

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 a copy of our presentation & some bonus slides go to:

www.BlockAndNation.com/BlockAndBiggs



Super Users Roadshow: Bradley M. Block, M.D. & William "Reddy" Biggs, M.D.

Who Are We?

- Bradley M. Block, M.D., FAACFP
 - Family Physician in independently owned, 4 physician Family Medicine group in Oviedo, Florida (1 partner retiring this year)
 - eCW User for 21 years
- William “Reddy” Biggs, M.D., FACE, ECNU
 - Endocrinologist in independently owned, 54 provider Internal Medicine Multi-Specialty group in Amarillo, Texas
 - eCW User for 19 years
 - Board Certified in Clinical Informatics
 - CPT reviewer for AMA
- Spoken together since the 1st NUC in 2008



Why Were We Asked to Speak?



- Together we have 40 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 w/ Usability Project 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

Presentation Required Disclaimers

- All Photos and Images Used in our slides were supplied by us (the “client”) and not by eClinicalWorks
- Dr Bigg’s AMA & AACE Work Required 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 the AMA or the AACE.
 - *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
- Mix of new & last year's 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 until all questions are answered
 - Make notes so you don't forget!

Settings to Help to Provide a More Optimal User Experience



2FA Now Literally Means 2 Factors

- New 2FA option to have a 2nd alternate authentication method
- “Messenger (Mobile Number)” = cell phone. Approves w/ single click on text link vs Auth App requiring typing in code
- eCW login screen creates “Alternate Authentication Method” link once activated (& which needs to be verified first time logging in)
- Under File>Settings>Admin>Authentication Settings>User Name: Configuration option for each user to ONLY need 2FA first time on any new device for more simple user experience

The image contains four screenshots illustrating the 2FA setup process in eClinicalWorks:

- Left Screenshot:** The eClinicalWorks login screen for user "Block, Bradley M, M.D." (DrBlock-SP9). The "LOG OUT" button is highlighted with a red box.
- Middle Left Screenshot:** The "User Profile" page for the same user. It shows the "Two Factor Authentication Modalities" section, where "Email" is selected as the Primary Type. The "Secondary Type" dropdown is open, showing "Messenger (Mobile Number)" as an option, which is also highlighted with a red box.
- Middle Right Screenshot:** The "Login Screen" showing a confirmation message: "eClinicalWorks sent a notification to your Email. Please confirm to Log in." A red box highlights the "Alternate Authentication Methods" link at the bottom of the screen.
- Right Screenshot:** A configuration dialog box titled "Configuration". It has three options: "Activate if change in device/location" (highlighted with a red box), "Activate for every login", and "Activate if change in device/location".

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

- Security Settings > By Security Attribute > “New” tab for new settings in past 30 days
- After EVERY version or CP update review new security settings and update providers & staff accordingly
- Alternative: Use “Export into Excel” button at the bottom of security settings screen to save all new & old Security Setting options for later use
- Can sort Excel list for New vs Old settings using individual column “Filter” option

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. New	Administration / EMR Setup
Allow access to Sensitive Data Blocks	Shall grant or deny a user access to Sensitive Data Blocks. New	Administration / EMR Setup
Allow user to set Out of Office for other users	Allow user to set Out of Office for other users. New	Administration / EMR Setup
Allow users to restore deleted Staff/Provider	Allow users to restore deleted users from Admin > Providers and Admin > Staff screen. New	Administration / EMR Setup
Allows access to Narx Score in RCP	Allows access to Narx Score in RCP. New	Administration / EMR Setup



