

eClinicalWorks

Business Analysis Department



EMR - II

Kentucky Department for Public Health

CONTENTS

Documenting Treatment Plan	4
Overview of Treatment Management	4
Prescribing/Refilling Medications.....	5
Adding Medications to your Favorite List	9
Using Chart Panel to Continue/Refill/Stop Medication	10
Prescribing Medication with Formulary.....	11
Checking Prescription Log(s)	13
Lab/Diagnostic Imaging Orders Workflow	14
Ordering Diagnostic Imaging.....	19
Ordering Procedures.....	20
Outgoing Referrals.....	21
Documenting the Treatment Plan – II	25
Immunizations/Injections – Ordering/Administering Immunization.....	25
Reviewing & Importing Historical Lab Results into Progress Note	26
Preventive Medicine	27
Billing and Follow-up Information	28
Entering Billing Information and Follow-up Details.....	28
Super Bills.....	29
Printing the Progress Note in Different Styles:.....	30
Faxing the Progress Note in Different Styles:.....	30
Locking a Progress Note in Different Styles:	31
Printing & Modifying Patient Visit Summary.....	32
Faxing Consult Notes/Report:	33
Printing Consult Notes/ Reports:.....	34
Using eCliniforms.....	35
Re-Inking the Saved Documents.....	36
Progress Notes Short-Cuts.....	38
Patient Chart Panel	38
Using the ‘Caret’ Options	38
Using the ‘Scroll Item’ Function	39
Using the ‘Notes’ Drop-Down.....	40

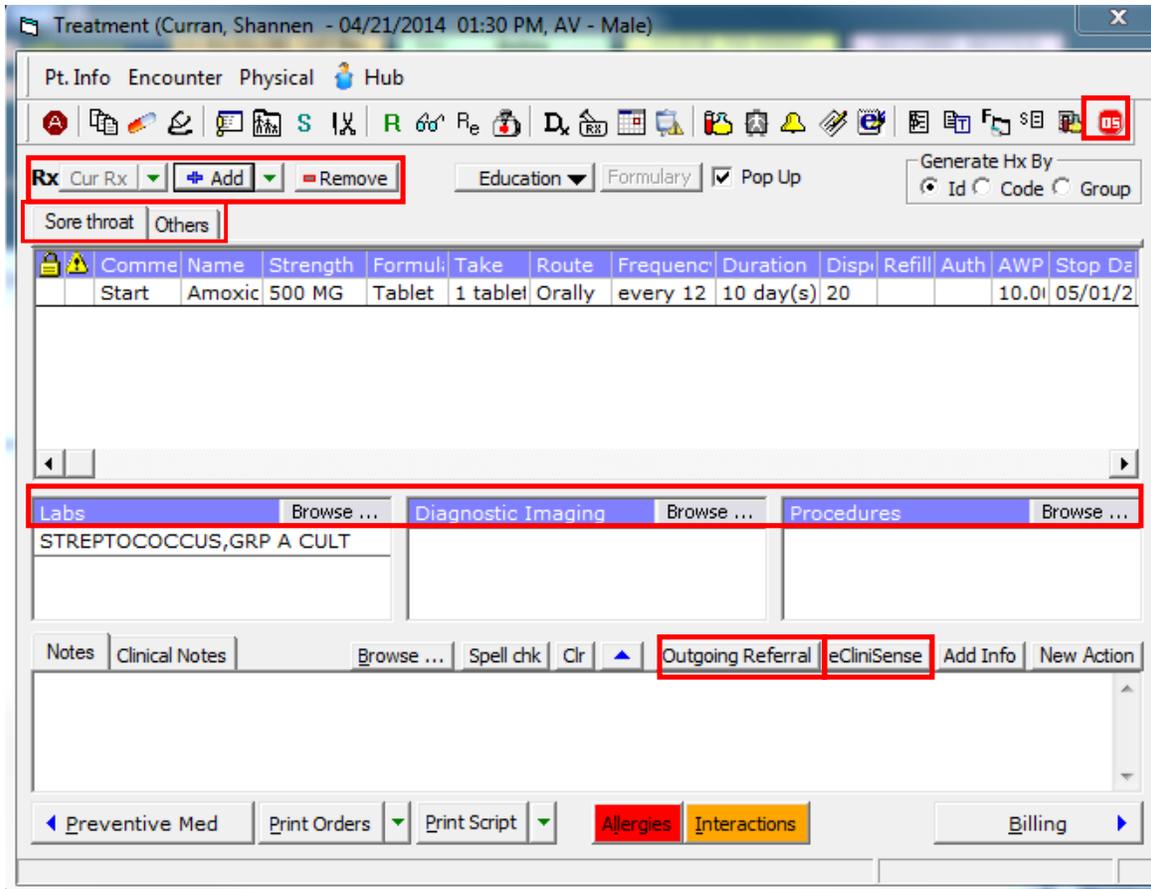
Appendix A: Notices41
Trademarks..... 41
Copyright..... 41

eClinicalWorks

Documenting Treatment Plan

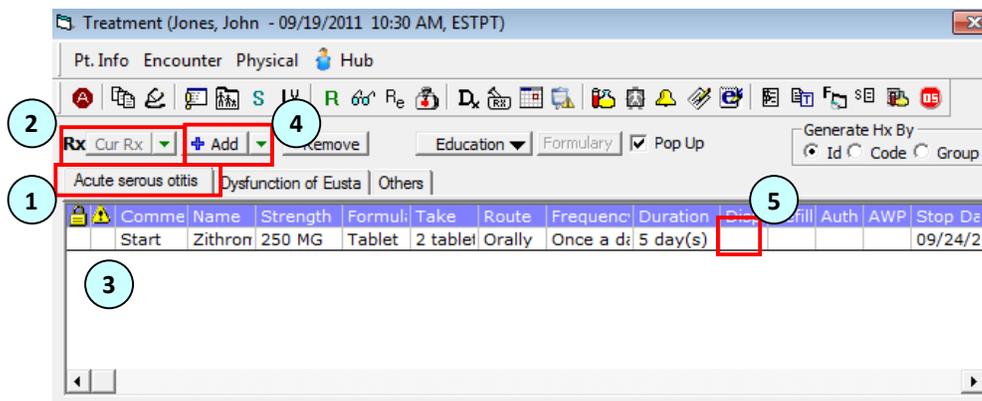
Overview of Treatment Management

From the progress note, click on “Treatment”. The following window opens.

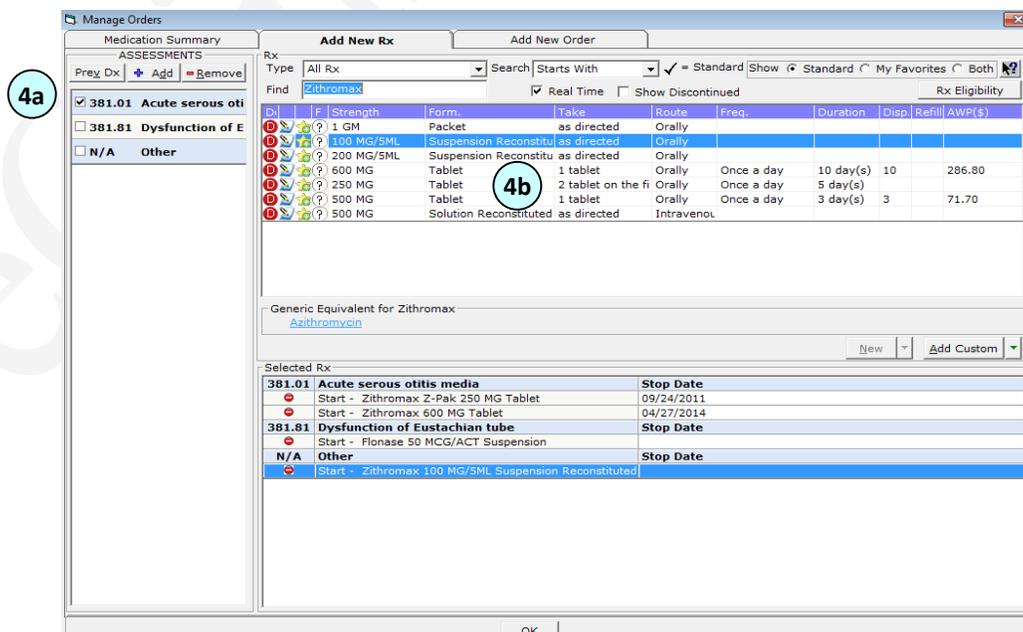


- Patient assessments made in the assessment section of the progress notes appear as individual tab(s) in the Treatment Window. The individual tabs allow the provider to specifically address each symptom.
- Treatment Screen allows Providers to:
 - Prescribe Medication.
 - Order Lab/Diagnostic Imaging.
 - Order In-House Procedure.
 - Generate Outgoing Referral.
- In addition, advanced features of the EMR System such as Order Sets and eClniSense can also be found in the treatment section.

Prescribing/Refilling Medications



1. Click on the 'tab' corresponding to the diagnosis for which medications need to be prescribed or refilled.
2. To refill patient's current medications, click on the "Cur Rx" button, select the meds that need to be refilled and simply type in the number of refills in the "Refills" column. Can select 30 or 90 day refills.
3. To document whether the patient was asked to increase/decrease/stop the current dose, click on the "comment" column and choose the respective comment.
4. To prescribe a new medication, click on the "Add" button.
 - a. Choose the corresponding diagnosis code.
 - b. Choose a new medication from the 'drug dictionary' by searching for the medication. Once the medication is chosen and when you click on 'OK', the dosage details can be modified back on the 'Treatment' screen.
5. To edit the duration/dispense and refill information, click on the desired column.



- To edit the duration/dispense and refill information, click on the desired column ('pop-up' must be checked in order for this screen to appear).

Strength	Formulation	Take	Route	Frequency	Duration	Dispense	Refill
10 MG	Powder	2 tablets	Orally	Once a day	30 day(s)	60	
5 MG	Tablet	1 tablet					
2.5 MG	Tablet Extended Rel	2 tablets					
5 MG							
10 MG							
2.5 MG	Tablet Extended F	2 tablets	Orally	Once a day	30 day(s)	60	1

* Custom Dosages are not shown by default. To Show/Hide Custom Dosages Setting follow the link: MySetting --> Show/Hide Tab --> Custom Dosages in Rx Edit Screen

Rx: GlipiZIDE 2.5 MG Tablet Extended Release 24 Hour, TAKE: 2 tablets, Orally Once a day, for 30 day(s), DISPENSE: 60, REFILLS: 1

Buttons: Apply, Cancel, Clear DDR, Add as Favorite

- The medications can then be printed or faxed or electronically prescribed to the patient's pharmacy by clicking on either the "Print" button (to print on prescription paper) or the green arrow next to the "Print" button (to fax or e-scribe).

Buttons: Labs, Diagnostic Imaging, Procedures, Pt Instructions, Discussions, Browse ..., Spell chk, Clr, Outgoing Referral, eCliniSense, Add Info, New Action, Preventive Med, Print Orders, Send Rx, Allergies, Interactions, CDSS

Dropdown menu for Send Rx: Fax Rx, Print Rx, ePrescribe Rx

Note: If patient has an ePrescribe pharmacy (indicated by the red 'E' with a black background) users can hit 'Send Rx' and it will be sent out automatically.

Patient Name Jones, John

Patient Address 35 Eaton Pass, Westborough, MA-01581

Last Appt: 04/16/2014 09:40 AM

Next Appt: 12/3/1984

Provider Name Jones, Mary

Provider DEA # DEASam999

Pharmacy CVS/pharmacy #0444 (P)

Pharmacy Address 74 EAST MAIN STREET, WESTBOROUGH, MA-01581
Phone: 508-366-0670, Fax: 508-616

Notes to Pharmacist [Browse ...] [Check Spelling]

Supervising Provider [Dropdown]

Start	Drug Name	S	Comments	Browse...
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Start Flonase	<input checked="" type="checkbox"/>		...
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Start Zithromax	<input checked="" type="checkbox"/>		...
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Start Zithromax Z-Pak	<input checked="" type="checkbox"/>		...
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Start Zithromax	<input checked="" type="checkbox"/>		...

Existing Prescriptions Not Requiring Refills

Start	Drug Name	S	Comments
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			

Send ePrescription

ePrescribing

- For ePrescribing, provider can enter any comments under the comment section.
- Provider can select which medication to ePrescribe by checking off the selection under the 'Prescription' section. In addition, individual comments for each medication can be entered under the comments section.
- Once complete, the provider can preview the script using the 'Show Preview Rx' button or ePrescribe the medication to the Pharmacy using the 'Send ePrescription' button.

