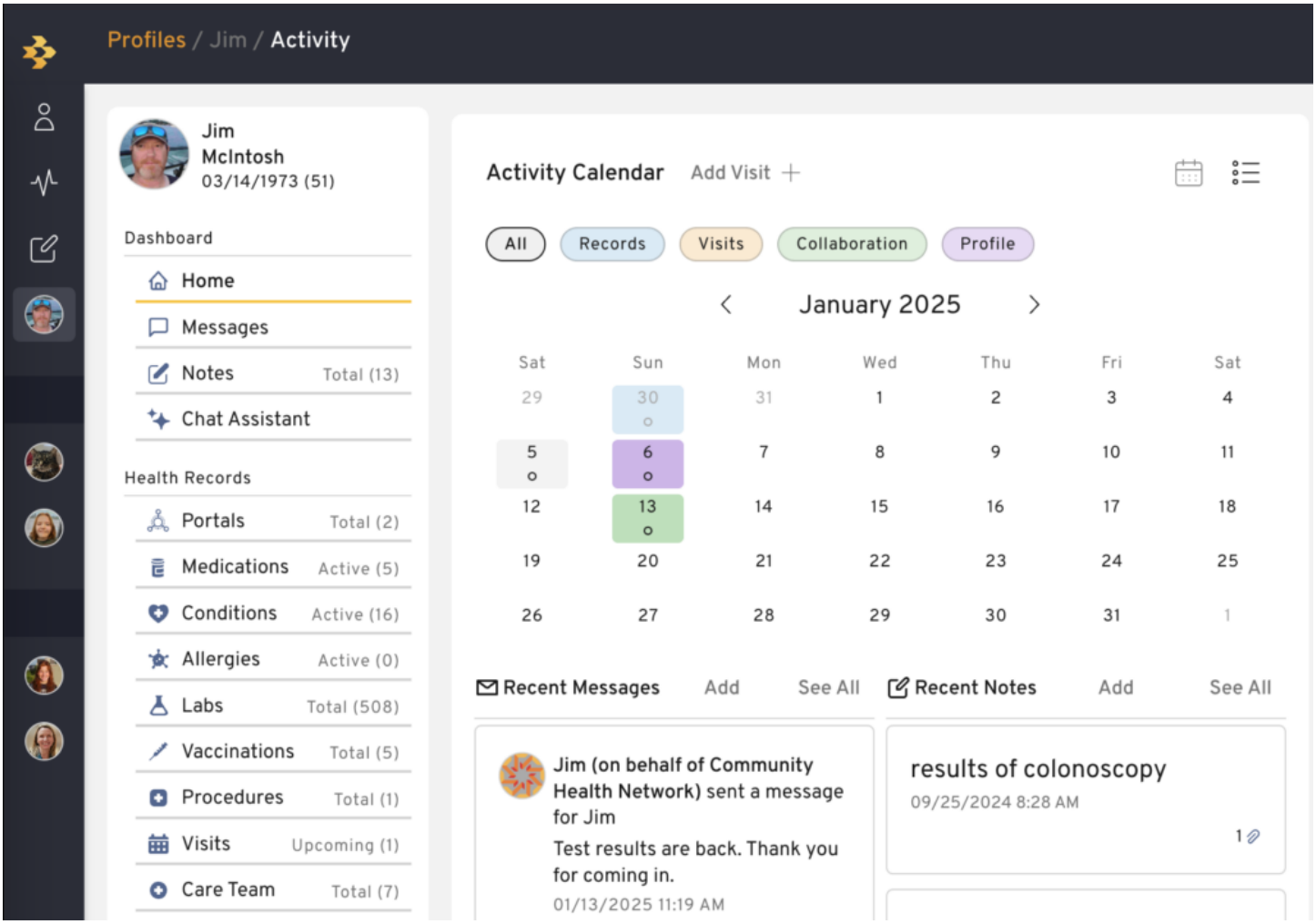
As part of a project to help users and families more easily collaborate, we've updated the top level navigation for a profile into three sections: Dashboard, Health Records, and Access.

In Dashboard you will now find a dedicated place to see all messages and comments made from collaborators in the profile.

The activity feed has evolved to a calendar and list view to help users quickly reference past or future visits and changes to the profile.

