

Block & Biggs Roadshow Back by Popular Demand!

Superuser Tips and Tricks to Improve Efficiency, Patient Management, Quality Performance, and Income for a Better Overall Provider & Patient Experience

- For copy of presentation & some bonus slides go to:
www.BlockAndNation.com/BlockAndBiggs



Who Are We?

- Bradley M. Block, M.D., FAAFP
 - Family Physician in independently owned, 4 physician Family Medicine group in Oviedo, Florida
 - eCW User for 20 years
- William “Reddy” Biggs, M.D., FACE, ECNU
 - Endocrinologist in independently owned, 55 provider Internal Medicine Multi-Specialty group in Amarillo, Texas
 - eCW User for 18 years
 - Board Certified in Clinical Informatics
 - CPT reviewer for AMA
- Spoken together at NUC since 2008



Why Were We Asked to Speak?



- Together we have 38 years of total eCW experience
- We've been using eCW longer than approx. 110,000 facilities & approx. 180,000 physicians
- Provide improvement ideas to eCW & work with Usability Leaders
- “eClini-Geeks” on the eCW Web User’s Forum for assisting users w/ expert eCW advice with over 4,700 combined total posts
- Both in leadership roles in very successful ACO’s
- No Financial Incentives for anything we present nor do we get paid by eCW for anything we do for them

Dr Bigg's AMA & AACE Work Required Disclaimers

- Disclaimers:
- This session is not given under the auspices of AACE or AMA, and any opinions or comments are my own, and do not necessarily reflect official opinions from AACE or AMA.
- *Comments, information or advice (collectively referred to as “information”) provided reflect current understanding of the proper use and application of CPT®¹, ICD, HCPC codes, and claims modifiers. The information provided is solely intended as general information only. Ultimately, it is the provider’s responsibility to understand and comply with National Coverage Determinations (NCD), Local Coverage Determinations (LCD) and any other complex coverage requirements established by relevant government and private payors, which are subject to frequent change.*
- *No representation is made regarding the appropriateness of use or the likelihood of reimbursement with respect to a specific code or claim. The information presented in this presentation is for informational purposes only, and is not meant as a substitute for professional medical and/or legal advice, both of which should be obtained independently from qualified professionals.*

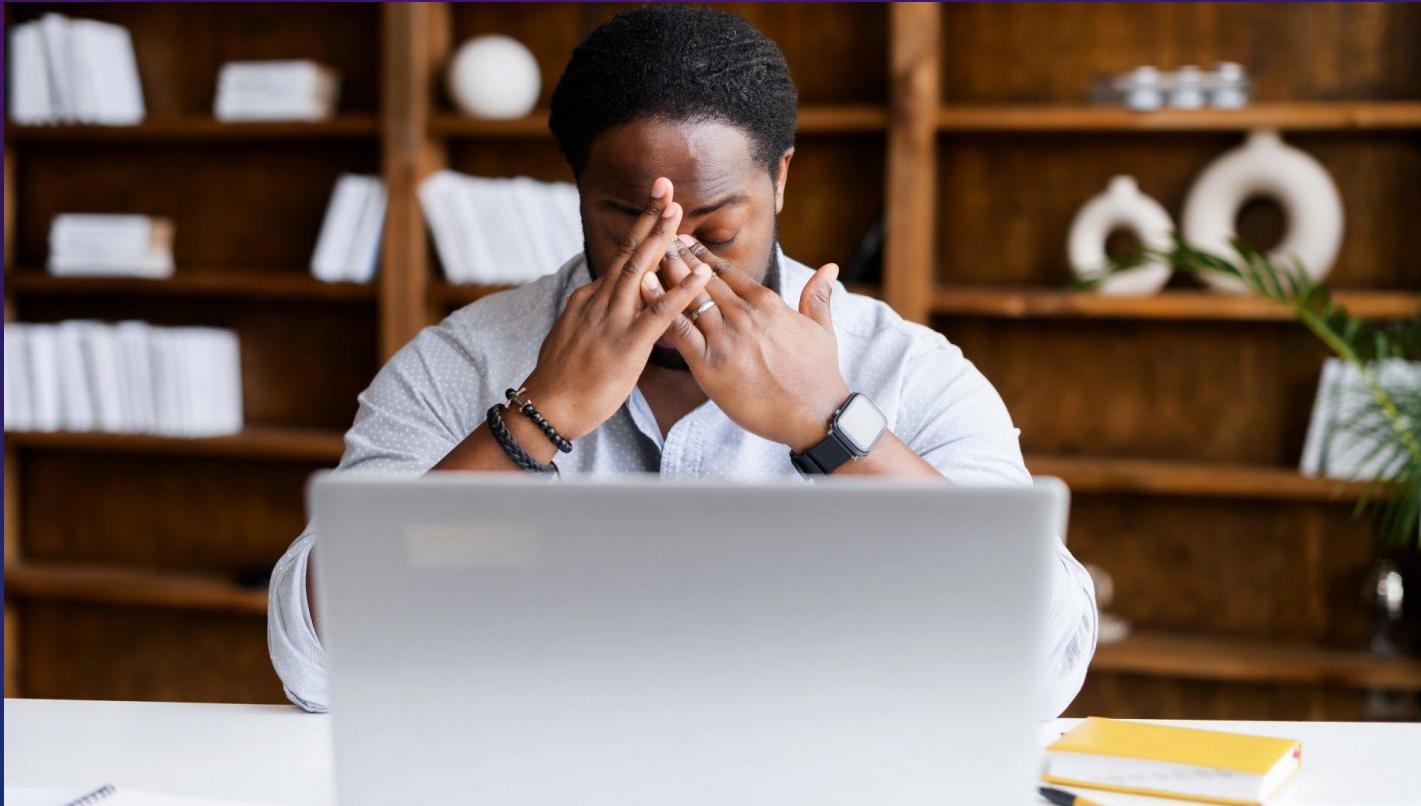
Our Goal: Provide Beneficial Ideas You Can Implement Using Tools Available Through eCW

- Increase Efficiency of Providers & Staff
- Improve Quality of Patient Care & Experience
- Boost Practice Income

Overview of Our Presentation

- Full Hour of Tips, Tricks & Examples
- 100% ALL new material & includes mix of basic concepts through more advanced ideas
- Some Tips might be v12 version dependent
- Fast Pace to share as much as possible
- Make Note of 3-5 Things Presented
- Question & Answer Session at the End
 - We'll stay after in hallway until all questions are answered
 - Make notes so you don't forget!

Tired of Waiting on eCW! Configure Your Computer And Your eCW Settings For Maximal Performance & Efficiency and Optimal Experience



Configure eCW Plug-in Settings to Maximize Performance

- Confirm w/ eCW that you have latest plugin version if having issues
- Update eCW Settings!
- Turn off Print Settings AFTER done configuring your Print settings w/in eCW
- Clean out Chrome Cache daily before starting & PRN. Our IT person created a script that runs s/w automatically on computer start up. Be sure to have IT person configure any cleaning s/w if not familiar w/ options



eClinicalWorks V12.0.3

Enter username to continue

Enter your password on next screen

Next

Download Plug-in

Windows Applications

Firefox

<input checked="" type="checkbox"/>	Internet Cache	25,547 KB	361 files
<input type="checkbox"/>	Internet History	983 KB	12 files
<input type="checkbox"/>	Cookies	4,112 KB	2 files
<input type="checkbox"/>	Bookmarks Backup	130 KB	4 files
<input checked="" type="checkbox"/>	Crash Reports		
<input type="checkbox"/>	Download History		
<input type="checkbox"/>	Last Download Location		
<input checked="" type="checkbox"/>	Session		
<input type="checkbox"/>	Site Preferences		
<input type="checkbox"/>	Saved Form Information		
<input type="checkbox"/>	Saved Passwords		
<input type="checkbox"/>	Compact Databases		
Google Chrome	<input checked="" type="checkbox"/> Internet Cache	905,707 KB	6,599 files
<input type="checkbox"/>	Metrics Temp Files	9,216 KB	3 files
<input type="checkbox"/>	Session	5,330 KB	23 files
<input type="checkbox"/>	Windows Store - Snip & Sketch	3,999 KB	10 files

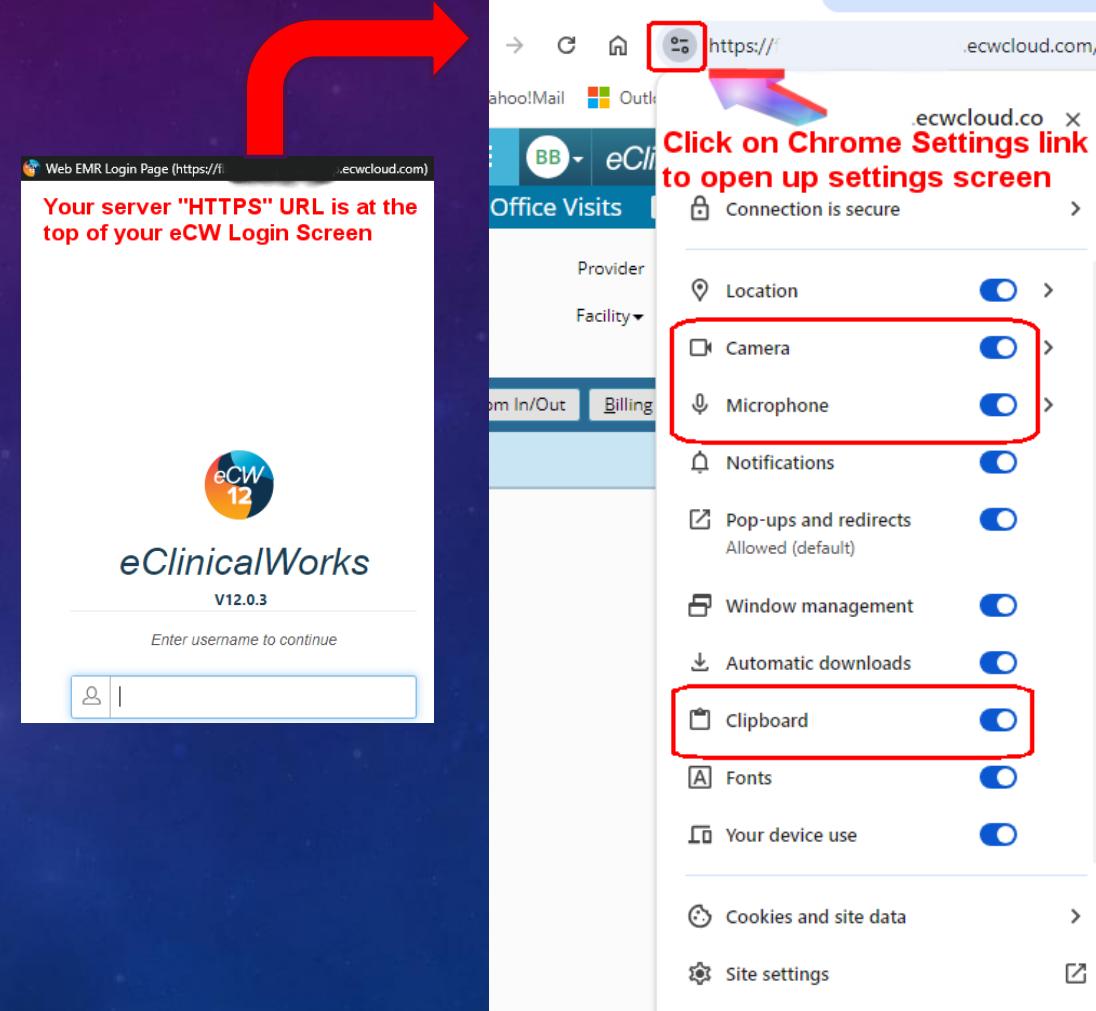
Analysis Complete - (1.749 seconds)
1.06 GB to be removed. (Approximate size)

Details of files to be deleted (Note: No files have been deleted yet)

<input checked="" type="checkbox"/>	Edge Chromium - Internet Cache	25,547 KB	361 files
<input type="checkbox"/>	Edge Chromium - Session	983 KB	12 files
<input type="checkbox"/>	Edge Chromium - Metrics Temp Files	4,112 KB	2 files
<input type="checkbox"/>	Internet Explorer - Temporary Internet Files	130 KB	4 files
<input type="checkbox"/>	System - Temporary Files	26,631 KB	56 files
<input type="checkbox"/>	System - Memory Dumps	128,725 KB	8 files
<input type="checkbox"/>	System - Windows Error Reporting	212 KB	8 files
Google Chrome	<input checked="" type="checkbox"/> Internet Cache	905,707 KB	6,599 files
<input type="checkbox"/>	Metrics Temp Files	9,216 KB	3 files
<input type="checkbox"/>	Session	5,330 KB	23 files
<input type="checkbox"/>	Windows Store - Snip & Sketch	3,999 KB	10 files

End Pop-Up Approvals When Using eCW by Updating Chrome Browser Settings to Permanently “Allow” eCW Features

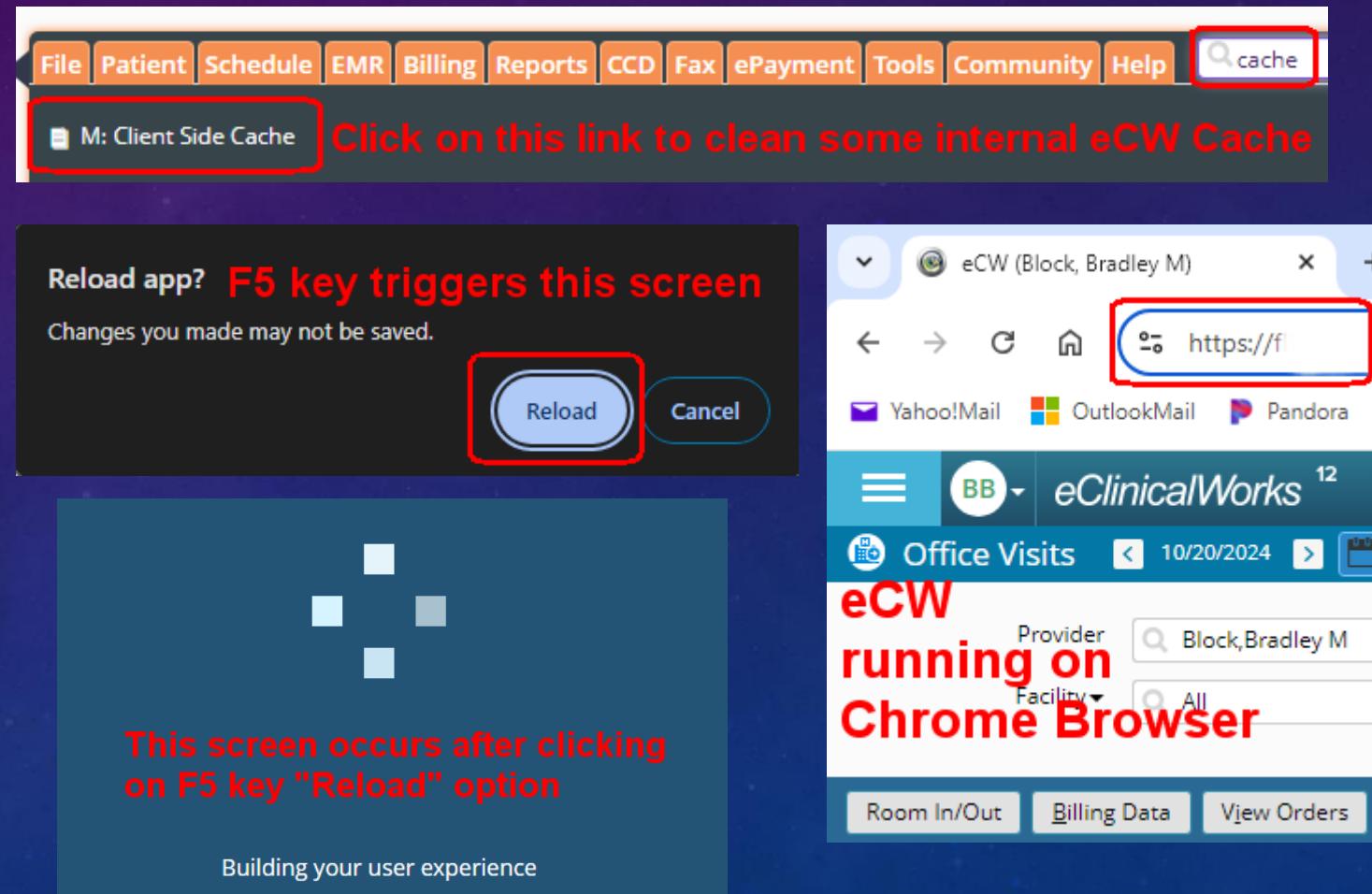
- Go to eCW Cloud Server URL on Chrome Browser
- Set Chrome Browser settings to “**Always Allow**” camera & microphone (for Televisits)
- Set Chrome settings to “**Always Allow**” clipboard (for copying & pasting in eCW) (but only seems to work for W10, not W11)



Quick Fixes for Slowness & Freezes

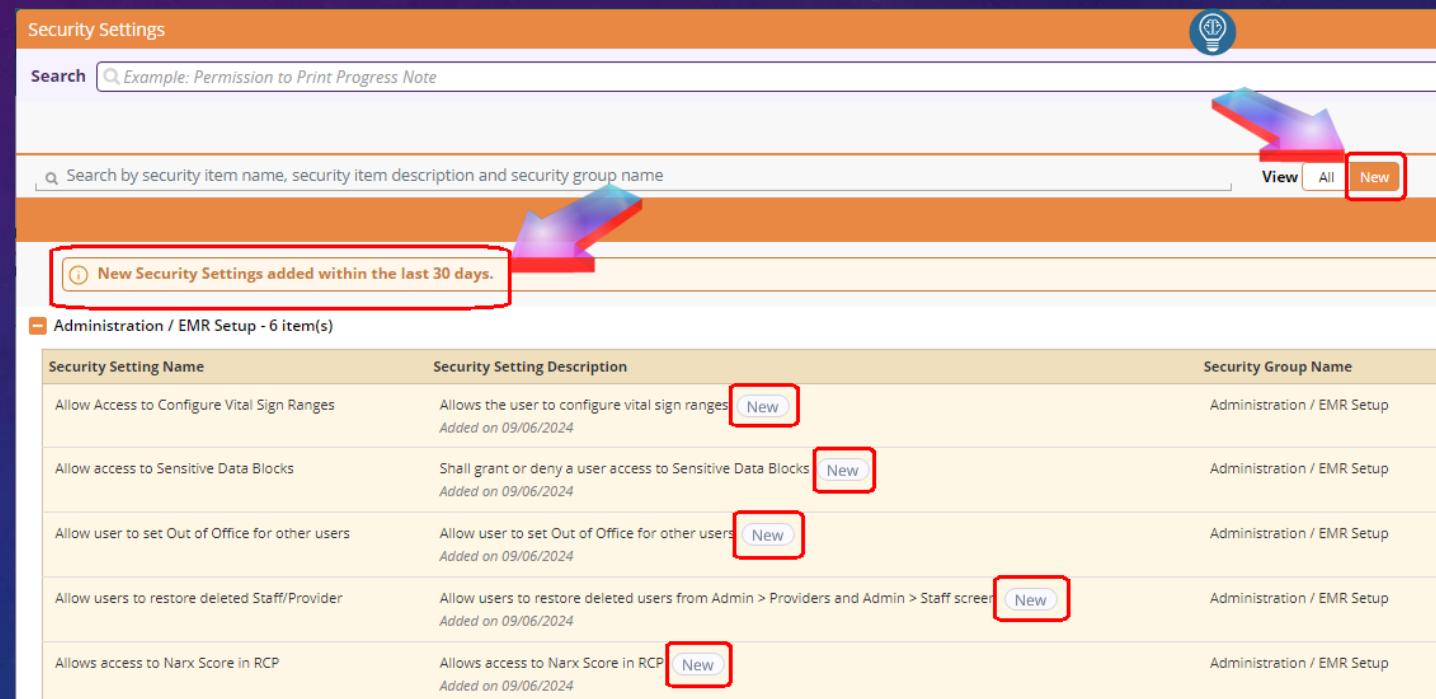
And Alternate Ways to Run eCW

- Click on eCW “Client Side Cache” link as needed (or daily if not using Chrome cache cleaner s/w)
- Use “**F5**” Function Key as needed to fix freezes to refresh the current screen
- Can try running eCW in Chrome (or MS Edge) Browser window w/o using eCW Plugin by going to Cloud Server URL to see if eCW performs any differently



At Practice Level: Avoid Blocking Users from Performing Their Tasks After Version Updates & Cumulative Patches

- New option in Security Settings: Click on “New” tab for new settings in past 30 days
- After every version or CP update always review all the new security settings and update providers & staff accordingly



Security Settings

Search Example: Permission to Print Progress Note

Search by security item name, security item description and security group name

View All New

New Security Settings added within the last 30 days.