To

Name: 167 Street Pharmacy Pharmacies Browse

To Fax: - 718-588-5814

CC Fax: Ref Physicia Browse

Subject: Prescription

Company: 167 Street Pharmacy

From

Name: eclinicalworks M.D.,support

Provider: Sam Willis

Voice #: 617-999-3333

Company: Ton Facility

Facility: Ton Facility Browse...

DOB: 07/25/1982, Phone:

Rx

12 Hour Antihist/Decongestant Tablet Extended Release 12 Hour 6-120
MG Orally
Disp: ***n/a*** (N/A)
Sig: as directed
Diagnosis:

Refills: ***** (ZERO)

Auth No: 122

DEA #: SWDEA

NPI #: SWNPI00000

Signature Clear Update

Schedule Print Print Preview Copy **Send Fax** Cancel Show/Hide Panels

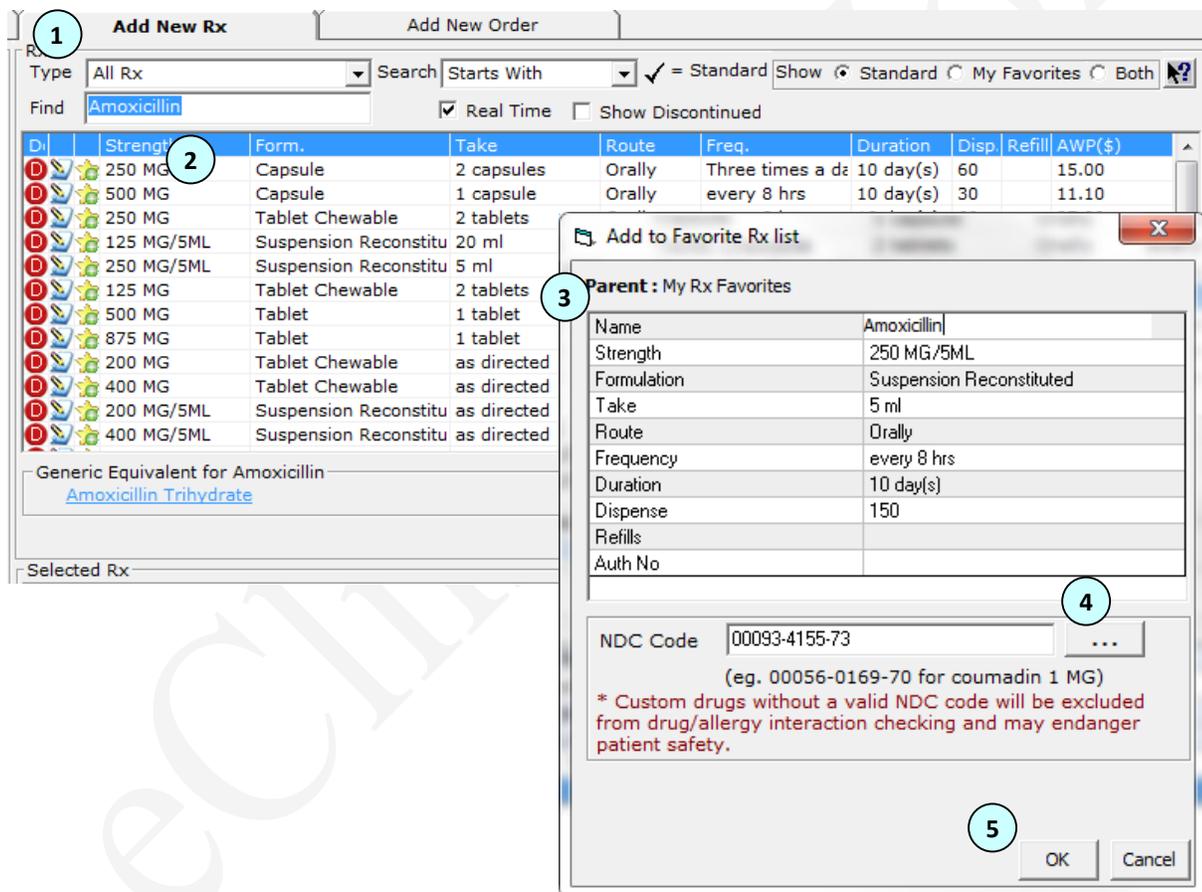
Faxing

- By default, the patient's preferred pharmacy will be populated in the 'To' section with the corresponding fax number.
- Provider can choose to fax the prescription to a different pharmacy using the 'Browse' button. In addition, the fax number can be entered manually in the fax number box.
- For faxed prescription, provider signature will be sent along with the prescription automatically.
- Once ready to send, the provider can click on 'Send Fax' button to electronically fax the prescription to the pharmacy.

Adding Medications to your Favorite List

Frequently used medications can be added to your favorite list by:

1. From the “Manage Prescriptions” window (Ex: click “Add” from the treatment screen), search for the desired medication.
2. Once the medication is located, click on the  for the desired medication.
3. “Add to Favorite Rx List” window will show up with default medication properties and NDC Code. Edit the properties, if needed.
4. **If you need to modify the Strength, the NDC can be chosen by using the “...” button.**
5. Click OK to add the medication to the favorite list.



The screenshot shows the 'Add New Rx' window with a search for 'Amoxicillin'. A table lists various strengths and formulations. A dialog box titled 'Add to Favorite Rx list' is open, showing the medication details and an NDC Code field with a dropdown arrow (indicated by a circled 4). The dialog box also has 'OK' and 'Cancel' buttons (indicated by a circled 5).

D	Strength	Form.	Take	Route	Freq.	Duration	Disp	Refill	AWP(\$)
	250 MG	Capsule	2 capsules	Orally	Three times a day	10 day(s)	60		15.00
	500 MG	Capsule	1 capsule	Orally	every 8 hrs	10 day(s)	30		11.10
	250 MG	Tablet Chewable	2 tablets						
	125 MG/5ML	Suspension Reconstitu	20 ml						
	250 MG/5ML	Suspension Reconstitu	5 ml						
	125 MG	Tablet Chewable	2 tablets						
	500 MG	Tablet	1 tablet						
	875 MG	Tablet	1 tablet						
	200 MG	Tablet Chewable	as directed						
	400 MG	Tablet Chewable	as directed						
	200 MG/5ML	Suspension Reconstitu	as directed						
	400 MG/5ML	Suspension Reconstitu	as directed						

Generic Equivalent for Amoxicillin:
[Amoxicillin Trihydrate](#)

Medication that is part of the favorite list can be found using the “My Favorite” radio button.



The screenshot shows the 'Add New Rx' window with the 'My Favorites' radio button selected in the 'Show' section.

Favorite Medications can also be removed by clicking on the  button.

Using Chart Panel to Continue/Refill/Stop Medication

In addition to the treatment section, existing medication (part of current medication) can be Continued/Refilled/Stopped using the Chart Panel by:

1. Open “Overview” tab from Chart Panel.
2. Click on the “C”, “R” or “S” button on the desired medication.
3. (The Selected) Medication will be brought to the Treatment section with the previously associated Assessment.
4. If you wish to ePrescribe/eFax the medication, click on the Treatment section, edit the medication properties, and send prescription.

Assessment:

- Acute serous otitis media - 381.01 (Primary)
- Dysfunction of Eustachian tube - 381.81

Plan:

Treatment:

Acute serous otitis media
Start Zithromax Z-Pak Tablet, 250 MG, 2 tablet on the first day, then 1 tablet daily for 4 days, Orally, Once a day, 5 day(s)
Start Zithromax Tablet, 600 MG, 1 tablet, Orally, Once a day, 10 day(s), 10

Dysfunction of Eustachian tube
Start Flonase Suspension, 50 MCG/ACT, 2 sprays, Nasally, Once a day, 30 day(s)

Others
Start Zithromax Suspension Reconstituted, 100 MG/5ML, as directed, Orally

Medication Summary

Group by: Date All

Medication	Action
Medications as of: Today (04/17/2014)	
Flonase 50 MCG/ACT Suspension	Start
Zithromax 100 MG/5ML Suspension Reconstituted	Start
Zithromax 600 MG Tablet	Start
Medications on: 09/19/2011	

Allergies

Immunizations

Therapeutic Injections

Circle of Care

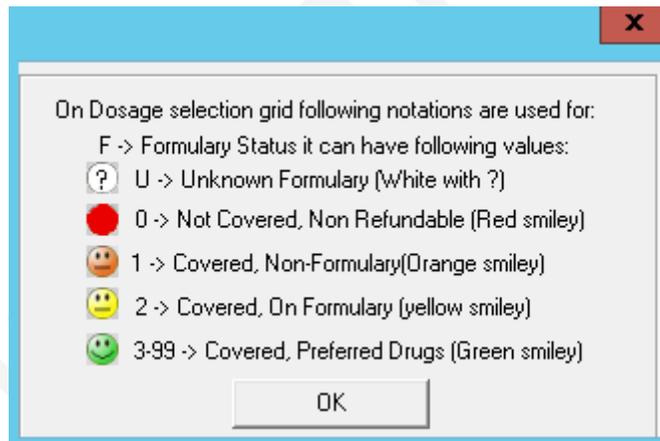
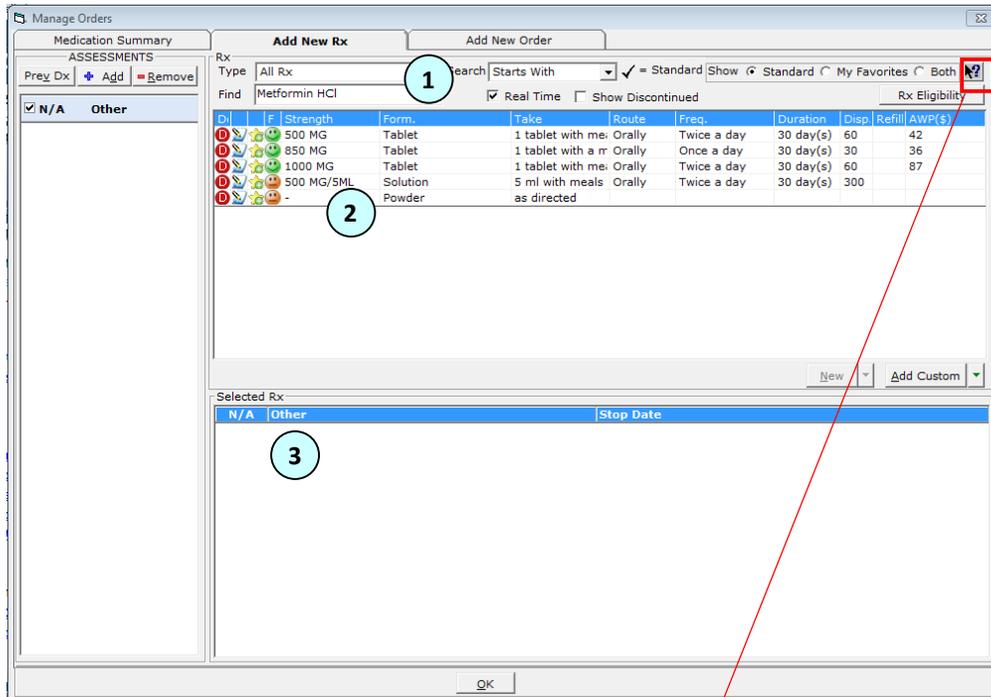
Prescribing Medication with Formulary

When Rx Eligibility is performed, provider can view the medications that are covered by the insurance/on Formulary by:

1. From the Treatment Screen, click on Add button. (In addition to 'Add', provider can also click on the Green Arrow and select Rx with Formulary).
2. The Select Rx Window will be displayed.
3. Search for the desired medication by typing in the search box.
4. The medication will show up in different colors corresponding to their coverage.
5. Select the desired medication.
6. The medication is added to the list of medications to be prescribed.

The screenshot shows a medical software window titled "Treatment (Jones, John - 09/19/2011 10:30 AM, ESTPT)". The interface includes a navigation bar with "Pt. Info", "Encounter", "Physical", and "Hub". Below this is a toolbar with various icons. A dropdown menu is open, showing two options: "Rx with Formulary" (highlighted in red) and "Rx without Formulary". The main area displays a table of medications with columns for Name, Strength, Formulation, Take, Route, Frequency, Duration, Dispensing, Refill, Authorization, AWP, and Stop Date. Two rows of Zithron are visible. Below the table are sections for "Labs", "Diagnostic Imaging", and "Procedures", each with a "Browse ..." button. At the bottom, there are buttons for "Pt Instructions", "Discussions", "Browse ...", "Spell chk", "Clr", "Outgoing Referral", "eClniSense", "Add Info", "New Action", "Preventive Med", "Print Orders", "Send Rx", "Allergies", "Interactions", and "CDSS".