Security Setting Name Security Setting Description Security group Name

A	B	C	D	E	F
1 Security Setting Name	Security Setting Description	Security group Name			
2 277CA - Download 277CA	All	Administration / Billing Setup			
3 Add/Delete Bank Account	All	Administration / Billing Setup			
4 Add/Remove CPT code in	All	Administration / Billing Setup			
5 Administrate Payment Bat	All	Administration / Billing Setup			
6 Allow access to Case Man	All	Administration / Billing Setup			
7 Allow access to Download All	All	Administration / Billing Setup			
8 Allow access to edit the Se	All	Administration / Billing Setup			
9 Allow access to expire Slid All	All	Administration / Billing Setup			
10 Allow access to NADEAN C Gi	All	Administration / Billing Setup			
11 Allow access to Sliding Fee All	All	Administration / Billing Setup			
12 Allow access to update Op All	All	Administration / Billing Setup			
13 Allow Bulk Adjust Claims C All	All	Administration / Billing Setup			
14 Allow Changing Payment E Gr	All	Administration / Billing Setup			
15 Allow Result Entry For Res All	All	Administration / Billing Setup			
16 Allow to view/modify the All	All	Administration / Billing Setup			
17 Allow Update of Clearing All	All	Administration / Billing Setup			
18 Change Appt Facility on lo All	All	Administration / Billing Setup			
19 Changing Fee schedule	All	Administration / Billing Setup			
20 Claim Creation Rules	Th	Administration / Billing Setup			
21 Configure CPT Groups	Gr	Administration / Billing Setup			
22 Configure Dental CPT info All	Gr	Administration / Billing Setup			
23 Configure ICD Groups	Gr	Administration / Billing Setup			
24 Configure Patient Estimate Enables the Configure Patient Es	Old	Administration / Billing Setup			
25 Configure Preferred Provid Allows authorized user to config	Old	Administration / Billing Setup			
26 Configure Statement Hold Allows the user to configure the Old	Administration / Billing Setup				
27 CPT Codes	Allows the user to create, update Old	Administration / Billing Setup			
28 Credentialing Setup	Allow Access to Credentialing Se Old	Administration / Billing Setup			

Sort by Color

Sheet View

Clear Filter From "Security Setting ..."

Filter by Color

Text Filters

Search

(Select All)

New

Old

uncheck "Old" to see only the "New" settings

OK Cancel

Use Provider NPI #'s to More Efficiently & hopefully more accurately)

Add Providers to Referral Database

- Need to enable “Add referring physician by NPI #” in security settings
- Import new Providers into your eCW database using link in “Referring Physicians” for creating referrals and for linking to consult reports
- Import process cross matches & offers to update current providers already in referral DB
- **Warning:** many practices are run by corporate management companies which can cause the doctor’s info to be linked to an out of town corporate office address and fax number
- Additional option to import new internal practice providers too (w/ separate similar security setting)

Type in the NPI # of a provider, and eCW will pull up that provider and provide option to import them into your database.

We've Got Futuristic Cures to Help Your Efficiency & eCW Experience for Patient Care



Super Users Roadshow: Bradley M. Block, M.D. & William "Reddy" Biggs, M.D.

New Feature Highlight - Healow Sign Is Amazing!

- **VERY EASY & FAST** to configure & prep new forms to send to patients
- Great for Consent forms & Simple forms – filled out, signed, download into chart
- Upload PDF or Word (.docs) files. Using Word allows for easier revisions
- Forms sent via secure text, Healow app, and portal for pts to sign/fill out
- Use Healow “Connect” in HUB to send these to patients in matter of secs
- Delivers forms directly back into patient chart
- Need to give security setting access to “Secure Texts” & “Healow Connect” & “Manage Templates” (these templates are specific to Healow Sign)
- Best to include basic instructions to patients for signing & submitting forms since it is a multi-step process for patients



Creating a Heallow Sign Consent is as Easy as 1-2-3

Create heallow Sign Template - AUTH TO TREAT CHILDREN-Heallow...

① Details ② Select File ③ Map & Tag

Create Copy from existing

Name* **AUTH TO TREAT CHILDREN-Heallow Sign** Document name when saved in eCW

Type* **Consents**

Effective From* **09-01-2025**

Description* **AUTHORIZATION TO TREAT MINORS-Heallow Sign**

1st Screen

Assign to User **zPortal,Front Office**

Auto Review

Publish to Portal

Facility **Block,Nation,Chase,Smolen Fa...**

Save to* **Patient Documents**

Create heallow Sign Template - AUTH TO TREAT CHILDREN-Heallow...

① Details ② Select File ③ Map & Tag

Signature / Initial
 Text
 Checkbox
 Radio Button
 Drop-down Box

Tag Type **Collection Letters**

Collection Letters
 Progress Notes Related
 Immunizations
 Referrals - Outgoing
 Appeal Letter
 Fax CoverSheet
 Encounter Form

2nd Screen

Add tags that patients update

Be sure to add Patient Name & DOB

BLOCK, NATION, CHASE & SMOLEN FAMILY MEDICINE

AUTHORIZATION TO TREAT PATIENTS UNDER 18 YEARS OF AGE WHO ARE NOT ACCOMPANIED BY PARENT

- My child may be seen and treated for general medical conditions without my presence.
- Physicians reserve the right to request specific authorization for certain problems.
- Children under the age of 16 years old must be accompanied by an adult (parent, sibling over the age of 16, grandparent, etc.)
- This authorization is valid for all medical services for one (1) year from the date of signature.