Administration / EMR Setup - 6 item(s)

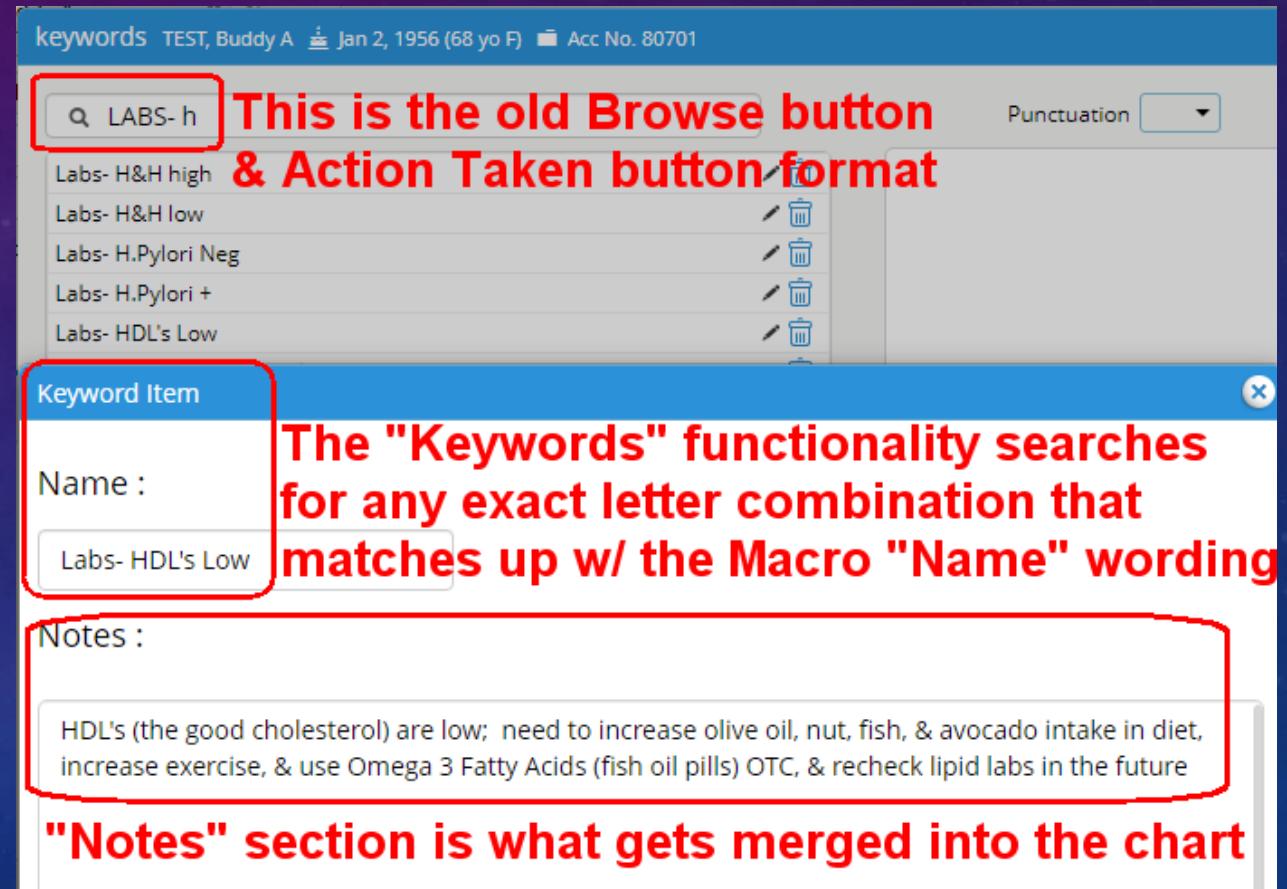
Security Setting Name	Security Setting Description	Security Group Name
Allow Access to Configure Vital Sign Ranges	Allows the user to configure vital sign ranges Added on 09/06/2024	Administration / EMR Setup
Allow access to Sensitive Data Blocks	Shall grant or deny a user access to Sensitive Data Blocks Added on 09/06/2024	Administration / EMR Setup
Allow user to set Out of Office for other users	Allow user to set Out of Office for other users Added on 09/06/2024	Administration / EMR Setup
Allow users to restore deleted Staff/Provider	Allow users to restore deleted users from Admin > Providers and Admin > Staff screen Added on 09/06/2024	Administration / EMR Setup
Allows access to Narx Score in RCP	Allows access to Narx Score in RCP Added on 09/06/2024	Administration / EMR Setup

Hidden Gems in v12 to Improve Your Efficiency & eCW Experience



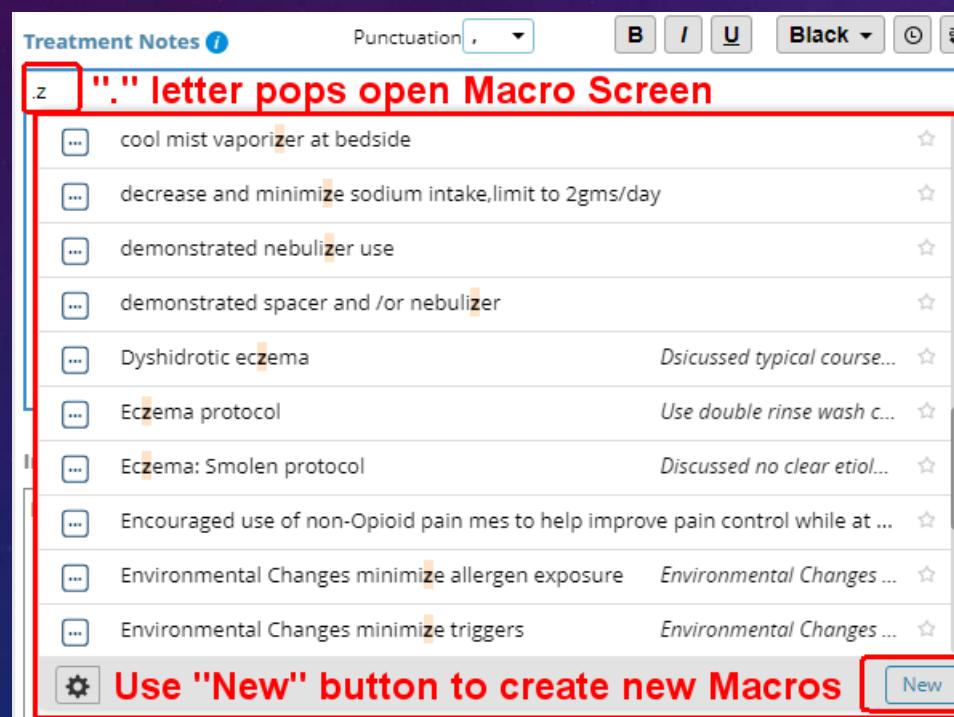
Create, Add, Update Notes Faster with Keyword Macros!

- “Keywords” are the same thing as the old traditional “Macros” found in the “Browse” & “Action Taken” buttons
- Use Keywords from the “Name” box of Macro to pull them up & add the “Notes” to the chart
- Just type a “.” immediately followed by letters in the “Keywords” (in the Macro “Name”) to bring up Macro options to add to chart
- Do NOT include any “.” in the middle of the keyword (macro name) phrase
- In this example, I could type “.Labs” or “.HDL” to easily find this Macro



Easily Create New Macros From Scratch

- Create Macros from scratch that work anywhere in eCW including Visit notes, TE's, RX Edit screens, Lab/DI Notes, & internal "M" Messages
- Easiest way to get to master list of Macros & see a button to create new one is type ":" followed by any single letter



Configure Options **Macro name organizes Macros alphabetically**

Macro Name* **eCW NC** "Shortcut" is the Keyword phrase for adding Macros to eCW; cannot contain any special characters

Macro Shortcut* **eCWNC**

Macro Text* **I'm off work at the eCW National Conference, and will be busy hanging out with Girish, Sam, Dr Raj, and the rest of the eCW folks, so please do not call me unless there is an emergency (or you have an important eCW question for me to ask them).**

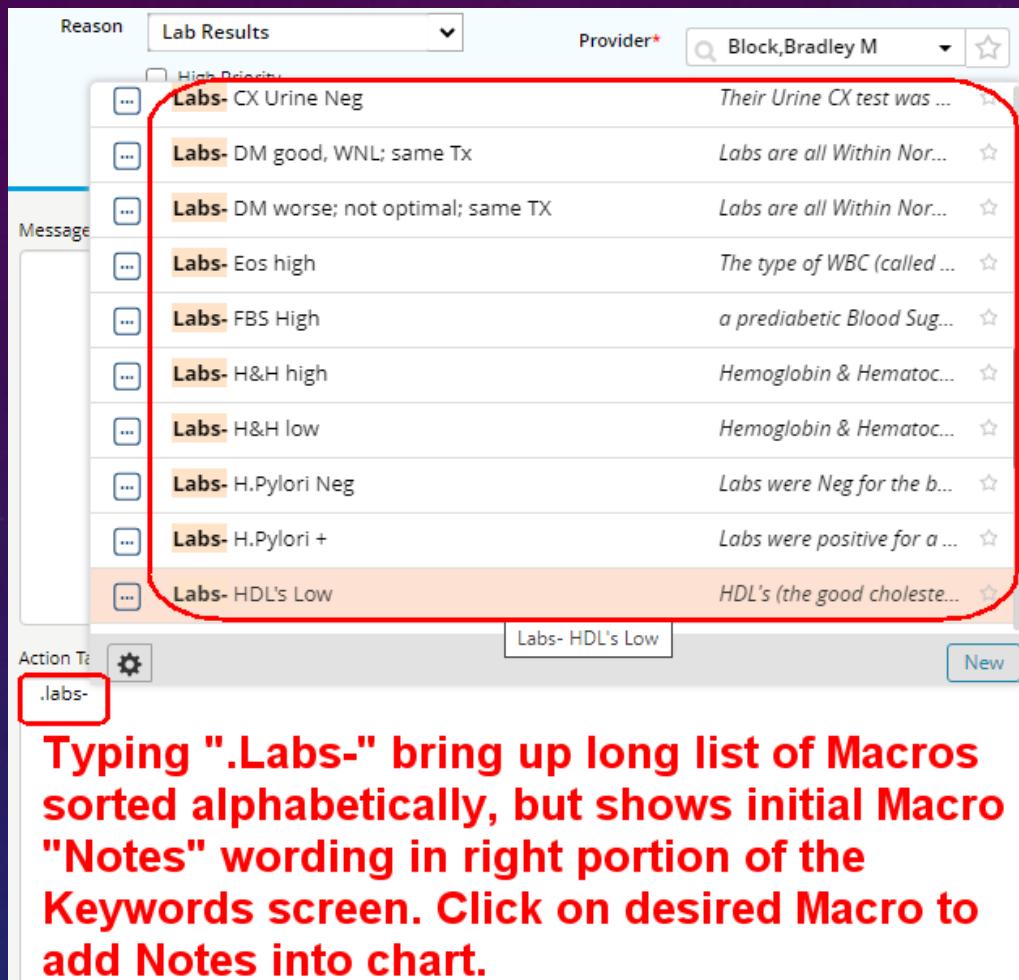
Share it with other users **We usually share our Macros**

For **Lab** **Imaging** **Procedures**

OK **Cancel**

These are the notes that get added

Tips for Efficient Use of Keyword Macros



Reason Lab Results Provider* Block, Bradley M

Message

Action Taken

.Labs- CX Urine Neg Their Urine CX test was ...

.Labs- DM good, WNL; same Tx Labs are all Within Nor...

.Labs- DM worse; not optimal; same TX Labs are all Within Nor...

.Labs- Eos high The type of WBC (called ...

.Labs- FBS High a prediabetic Blood Sug...

.Labs- H&H high Hemoglobin & Hematoc...

.Labs- H&H low Hemoglobin & Hematoc...

.Labs- H.Pylori Neg Labs were Neg for the b...

.Labs- H.Pylori + Labs were positive for a ...

.Labs- HDL's Low HDL's (the good choleste...

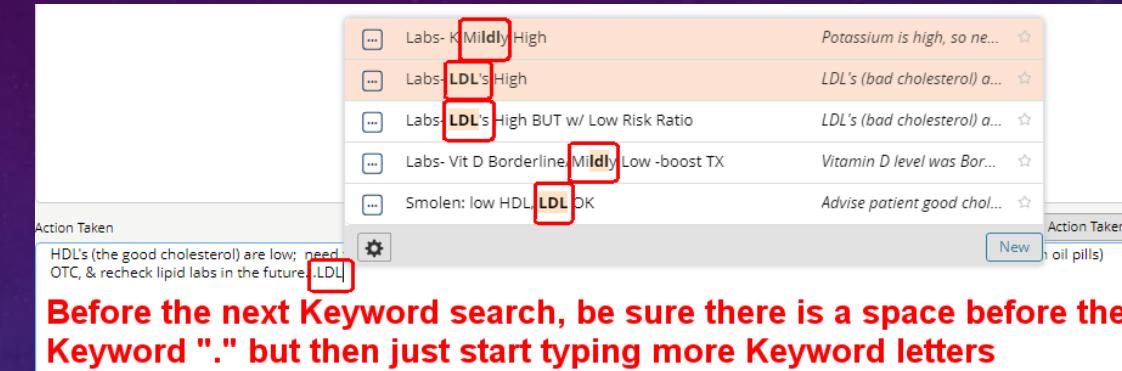
Action Taken

.Labs- HDL's Low

New

.Labs-

Typing ".Labs-" bring up long list of Macros sorted alphabetically, but shows initial Macro "Notes" wording in right portion of the Keywords screen. Click on desired Macro to add Notes into chart.



Action Taken

Labs- K Mildly High Potassium is high, so ne...

Labs- LDL's High LDL's (bad cholesterol) a...

Labs- LDL's High BUT w/ Low Risk Ratio LDL's (bad cholesterol) a...

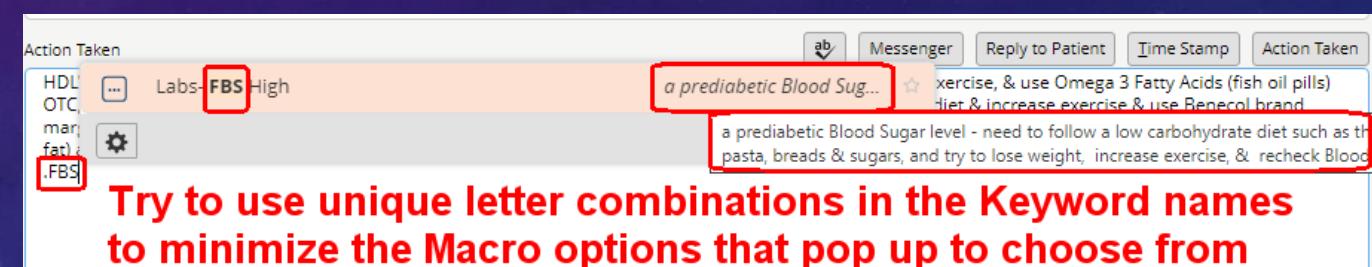
Labs- Vit D Borderline Mildly Low -boost TX Vitamin D level was Bor...

Smolen: low HDL LDL OK Advise patient good chol...