Name	Strength	Formulation	Take	Route	Frequency	Duration	Dispensing	Refill	Auth	AWP	Stop Date
Zithron	250 MG	Tablet	2 tablet	Orally	Once a day	5 day(s)					09/24/2
Zithron	600 MG	Tablet	1 tablet	Orally	Once a day	10 day(s)	10			286.0	04/27/2



The “?” allows the provider to see the meaning of the different colors (Green, Yellow, Orange and Red).

Checking Prescription Log(s)

Medication(s) that have been prescribed are logged in the system.

To check the prescription log:

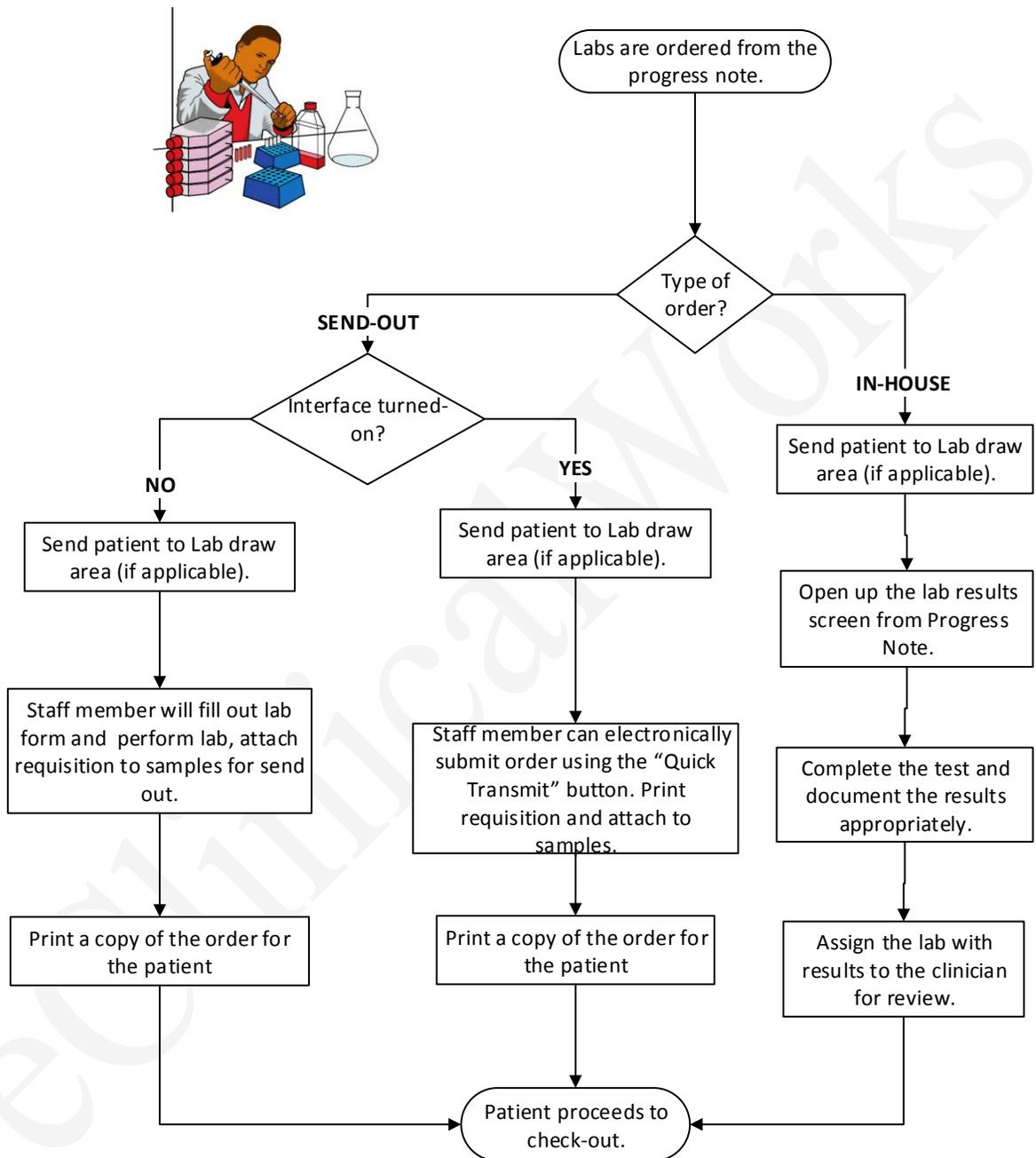
- From the Patient Hub – ePrescription Logs.
- From Documents Band – Prescriptions (For Medication that have been Faxed/Printed)
 - ePrescriptions (For Medication that have been ePrescribed).

The screenshot displays the Patient Hub for John Jones. The left sidebar contains navigation options: Admin, Practice, Registry, Referrals, Messages, Documents, Fax Inbox, Prescriptions, ePrescriptions, Patient Documents, Review Documents, eCliniForms, Messenger Logs, and Billing. The main content area shows patient details for John Jones, including contact information, insurance, and financial status. A grid of action buttons is visible, with 'ePrescription Logs' highlighted. The right sidebar shows a medication list for Cough variant asthma, including Flonase 50 MCG/ACT Suspension, Zithromax 100 MG/5ML Suspension Reconstituted, and Zithromax 600 MG Tablet.

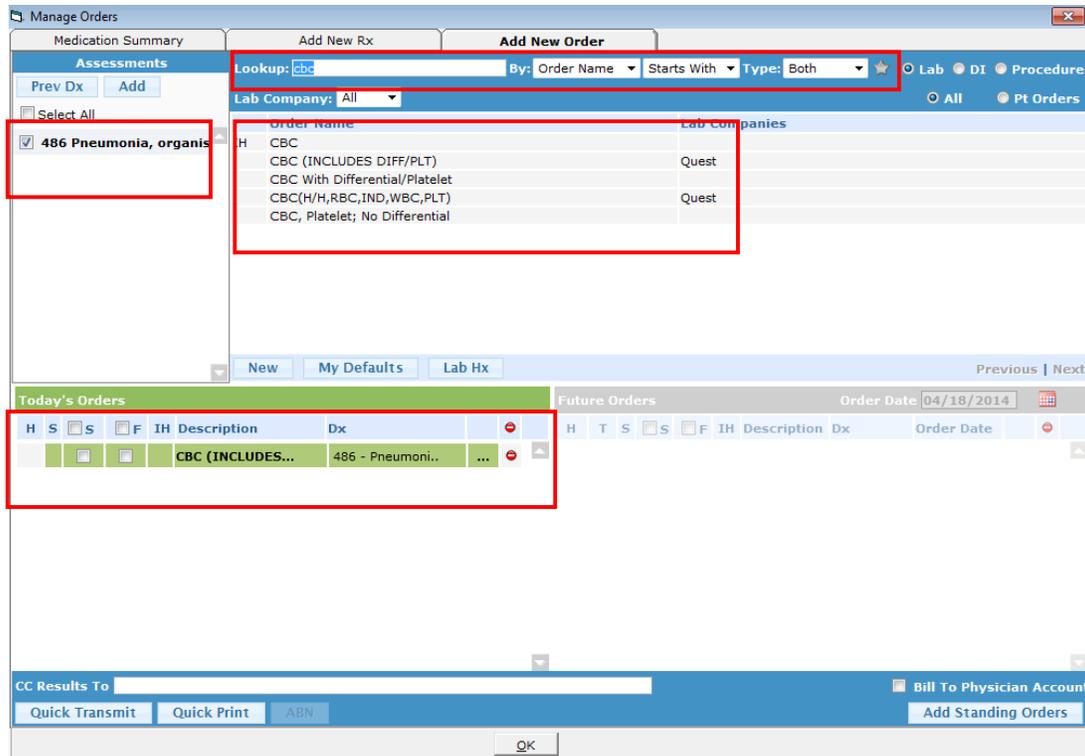
Medication	Action
Flonase 50 MCG/ACT Suspension	Start
Zithromax 100 MG/5ML Suspension Reconstituted	Start
Zithromax 600 MG Tablet	Start

Lab/Diagnostic Imaging Orders Workflow

Below illustrates the workflow for lab/diagnostic orders pre-interface and post interface.



- In the Lab section, click on “Browse” to open the Labs screen.



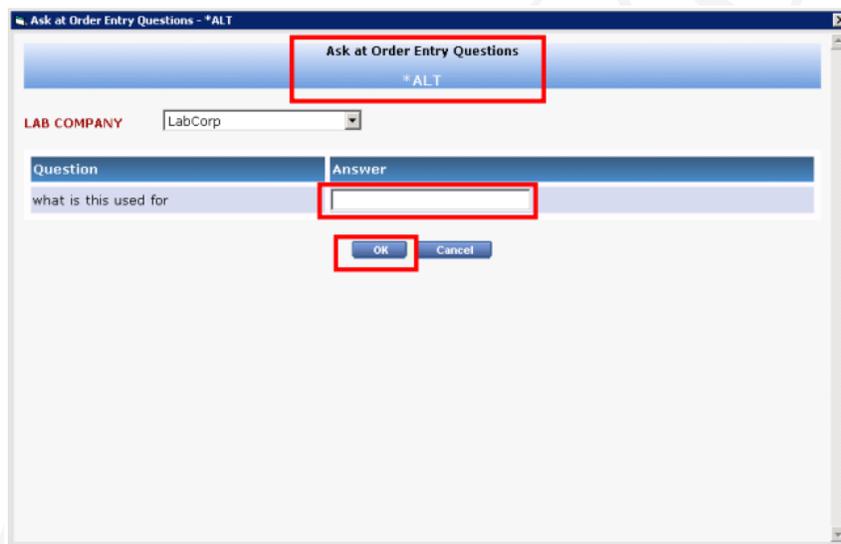
- Check off the desired diagnosis code on the left hand side and use the ‘Look Up’ section to search and select labs for the current visit. The selected lab will be associated with a diagnosis (on the left hand side). Provider can use the filter (Lab Company, Lookup by Name, etc., In-House or Send Out) to search for the desired lab.
- ‘In-House’ is the eClinicalWorks (eCW) terminology for CLIA-Waived and Provider Preferred Microscopy. These are the labs that are ordered, drawn, and resulted within the walls of the Local Health Department. Below is a list of in-house labs that are specifically built for the Local Health Departments:

Type	Name
IH	Cholesterol, Total
IH	Glucose
IH	Hemocult (fecal occult blood)
IH	Hemoglobin (capillary)
IH	Hemoglobin (Pronto)
IH	Hemoglobin A1c
IH	Hepatitis C Rapid Test
IH	HIV Rapid Test
IH	KOH Prep
IH	Lead (capillary)
IH	Lipid Panel
IH	OC Light Fit
IH	Pregnancy Test, Urine
IH	Rapid Strep
IH	Urinalysis, Routine
IH	Vaginal amines (Whiff)
IH	Vaginal PH
IH	Wet Prep

- Future (Lab) can be selected by highlighting the 'Future Orders' tab, select the desired date (from the calendar), and search for the lab using the 'Look Up' feature.
- Once selected, recurring future orders for labs can be ordered by clicking on the "Add Standing Orders" button. 



- If an AOE (Ask at Order Entry Question) is associated with an Order, the AOE window will pop up (with the Lab Name), at which point the provider can enter the information into the window and click 'OK'.



- Once completed, the provider can transmit the order electronically via the interface using the 'Quick Transmit' feature. 
- Once clicked, the provider can electronically transfer the order by selecting the desired order, lab company, enter the collection date, fasting requirement, assigned to staff, and click 'Transmit'.

Select All

	NAME	LAB CO.
<input checked="" type="checkbox"/>	NAME	LAB CO.
<input checked="" type="checkbox"/>	CBC (INCLUDES DIFF/PLT)	Quest

Collection Date 4/18/2014 **Time** 11:04 AM **Actual Fasting** Not Recorded

Assigned To Cline, Enn

Select Lab Quest

Clinical Information

Transmit Cancel

- In addition, the lab requisition can be printed/faxed by clicking on the 'Print Orders' button from the treatment screen.

Treatment (Bennett, Janice - 04/16/2014 09:00 AM, F/U)

Pt. Info Encounter Physical Hub

Rx Cur Rx Add Remove Education Formulary Pop Up Generate Hx By Id Code Group

Pneumonia, organism Others

Comme	Name	Strength	Formuli	Take	Route	Frequenc	Duration	Dispi	Refill	Auth	AWP	Stop Da
Start	Robaxii	500 MG	Tablet	1 tablet	Orally	Four time	30 day(s)	120			214.	05/18/2

Labs Browse ... Diagnostic Imaging Browse ... Procedures Browse ...