PLEASE "ELECTRONICALLY SIGN" THIS BY TAPPING THE "SIGN HERE" BOX, THEN CLICK "APPLY" BUTTON, THEN CLICK "SUBMIT".

signature box **automated date signed box**

ptname DOB

Field Type: Signature
Field Name: SignatureFormField 4

Sending a Heallow Sign is Even Easier

- “Manage Template” creates & names templates & adds message that goes out w/ document
- “Heallow Sign” chooses & sends the actual documents

Heallow Connect DEMO, Patient "Spiderman" M Jun 6, 1906 (119 yo F) Acc No. 70248

Patient Preference | Yes | Yes | Yes | Yes | Yes

Add Note Quick Action

All Activities

SIGN Search

AUTH TO TREAT CHILDREN

AUTH TO TREAT CHILDREN-Heallow Si...

Please Review & Sign this required form for Block, Nation, Chase & Smolen Family Medicine to treat your child.

ANNUAL ADMIN FEE CONSENT FORM

Annual Admin PCP Fee Acknowledge...

Please Review & Sign this required form for Block, Nation, Chase & Smolen Family Medicine.

Last sent date: Aug 21, 2025 12:59 PM

heallow Sign

heallow Survey

heallow Questionnaire

Manage Templates

Custom Text

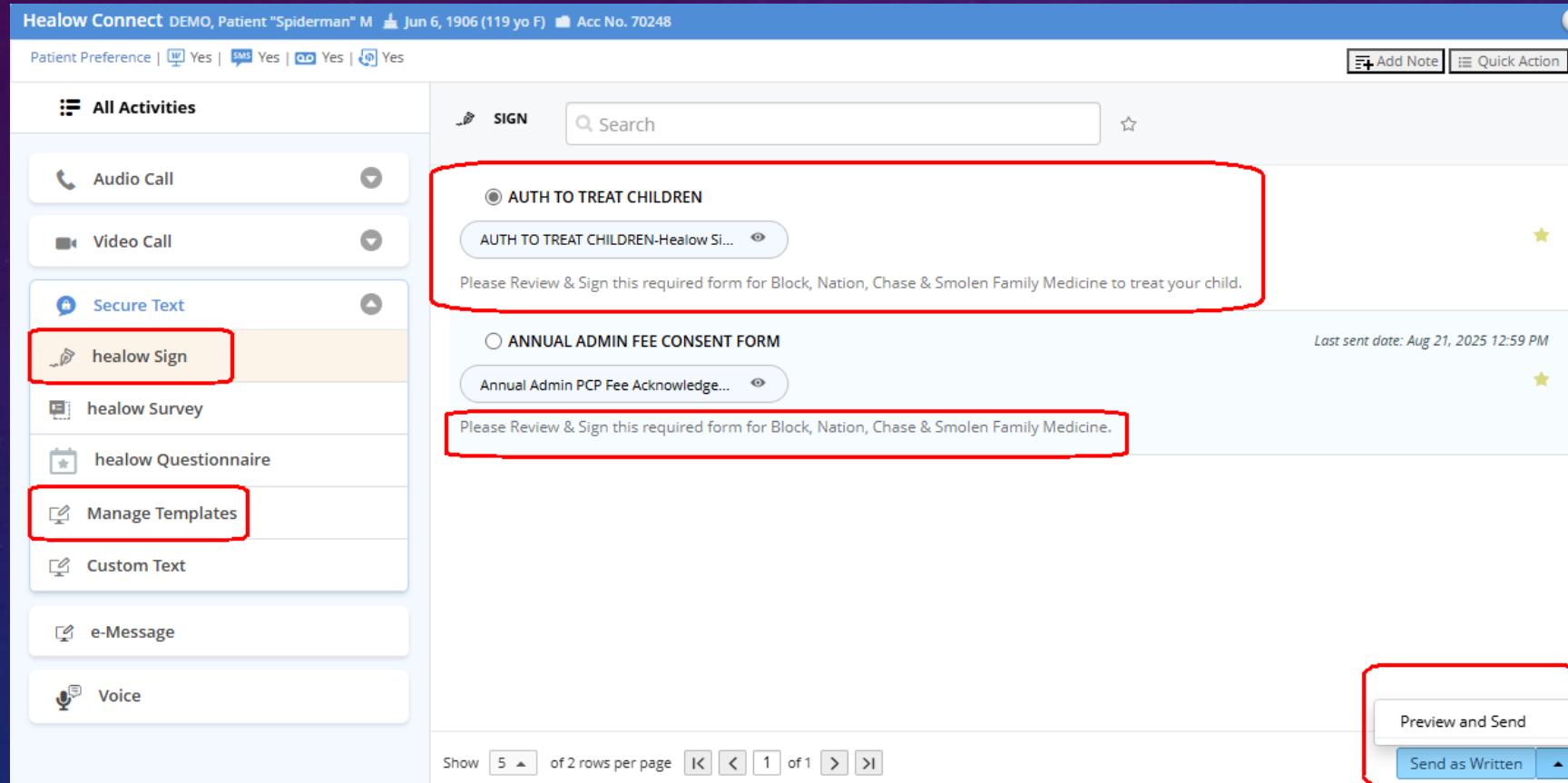
e-Message

Voice

Show 5 of 2 rows per page < < 1 of 1 > >

Preview and Send

Send as Written



Web EMR - heallow Sign - Google Chrome

heallowsign.ecwcloud.com/heallowsign/documents/view-document

heallow SIGN AUTH TO TREAT CHILDREN-Heallow Sign

Patient Jun 06,1906 START

BLOCK, NATION, CHASE & SMOLEN FAMILY MEDICINE

Patient View After Signing & Ready to Submit

AUTHORIZATION TO TREAT PATIENTS UNDER 18 YEARS OF AGE WHO ARE NOT ACCOMPANIED BY PARENT

- My child may be seen and treated for general medical conditions without my presence.
- Physicians reserve the right to request specific authorization for certain problems.