Action Taken

New

Before the next Keyword search, be sure there is a space before the Keyword "." but then just start typing more Keyword letters

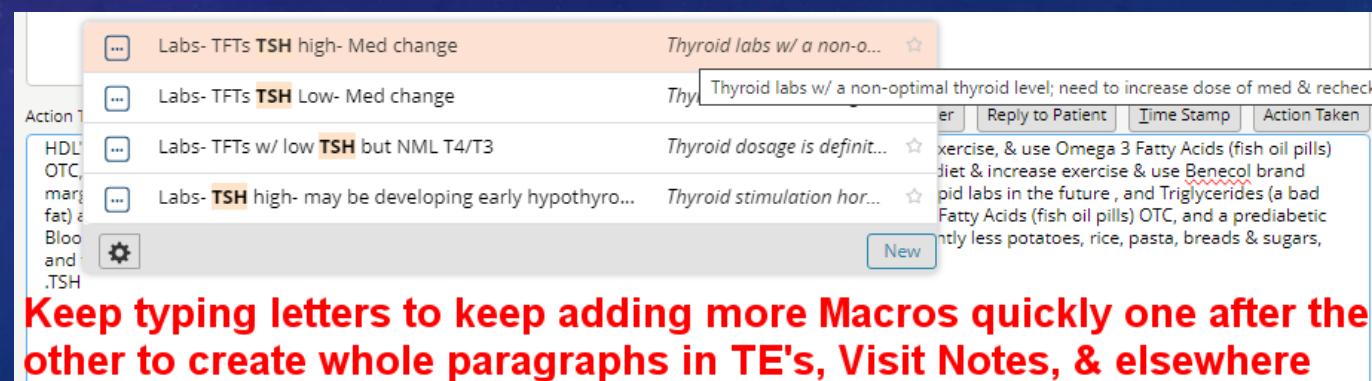


Action Taken

HDL's OTC labs- FBS High a prediabetic Blood Sug... exercise, & use Omega 3 Fatty Acids (fish oil pills) diet & increase exercise & use Benecol brand

mar... fat & .FBS a prediabetic Blood Sugar level - need to follow a low carbohydrate diet such as the pasta, breads & sugars, and try to lose weight, increase exercise, & recheck Blood

Try to use unique letter combinations in the Keyword names to minimize the Macro options that pop up to choose from



Action Taken

Labs- TFTs TSH high- Med change Thyroid labs w/ a non-o...

Labs- TFTs TSH Low- Med change Thyroid labs w/ a non-optimal thyroid level; need to increase dose of med & recheck

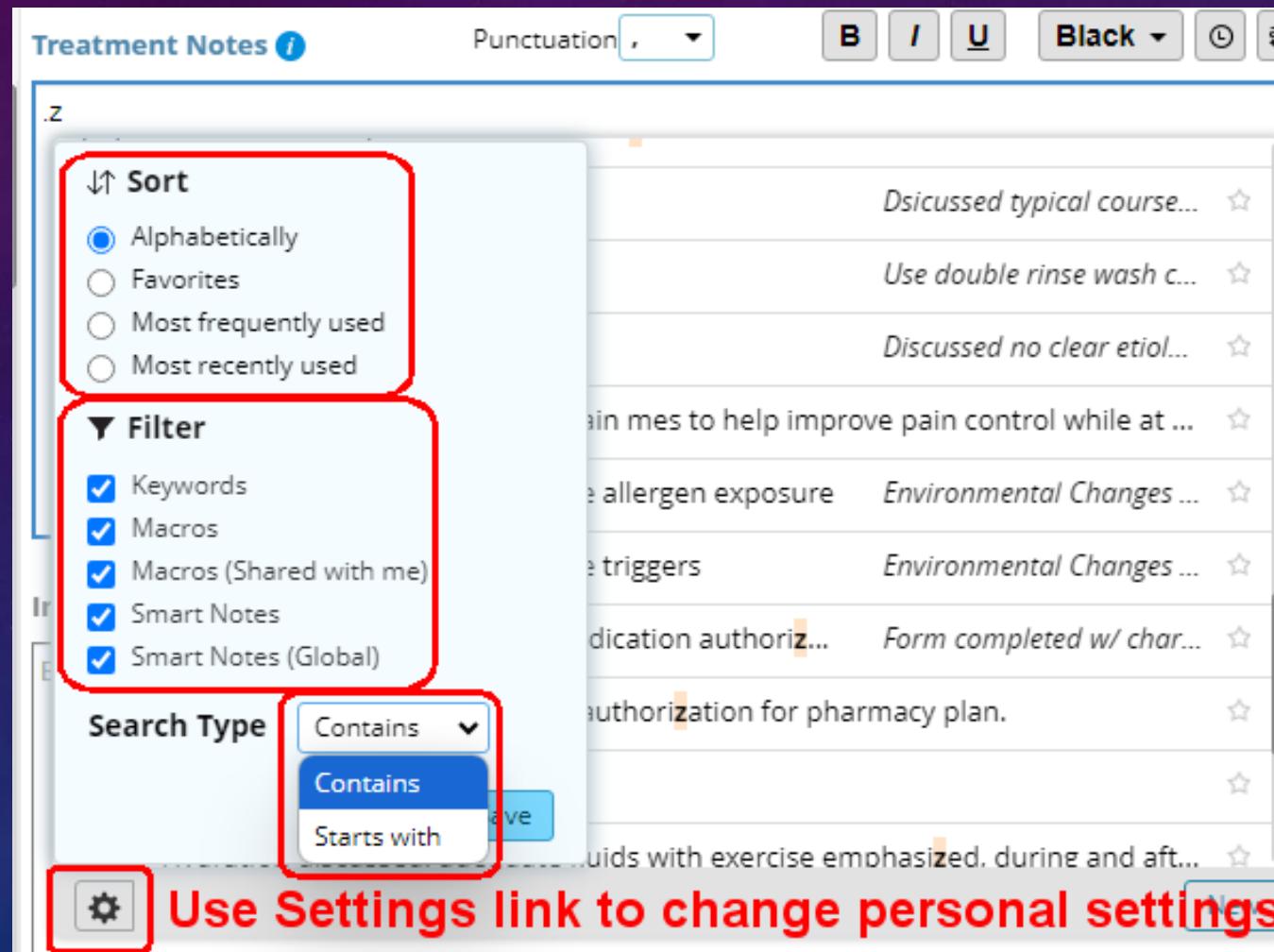
HDL's OTC labs- TFTs w/ low TSH but NML T4/T3 Thyroid dosage is definit...

mar... fat & .TSH Labs- TSH high- may be developing early hypothyro... Thyroid stimulation hor...

New

Keep typing letters to keep adding more Macros quickly one after the other to create whole paragraphs in TE's, Visit Notes, & elsewhere

Hidden Option to Further Personalize & Improve Your User Experience with Keyword Macros



How About When You Do Not Have Appropriate Macros or Templates – “Favorites” & Pic List Keywords to the Rescue!

- In the notes boxes of any visit HPI, ROS, PE, TX areas, tag pic list documentation items as your personal Favorites using star to move items to top of pic lists
- Keyword search screen in pic lists can help get to pic list items faster too

Physical Examination DEMO, Patient "Spiderman" M Jun 6, 1906 (118 yo F) Acc No. 70248

DERMATOLOGY > skin

Search Keyword 

Options	
without rash	
without jaundice	
exposed areas within normal limits	
Positive:	
Negative:	
Positive: small to moderate sized ...	
warm, moist	

without rash, without jaundice, Positive: small to moderate sized benign appearing non-palpable red or purplish or mechanical purpura

Use Keyword Search above pic list to quickly get to phrases same as in TX Notes screen

Keep Favorites Star icon yellow so frequently used pic list items stay at the top for easy access



Try “Prisma Highlights” AI at Top of Visit Notes for Quick Interim Updates When Seeing Patients

- Click on link at top of visit notes
- Often provides info on care we have no records on yet
- Not stored permanently in chart
- Can highlight & copy & paste text into chart

Account Number: 1536 Encounter Date: 10/11/2024 Provider: Bradley M. Block, M.D.
Appointment Facility: Block,Nation,Chase,Smolen Family Medicine

PRISMA Highlights [Click "PRISMA Highlights" to Generate Results](#) Generated On: 10/09/2024 10:02 PM [Import into](#) [\(i\)](#)

External Timeline The patient had two hospital encounters, one on August 4, 2024, and another on September 19, 2024. The details of these hospital visits, including the names of the hospitals and the reasons for the visits, are not provided. In addition to these hospital encounters, the patient also had two instances of travel on the same dates as the hospital visits. The reasons for these travels are also not specified. The patient had orders only visits on August 1, 2024, and September 17, 2024, both times seen by Dr. Frank Hellinger at AdventHealth. The specifics of these orders are not detailed in the provided data. [View More](#)

External Results

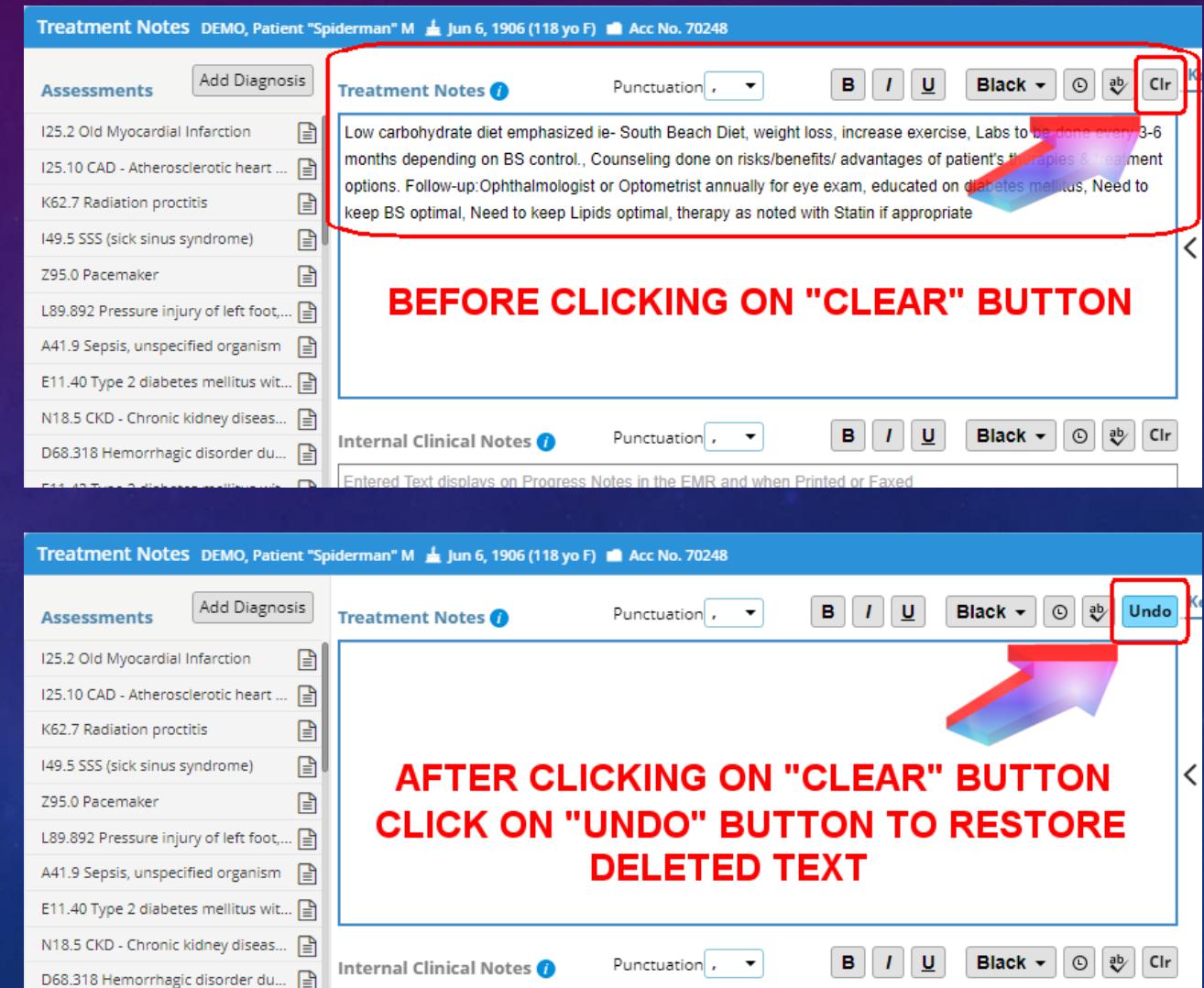
Test Name: MR Spine Lumbar W and WO IV Contrast
Date Performed: 2024-08-04 16:06:29
Facility: ADVENTHEALTH RADIOLOGY SYSTEM
Findings:
- Mild acute compression fracture of the superior aspect of L1. - No additional fracture and no evidence of underlying vertebral body lesion. - Moderate degenerative changes throughout the lumbar spine with mild rotatory dextroscoliosis. - Mild to moderate spinal canal narrowing at L3-4 and L4-L5. - No large disc herniation. - Multilevel facet arthropathy, worst at L5-S1.
Test Name: MR Spine Lumbar W and WO IV Contrast
Date Performed: 2024-09-19 13:20:19
Facility: ADVENTHEALTH RADIOLOGY SYSTEM
Findings:
- Interval vertebral body augmentation procedure at L1 compression fracture. - There is marrow edema and contrast enhancement surrounding the cement. - Edema in the soft tissues surrounding the right T12-L1 facet joint. - Multilevel degenerative changes with mild to moderate spinal canal narrowing at L3-L4 and moderate spinal canal narrowing at L4-L5 level. - Annular fissure at L3-L4 and L5-S1 levels. - Multilevel foraminal narrowing, moderate at left L4-L5 level. - 2 mm focus of contrast enhancement at anterior T12 conus medullaris, increased in conspicuity when compared to prior study, favored to represent vascular structure on axial plane. - Trace anterolisthesis of L5 on S1, unchanged.
Test Name: MR Spine Thoracic W and WO IV Contrast
Date Performed: 2024-08-04 16:11:12
Facility: ADVENTHEALTH RADIOLOGY SYSTEM
Findings:
- Mild levoscoliosis of the lower thoracic spine. - No fracture or spinal stenosis in the thoracic spine.
[View More](#)

Care Gaps / Coding Gaps, and Social Determinants of Health : No data available to generate Highlights.

Subjective: [Verify Histories](#) [\(i\)](#)
Chief Complaint(s): [▼](#)

Your New Best Friend – The “Undo” Button in Notes Screens

- Fix accidental “Clear” button deletions in visit “Notes” screens
- “Clear” button becomes an “Undo” button
- Clear/Undo button screens include TX Notes, “Specify” & “Notes” boxes linked to each Assessment, & the free text Notes box below HPI, ROS, PE, & Assessments List
- Alternate option works everywhere in eCW and is ONLY option in TE’s: click on “CTRL Z”



Tired of Having to Jump to the “L” Jellybean Screen to “Review” Reports When Providing Results to Patients – Try the New Combo View & Review Button in Lab & DI Link

- **“View All Report” button** pops open all “unreviewed” Lab & DI & Procedure Results same as viewing results from “L” jellybean but is directly accessible from HUB, TE’s/WE’s, & Visit Notes via Lab & DI Links
- Update “Results” & “Notes” boxes & mark tests “Reviewed” same as “L” jellybean
- Only shows results NOT “Reviewed”



Tired of Little Screens With Very Limited View of Data

- Use Blue tab to expand screens for better view of long lists
- Expand option found in Med HX, Surg HX, Assessments, Billing Code Screens
- Very helpful for faster drag & drop scrolling functionality to sort order of line items

Click on Blue Tab to Expand Selected Assessments to Use Full Screen

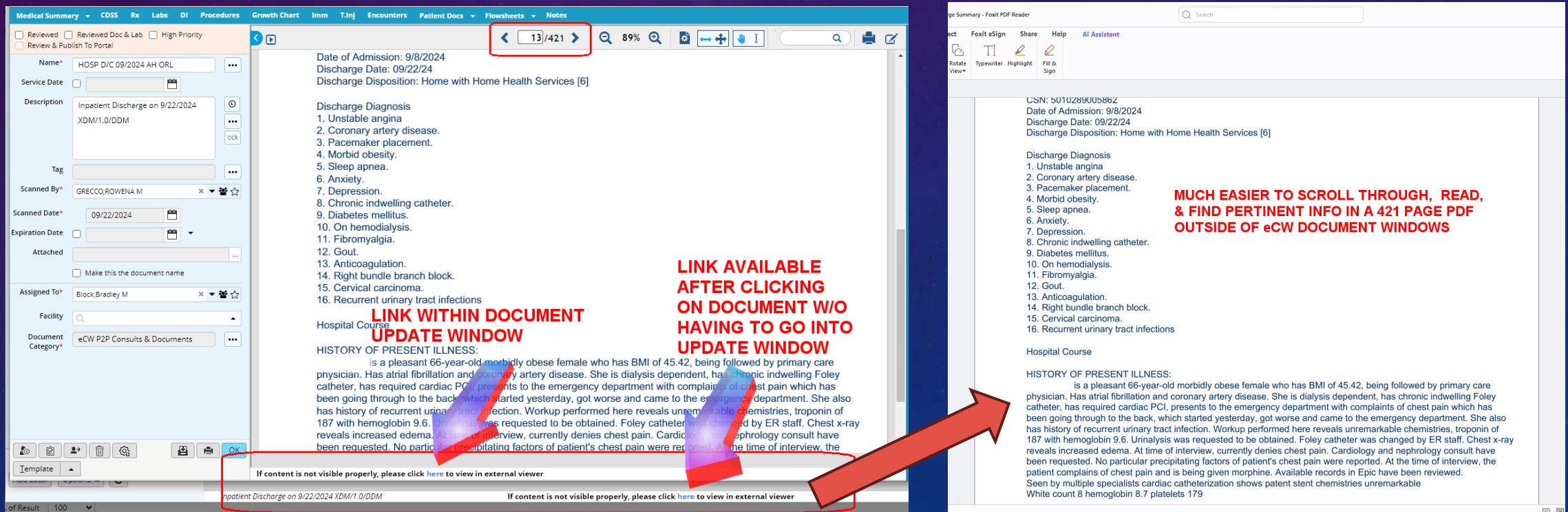
P	PL	Code	SNOMED	Diagnosis	Specify	Notes	Risk
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	E11.22		Type 2 diabetes mellitus with Diabetic Chronic Kidney Disease			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	N18.2		CKD - Chronic kidney disease, Stage 2 (Mild). GFR 60-89 mL/min/1.73 sq...			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	I10		Hypertension, Essential (primary)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	G51.0		Bell's palsy		Right ...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E29.1		Hypogonadism, Testicular hypofunction			

More Than Twice as Many Assessments Now Visible. Blue Tab Restores Default View.