CBC (INCLUDES DIFF/PLT)

Pt Instructions Discussion

Outgoing Referral eClniSense Add Info New Action

Assessments Interactions CDSS

- Print Labs
- Print Diagnostic Imaging
- Print Procedures
- Fax Labs
- Fax Diagnostic Imaging
- Fax Procedures
- Fax Orders

Fax Preview

To

Name: [] Lab Compar [] Browse []

To Fax: [] - []

CC Fax: [] Ref Physici [] Browse []

Subject: Lab Orders

Company: []

From

Name: eclinicalworks.support

Provider: Sam Willis

Voice #: 561-555-1212

Company: []

Facility: [] Browse...

Primary Insurance Name: UNITED Healthcare
 Insurance Address: 1 Ins Drive , Orlando , FL , 33123
 Subscriber Number: 9485938-83745
 Name: Curran, Jeff P
 Address: 6417 Boca Rio Dr, Boca Raton, FL, US 33433

Code	TestName	FastingAssessment(s)	Notes
	CBC (INCLUDES DIFF/PLT)	N 250.00, Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled	

Signature [] Clear [] Update []

Schedule Show/Hide Panels

Ordering Diagnostic Imaging

- In the Diagnostic Imaging section, click “Browse” to open the list of Diagnostic Imaging procedure orders in your system.

The screenshot shows the 'Manage Orders' window with the 'Add New Order' tab selected. A search bar at the top right is highlighted with a red box, containing 'Lookup:' and 'By: Order Name'. Below it, a list of diagnostic imaging procedures is shown, with '486 Pneumonia, organis' selected on the left and '3 phase bone scan' highlighted in the list. The 'Today's Orders' table at the bottom shows the selected order with a red box around it. The 'Add Standing Orders' button is visible at the bottom right.

- Similar to selecting the lab, check off the desired diagnosis code on the left hand side and use the ‘Look Up’ section to search and select the DI for the current visit. The selected Imaging will be associated with a diagnosis (on the left hand side). Provider can use the filter (DI Company, Lookup by Name, etc., In-House or Send Out) to search for the desired Imaging.
- Future (DI) Orders can be selected by highlighting the ‘Future Orders’ tab, select the desired date (from the calendar), and search for the DI using the ‘Look Up’ feature.
- Once selected, recurring future orders for DI can be ordered by clicking on the “Add Standing Orders” button.

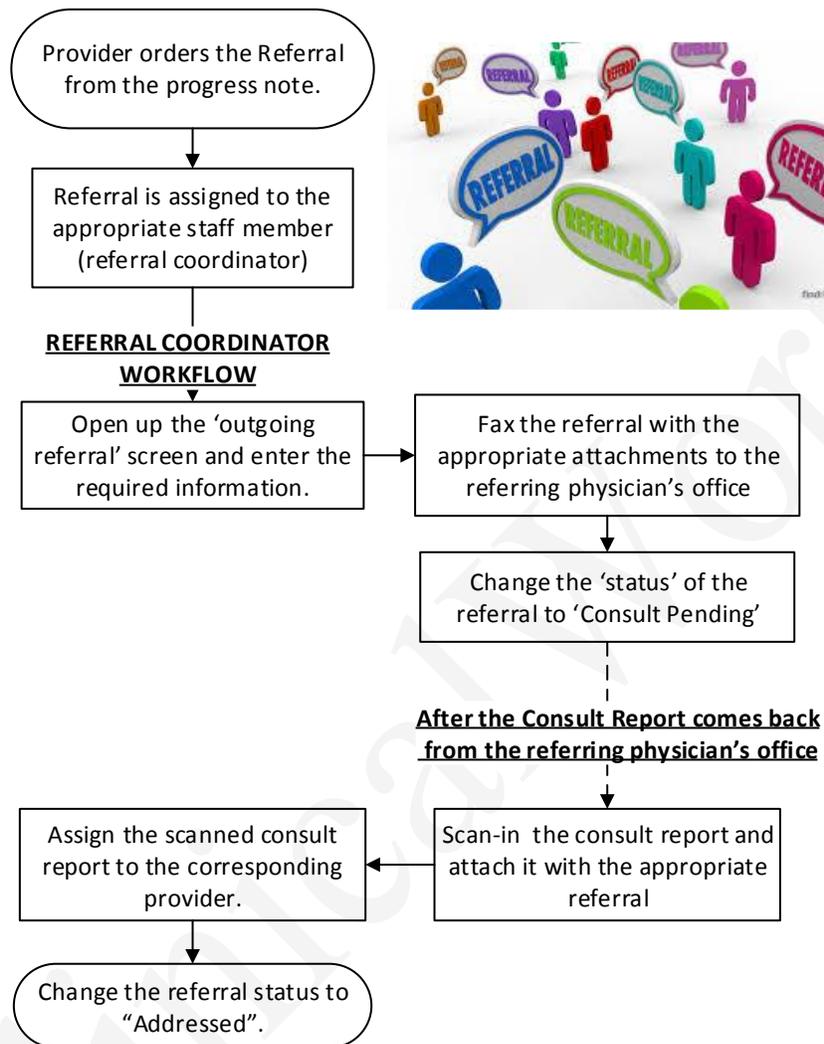
The screenshot shows the 'Future Orders' section of the software. The 'Future Orders' tab is selected, and a calendar is open showing the date 04/18/2014. The 'Add Standing Orders' button is highlighted with a red box.

Ordering Procedures

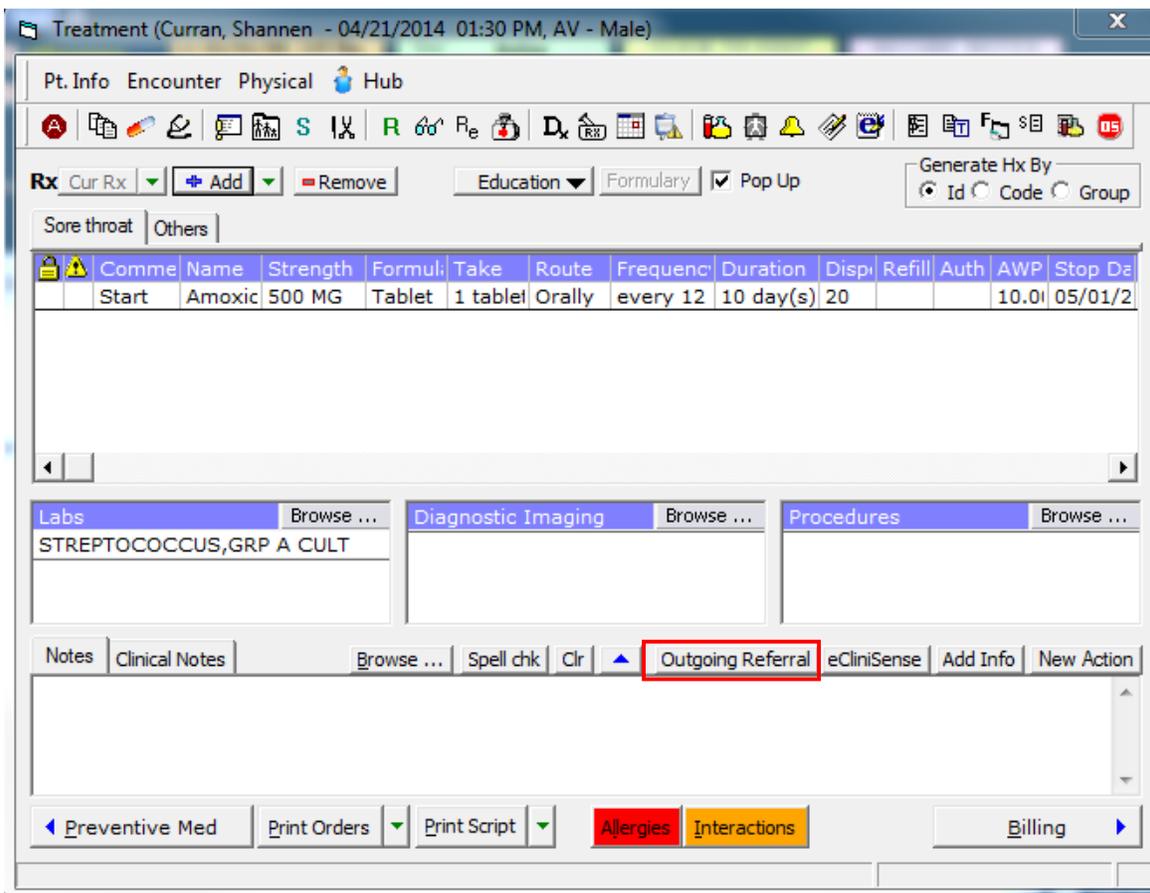
- Similar to lab and diagnostic imaging, procedures can also be ordered from the treatment screen by following a process similar to the lab and diagnostic imaging ordering process.
- Provider can use the 'Lookup' option to search for the desired procedure.
- Diagnosis code needs to be selected before procedure look-up and selection.

The screenshot shows the 'Manage Orders' application window. The 'Assessments' panel on the left contains a search box with '486 Pneumonia, organism' entered and checked. Below this, a list of procedure names is displayed, including 'ANESTH, BLEPHAROPLASTY' (repeated five times), 'ANESTH, REPAIR OF CLEFT LIP' (repeated five times), 'BLOOD PRESSURE, MEASURED', and 'CAP BACTERIAL ASSESS'. The interface includes navigation buttons like 'Prev Dx', 'Add', and 'Select All'. At the bottom, there are tabs for 'New', 'My Defaults', and 'Procedure Hx', and a 'Generate Referral' button.

Outgoing Referrals



The Outgoing Referral button on the treatment screen opens the window where you can enter information for creating a referral.



- Enter the information into the fields and then print the referral or assign it to the staff member that processes referral.

By using the Referral Module in eCW, you can track if the consult report has been received or not.

Example of Referral Workflow:

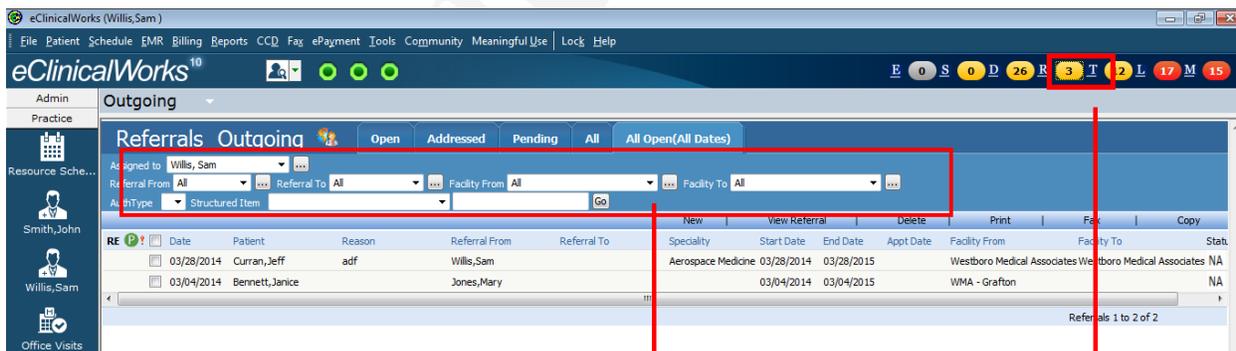
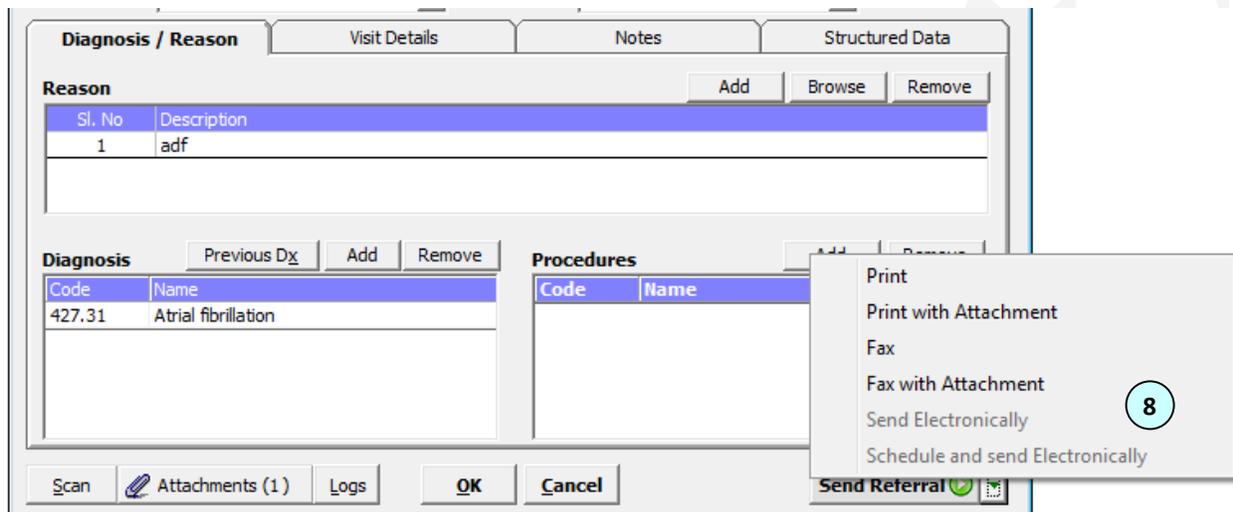
Allows the provider to specify the specialist/specialty.