- Children under the age of 16 years old must be accompanied by an adult (parent, sibling over the age of 16, grandparent, etc.)
- This authorization is valid for all medical services for one (1) year from the date of signature.

PLEASE "ELECTRONICALLY SIGN" THIS BY TAPPING THE "SIGN HERE" BOX, THEN CLICK "APPLY" BUTTON, THEN CLICK "SUBMIT".

Demo, Patient M 06/06/1906

Patient Demo

ANNUAL ADMINISTRATIVE PCP (Primary Care Physician) FEE ACKNOWLEDGEMENT (FOR NON-MEDICARE PATIENTS). PLEASE REVIEW THIS WHOLE MESSAGE, AND SIGN AT THE BOTTOM.

After much consideration, Block, Nation, Chase & Smolen Family Medicine finds it is necessary to charge an Annual Administrative PCP Fee (AAPF) for non-Medicare Patients of \$100 per adult patient and \$50 per pediatric patient (through 21 years of age). The AAPF is intended to cover services performed outside of office visits such as medication refill requests, answering messages, providing test results, treating by phone messages without a visit when appropriate, coordinating care, insurance prior-authorizations of medications & other care, completion of forms, and maintaining medical records, etc. This AAPF will be billed as a recurring fee each year approximately 12 months from the 1st month that the fee was initiated.

Signed Admin Fee Consent Form Saved in Patient Chart

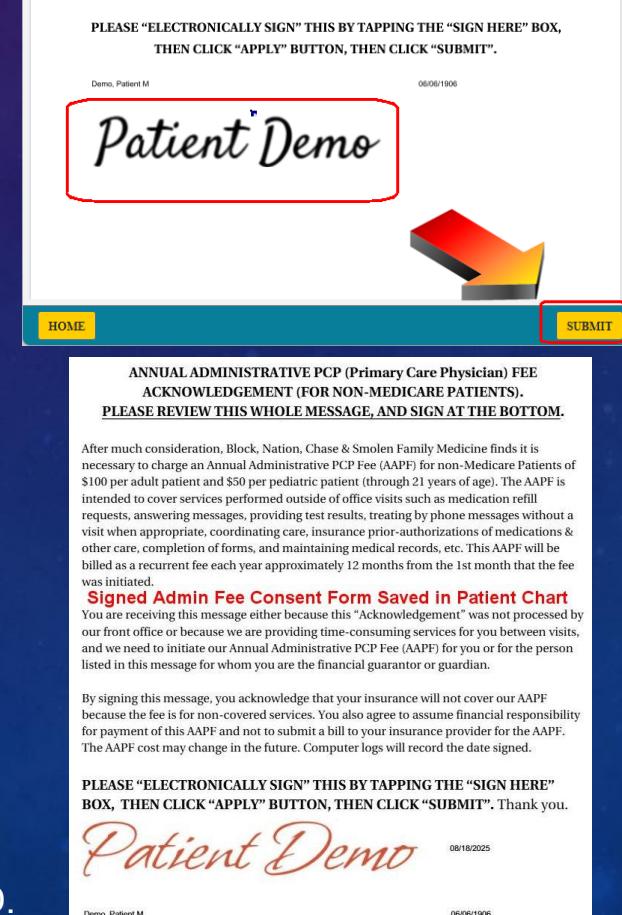
You are receiving this message either because this "Acknowledgement" was not processed by our front office or because we are providing time-consuming services for you between visits, and we need to initiate our Annual Administrative PCP Fee (AAPF) for you or for the person listed in this message for whom you are the financial guarantor or guardian.