P	PL	Code	SNOMED	Diagnosis	Specify	Notes	Risk
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	E11.22		Type 2 diabetes mellitus with Diabetic Chronic Kidney Disease			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	N18.2		CKD - Chronic kidney disease, Stage 2 (Mild). GFR 60-89 mL/min/1.73 sq...			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	I10		Hypertension, Essential (primary)			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	G51.0		Bell's palsy		Right ...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E29.1		Hypogonadism, Testicular hypofunction			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E03.9		Hypothyroidism, unspecified			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	G47.33		Obstructive sleep apnea	improved w...	Severe...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	F31.9		Bipolar Disorder, unspecified		Type 2	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	F51.01		Insomnia, primary			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E72.12		MTHFR genetic mutation		Probab...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	C44.1192	402494003	Basal cell carcinoma (BCC) of left lower eyelid		,under...	

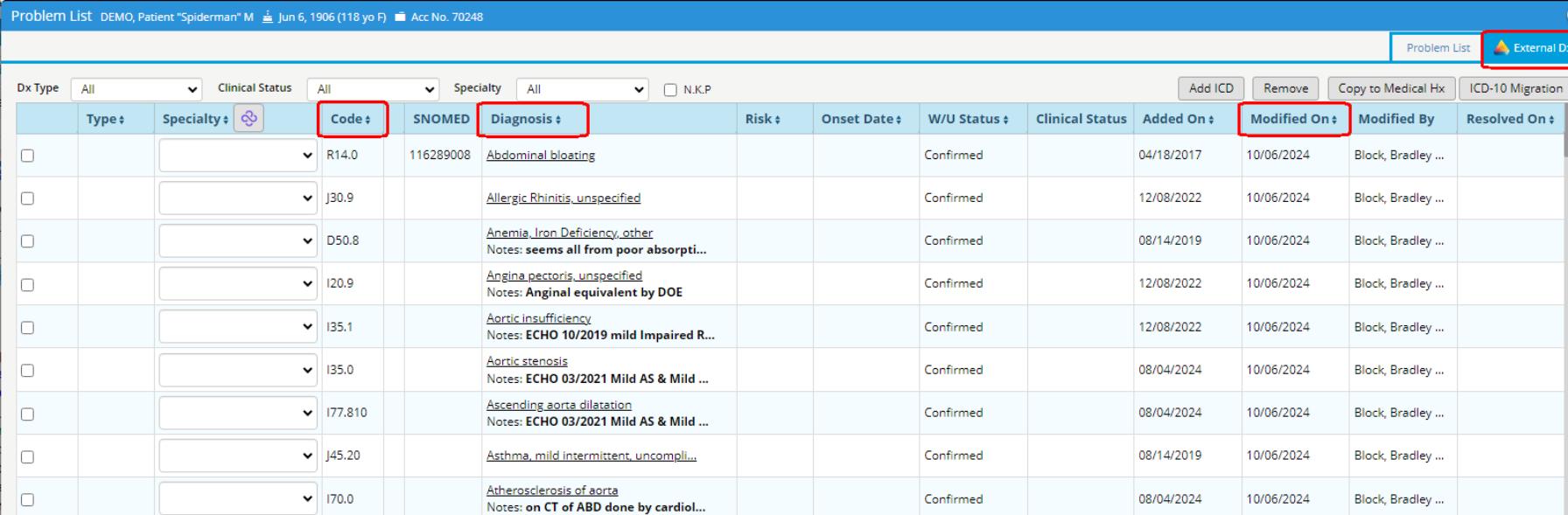
Not Satisfied with PDF Document Reviewing Experience? Try the Document “View in External Viewer” Link

- Pops open PDF documents into your computer’s default PDF Reader Software
- Extra helpful for documents with LOTS of pages since viewing experience is usually less cumbersome, smoother scrolling, and better visual quality with a dedicated PDF viewer software



Organize Disheveled Problem Lists The Way You Like

- Sort any PL column by clicking on header at top to organize alphabetically by DX name, by ICD Code (to cluster organ system medical conditions), by Modified Date to look for most recently added & updated DX's, & by other options
- Makes reviewing PL's and finding specific medical diagnoses faster
- Use "Save" button to keep changes that you made
- Can also look for & Add new outside ICD codes using the PRISMA External DX Link

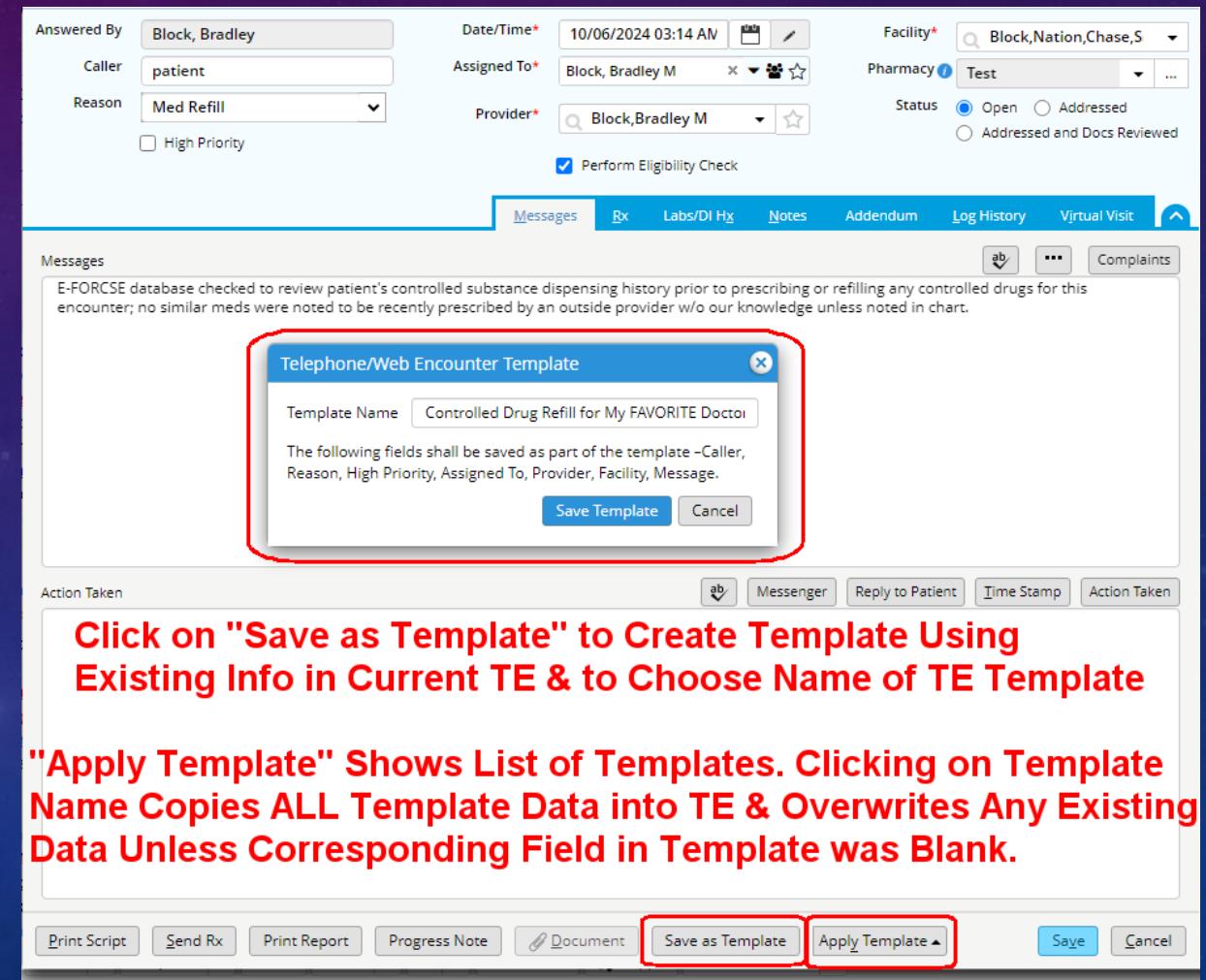


The screenshot shows the PRISMA Problem List interface. At the top, there are filters for Dx Type (All), Clinical Status (All), Specialty (All), and N.K.P. Below these are buttons for Add ICD, Remove, Copy to Medical Hx, and ICD-10 Migration. The main area is a table with columns: Type, Specialty, Code, SNOMED, Diagnosis, Risk, Onset Date, W/U Status, Clinical Status, Added On, Modified On, Modified By, and Resolved On. The 'Code' column is highlighted with a red box. The 'Modified On' column is also highlighted with a red box. The 'External Dx' button in the top right is also highlighted with a red box. The table contains several rows of medical diagnoses, each with a checkbox, a dropdown for specialty, an ICD code, a SNOMED code, a detailed diagnosis name, and various status and date fields.

Type	Specialty	Code	SNOMED	Diagnosis	Risk	Onset Date	W/U Status	Clinical Status	Added On	Modified On	Modified By	Resolved On
□		R14.0	116289008	Abdominal bloating			Confirmed		04/18/2017	10/06/2024	Block, Bradley ...	
□		J30.9		Allergic Rhinitis, unspecified			Confirmed		12/08/2022	10/06/2024	Block, Bradley ...	
□		D50.8		Anemia, Iron Deficiency, other Notes: seems all from poor absorpti...			Confirmed		08/14/2019	10/06/2024	Block, Bradley ...	
□		I20.9		Angina pectoris, unspecified Notes: Anginal equivalent by DOE			Confirmed		12/08/2022	10/06/2024	Block, Bradley ...	
□		I35.1		Aortic insufficiency Notes: ECHO 10/2019 mild Impaired R...			Confirmed		12/08/2022	10/06/2024	Block, Bradley ...	
□		I35.0		Aortic stenosis Notes: ECHO 03/2021 Mild AS & Mild ...			Confirmed		08/04/2024	10/06/2024	Block, Bradley ...	
□		I77.810		Ascending aorta dilatation Notes: ECHO 03/2021 Mild AS & Mild ...			Confirmed		08/04/2024	10/06/2024	Block, Bradley ...	
□		J45.20		Asthma, mild intermittent, uncompli...			Confirmed		08/14/2019	10/06/2024	Block, Bradley ...	
□		I70.0		Atherosclerosis of aorta Notes: on CT of ABD done by cardiol...			Confirmed		08/04/2024	10/06/2024	Block, Bradley ...	

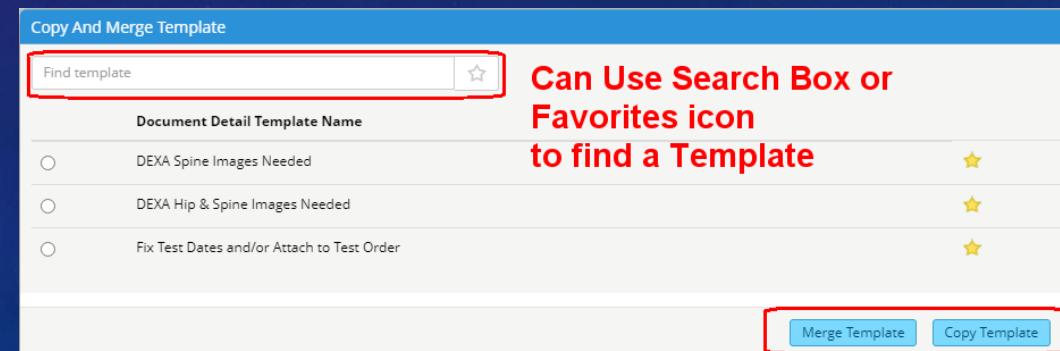
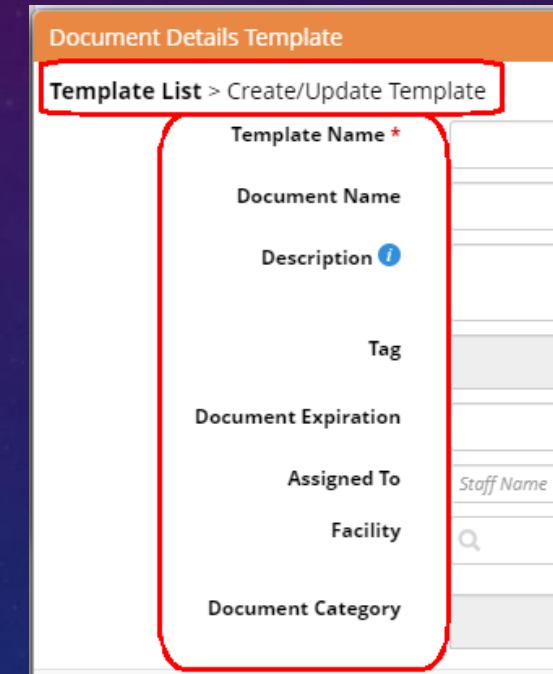
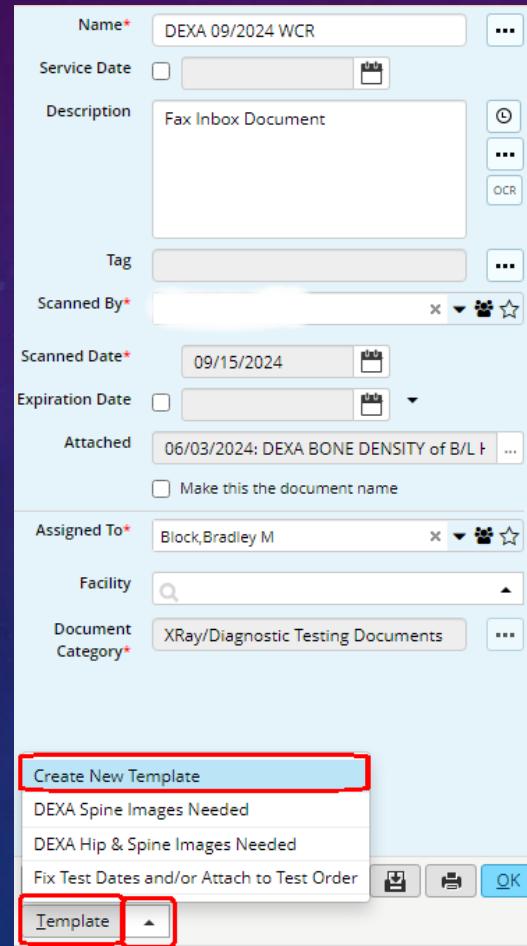
A New Twist on TE Templates – No Longer Are Templates Limited to Just Virtual Visit Documentation

- Create Templates that specifically fill in TE/WE Reason, Message screen, Provider, Assigned to person, High Priority status, Caller and/or Facility with a single click
- No option to include “Action Taken” screen in TE templates
- Applying TE Template is an All or Nothing Copy NOT Merge Process. Cannot choose to leave out specific fields that are part of the template (but templates do not have to have data for every field)
- “Apply Template” button shows list of all templates alphabetically. Single click copies chosen template into TE
- No option to update existing templates



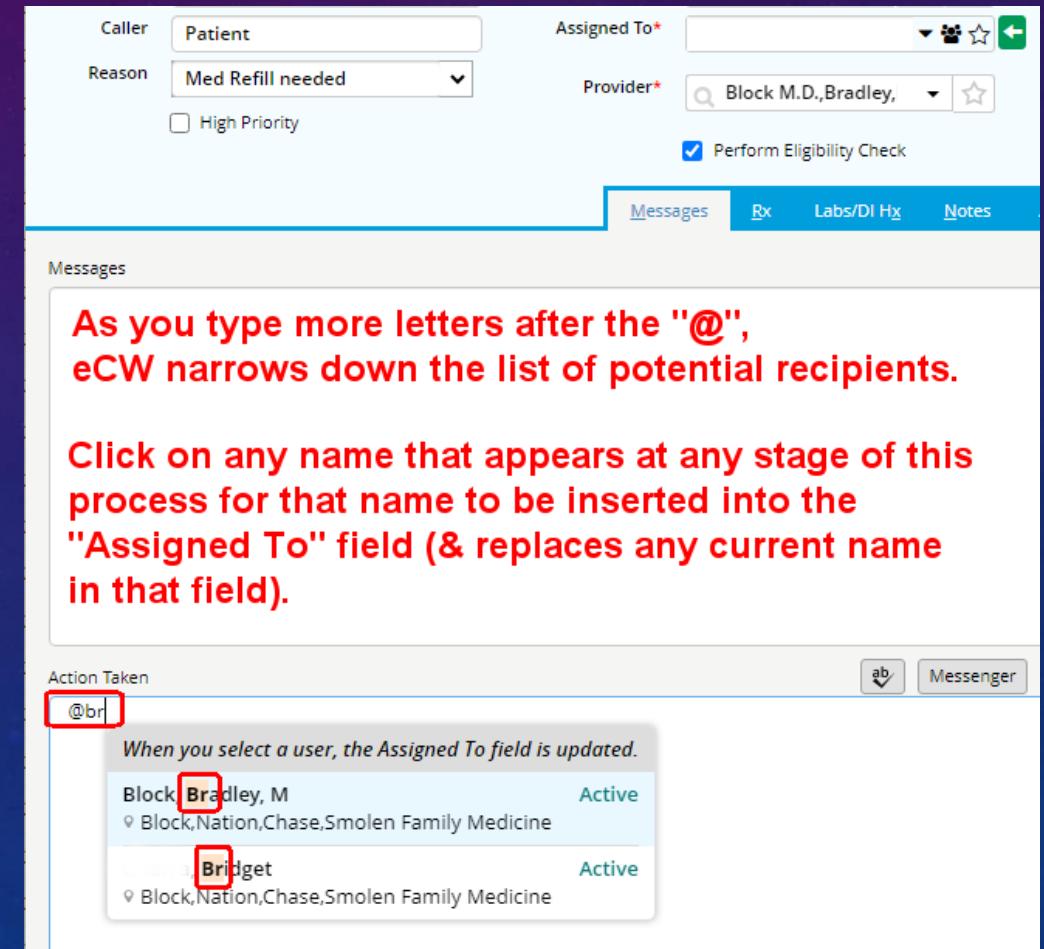
Quickly Fill in Document Update Screen Fields by Using Document Templates

- Create Document Templates that fill in Document Name, Description screen, Document Category, Tag, Expiration, Assigned to person, and/or Facility with a single click
- All templates have Merge option that ONLY fills in blank fields, and a Copy option that OVERWRITES all fields that are not empty in the template
- These have an update option



Quickly Assign Items to Others - Try Out the "@" Shortcut Option

- Type "@" followed by the starting letters of the first or last name of the desired recipient in the Notes box (NOT the "Assigned To" field) to bring up list of potential recipients
- Works in TE's, Documents, Internal Messages, Lab/DI/Procedure Result screens, Referrals, Action Items (BUT ONLY RESPONDS TO TYPING IN A "NOTES" BOX)
- Super helpful for large practices like Dr Biggs with over 200 staff & providers



Referral Screen Secret – The Hidden Links!