Displays patient and provider information.

Allows provider to specify the reason and diagnosis code.

1. Once referral window opens, provider can verify/select his/her name from the 'Referral From' drop down.
2. Provider can specify the specialist by clicking on the drop down from the 'Referral To' section.
3. Provider can specify the reason for the referral by using the 'Add' or 'Browse' button.
4. Provider can also specify the diagnosis code by clicking on the 'Previous Dx' or 'Add' button. In addition, Provider can also specify a procedure by clicking 'Add' under procedures (optional).
5. Attachments such as the Progress Note, lab/DI results, etc. can be attached using the 'Attachments' button.

6. If the provider wants to add notes or special instructions, click on the 'Notes' tab and enter the information.
7. Once completed, provider assigns the referral to the staff that processes the referral.
8. Staff can print/fax the referral along with the attachments (if applicable) by clicking on the "Send Referral" button.
9. Once completed, Staff can change the status of the referral to 'Consult Pending'.



Allows user to search for referral by status.

Displays the assigned referral(s).

Note: The assigned referral can also be found in the 'R' Jelly Bean.

Documenting the Treatment Plan – II

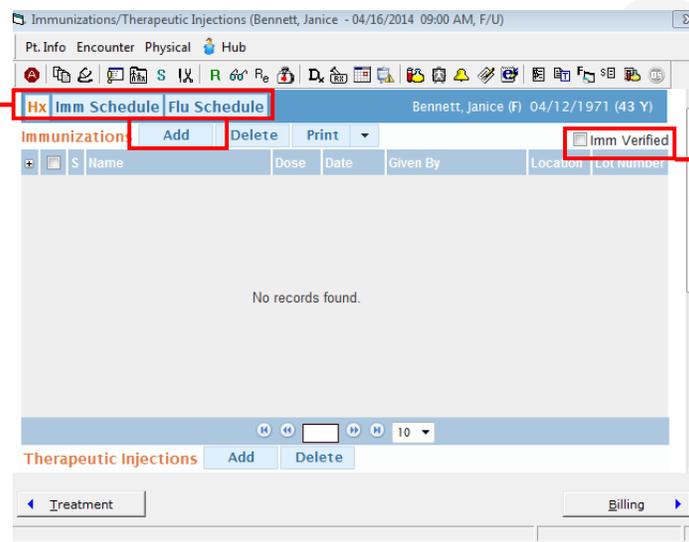
Immunizations/Injections – Ordering/Administering Immunization

From the progress notes, click on “Immunizations”. The Immunizations/Therapeutic Injections window opens for the patient. Click on “Add” button to add an immunization.

Assessment:
[Assessment:](#)
Plan:
[Treatment:](#)
[Procedures:](#)
[Immunizations:](#)
[Diagnostic Imaging:](#)
[Lab Reports:](#)
[Preventive Medicine:](#)
[Next Appointment:](#)

+	+	466.0	Acute bronchitis
+	+	401.1	Essential hypertension, ben
+	+	311	Depressive disorder, not els classified
Medication Summary			
Group by Date All			
Medication			
Medications as of: Today (04/15/2011)			
C	R	S	Green Tea 1000 MG Capsule
C	R	S	Prolia 60 MG/ML Solution

Provides recommendations on vaccinations based on CDC schedule.



Allows you to verify immunizations.

- Use the “Find” field to locate the immunization from the list in the left pane. Once located select the desired immunization by simply clicking on it.
- After selecting the immunization, provider can exit out of the immunization screen, return to the office visit screen and select ‘Nur’ or ‘MA’ as the status so that the Nurse/MA knows that the patient needs to be administered a shot.
- Nurse/MA then can enter the examination room and document the other required fields on the “Immunizations” screen (such as ‘given by’, dosage details, location, etc.).
- The following fields must be filled in: Lot Number (Manufacturer, Expiry Date, VIS Date, Dosage will auto populate), route, location, given by.

Reviewing & Importing Historical Lab Results into Progress Note

Bennett, Janice, 43 Y, F | Sel | Info | Hub

12 Patterson Rd
Shrewsbury, MA
H:555-555-5506
DOB:04/12/1971

Allergies
Billing Alert

Wt: 04/21/14: 150 lbs.
Appt(L): 04/21/14(SW)
PCP: Jones, Mary
Language: English
Translator: No

Ins: Self Pay
Acc Bal: \$525.50
Guar: Janice
Gr Bal: \$525.50
Ref: Jones, Mary

CLICK TO EDIT

SECURE NOTES

Enable healow
The patient is not on healow

Medical Summary | OB Summary | CDSS | Alerts | Labs | DI | Procedures | Growth Chart | Imm/T.Inj | Encounters | Patient Docs | Flowsheets | Notes

SF [dropdown] Enc << 04/21/2014 SW

Progress Notes | Scribe | Orders

Quick Search

Patient: Bennett, Janice DOB: 04/12/1971 Age: 43 Y Sex: Female
Phone: 555-555-5506 **Primary Insurance:** Self Pay
Address: 12 Patterson Rd, Shrewsbury, MA-01581
Account Number: 7
PCP: Mary Jones, MD
Encounter Date: 04/21/2014 **Provider:** Sam Willis, MD
Appointment Facility: Westboro Medical Associates

Subjective:
Chief Complaint(s):
HPI:
Current Medication:
Medical History:

- Detached Retina-left eye
- cataracts
- Abdominal pain
- abscess
- abnormal chest x-ray

UpToDate GO

Overview | DRTL | History | CDSS | Order Sets | Labs <>

Bennett, Janice 43 Y, F as of 04/21/2014

Labs All

Hgb A1c with MBG Estimation	04/18/2014
CBC (INCLUDES DIFF/PLT)	04/16/2014
1-Methyl-histidine_Qn_CSF	02/24/2014
Hgb A1c with MBG Estimation	02/24/2014

DI All

Mammogram	04/19/2014
3 phase bone scan	04/16/2014

- The previously ordered labs are available on the labs/DI section on the right side chart panel of the progress note.
- If the results are already marked off as “reviewed” by the provider, the lab appears in a normal font, if it has not been reviewed, the lab name appears in bold text.
- Once the lab has been marked ‘Reviewed’, the icon will change to a blue arrow (next to the lab name). By clicking on the arrow, the lab result will be imported to the current progress notes under the ‘past results’ section.

Bennett, Janice, 43 Y, F | Sel | Info | Hub

12 Patterson Rd
Shrewsbury, MA
H:555-555-5506
DOB:04/12/1971

Allergies
Billing Alert

Appt(L): 04/16/14(SW)
PCP: Jones, Mary
Language: English
Translator: No

Ins: Self Pay
Acc Bal: \$525.50
Guar: Janice
Gr Bal: \$525.50
Ref: Jones, Mary

CLICK TO EDIT

SECURE NOTES

Enable healow
The patient is not on healow

Medical Summary | OB Summary | CDSS | Labs | DI | Procedures | Growth Chart | Imm/T.Inj | Encounters | Patient Docs | Flowsheets | Notes

SF [dropdown] Enc << 04/16/2014 SW

Progress Notes | Scribe | Orders

Quick Search

Objective:
Vitals:
Past Results:

Lab: 1-Methyl-histidine_Qn_24hr_Ur (Order Date - 02/26/2014)
Result: Positive

Lab: Hgb A1c with MBG Estimation (Order Date - 02/26/2014)
Result: Normal
Hemoglobin A1c 25
Mean Bld Glu Estim. 25

Examination:
Assessment:
Plan:

UpToDate GO

Overview | DRTL | History | CDSS | Order Sets | Labs/DI <>

Bennett, Janice 43 Y, F as of 04/18/2014

Labs All

1-Methyl-histidine_Qn_CSF	02/24/2014
Hgb A1c with MBG Estimation	02/24/2014

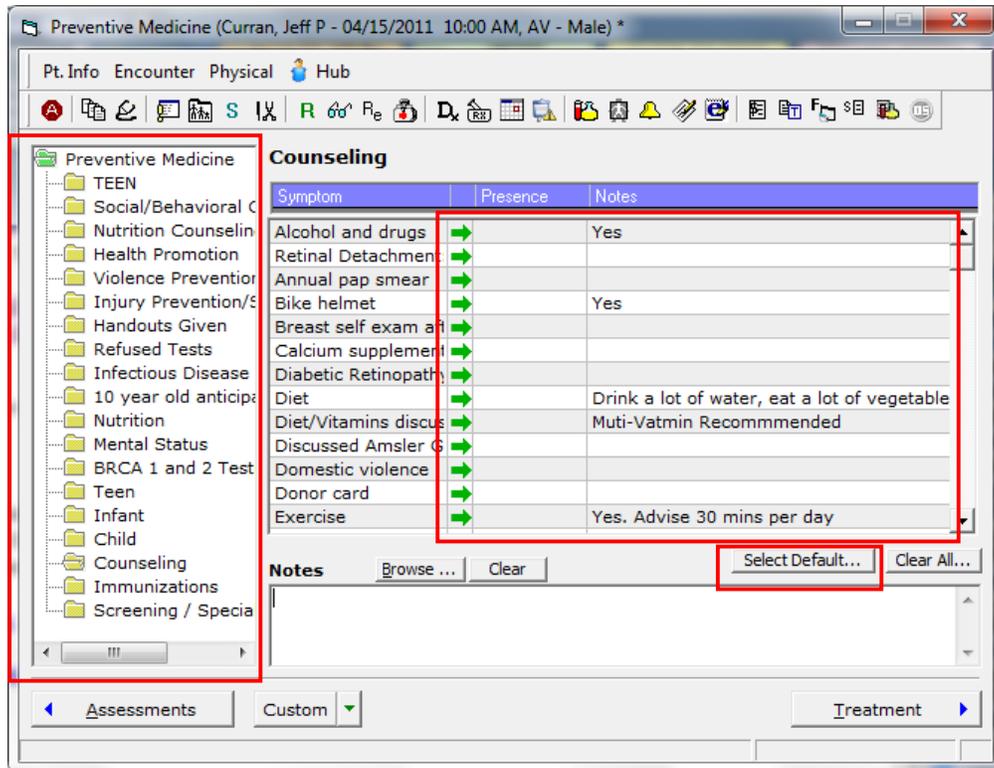
DI All

Note: Very important for Women’s Cancer Screening Program and Lead:

- **Must create lab, back date & enter in results. Scanning document will not be sufficient.**

Preventive Medicine

The preventive medicine screen is used to document the necessary counseling given to the patient.



- The categories are available on the left side and the items under the categories are on the right side.
- Click on the 'Notes' box to document the information in more detail.
- There is also a miscellaneous notes section at the bottom of the section.

Billing and Follow-up Information

Entering Billing Information and Follow-up Details

From the progress notes, click on “Visit code”, to open the “Billing” window.

P	CODE	Diagnosis	Specify	Notes
1	X 462	Sore throat		

Chg. Cod	CPT	Name	Units	M1	M2	M3	M4	ICD1	ICD2	ICD3	ICD4
	99213	Office Visit, Est Pt.,	1					1 462			

Billing Notes: Please waive copay

Follow Up: 1 Week

2-3 Ds	1 W	2 W	3 W
4 W	6 W	2 M	3 M
4 M	6 M	1 Y	prn

Follow up N/A

Done

1. The “Assessment” section will have all the diagnoses added by the provider. The provider can also add additional diagnoses from here.
2. The E & M code can be entered through the following format:
 - a. Provider can enter the E&M (Office Visit) code by clicking on the ‘Add E&M’ button or by clicking on ‘Add CPT’ button.
3. Additional “Procedure Codes” can be added by clicking on the ‘Add CPT’ button.
4. If the provider wants to put in some notes for the biller those can be typed in the “billing notes” section.
5. A follow-up appointment with respective details can be entered in the “Follow-up” section. The details entered here will be displayed in the “Appointment” screen and can be seen by the clerks during the check-out process.
6. “Done” indicates to the billing department that the note is ‘ready to be billed’ where as “Close” means that the provider will still work on the note and might enter additional billing information.