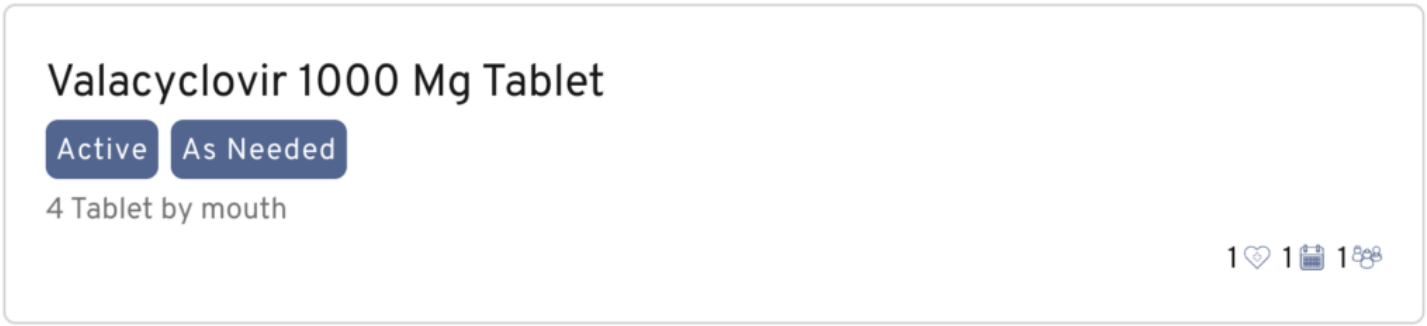
Notes have also be moved to the Dashboard for quicker access and reference.

Connecting to Patient Portals has been moved to the Health Records section because it's more closely related to updating those records.