Referral (Outgoing) DEMO, Patient "Spiderman" M Jun 6, 1906 (118 yo F)

Demo, Patient M, 118 Yrs FEMALE

From

Provider: Block, Bradley, M

Facility: Block,Nation,Chase,Smolei

To

Provider:

Specialty: ... Specialties ...

Facility:

Click on Patient's Name to Launch HUB

Reason

Description
1 need to evaluate and treat condition
Enter text and press Enter

Diagnosis

Code	Name
Q70.10	Webbed fingers

Referral (Outgoing) DEMO, Patient "Spiderman" M Jun 6, 1906 (118 yo F) Acc No. 70248

Demo, Patient M, 118 Yrs FEMALE

From

Provider: Block, Bradley, M

Facility: Block,Nation,Chase,Smolei

To

Provider:

Specialty: ... Specialties ...

Facility:

Click on Patient's Age or DOB to Launch Demographics Screen

Reason

Description
1 need to evaluate and treat condition
Enter text and press Enter

Diagnosis

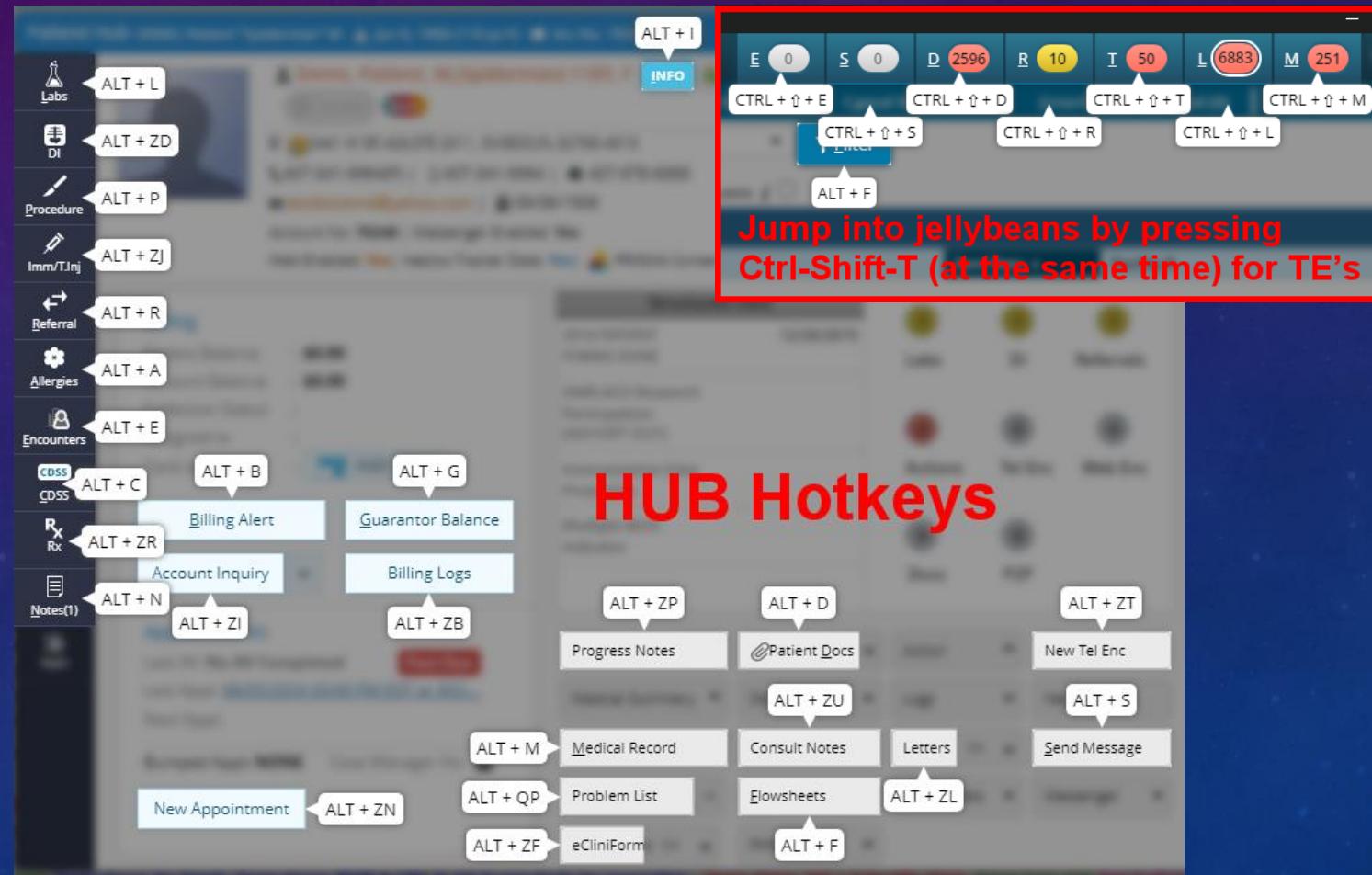
Code	Name
Q70.10	Webbed fingers

Procedures

Code	Units

Discover the Numerous Hidden “Hotkeys” to Take Advantage of Keyboard Shortcuts

- Hold “ALT” button down for 3 secs in any screen to see what shortcuts exist
- Push the buttons listed all at once to jump to the desired link or trigger the desired action
- LOTS of Hotkeys in Visit Notes
- Use Hotkeys when reviewing labs or documents to perform “Review & Next” or the plain “Next” function w/o needing to use a mouse



Listen Closely to Uncover Hidden Gems That Help Prep Prescriptions Faster



There Are Many New RX Edit Screen Treasures

Jun 6, 1906 (118 yo F) ■ Acc No. 70248 **Appt: (08/05/2024 03:00 pm, 60 MINS)**

Lipitor

Drug Product	Take	Route	Frequency	Duration	Dispense	Refill
10 MG - Tablet	1 tablet (20 mg)					0
20 MG - Tablet	2 tablet (40 mg)					1
40 MG - Tablet						2
80 MG - Tablet						3
20 MG - Tablet	1 tab for Cholesterol	orally	once a day	90	Days	90
Additional Instructions: <input type="checkbox"/> PRN <input type="checkbox"/> D.A.W. (Dispense as Written / No Substitutes Allowed)						
Rx : Lipitor 20 MG Tablet Take: 1 tab for Cholesterol orally once a day Duration: 90 days Dispense: 90 Refill: 3						
Diagnosis: N/A Other		Pharmacy	COSTCO			
Status: Refill	Start Date: 02/22/2009	Stop Date: 02/22/2009	COSTCO 9333 UNIVERSITY BLVD, WINTER PARK, FL, 327...			
			CVS 839 N ORLANDO AVE, WINTER PARK, FL, 32789 407-647-1862, 407-622-0994			
Notes to Pharmacist (Do not send D.A.W. or coupon information)		Add to Favorites				
Can confirm & change pharmacy for each med within RX Edit screen to avoid checking & unchecking lots of boxes for meds in the "Send" screen						
Use "+" button to link new pharmacy to script, and this opens a window with a MUCH longer list of pharmacies per screen to choose from than when selecting a pharmacy from the "Send" screen						
Use "Split" button to create 2 scripts of this medicine						
Use "Save & Next" button to save RX Edit changes & jump to next script in Visit Notes TX screen or TE RX screen, or use "Next" button to jump to next script w/o saving any changes. Left area of window has similar "Previous" options.						
* Combined length of Take, Route, Frequency and Additional Instructions cannot exceed 1000 characters. (Remaining Characters 950)						
Ok Cancel Next Save & Next						

The Two Options for Selecting & Linking a New Pharmacy to a Script Are NOT Equal

Local Pharmacy Database Lookup from RX "Send" Screen

Local Pharmacy Database

Name: walgreens City: orlando

	E	C	M	NCPDPID	Name	Service Level	Addr1	Addr2	Cross St.	City	State	Zip	Phone No.	Fax No.
<input type="checkbox"/>	✓	✓		1084716	WALGREENS	NewRx,RefillRx,...	12279 LAKE UNDERHIL...			ORLANDO	FL	32825	407-273-0817	407-273-1267
<input type="checkbox"/>	✓	✓		1080251	WALGREENS	NewRx,RefillRx,...	12100 S APOPKA VINE...			ORLANDO	FL	32836	407-238-0600	407-238-9461
<input type="checkbox"/>	✓	✓		1051224	WALGREENS	NewRx,RefillRx,...	8000 LAKE UNDERHIL...			ORLANDO	FL	32822	407-658-1045	407-382-1627
<input type="checkbox"/>	✓	✓		1060588	WALGREENS	NewRx,RefillRx,...	11600 S ORANGE BLO...			ORLANDO	FL	32837	407-851-8554	407-240-2727
<input type="checkbox"/>	✓	✓		1078232	WALGREENS	NewRx,RefillRx,...	7650 W SAND LAKE RD			ORLANDO	FL	32819	407-370-6742	407-345-5463

Pharmacy Lookup from "Send" screen only shows 5 pharmacies per screen which would require going through up to 10 screens to find the correct Walgreens in Orlando for this patient

Pharmacy not appearing in local database? Extend search to Cloud Pharmacy Database below

Total Counts: 47 Page: 1 of 10 Next

Cloud Pharmacy Database

Source - Surescripts E-Prescribing Fax Only Mail Order Only

Bulk Import Import to local Link Unlink

	E	C	M	NCPDPID	Name	Service Level	Addr1	Addr2	Cross St.	City	State	Zip	Phone No.	Fax No.
<input type="checkbox"/>	✓	✓		1033199	*Bay Area Pharmac...	NewRx,RefillRx,Cha...	13502 N FLORID...	Unit 8		Tampa	FL	33613	8132213131	8133434321
<input type="checkbox"/>	✓	✓		5717410	*Bay Area Pharmac...	NewRx,RefillRx,Cha...	10815 N NEBRAS...			Tampa	FL	33612	8132344200	8132344270
<input type="checkbox"/>	✓	✓		5702724	*Bay Area Pharmac...	NewRx,RefillRx,Cha...	1401 S Military Trl	Ste 1-2		West Pal...	FL	334155720	5618780011	5612680608
<input type="checkbox"/>	✓	✓		1042213	*Bay Area Pharmac...	NewRx,RefillRx,Cha...	106 East Blue He...			Riviera B...	FL	33404	5618182233	5618780122
<input type="checkbox"/>	✓	✓		5747348	*Bay Area Pharmac...	NewRx,RefillRx,Cha...	450 NE 125 Street			North Mi...	FL	33161	3056771221	3056771220

NOTE: If prescribing controlled substances to a Linked pharmacy, state-controlled medications should be configured from Menu > EMR > Miscellaneous Configuration Options > Configure State Specific Controlled Drugs

Select Pharmacy Close

Local Pharmacy Database Lookup from RX Edit Screen "+" button

Pharmacy Lookup

Local Pharmacy Database

Name: walgreens City: orlando

	E	C	M	NCPDPID	Name	Service Level	Addr1	Addr2	Cross St.	City	State	Zip	Phone No.	Fax No.
<input type="checkbox"/>	✓	✓		1018515	WALGREENS	NewRx,RefillRx,...	1000 N AVALON PARK ...			ORLANDO	FL	32828	407-736-8045	407-736-8493
<input type="checkbox"/>	✓	✓		1006584	WALGREENS	NewRx,RefillRx,...	10425 NARCOOSSEE RD			ORLANDO	FL	32832	407-384-9353	407-384-1226
<input type="checkbox"/>	✓	✓		1098551	WALGREENS	NewRx,RefillRx,...	10801 S JOHN YOUNG ...			ORLANDO	FL	32837	407-251-7565	407-251-8341
<input type="checkbox"/>	✓	✓		5709843	Walgreens	NewRx,RefillRx,...	11018 INTERNATIONA...			ORLANDO	FL	32821	407-597-5053	407-345-4972
<input type="checkbox"/>	✓	✓		5709843	Walgreens	NewRx,RefillRx,...	11018 INTERNATIONA...			ORLANDO	FL	32821	407-597-5053	407-345-4972
<input type="checkbox"/>	✓	✓		1060588	WALGREENS	NewRx,RefillRx,...	11600 S ORANGE BLO...			ORLANDO	FL	32837	407-851-8554	407-240-2727
<input type="checkbox"/>	✓	✓		1025851	Walgreens	NewRx,RefillRx,...	1200 KUHL AVE			ORLANDO	FL	32806	407-849-5088	407-849-3094
<input type="checkbox"/>	✓	✓		1080251	WALGREENS	NewRx,RefillRx,...	12100 S APOPKA VINE...			ORLANDO	FL	32836	407-238-0600	407-238-9461
<input type="checkbox"/>	✓	✓		1084716	WALGREENS	NewRx,RefillRx,...	12279 LAKE UNDERHIL...			ORLANDO	FL	32825	407-273-0817	407-273-1267
<input type="checkbox"/>	✓	✓		1084716	Walgreens	NewRx,RefillRx,...	12279 LAKE UNDERHIL...			ORLANDO	FL	32825	407-273-0817	407-273-1267
<input type="checkbox"/>	✓	✓		1097270	WALGREENS	NewRx,RefillRx,...	12650 INTERNATIONA...			ORLANDO	FL	32821	407-238-4677	407-239-2792
<input type="checkbox"/>	✓	✓		1066386	WALGREENS	NewRx,RefillRx,...	13700 E COLONIAL DR			ORLANDO	FL	32826	407-382-9291	407-282-5417
<input type="checkbox"/>	✓	✓		1086253	WALGREENS	NewRx,RefillRx,...	13880 TOWNE PLACE ...			ORLANDO	FL	32837	407-857-4548	407-851-8725

Pharmacy Lookup from the RX Edit "+" button screen shows 13 pharmacies per screen which would only require going through up to 4 screens max to find the correct Walgreens in Orlando for this patient

OK Close Total Counts: 47 Page: 1 of 4 Next

Be The Master of Split RX Edit Screens

in 6,1906 (118 yo F) ■ Acc No. 70248 Appt: (08/05/2024 03:00 pm, 60 MIN)

H Lipitor

Drug Product	Take	Route	Frequency
10 MG - Tablet	1 tablet (20 mg)		
20 MG - Tablet	2 tablet (40 mg)		
40 MG - Tablet			
80 MG - Tablet			

Height: 72 in (11/02/2022) Weight: 200 lbs (01/16/2024)

"Split RX" RX Edit Screen

Take: 1 tab for Cholesterol, Route: orally, Frequency: once a day

Additional Instructions: PRN D.A.W. (Dispense as Written / No Substitutes Allowed)

Prescription 1: Duration: 30 Days, Dispense: 30 Tablet, Refill: 1
Prescription 2: Duration: 90 Days, Dispense: 90 Tablet, Refill: 3

Start Date: 10/19/2024, Stop Date: 11/18/2024, MM/DD/YYYY

Pharmacy: CVS, EXPRESS SCRIPTS 4600 North Hanley Rd, St. Louis, MO 63110, USA

Undo

Rx 1: Lipitor 20 MG Tablet Take: 1 tab for Cholesterol orally once a day Duration: 30 days Dispense: 30 Tablet Refill: 1
Rx 2: Lipitor 20 MG Tablet Take: 1 tab for Cholesterol orally once a day Duration: 90 days Dispense: 90 Tablet Refill: 3

Diagnosis: N/A Other

Status: Refill

Notes to Pharmacist (Do not send D.A.W. or coupon information)

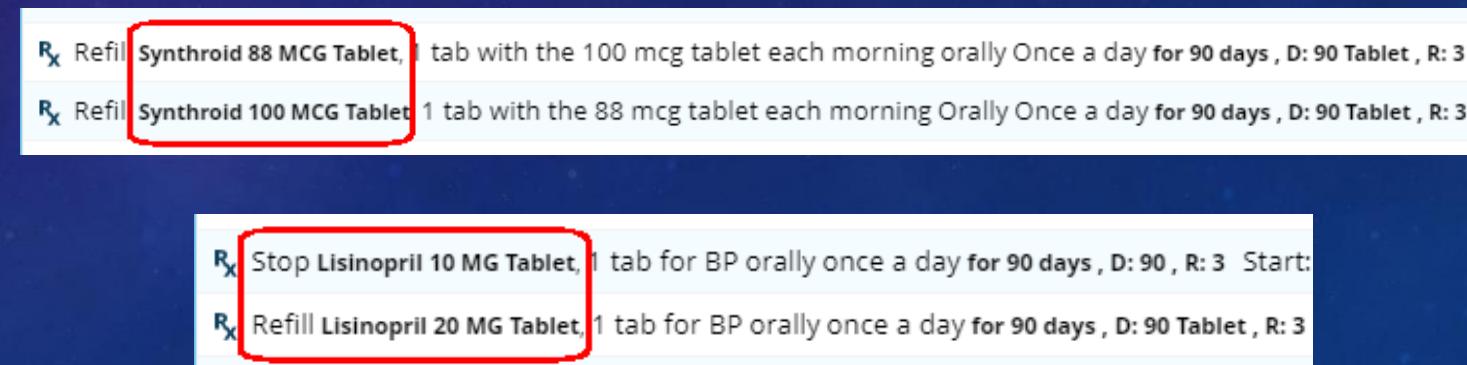
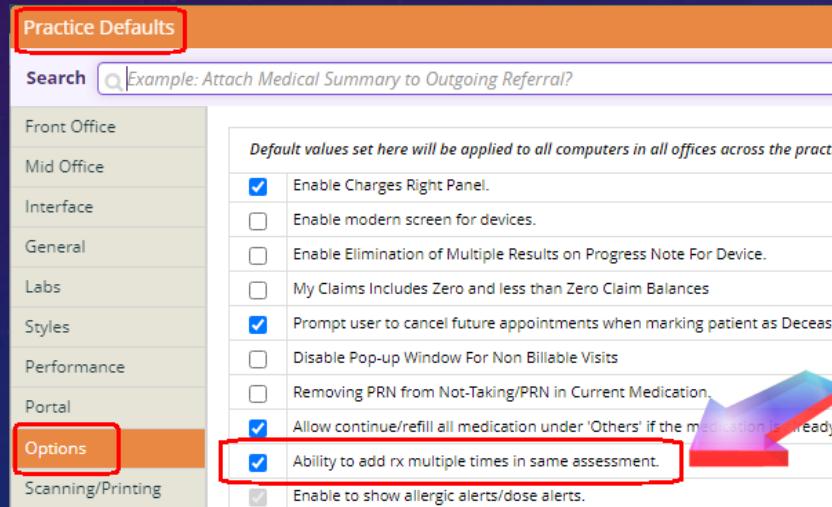
Notes (These notes will be sent to the pharmacy): EXPRESS SCRIPTS, Address: 4600 North Hanley Road, St. Louis, MO 63110, USA

Both scripts have to have the exact same doses & instructions, but you can choose different Durations, Quantities, Refills, & Pharmacies

You can also "Undo" your decision to "Split" a script with the "Undo" button

The Split Screen Does Not Solve All Issues – How About Medicines with 2 Different Doses

- Turn on Practice Default Setting to allow “Ability to Add RX multiple times in same assessment”
- Very helpful when needing to prescribe 2 different doses of the same med like with Thyroid meds or when combining a 30 mg & 60 mg of Duloxetine daily
- Great way to fix situation when wrong dosage of med sent to pharmacy. No need to create a TE to send correct dosage. Cancel wrong (“locked”) dosage (& change RX status to “Stop” to avoid future confusion in chart), and send correct dosage



A Long Lost Pharmacy Feature is Back At Last

in 6, 1906 (118 yo F) Acc No. 70248

Major: Review Interaction Prior to processing medications when the Drug Interaction severity is Major

Update Primary Pharmacy by choosing the "Send To" pharmacy & checking Primary Pharmacy check box, then click "Apply" & send RX

Send To ▾
EXPRESS SCRIPTS
 Set as primary pharmacy

Notes to Pharmacist 0/210
Do not use for "D.A.W" or diagnosis or to send coupon information.