Super Bills

Users can also enter in billing information using super bills.

From the progress note:

- 1) Click on the 'green arrow' next to the 'details' button.
- 2) Choose 'Super Bill'.
- 3) Select the appropriate super bill to display the list of available CPT codes.
- 4) Select the corresponding CPT codes.
- 5) Click 'Save' and the codes will drop on the 'Procedure Codes' Section of the progress note.

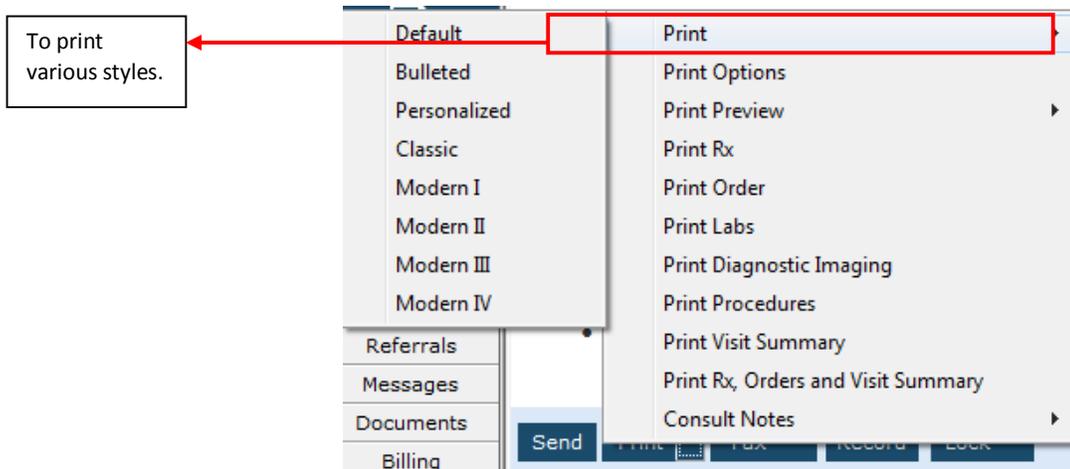
The screenshot shows the 'Super Bill' application window. A sidebar on the left contains a menu with 'Super Bill' highlighted and circled with a '2'. At the top of the window, a dropdown menu is open, showing 'KYDPH Family Planning' selected and circled with a '3'. The main area displays patient information for 'Madison County Health Dept' and a list of available CPT codes. One code, 'AMINES, VAGINAL FLUID QUAL', is checked and circled with a '4'. At the bottom of the window, a 'Save' button is circled with a '5'. A 'Details' button with a green arrow is circled with a '1'.

Pt Name	Test, Letters A	Madison County Health Dept	Provider	April Woodard
DOB	12/02/2010	214 BOGGS LANE	PCP	NO, Primary Care Provi
Insurance	AETNA	Richmond, KY-404769998	Appt Date	11/02/2016
Copyment			Appt Time	16:30:00

FP-CPT	Units					
<input checked="" type="checkbox"/> AMINES, VAGINAL FLUID QUAL	82120	1.00	<input type="checkbox"/> LNG-RELEASING IUC SYS 52MG 5 YR DUR	J7298	<input type="checkbox"/> FFC Office Visit, Est Pt., Level 1	99211
<input type="checkbox"/> ANESTH, TUBAL LIGATION	00851		<input type="checkbox"/> Medroxyprogesterone inj	J1050	<input type="checkbox"/> FFC Office Visit, Est Pt., Level 2	99212
<input type="checkbox"/> ANESTH, VASECTOMY	00921		<input type="checkbox"/> N.GONORRHOEAE, DNA AMP PROB	87591	<input type="checkbox"/> FFC Office Visit, Est Pt., Level 3	99213
<input type="checkbox"/> ASSAY OF BODY FLUID ACIDITY	83986		<input type="checkbox"/> POLYMER PREPS	Q0112	<input type="checkbox"/> FFC Office Visit, Est Pt., Level 4	99214
<input type="checkbox"/> ASSESS ANGINAL SYMPTOM/LEVEL	1002F		<input type="checkbox"/> REMOVAL OF SPERM DUCT(S)	55250	<input type="checkbox"/> FFC Office Visit, Est Pt., Level 5	99215
<input type="checkbox"/> BLOOD PRESSURE, MEASURED	2000F		<input type="checkbox"/> REMOVE DRUG IMPLANT DEVICE	11982	<input type="checkbox"/> FLAT Office Visit, Est Pt., Level 1	99211
<input type="checkbox"/> BLOOD SEROLOGY, QUALITATIVE	86592		<input type="checkbox"/> INTRAUTERINE DEVICE	58301	<input type="checkbox"/> FLAT Office Visit, Est Pt., Level 2	99212
<input type="checkbox"/> CERVICAL CAP FOR CONTRACEPTIVE USE	A4261		<input type="checkbox"/> REMOVE/INSERT DRUG IMPLANT	11983	<input type="checkbox"/> FLAT Office Visit, Est Pt., Level 3	99213
<input type="checkbox"/> CHYLMID TRACH, DNA, AMP PROBE	87491		<input type="checkbox"/> SMEAR, WET MOUNT, SALINE/INK	87210	<input type="checkbox"/> FLAT Office Visit, Est Pt., Level 4	99214
<input type="checkbox"/> COMPLETE CBC W/AUTO DIFF WBC	85025		<input type="checkbox"/> TOBACCO USE, SMOKING, ASSESS	1000F	<input type="checkbox"/> FLAT Office Visit, Est Pt., Level 5	99215
<input type="checkbox"/> CONTRACEPT SUPPLY CONDOM FEMALE EA	A4268		<input type="checkbox"/> TREPONEMA PALLIDUM	86780	<input type="checkbox"/> Office Visit, Est Pt., Level 1	99211
<input type="checkbox"/> CONTRACEPTIVE PILLS BIRTH CONTROL	S4993		<input type="checkbox"/> UNCLASSIFIED DRUGS	J3490	<input type="checkbox"/> Office Visit, Est Pt., Level 2	99212
<input type="checkbox"/> CONTRACEPTIVE SPL HORMONE PATCH EA	J7304		<input type="checkbox"/> URINALYSIS	81005	<input type="checkbox"/> Office Visit, Est Pt., Level 3	99213
<input type="checkbox"/> CONTRACEPTIVE SUPPLY CONDOM MALE EA	A4267		<input type="checkbox"/> URINALYSIS, AUTO W/SCOPE	81001	<input type="checkbox"/> Office Visit, Est Pt., Level 4	99214
<input type="checkbox"/> CONTRACEPTIVE SUPPLY SPERMICIDE A4269	A4269		<input type="checkbox"/> URINALYSIS, AUTO, W/O SCOPE	81003	<input type="checkbox"/> Office Visit, Est Pt., Level 5	99215
			<input type="checkbox"/> URINE PREGNANCY TEST	81025	Prev Health E&M	
			<input type="checkbox"/> URINE-NO MICRO	81002	<input type="checkbox"/> Preventive Care Est Pt. Age 12-17	99394
			<input type="checkbox"/> US EXAM, PELVIC,	76657	<input type="checkbox"/> Preventive Care Est Pt. Age 18-39	99395

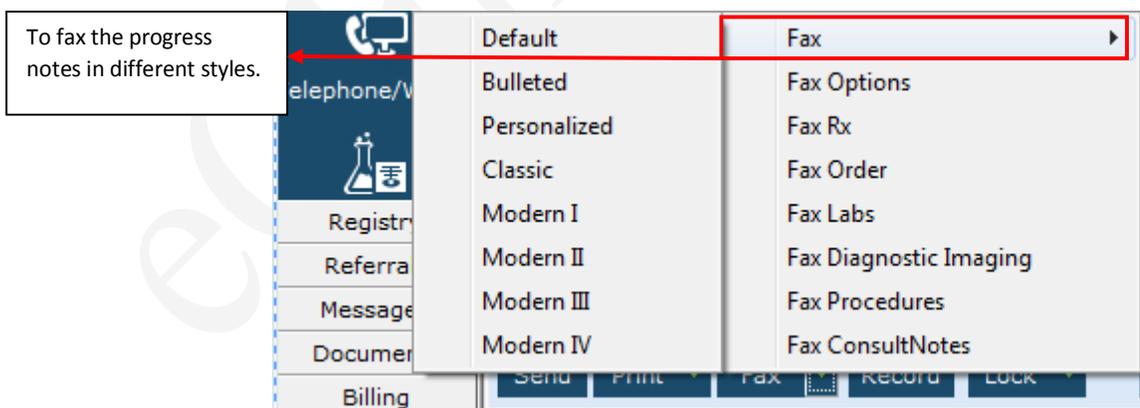
Printing the Progress Note in Different Styles:

Click on the small green arrow next to the 'Print' button at the bottom of the progress notes and choose the style of printing.



Faxing the Progress Note in Different Styles:

Click on the green arrow next to the "Fax" button, then choose the 'style'. Once the 'fax' window opens, enter the fax number and click on the "Send Fax" button.



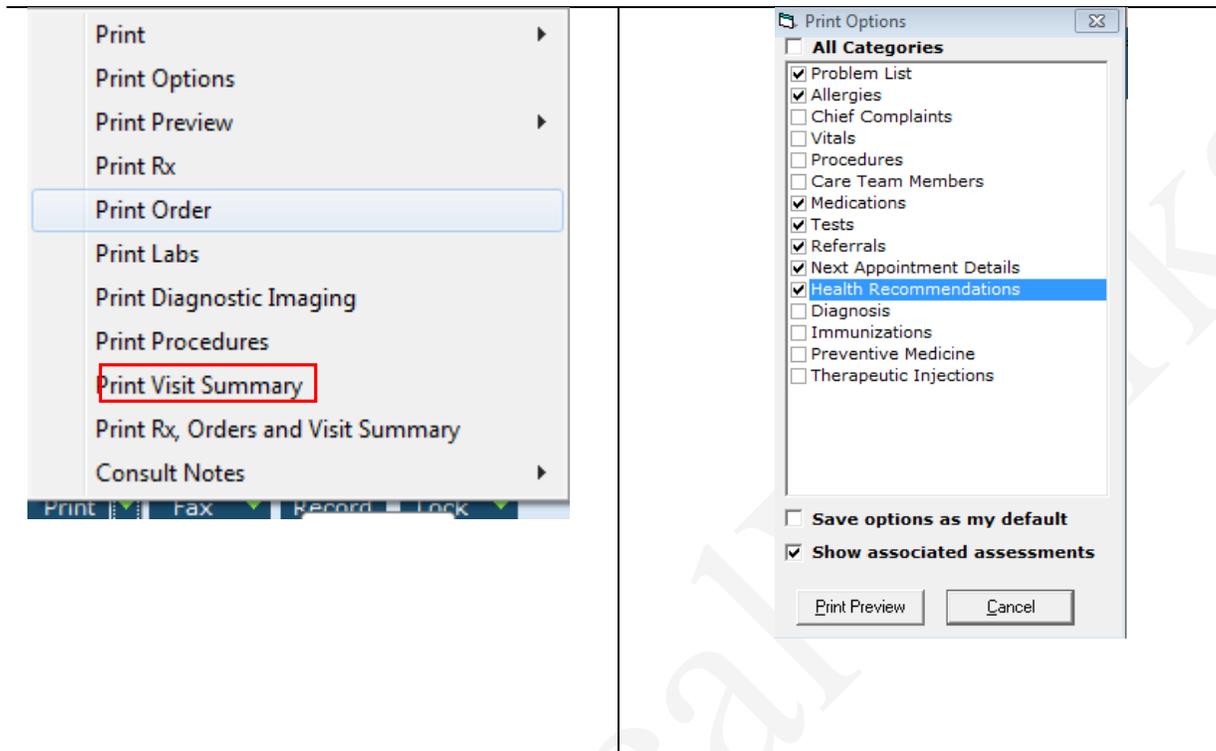
Locking a Progress Note in Different Styles:

To lock the progress notes, click on the green arrow next to the “Lock” button at the bottom of the screen and choose a ‘style’ to lock the note.