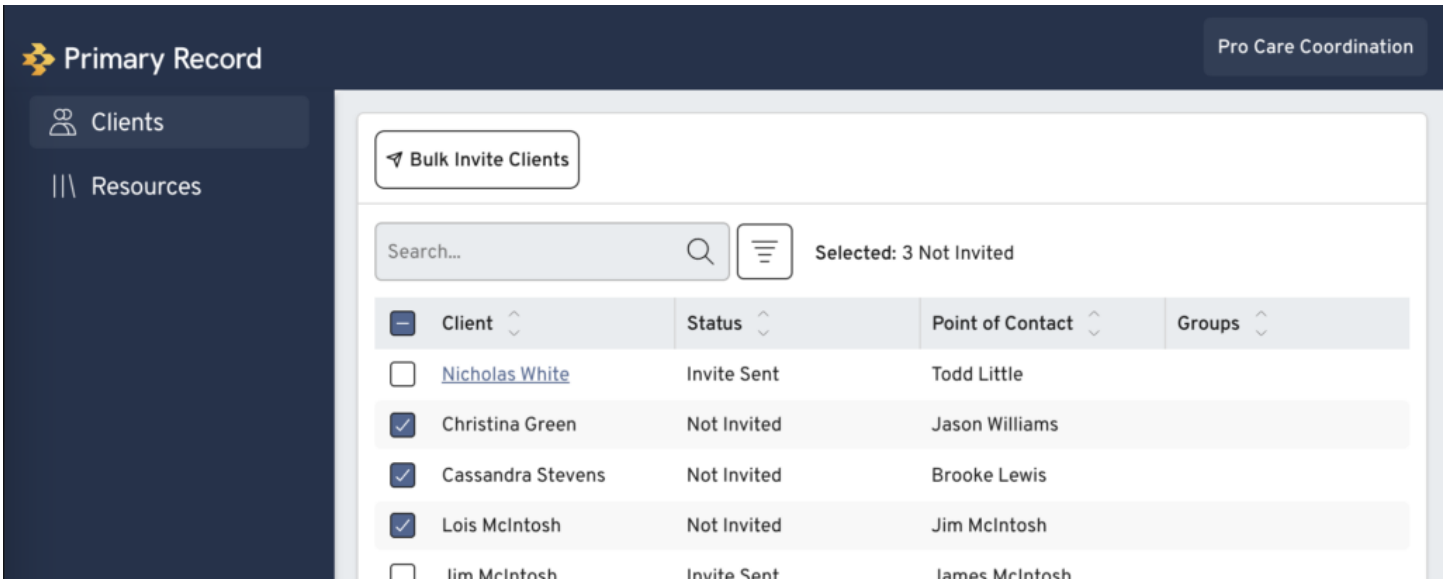
As Needed added to Medications

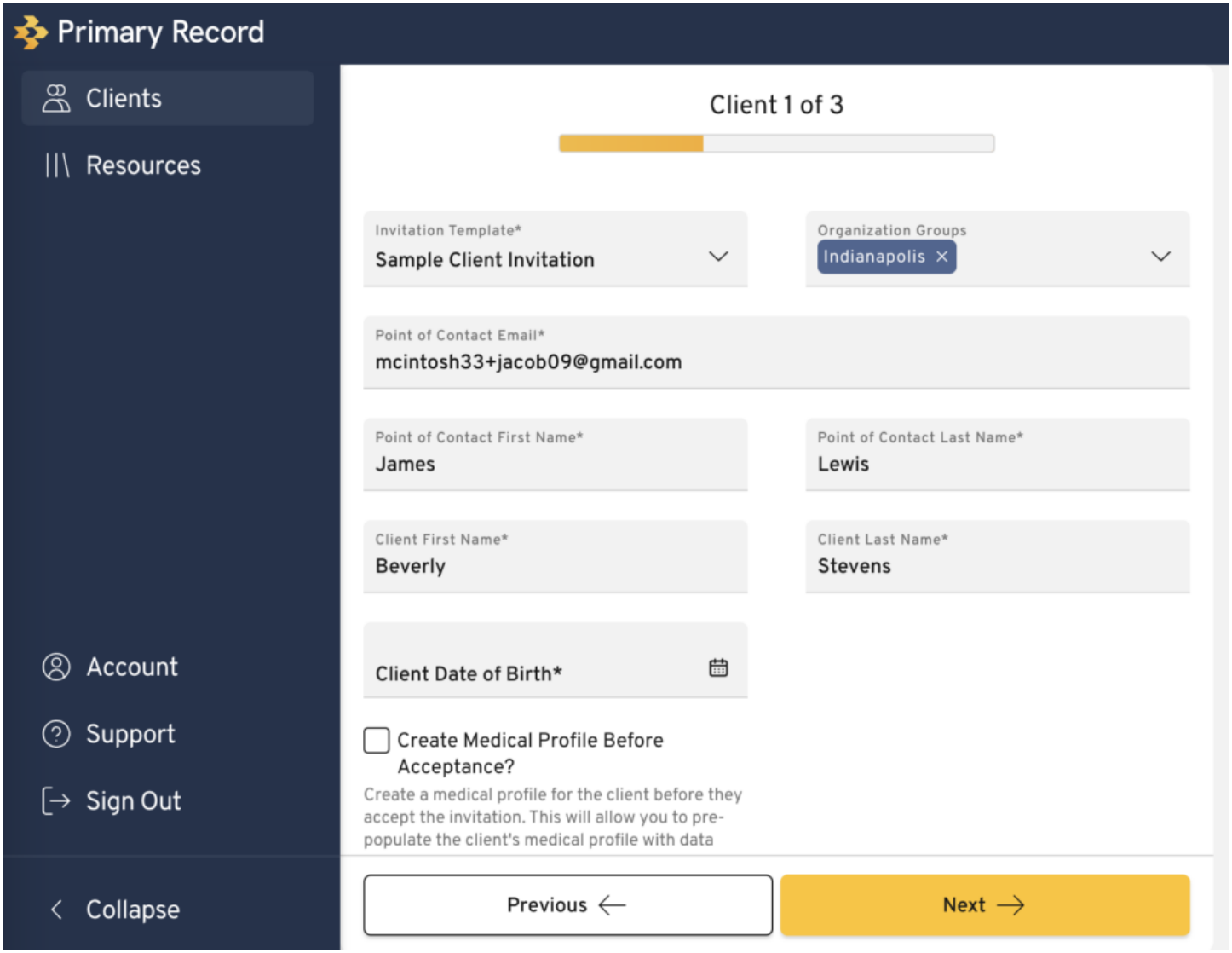
Prior to this enhancement, As Needed was a single option for frequency with a medication prescription. This didn't allow for a dose instruction to accurately represent how the and when to take the medication. Users can now document a full dose instruction in combination with the As Needed designation.



Bulk Invitations for Pro

Professional users can now send invitation to many clients who are in the Not Invited status at one time. After selecting those clients and clicking the Bulk Invite Client button, the user can pick the invitation template and assign the groups.





In-App or Native Notifications

Notifications of messages or comments that were previously delivered via email, are now working with app notifications in pre-release version of the native applications. Preferences can now be set for each users account.

Issues and Bugs

- Duplicate options were showing in the medication adding screen for Source and Rout
- Images were not selecting for Android users