Last Appt: 06/19/2024
Block, Bradley M
Height: 72 in (11/02/2022)
Weight: 200 lbs (01/16/2018)

2027] Certificate to Prescribe No.

Requested Fill Message Types

Assign Future Requests From Pharmacy To

Major Interaction

Apply to Rx (3/ 5)

Rx	D.A.W.	Send To	Notes and Identifiers
Lipitor 20 MG Tablet Take: 1 tab for Cholesterol, once a day, orally, Duration: 30 days, Dispense: 30 Tablet, Refills:1 Last Ordered:	<input type="checkbox"/>	CVS 7496 UNIVERSITY BLVD, WINTER PARK, FL, 32792 Call: 407-657-7363 Fax: 407-657-3834	Notes to Pharmacist: SP: Block, Bradley M DEA#: Fill Message Type:

Save Time by Using Right Chart Panel to Refill & Stop Meds

- No need to open up & scroll through a current med list. Just click on the “R” or “S” icon
- Very helpful in TE’s (especially for staff) for “stopping” meds or adding meds to the RX screen that need refills, and all with a single click in the RCP. Med drops directly into the RX screen.
- Works in visit notes too w/o needing to be in TX screen
- Cannot choose refill duration when refilling from RCP. Med drops into RX screen using the last dispense quantity & # of refills as when last prescribed
- Can modify refills in RX Edit screen like usual

Overview			History	DRTLA	CDSS	Templates
Group By: Date Date: -- As of Today --						
▼ Medications as of Today (10/06/2024)						
C	R	S	Breztri Aerosphere 160 MCG-4.8 MCG-9 MCG/INH AEROSOL	Taking		
C	R	S	Rosuvastatin Calcium 40 MG Tablet	Taking		
C	R	S	Refill			
C	R	S	Ezetimibe 10 MG Tablet	Taking		
C	R	S	Movantik 12.5 MG Tablet	Taking		

Overview			History	DRTLA	CDSS	Templates
Group By: Date Date: -- As of Today --						
▼ Medications as of Today (10/06/2024)						
C	R	S	MagOx 400 400 MG TABLET	Taking		
C	R	S	Folic Acid 1 MG Tablet	Taking		
C	R	S	Mupirocin 2 % Ointment	Taking		
C	R	S	Bisoprolol Fumarate 5 MG Tablet	Taking		
C	R	S	Parxiga 10 MG Tablet	Taking		
C	R	S	Torsemide 10 MG Tablet	Taking		
C	R	S	Refill			
C	R	S	Potassium Chloride ER 20 EQ Tablet Extended Release	Taking		
C	R	S	Rivastigmine 4.6 MG/24HR Patch 24 Hour	Taking		

“MS Clinical” Update for Scripts is Coming Soon

- MS Clinical RX Edit screens have preconfigured Dispense choices based on the drug specific available options for creams, liquids, inhalers, etc
- Prepopulates mg/kg/day options for Pediatric scripts & calculates dosing based on weight in vitals
- Replaces the old RX Edit screen pic lists by providing the most common dosing instructions associated with most meds
- Can still click on edit link to go to traditional looking RX Edit screen
- Save “Favorites” as you create new scripts for future efficiency
- Favorites has own tab (or need to use Star for Medical Supplies) instead of having to scroll through long list of med options to find a favorite

Use Star to search directly for Favorites Height: 72 in (11/02/2022) Weight: 200 lbs (01/16/2018)

Favorites tab takes you to your usual Favorites

Recommended Dosing Favorites

Strength	Formulation	Take	Route	Frequency	PRN	Duration	Dispense	Refill
0.147 MG/GM	Aerosol Solution	1 application	Externally	daily	<input type="checkbox"/>	7 Days	<input type="checkbox"/>	0
0.025 %	Cream	1 application	Externally	daily	<input type="checkbox"/>	7 Days	<input type="checkbox"/>	0
0.1 %	Cream	1 application	Externally	2 times per day	<input type="checkbox"/>	28 Days	<input type="checkbox"/>	0
0.5 %	Cream	1 application	Externally	2 times per week	<input type="checkbox"/>	7 Days	<input type="checkbox"/>	0
0.025 %	Lotion	1 application	Externally	daily	<input type="checkbox"/>	7 Days	<input type="checkbox"/>	0
0.1 %	Lotion	1 application	Externally	daily	<input type="checkbox"/>	7 Days	<input type="checkbox"/>	0

Edit icon takes you to regular RX Edit screen

Selected Medicines

Assessment Status Medicine Stop Date

Pediatric Patient Height: 72 in (11/02/2022) Weight: 30 lbs (08/05/2024)

Choose mg/kg/day, Frequency, Med Strength, then click arrow to round “Take” dose up or down to finalize Dispense quantity

Dosing Based On: AMOXICILLIN

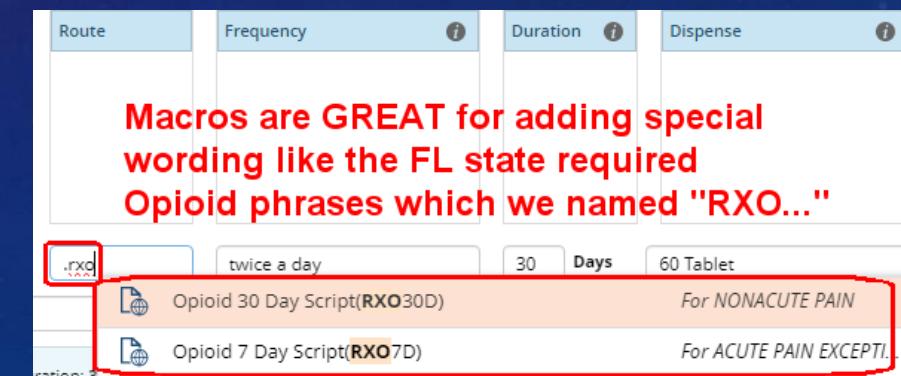
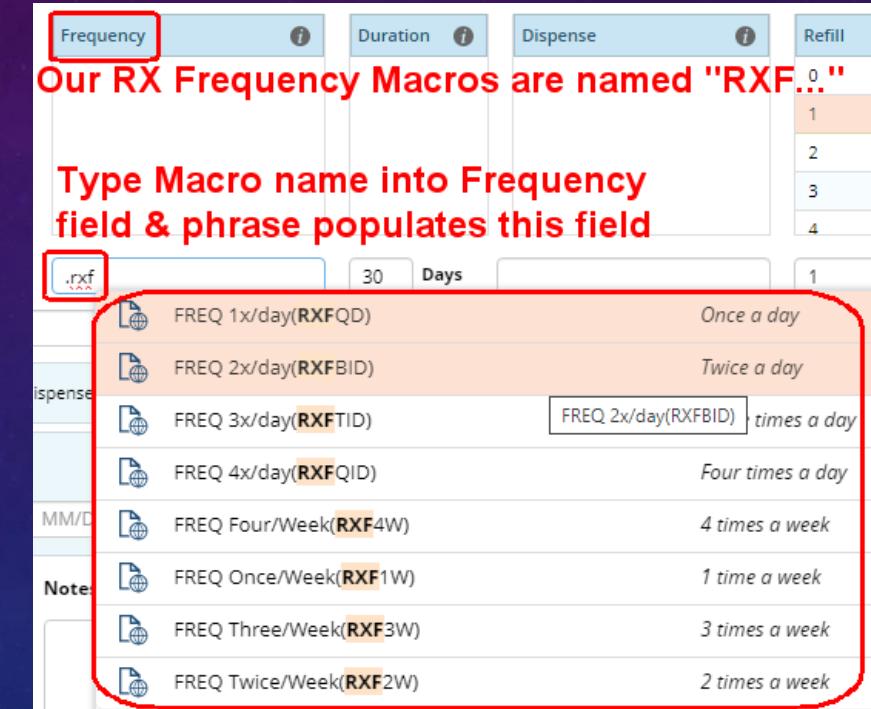
Strength	Formulation	Take	Route	Frequency	PRN	Daily Dose	Duration	Dispense	Refill
8 mg/kg/Day	10 mg/kg/Day	20 mg/kg/Day							
Frequency: daily									
125 MG/5ML	Suspension Reconstituted	10.888 mL (272.2 mg)	Orally	daily	<input type="checkbox"/>	20 mg/kg/Day	10 Days	108.9 mL	0
200 MG/5ML	Suspension Reconstituted	6.8	Round up to the nearest half		<input type="checkbox"/>	20 mg/kg/Day	10 Days	68.1 mL	0

Selected Medicines

Assessment Status Medicine Stop Date

A Secret Weapon to Quickly Update RX Edit Screen Verbiage: Macros

- Very helpful to edit scripts that are missing desired pic list options for Frequency or other RX Edit fields
- Create Macros for commonly needed prescribing phrases, special instructions, and state mandated requirements like for Opioids in Florida
- Macros work in any box of RX Edit screen (& elsewhere in eCW)
- All of our RX Edit Screen Macros are named “RX....” to simplify use
- “Share” with others so everyone benefits
- Be sure to save newly configured scripts as “Favorites” for future use

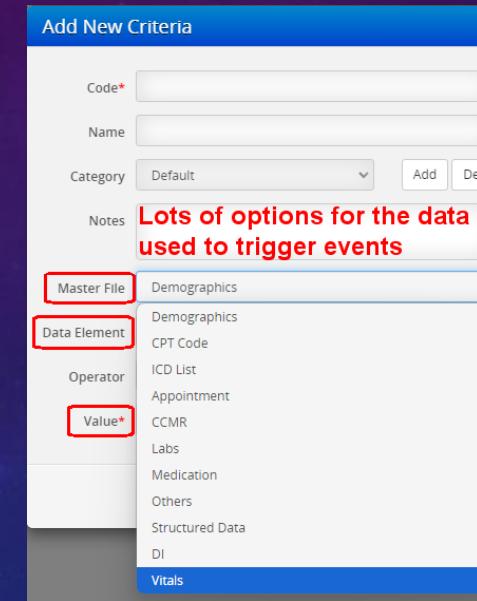


How About Boosting Quality & Risk Adjusted Shared Savings Incentive Bonuses to Your Practice



Use Clinical Rules Engine to Identify Patients with Specific Medical Conditions and to Boost Incentive Bonuses

- No extra cost but needs Item Key turned on by eCW Support
- Use CRE to automatically add appropriate DX codes & Qual Reporting codes to visit note & PL for things like Morbid Obesity BMI's & for BP & DM control
- Helps avoid missed medical DX recognition & missed Quality & HCC coding opportunities for Incentive Bonus Programs
- Can use vitals BMI & BP data to trigger approp BMI & BP control reporting codes
- With labs run & resulted in visit notes, structured lab attribute or LOINC results can trigger approp DX & CPT reporting codes for Diabetic control or CKD HCC code reporting



Rule Name	Rule Category	Description
Morbid Obesity	Vitals	Adds Morbid Obesity DX & 3008F Qual Reporting Code
BMI 40.0-44.9	Vitals	Adds BMI 40.0-44.9 DX Code & 3008F Qual Reporting Code
BMI 45.0-49.9	Vitals	Adds BMI 45.0-49.9 DX Code & 3008F Qual Reporting Code
BMI 50-59.9	Vitals	Adds BMI 50-59.9 DX Code & 3008F Qual Reporting Code
BMI 60.0-69.9	Vitals	Adds BMI 60.0-69.9 DX Code & 3008F Qual Reporting Code
BMI 70 or greater	Vitals	Adds BMI 70 or greater DX Code & 3008F Qual Reporting Code

Use Registry AI to Identify Patients with Specific Medical Conditions and to Boost Incentive Bonuses

- Registry AI simplifies staff running Registry searches on a regular basis to identify patients that need special care and/or missed HCC coding opportunities. Not free like CRE, but handles multiple variables for identifying target information & does not require a patient interaction to generate an action
- Easiest way to rerun reports - copy & paste the typed “Conversational Search” instructions that worked well for AI interpretation & save these in a shared office document
- Staff can use results to add approp. missing DX's to patient PL's in timely manner or provide approp care
- Tip: If looking for results based on a timeframe such as labs done or a patient being seen in the past 12 months, then need to phrase search in format such as “in date range of 12 months ago to present”. And, AI does not seem to recognize “Active Patients”, so timeframe instructions are good work-around for this

The screenshot shows the Registry AI search interface. At the top, a navigation bar includes tabs for Registry Assistant, Demographics, Vitals, Labs/DI/Procedure, ICD, CPT, RX, Chief Complaints, Medical History, Imm/T.Inj, Encounters, Structured Data Reports, Saved Reports, Referrals, and Allergies. The 'Registry Assistant' tab is highlighted with a red box.

The main area features a 'Conversational Search' box with the following text: "Run Lab name -CMP by attributes eGFR 30:59 in date range of 12 months ago to present, SubSetNOT ICD N18.30, N18.31, N18.32, N18.4, N18.5 in Problem List". To the right of this box is an 'Interpret' button.

Below the search box is a note: "Ensure the vitals and medication jobs are up-to-date on their respective tabs so that the Registry can fetch the latest data."

A red box highlights the search results area, which displays the text: "Search done for unidentified patients with CKD-3 (by labs done in past year & by Problem List)" in red.

At the bottom of the search results area, there is a note: "Note: The Registry will only return results for patients with encounters." and a detailed search query: "A: Lab Name = -CMP (comprehensive metabolic panel) w/GFR, Attributes = eGFR >= 30, Attributes = eGFR <= 59 AND Result Date From = 2023-10-10 AND Result Date To = 2024-10-10 NOT ICD Codes = N18.30,N18.31,N18.32,N18.4,N18.5 AND Search in Problem List = Yes".

A red box highlights the search parameters in the 'Search Builder' on the right. The parameters are listed in a table:

Tab	Field	Value	
-	Labs/DI/Procedure	Lab Name	-CMP (comprehensive metabolic panel)
AND	Labs/DI/Procedure	Attributes	eGFR >= 30 To 59
AND	Labs/DI/Procedure	Result Date From	10/10/2023
AND	Labs/DI/Procedure	Result Date To	10/10/2024
NOT	ICD	ICD Codes	N18.30,N18.31,N18.32,N18.4,N18.5
AND	ICD	Search in Problem List	Yes

At the bottom of the interface, a red box highlights the instruction: "Click 'Run New' button to create patient list once parameters are correct".

At the very bottom, there are buttons for Clear Search, Copy, Release Lock, Analyze Data, Exclude from Search, Bulk Inactivate/Activate patients, and Connect.

Take Home Message

- Share ideas from today with your practice to optimize workflow, efficiency, and patient care (& reduce provider EMR burnout) while boosting productivity & incentive bonus income
- Refer to your notes & Implement the 3-5 Ideas



Questions?

- Bradley M. Block, M.D.
- William “Reddy” Biggs, M.D.