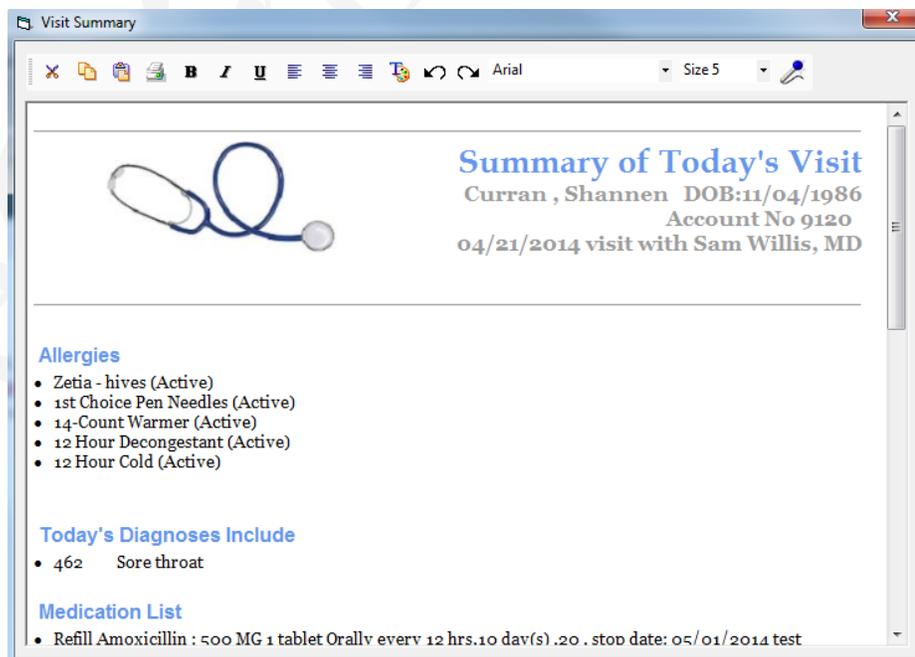
The screenshot displays a medical progress note interface. On the left, there are sections for **Objective:**, **Vitals:**, **Past Results:** (with two lab entries: "Lab: 1-Methyl-histidine, On, 24hr, ..." and "Lab: Hgb A1c with MBG Estimatic..."), **Examination:** (with a dropdown arrow), and **Assessment:** (with a dropdown arrow and a bullet point: "Pneumonia, organism unsp..."). At the bottom, there is a toolbar with buttons for "Send", "Print", "Fax", "Record", "Lock", "Templates", "Claim", "Letters", and "Ink". A red box highlights the "Lock" button, which has opened a dropdown menu. The menu contains 16 options: "Lock - Default Style", "Lock - Bulleted Style", "Lock - Personalized Style", "Lock - Classic Style", "Lock - Modern-I Style", "Lock - Modern-II Style" (highlighted), "Lock - Modern-III Style", "Lock - Modern-IV Style", "Preview - Default Style", "Preview - Bulleted Style", "Preview - Personalized Style", "Preview - Classic Style", "Preview - Modern-I Style", "Preview - Modern-II Style", "Preview - Modern-III Style", and "Preview - Modern-IV Style". A red arrow points from the "Lock - Modern-II Style" option to a text box on the right that reads: "Allows providers to preview and lock the progress notes in different styles."

Printing & Modifying Patient Visit Summary

To modify/add notes to the visit summary: Check the boxes next to the items to include in the printing of the visit summary.



To type some additional notes along with the visit summary, simply place your cursor on the screen where you would like to add your notes and type in any personalized notes, if required.



Faxing Consult Notes/Report:

Click on the green arrow next to the “Fax” button and choose the “Fax Consult Notes” option.

Patient: Lab, Larry **DOB:** 01/01/1983 **Age:** 31 Y **Sex:** M
Phone: 561-750-4753 **Primary Insurance:** Aetna **Pa**
Address: , 714 Lab Lane, Boca Raton, FL-33433
Account Number: 9122
Encounter Date: 03/24/2014 **Provider:** Sam Willis, MD
Appointment Facility: Westboro Medical Associates

Subjective:
Chief Complaint(s):
HPI:
Current Medication:

- Taking C... tablet as ne
- Taking C... ml as nee
- Taking C... Once a day
- Taking T... needed e
- Taking A... rules Three

Medical Histo
Allergies/Int

Send **Print** **Fax Consult Notes**

Consult Notes
Note Style: Classic
 Note Secti
 CC
 HPI
 CurrentMedi
 MedicalHistory
 Allergies
 SurgicalHistory
 Hospitalization
 FamilyHistory
 SocialHistory
 ROS
 Vitals
 Examination
 PhysicalExam
 Assessment
 Therapeutic
 TherapyAssessment
 Treatment
 Procedures
 Immunizations
 XRay
 Include Cover Letter
 Consult Report **Consult Request**

Fax **Cancel**

Choose consult report/consult request depending if it is an outgoing referral note/incoming referral note.

To Fax consult notes.

Fax Preview

To
 Name: Smith John Ref Physicia Browse
 To Fax: -
 CC Fax: Ref Physicia Browse
 Subject: Consult Notes
 Company:

From
 Name: eclinicalworks.support
 Provider: Sam Willis
 Voice #: 617-999-8888
 Company: Ton Facility
 Facility: Ton Facility Browse...

CC To Browse Save In Consult Notes As 06-16-2009_Smith John

Allows you to specify the recipient(s).

Allows you to save the document in the specified folder.

Allows you to preview the document.

Black, Joe
 19 Y old Male, DOB: 01/01/1990
 99 Test St, Apt 4, Westborough, MA, US 01581
 Home: 617-888-9777
 Consult Request to: Smith John

Dear Dr. Smith John,
 Thank you for evaluating Joe Black. In an effort to assist you in your assessment, I am

Signature Clear Update

Schedule **Print** **Print Preview** **Copy** **Send Fax** **Cancel** CC Fax to Patient

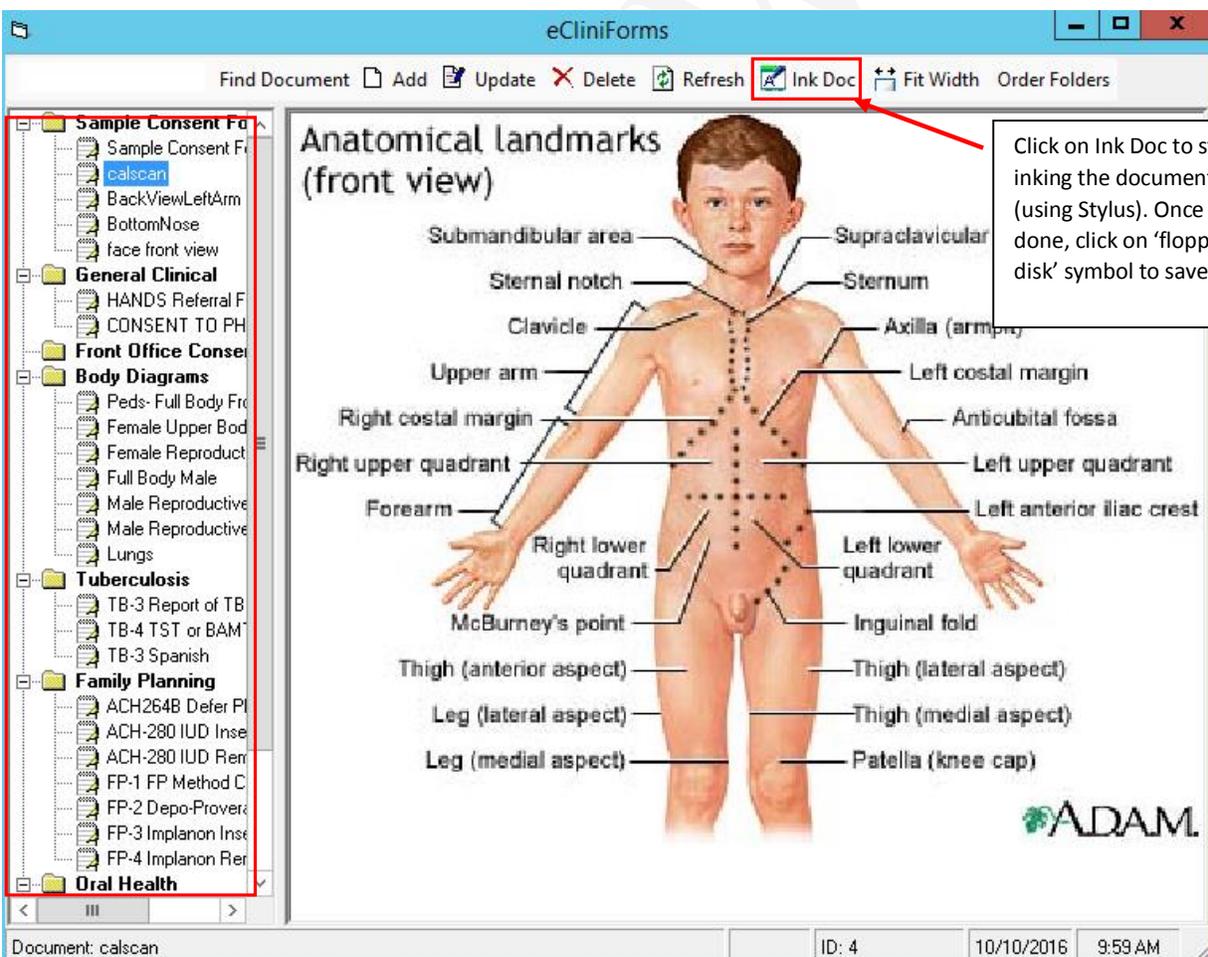
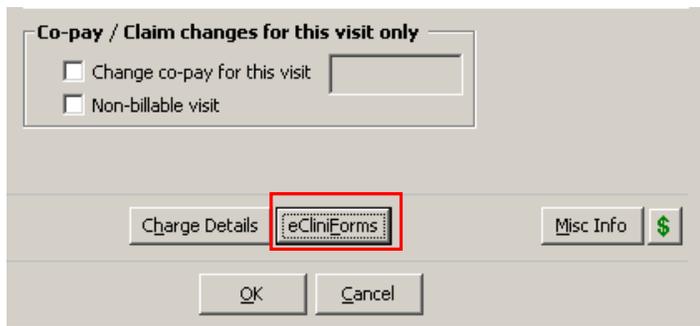
Printing Consult Notes/ Reports:

Click on the green arrow next to the “Print” button, choose the “Consult Note” and choose the “Print Using letter” option to print the consult note/report in a pre-loaded letter format. Provider can also print using the ‘HTML’ version by selecting ‘Print Using html’.

The screenshot displays a patient record page with a left-hand navigation menu and a main content area. The navigation menu includes: Office Visits, Lab, Progress Notes, Telephone/Web..., Registry, Referrals, Messages, Documents, and Billing. The main content area shows patient information: Phone: 561-750-4753, Primary Insurance: Aetna, Payer ID: 73383, Address: , 714 Lab Lane, Boca Raton, FL-33433, Account Number: 9122, Encounter Date: 03/24/2014, Provider: Sam Willis, MD, and Appointment Facility: Westboro Medical Associates. Below this, there are sections for Subject, Chief Complaint, HPI, Current Medications, and Allergies. A print menu is open over the 'Consult Notes' section, listing options: Print, Print Options, Print Preview, Print Rx, Print Order, Print Labs, Print Diagnostic Imaging, Print Procedures, Print Visit Summary, Print Rx, Orders and Visit Summary, Consult Notes, Print Using html, and Print Using Letter. The 'Print Using Letter' option is highlighted with a red box.

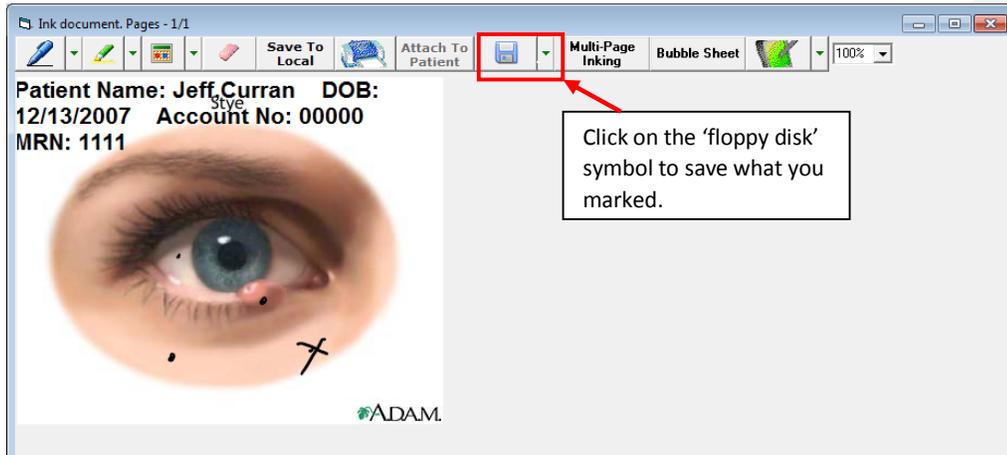
Using eCliniforms

Paper forms that providers/patient needs to sign and are not available in the EMR system (Some insurance/facility requires their unique paper forms) can be uploaded as 'eCliniForms'. eCliniForms can be accessed through the appointment window and the progress note (INK). eCliniForms can be 'Inked' using the Stylus from the tablet, the Signature Pad or finger using the iPad.