By signing this message, you acknowledge that your insurance will not cover our AAPF because the fee is for non-covered services. You also agree to assume financial responsibility for payment of this AAPF and not to submit a bill to your insurance provider for the AAPF. The AAPF cost may change in the future. Computer logs will record the date signed.

PLEASE "ELECTRONICALLY SIGN" THIS BY TAPPING THE "SIGN HERE" BOX, THEN CLICK "APPLY" BUTTON, THEN CLICK "SUBMIT". Thank you.

Patient Demo

Demo, Patient M 06/06/1906



Unlock the Keys to Happiness

- Have eCW Support Change “Item Keys”:
- List medications in Current Medication Lists alphabetically per user choice. Each user: My Settings>User Settings>“view current medication in an alphabetical order”
- Change default visit note follow-up from “N/A” to nothing pre-chosen (see below)

new version default visit note follow-up setting unless Item Key is changed

Follow-Up	<input checked="" type="checkbox"/> Follow-Up N/A											
2D	3D	1W	2W	3W	4W	6W	2M	3M	4M	6M	1Y	PRN
Notes	S	...	Clr	Reason	...	Clr						
Follow-Up Notes				Follow-Up Reason								

! Current Medication:

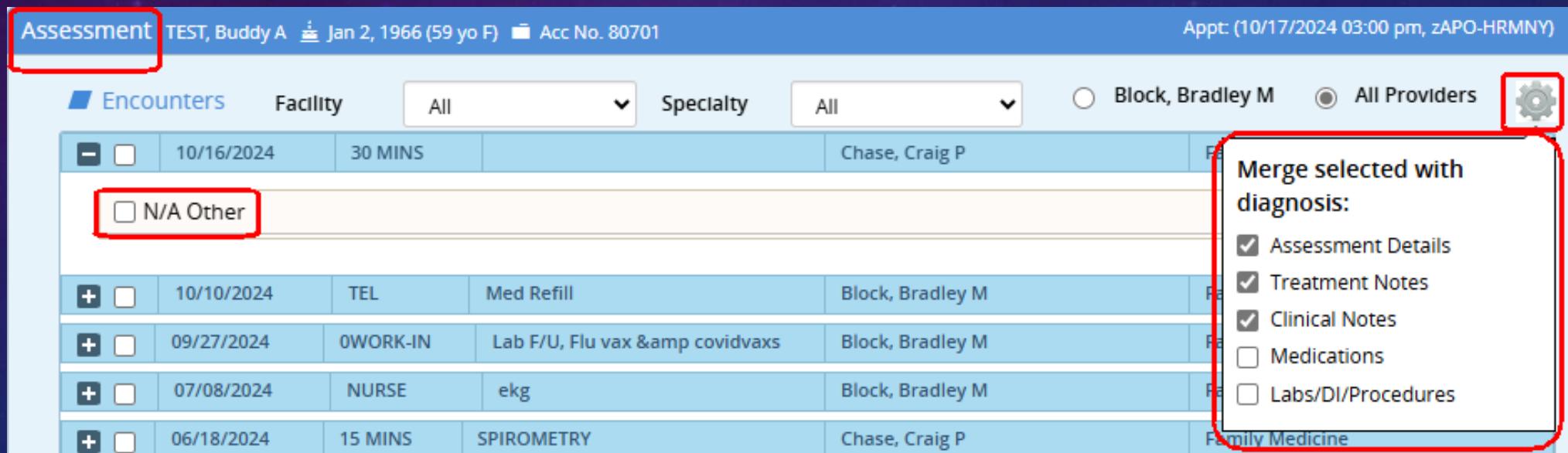
Taking

- Arava 20 MG Tablet 1 tablet Orally Once a day.
- Aspirin 81 MG Tablet Delayed Release 1 tab(s) orally with food once a day as tolerated.
- buPROPION HCl ER (XL) 300 MG Tablet Extended Release 24 Hour 1 tab every am orally once a day.
- Centrum Silver - Tablet 1 tab(s) orally OTC once a day.
- Co Q 10 100 MG Capsule 1 cap(s) orally once a day.
- CPAP MACHINE for 99 months for DX: Obstructive Sleep Apnea Needs: AUTO-CPAP model: Heated Humidifier, & CPAP Supplies.
- Donepezil HCl 10 MG Tablet 1 tablet at bedtime for memory Orally Once a day.