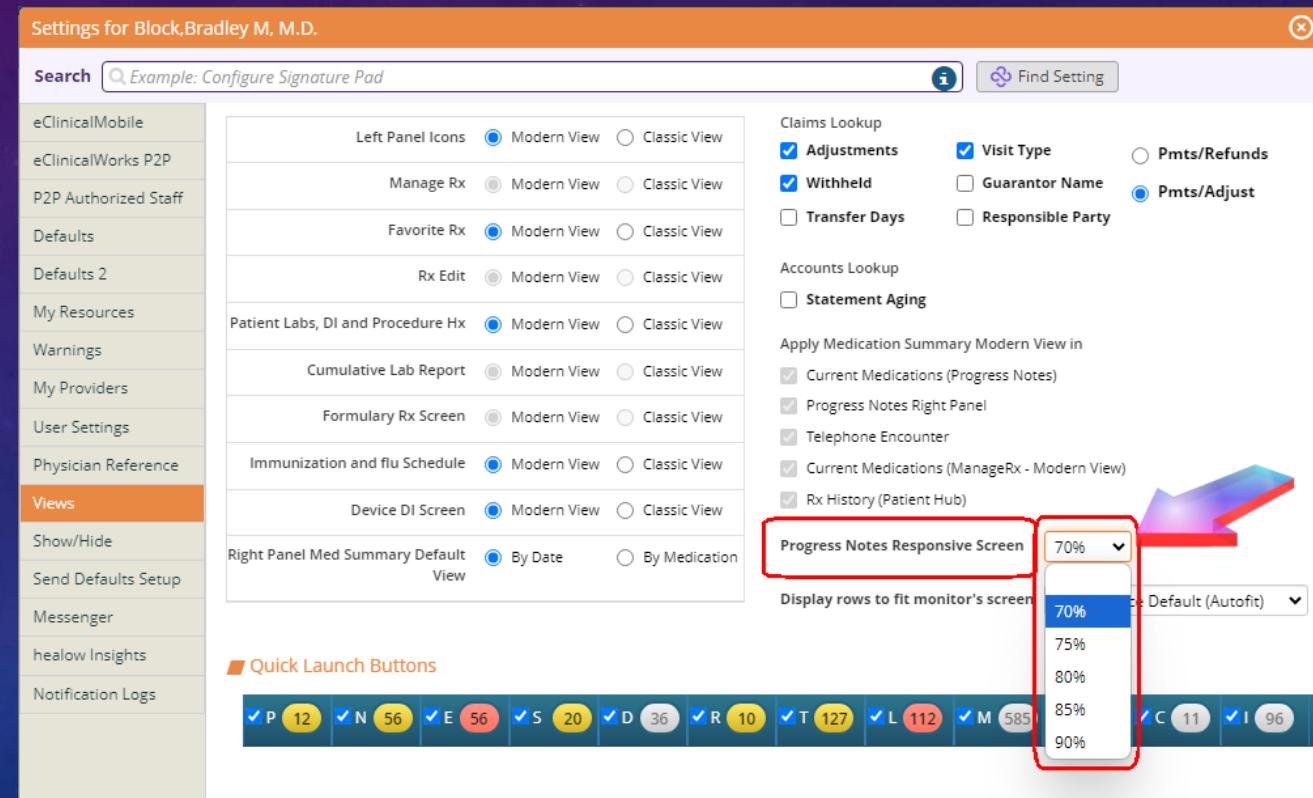


- If earning CME/CE Credit this is session ID “4001”
- For copy of our current & past presentations & bonus slides go to:
www.BlockAndNation.com/BlockAndBiggs

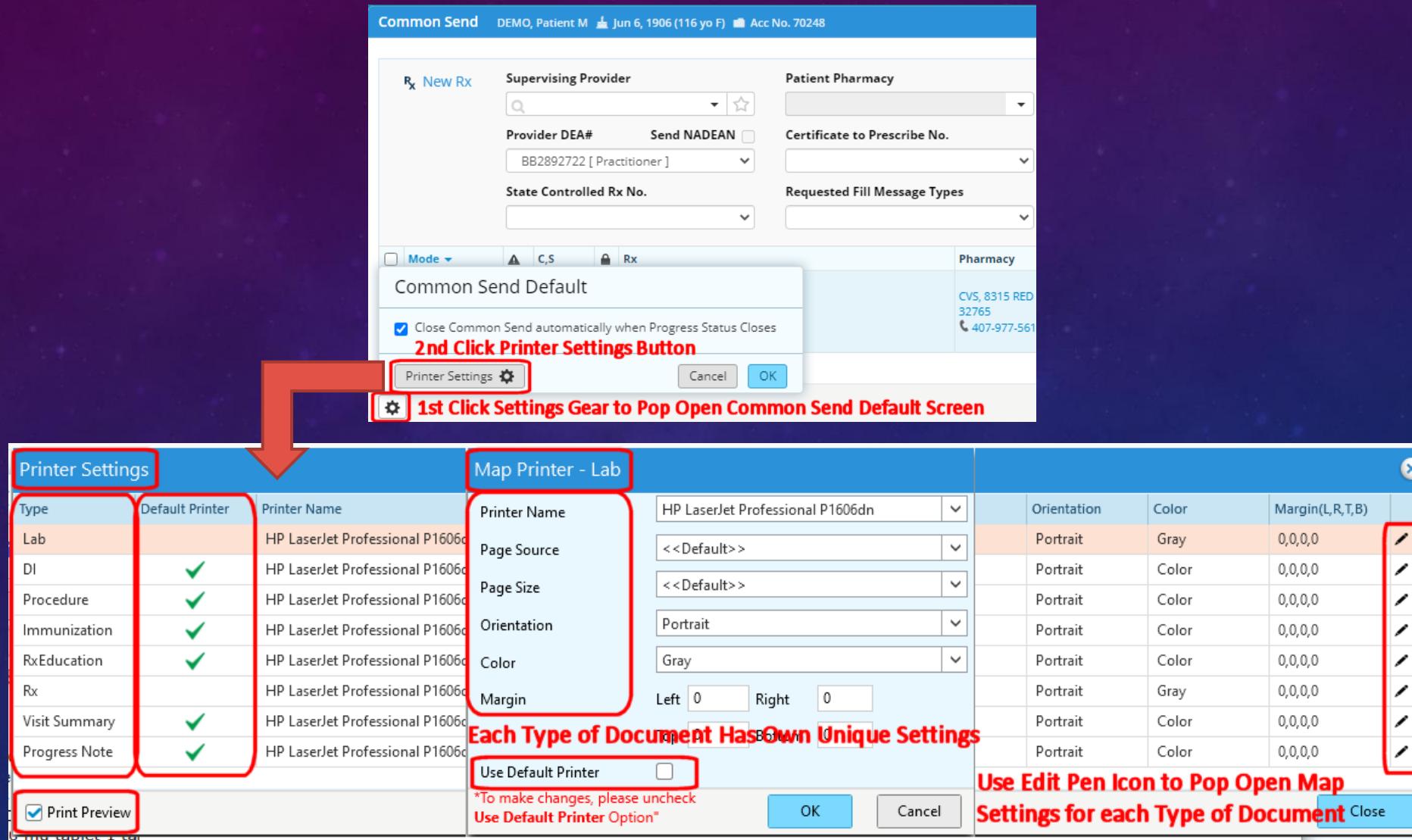
KEEP SCROLLING FOR BONUS SLIDES

Make Visit Note Work More Efficient by Optimizing the Pop-Up Window Size Based on Your Personal Preference

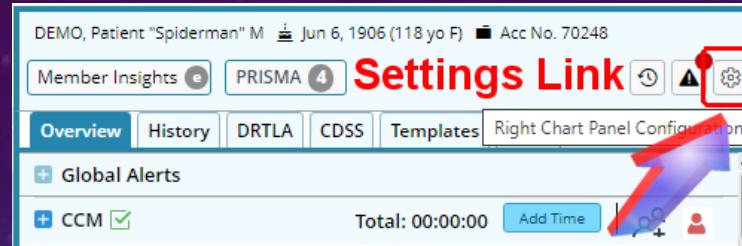
- Adjust the size of the visit notes window as a % of your monitor screen size between 70%-90% to maximize eCW magnification as desired
- If too large, may cover up some info in the margins that you like to see like current med list in the background
- Adjust in My Settings> Views> “Progress Notes Responsive Screen” (but should be named “visit window magnification size” b/c current name causes this to be very overlooked)



Tired of Things Printing On The Wrong Printer!!



Be Your Own Boss - Customize Your Right Chart Panel For Your Own Workflow



Right Chart Panel Configuration

Customization Other Settings

Customize which sections are available in the Right Chart Panel for each tab and change their order.

Right Chart Panel Tabs

Tab	Available Sections
Overview	Medical History, Surgical History, Hospitalization History, Social History, Family History, GYN History, OB History, Ocular History, Ocular Surgical History
History	Medical History, Surgical History, Hospitalization History, Social History, Family History, GYN History, OB History, Ocular History, Ocular Surgical History
DRTLA	Medical History, Surgical History, Hospitalization History, Social History, Family History, GYN History, OB History, Ocular History, Ocular Surgical History
Enc	None
CDSS	Medical History, Surgical History, Hospitalization History, Social History, Family History, GYN History, OB History, Ocular History, Ocular Surgical History
OS	None
Templates	Medical History, Surgical History, Hospitalization History, Social History, Family History, GYN History, OB History, Ocular History, Ocular Surgical History

History Sections

Drag the arrow icons to rearrange the order of RCP tabs & sections such as Surg HX & Hosp HX near the top to be able to review or update faster

the Right Chart Panel for each tab and change their order.

DRTLA Sections

- Referrals
- Actions
- Telephone Encounters
- Web Encounters
- Labs
- Diagnostic Imaging
- Documents
- Procedures
- eCW P2P Patient Records
- PPD

Rearrange sections to efficiently get to things like Referrals & Action Items that have no quick link from visit notes & TE's, and move sections never used to the bottom

Right Chart Panel Configuration

Customization Other Settings

Views

Default Tab

Default Right

Progress Note

Scribe

Overview

History

DRTLA

CDSS

Templates

View Vitals The Way You Want To See Them

- Change how many rows of Encounter vitals show by default (standard default = 10 rows)
- View even more rows of older encounter vitals using “View Older Vitals” button. Helpful for discussing how current weight, BP, etc compare to past vitals
- Filter Vitals by Provider, Facility & Visit Type
- Clear the Filtered appearance & return to unfiltered view by using “Clear Filters” button

The screenshot shows a table of patient vital signs with the following data:

Date	Wt(lbs)	BP(L)(mmHg)	BP(R)(mmHg)	Temp(F)	Pulse(/min)	Ht(in)	BMI(Ind)	Wt Change	HC(in)	RR(/min)	SpO2(%)	Ext
04-28-2025												
10-21-2024												
09-30-2024*	215.4	154/80	140/76	96.5	56	69.75	31.13	+1.8 lbs				
09-04-2024		136/76				69.75						
08-22-2024	217.2	120/66		96.6	68	69.75	31.39	0 lbs				
08-05-2024	217.2	140/74		96.6	72	69.75	31.39	-2 lbs				
06-17-2024												
10-26-2023												
10-09-2023	219.2	130/74		96.6	64	69.75	31.67	5.6 lb				
09-02-2023												
04-06-2023	213.6	136/80		96.9	68	69.75	30.87	2.2 lb				
02-14-2023												
02-07-2023												

At the bottom, there are buttons for "Growth Chart", "Graph", and "Notes". A "Load" dropdown is set to "20 encounters by default". Buttons for "View more recent vitals" and "View older vitals" are also present.

The "Filters" dialog box contains the following fields:

- Appointment Provider: Block, Bradley M
- Appointment Facility: All
- Visit Type: PE 50yo

A note at the bottom states: "Note: The current encounter will always be displayed, even if the selected filters would exclude it."

At the bottom right are buttons for "Clear Filters", "Apply Filters", and "Cancel".

Improve Documentation Quality & Efficiency by Copying & Pasting PDF & TIF Document Data Into Charts

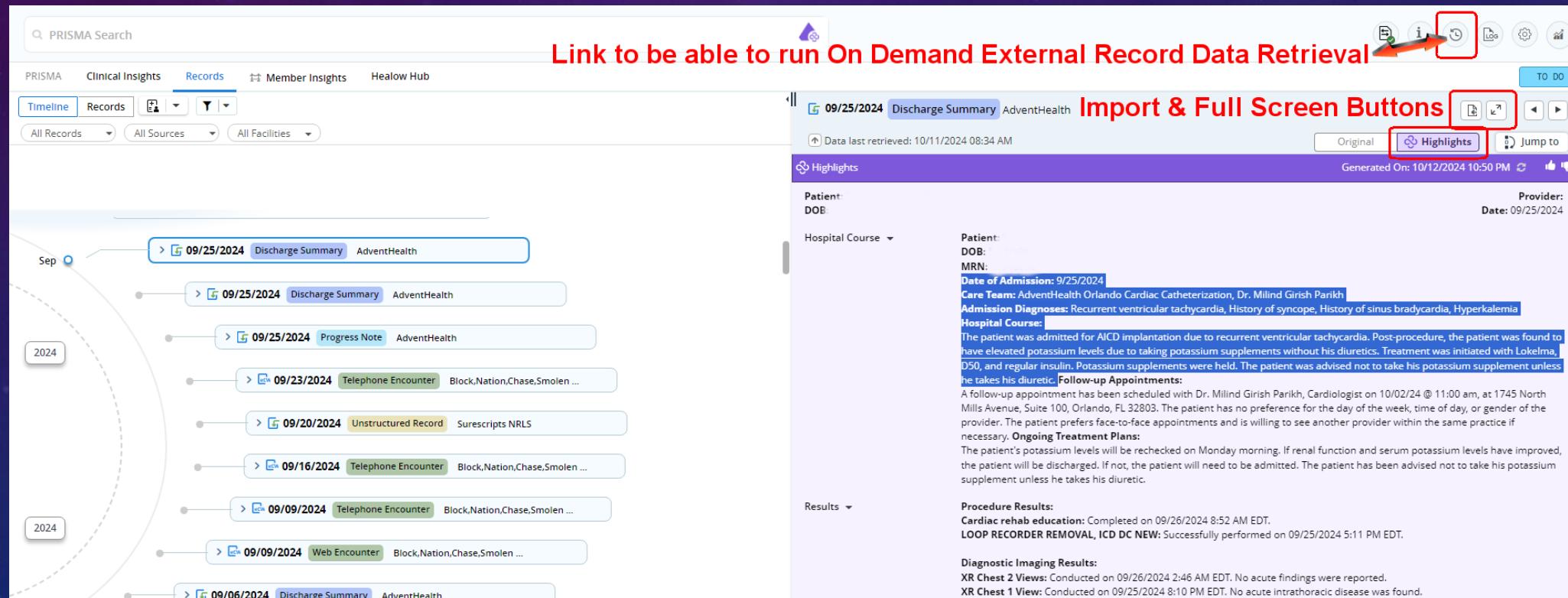
- Right click on patient documents in Plug-in Mode & choose “OCR Scanner” option
- OCR Scanner then opens window (to right of original document) in format that allows you to highlight, copy & paste text into pt chart
- OCR text recognition much more accurate with PDF than TIF documents

The image displays three windows side-by-side, each showing a different view of the same medical document.

- Patient Documents - Plug-in Mode:** On the left, a sidebar shows a tree view of documents: XRay/Diagnostic Testing Documents (128), Consult Letters, DC-Summary, Cardiology Co, and ECHO & C. A red box highlights the "OCR Scanner" option under ECHO & C. A red arrow points from this option to the "OCR Document" window.
- OCR Document View:** The middle window shows the "OCR Document View" for the file 59165_5C383D9D-F869-9F48-9AAC-20DF4CB523E3.pdf. It displays the document's content with text labels like "Confidence Level: 90%" and "Search" and "Copy" buttons. A red box highlights the "Confidence Level: 90%" text.
- Original TIF Document:** The right window shows the "OCR Document View" for the file 59165_4F8FD00-E286-7546-9AF9-B73A7E996F3.tif. It displays the document's content with text labels like "Confidence Level: 77%" and "Search" and "Copy" buttons. A red box highlights the "Confidence Level: 77%" text.

Try PRISMA AI External Records Highlights to Summarize Medical Records to Quickly See All Pertinent Info

- Very helpful, BUT takes time especially if lots of pages. Plan to do something else while running Highlights summary
- Can Import complete Summary, or copy & paste specific text from Highlights



The image shows the PRISMA AI interface. On the left, a timeline view displays a list of medical records from September 2024, including Discharge Summaries, Progress Notes, Telephone Encounters, and Unstructured Records from various sources like AdventHealth and Surescripts NRLS. On the right, a detailed view of a Discharge Summary for a patient admitted on 09/25/2024 is shown. The interface includes several buttons at the top right: a green 'Import' button, a red 'On Demand External Record Data Retrieval' button, a blue 'Highlights' button, and a purple 'Full Screen' button. The 'Highlights' section provides a summary of the patient's admission, including the date of admission, care team, admission diagnoses (Recurrent ventricular tachycardia, History of syncope, History of sinus bradycardia, Hyperkalemia), and a note about potassium levels and treatment. It also includes sections for Procedure Results, Diagnostic Imaging Results, and a note about ongoing treatment plans.

Referral Screen Diagnosis Selection Trick!

- Use DX search box at top of screen to search ALL DX screens at once for a matching DX from Smart search, PL, & Previous DX codes
- Add DX of choice from any & all of these screens

The screenshot shows the 'Select Assessments' screen for a patient named 'Spiderman' (M, Jun 6, 1906, 118 yo F, Acc No. 70248). The screen is divided into four main sections, each with a red box highlighting it:

- Smart Search:** A search bar with the text 'CHF' and a 'Type in Search Box' placeholder. Below it is a table with columns: HCC, RxHCC, V24 RAF, V28 RAF, ICD-9, ICD-10, SNOMED, and Diagnosis. The 'Diagnosis' column lists various codes and descriptions, including 'CHF (congestive heart failure)', 'Chronic systolic congestive h...', 'Congestive heart failure (CHF)', 'Chronic CHF', 'CHF, chronic', and 'CHF exacerbation'.
- Patient Problem List:** A table with columns: Code, SNOMED, and Diagnosis. It shows two entries: 'I50.40' with 'CHF - Unspecified com...' and 'I13.0' with 'Hypertensive Heart & C...'. A button 'Add diagnosis to Selected Assessments' is located below this table.
- Selected Assessment(s):** A table with columns: PL, Code, SNOMED, and Diagnosis. A red box surrounds this entire table. The 'Diagnosis' column displays the message 'No DX Selected Yet'.
- Patient Previous Diagnosis:** A table with columns: Code, SNOMED, and Diagnosis. It shows one entry: 'I50.40' with 'CHF - Unspecified com...'.