To use the eCliniforms:

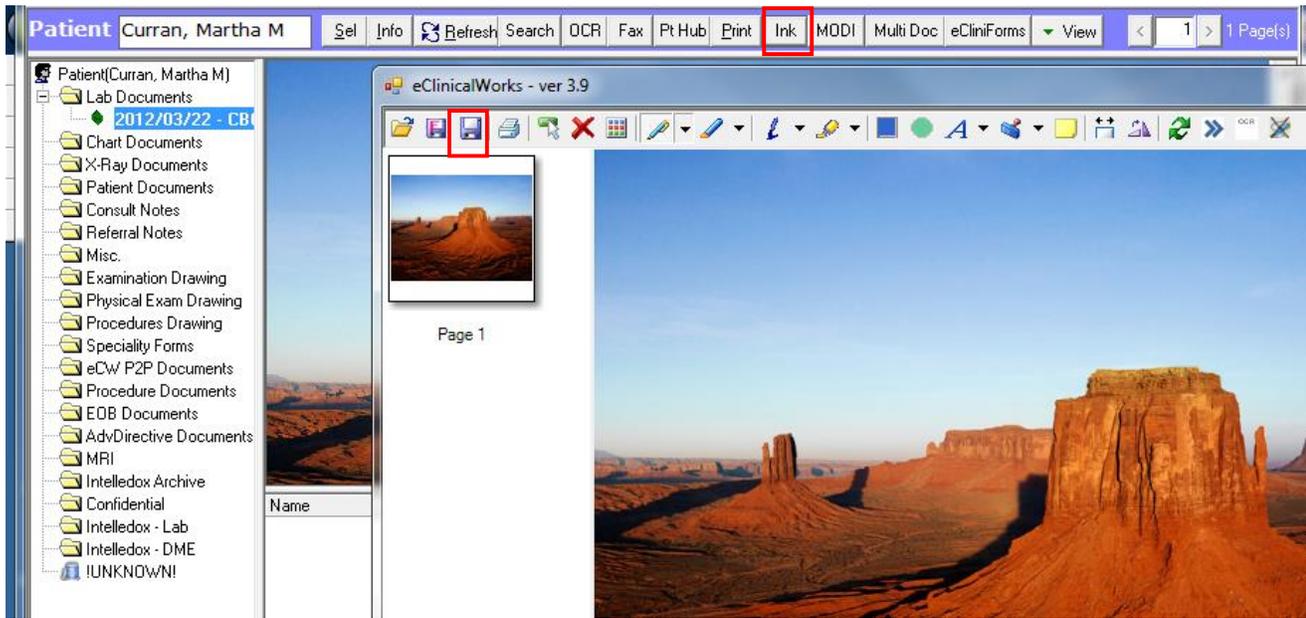
1. Click on the 'Ink' button at the bottom of the screen, which will open the eCliniForm screen.
2. Choose the form.
3. Click on 'Ink doc' and this will open the screen for inking.
4. Mark the necessary details and click on the 'floppy disk' symbol to save the changes made.
5. This document will be available for reference under the 'Chart Documents' folder in the patient documents.



Re-Inking the Saved Documents

Once the document is saved in the patient documents, you can re-ink the document by:

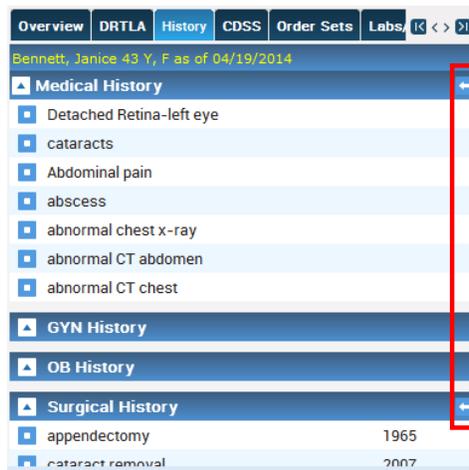
1. Open "Patient Documents" section.
2. Select the desired document and click on the "Ink" icon.
3. Start inking.
4. Click the floppy disk icon to save.



Progress Notes Short-Cuts

Patient Chart Panel

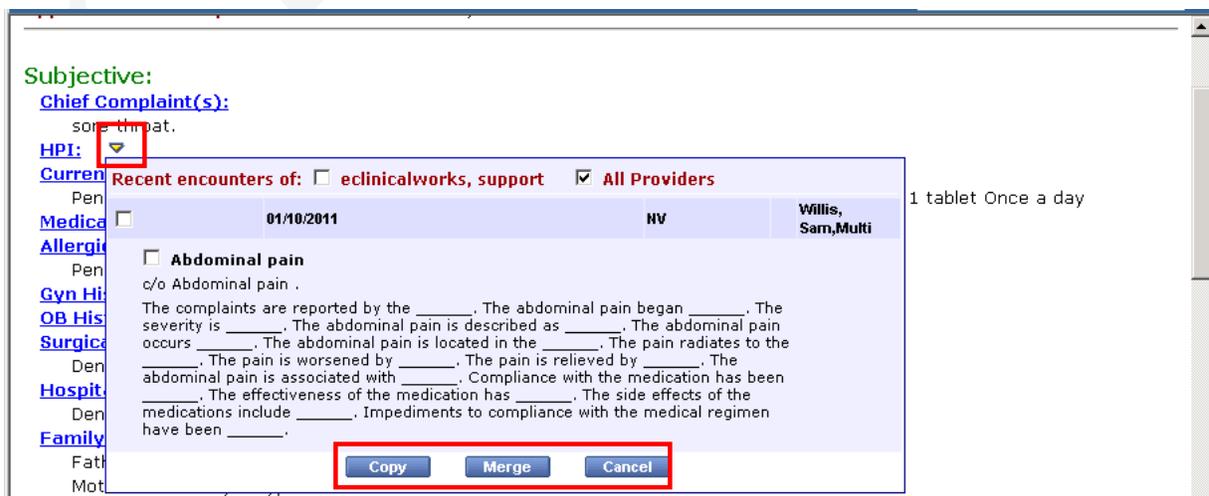
The patient’s history and allergy information can be populated on the current progress note, from previously entered information, by simply clicking on the respective ‘blue arrow’ icons on the patient chart panel.



Using the ‘Caret’ Options

The following sections of the progress note: HPI, ROS, Examination, Physical Examination, Assessment and Treatment, can be populated from previously entered information by clicking on the ‘caret’ option (yellow inverted triangle) next to the respective headings. The “Recent Encounter Of” allows you to view only your encounter(s) or all providers’ encounters.

The “copy” button will replace existing information with the selected information while the “Merge” button will append the selected information to the already existing data in that section.



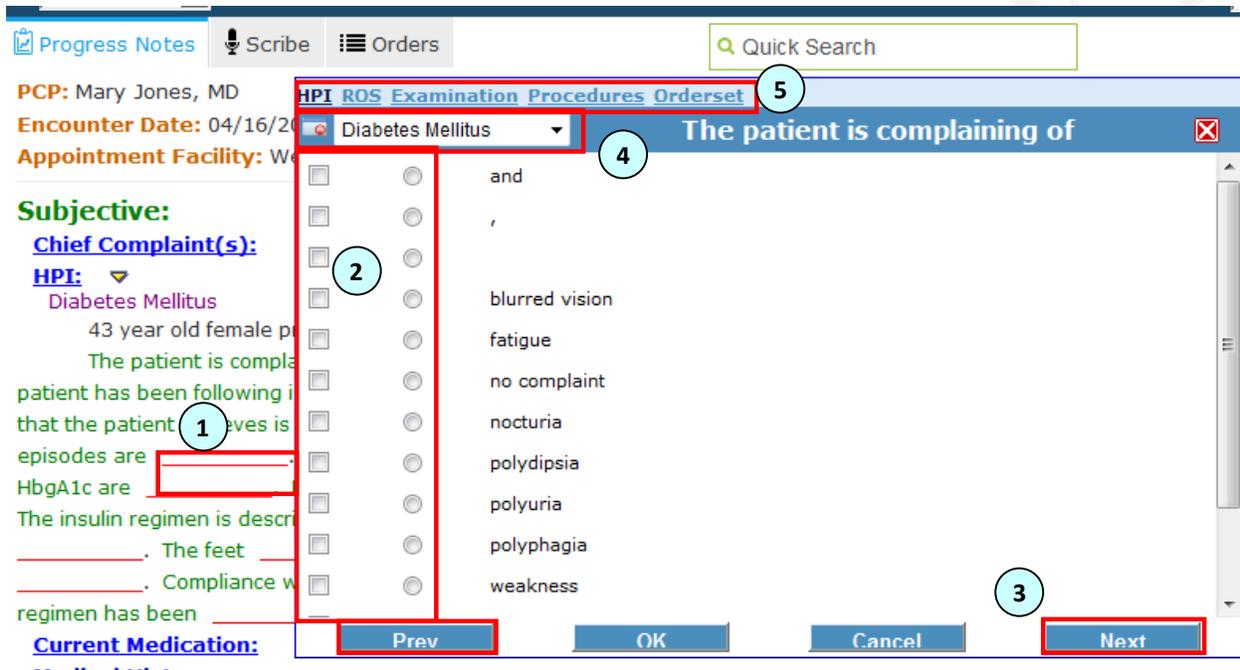
Using the ‘Scroll Item’ Function

For the HPI, ROS, Examination, Procedure, Preventative Medicine and Physical Examination sections, the notes that are already entered for the various symptoms can be modified by directly clicking on the green font of a certain item in a given section. Once the window opens, a user has the ability to use the “Prev” and “Next” button to easily toggle through different items of a particular section. This will be beneficial when using templates because it will allow users to fill in symptoms without having to click into the various different windows.

The screenshot shows the 'Examination Notes' window in the eClinicalWorks application. The window is titled 'Examination Notes' and has two tabs: 'Free-form' (selected) and 'Structured'. Below the tabs, there are options for 'NECK/THYROID' and a text area containing the text 'neck supple, full range of motion, no cervical lymphadenopathy'. The 'Free-form' tab shows a list of options for 'NECK/THYROID' including 'normal', 'carotid pulse normal', 'neck supple', 'neck supple, full range of motion', 'no carotid bruit', 'no cervical lymphadenopathy', 'no jugular venous distention', 'no lymphadenopathy', 'no thyroid nodules', 'no thyromegaly', 'thyroid nontender', 'thyroid normal', and 'trachea midline'. The 'Prev' and 'Next' buttons are highlighted with red boxes. A large watermark 'eClinicalWorks' is visible across the image.

Using the 'Notes' Drop-Down

For the HPI, Examination and Physical Examination sections, the notes that are already entered for the various symptoms can be modified by directly clicking on the respective notes keyword and choosing the alternate option from the drop down window that pops-up. This will be beneficial when using templates because it will allow users to change the symptoms without having to click into the various different windows. It will also allow users to move through the progress note quicker.



1. Click on the respective keywords to enable the “drop down” window.
2. The check boxes are multi-select options and the radio buttons are a single select option.
3. Use the “Prev” and “Next” buttons to toggle between category items.
4. Use the “category drop down” option to move to different categories documented in the respective section of the progress note.
5. Click on the hyperlinks at the top of the window to quickly move to a different section of the progress note or access “Order sets” that are linked to correlating template(s) that were merged onto the progress note.

Appendix A: Notices

Trademarks

eClinicalWorks®

eBO®

P2P®

eEHX®

eClinicalWorks, eBO, P2P, and eEHX, are registered trademarks of eClinicalWorks, LLC.

All other trademarks or service marks contained herein are the property of their respective owners.

Copyright

CPT Copyright Notice

CPT © 2012 American Medical Association. All rights reserved.

Fee schedules, relative value units, conversion factors and/or related components are not assigned by the AMA, are not part of CPT, and the AMA is not recommending their use. The AMA does not directly or indirectly practice medicine or dispense medical services. The AMA assumes no liability for data contained or not contained herein.

IBM® Cognos®

IBM and Cognos are registered trademarks of IBM Corporation in the United States, other countries, or both.