CCM/PCM Module Tips to Document Work More Efficiently

- Create & Add commonly used “Reasons” via Admin> Notes> “CCMReason” to document CCM time faster & more accurately

CCM/PCM Primary Contact:

Date: 10/09/2024 Billing Month: Oct-2024

Start Date * 10/09/2024 End Date * 10/09/2024 Duration HH:MM:SS

Reason *

Adding helpful “Reasons” can help reduce need for adding additional “Notes”

Type CCM Reason

- Coordinate Care with other service providers
- Other
- Created or Updated Care Plan
- Reviewed Chart for Due or Overdue Labs/Tests/Alerts/Preventive Care/Med Refills
- Manage Medical Condition(s) for patient
- Coordinate Care of patient
- Reviewed Medical Reports on Pt & Updated Chart as Appropriate
- Med Reconciliation Reporting

CCM/PCM Primary Contact:

Date: 10/09/2024 Billing Month: Oct-2024

Start Date * 10/09/2024 End Date * 10/09/2024 Duration HH:MM:SS

Reason *

Type CCM Reason

Notes

Document “Tests Reviewed”, “Forms filled out”, etc faster & w/ standardized notes by creating pic list through ellipsis link

ab (a) (b) (c) (d) View (e) ...

CCM/PCM Primary Contact:

If you just finished & forgot to use timer: For Manual time entry, skip filling in the start time

Date: 10/09/2024 Billing Month: Oct-2024

Start Date * 10/09/2024 End Date * 10/09/2024 Duration HH:MM:SS

Reason *

Type CCM Reason

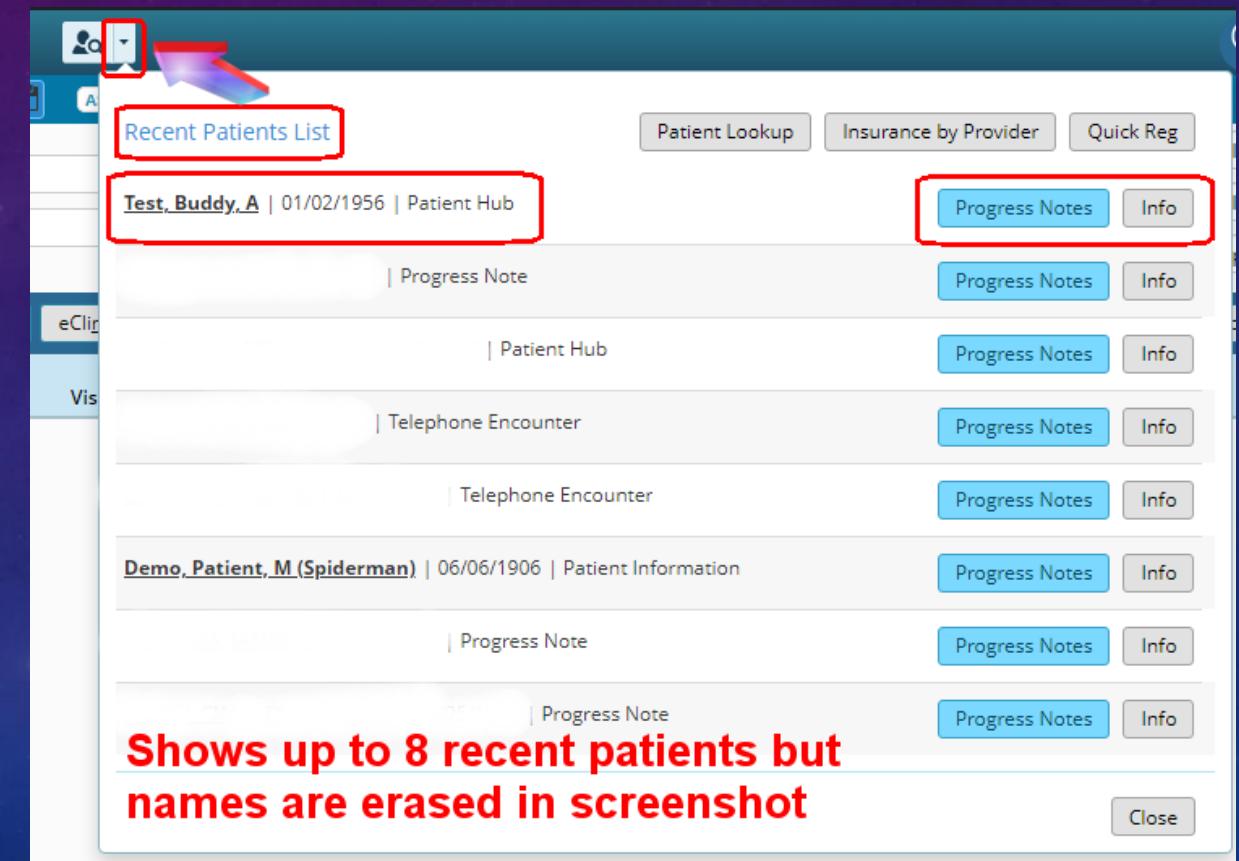
Notes

Select Minutes from Palette

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15

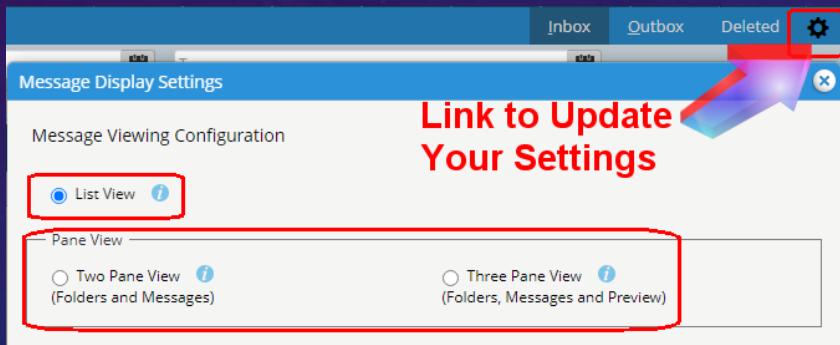
Jump Into Desired Area of Patient Chart Faster From Patient Lookup Link

- Use the small patient look up “arrow” link to see your patients recently viewed by HUB, TE, Visit Note, & Demographics screen
- Provides link to go directly into progress notes or info screen
- Lists manner viewed in case you forgot the name of someone you need to look up



Configure Your “M” Jellybean Inbox Viewing Settings to Optimize Your Own Personal Workflow

- List View is the traditional format & shows the most messages per screen w/o scrolling. Easier to recognize messages as “read” vs “unread” & quickest for choosing to show “All” vs “Unread” messages
- Three Pane View has Preview screen that eliminates need to pop open messages to read them, and has many easier to use filtering options



Three Pane View

Pop-up Filter settings

Filters

Sender: Search

Date From: mm/dd/yyyy To: mm/dd/yyyy

Subject Contains: Enter Text

Folders: Inbox Tags: Select

Priority: High Medium Regular

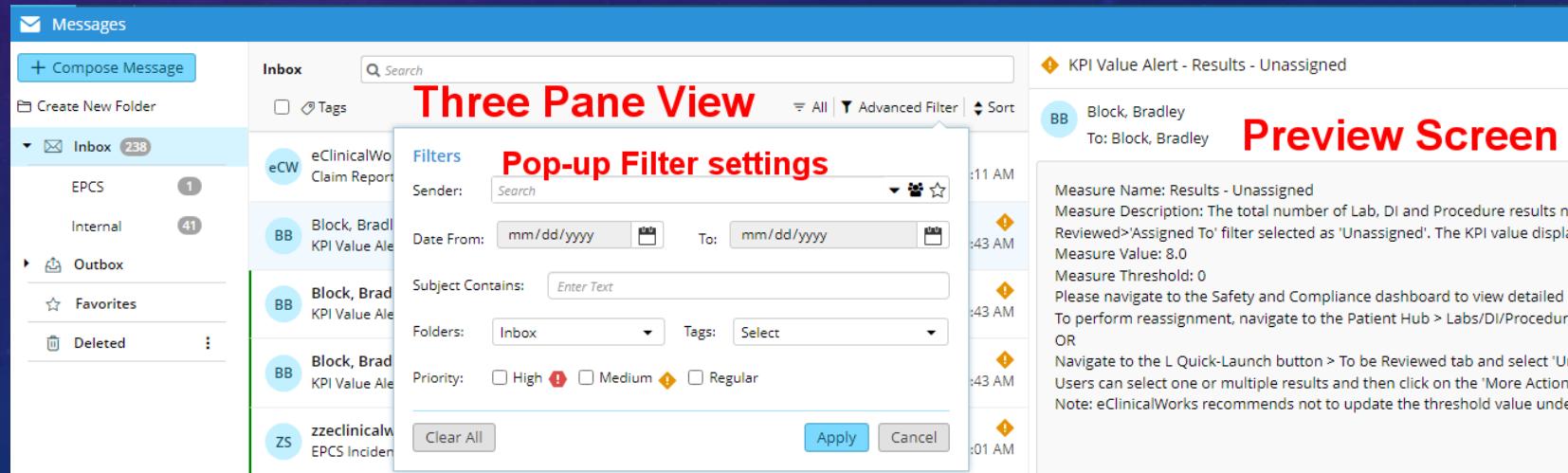
Clear All Apply Cancel

Preview Screen

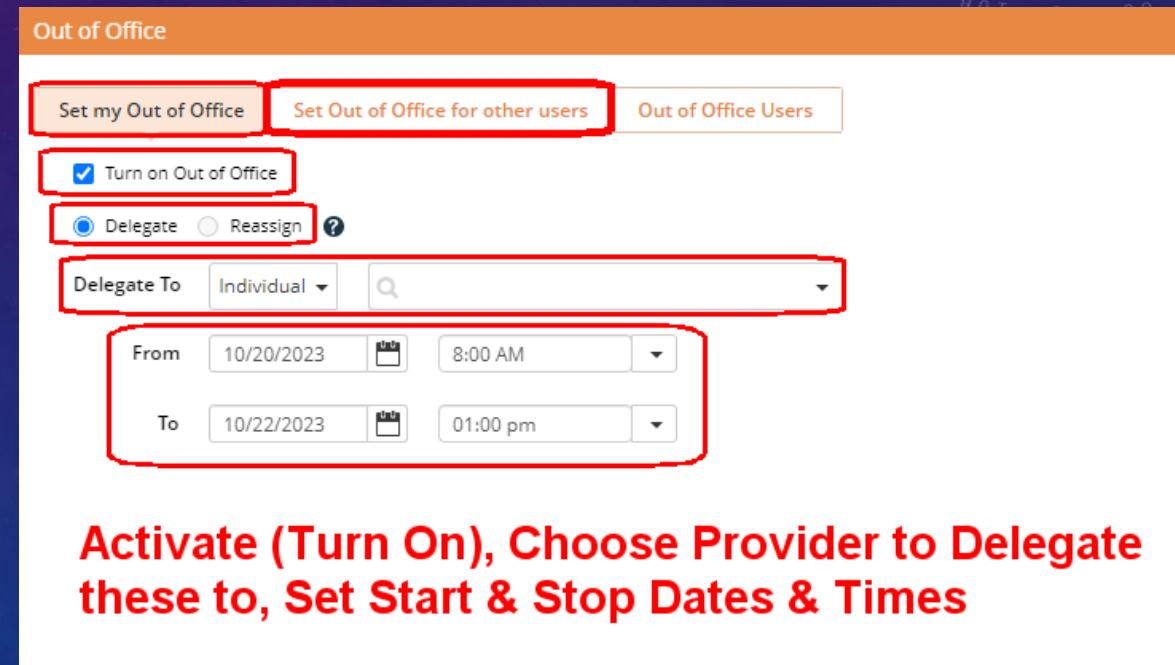
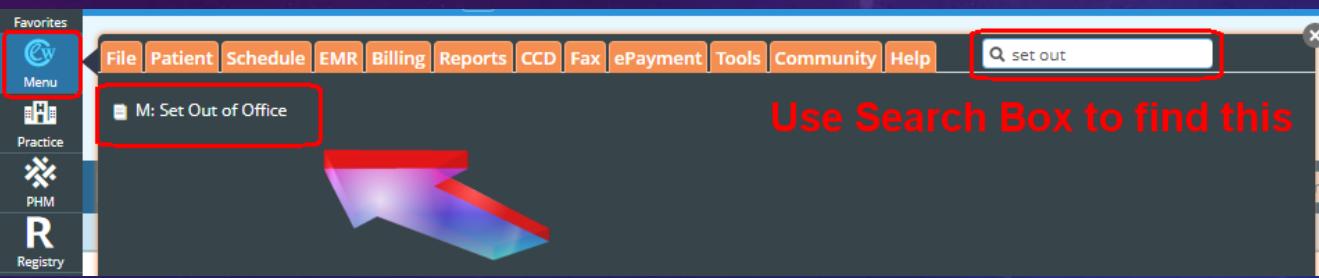
KPI Value Alert - Results - Unassigned

BB Block, Bradley To: Block, Bradley

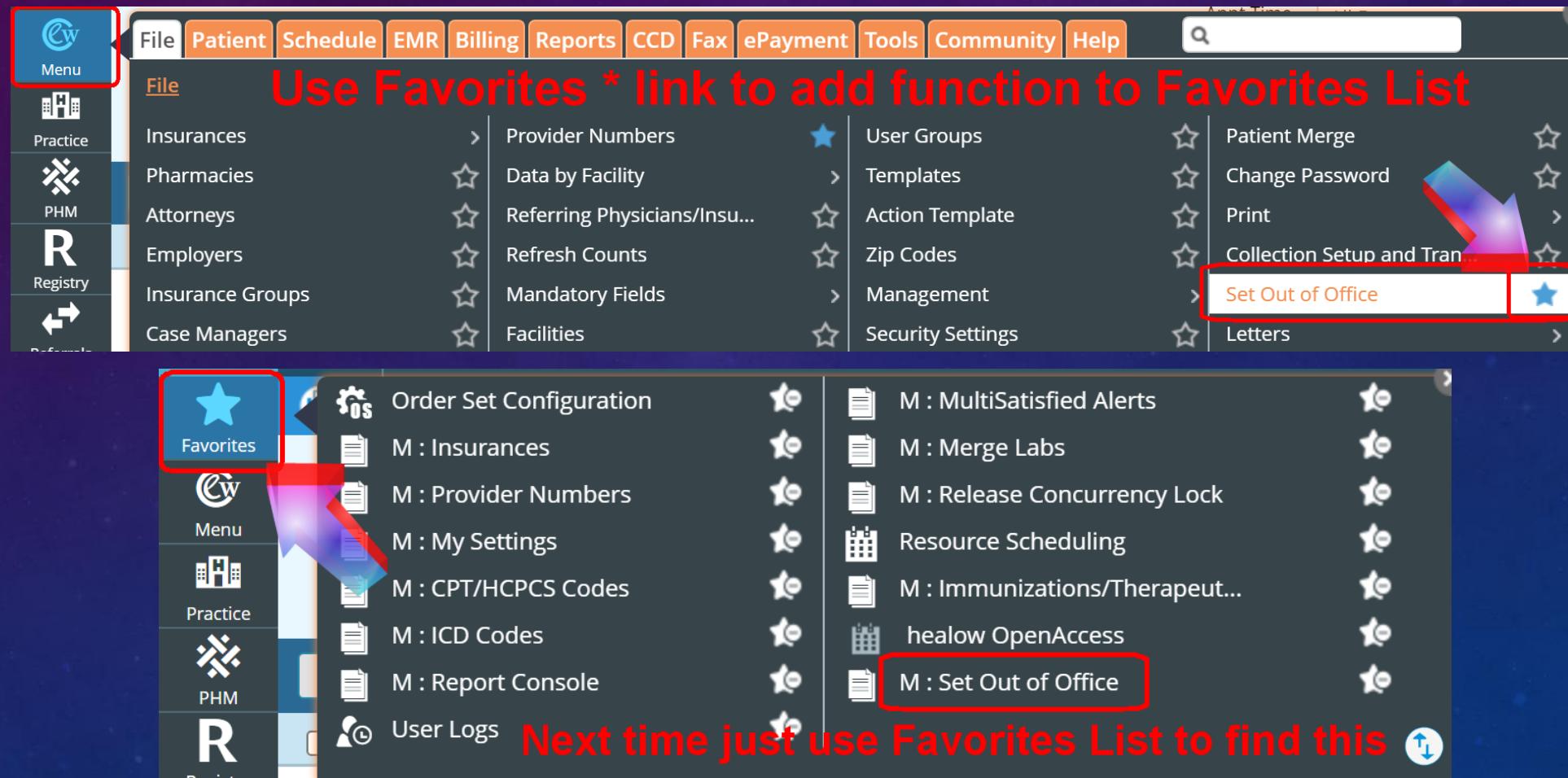
Measure Name: Results - Unassigned
Measure Description: The total number of Lab, DI and Procedure results not reviewed
Reviewed > 'Assigned To' filter selected as 'Unassigned'. The KPI value display
Measure Value: 8.0
Measure Threshold: 0
Please navigate to the Safety and Compliance dashboard to view detailed results
To perform reassignment, navigate to the Patient Hub > Labs/DI/Procedure
OR
Navigate to the L Quick-Launch button > To be Reviewed tab and select 'Unassigned'
Users can select one or multiple results and then click on the 'More Action' button
Note: eClinicalWorks recommends not to update the threshold value under



Wouldn't It Be Nice to Have Your TE's & WE's Automatically Assigned Or Delegated to Another Provider While Here Or Any Other Time When Out of The Office – Try Using the “Set Out of Office” Function



More Importantly, Make Sure You Can Easily Find The “Set Out of Office” Function Or Any Function In The Future Quick & Easy



Eliminate Malware Scanning Slowdowns – Configure Anti-Virus Software to Exclude eCW from Scans

- Exclude eCW Folders & App from Auto-Protect Real Time Scans (some items in screenshot are from EXE install), and Exclude eCW Process
- Find your Cloud Server URL from your eCW Login Screen or eCW Plugin Properties, and Exclude eCW Server URL from Firewall App URL Monitoring

Real Time Exclusions ?

The following items are ignored by Auto-Protect, Script Control, and Firewall.

- C:\ecw
- C:\Program Files (x86)\eClinicalWorks
- C:\ProgramData\eClinicalWorks
- C:\ProgramData\eClinicalWorks\plugin\ecWUrlLaunch.exe

Process Exclusions ?

Manage the processes excluded from Data Protector.

Process
C:\ProgramData\eClinicalWorks\plugin\ecWUrlLaunch.exe

App URL Monitoring Exclusions

The following items are ignored by App URL Monitoring.

- https://f.ecwcloud.com