- Etodolac 500 MG Tablet 1 tab(s) as needed for pain or arthritis orally with food twice a day.
- Ezetimibe 10 MG Tablet 1 tab for Cholesterol orally once a day.
- Famotidine 40 MG Tablet 1 tab(s) at bedtime for acid reflux orally once a day.
- Hydroxychloroquine Sulfate 200 MG Tablet TAKE 1 TABLET BY MOUTH TWICE DAILY Oral.
- IamoTRIgline 200 MG Tablet 2 tabs in pm orally once a day.
- Levothyroxine Sodium 112 MCG Tablet 1 tab in am orally once a day.
- Lisinopril 2.5 MG Tablet 1 tab(s) for BP and kidneys orally once a day.
- Magnesium Citrate 125 MG Capsule 2 cap(s) orally once a day.
- Memantine HCl 10 MG Tablet 1 tab(s) for memory orally with food 2 times a day.
- Mounjaro 10 MG/0.5ML Solution Auto-injector use 1 pen for dx: type 2 dm Subcutaneous once a day.
- Omeprazole 40 MG Capsule Delayed Release 1 capsule 30 minutes before morning meal Once a day.
- Pioglitazone HCl 45 MG Tablet 1 tab(s) for diabetes orally once a day.
- Primidone 250 MG Tablet take 1 tablet in a.m by mouth 2 tab in p.m. for tremor orally daily.
- Rosuvastatin Calcium 40 MG Tablet 1 tab for cholesterol orally once a day.
- Silodosin 8 MG Capsule 1 cap(s) each night for enlarged prostate orally once a day.
- tiZANidine HCl 2 MG Tablet 1 tablet in am, 1 tab at noon, 1 tab at dinner time, and 2 at bed time.
- traMADol HCl 50 MG Tablet 1-2 tabs For NONACUTE PAIN 4 times a day PRN severe pain.
- traZODone HCl 100 MG Tablet 2 tab(s) at night orally once a day.

Medication List reviewed and reconciled with the patient.

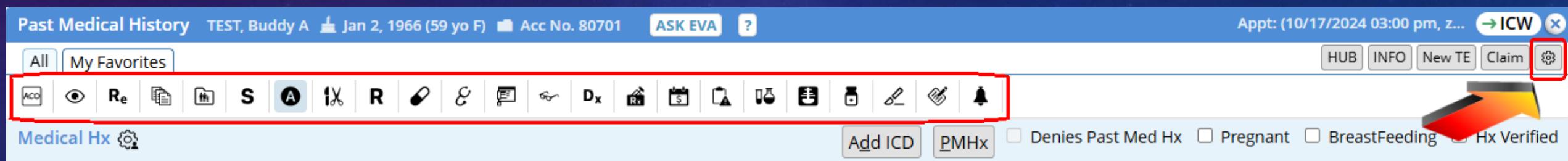
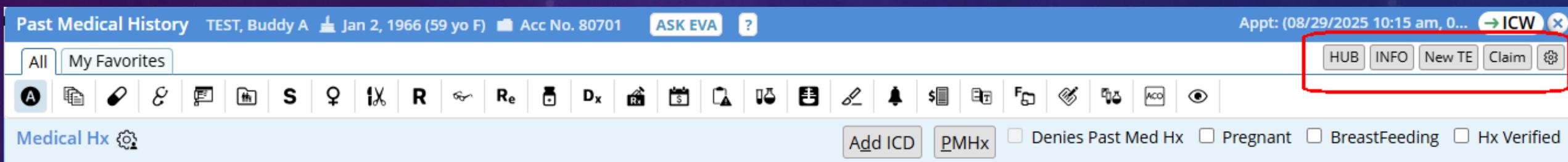
New Visit Note Setting Options to Simplify Your Life

- Orange Caret A/P Merge Options setting - can exclude meds, etc.
- Visit note A/P caret can now carry forward notes in the “Other” section



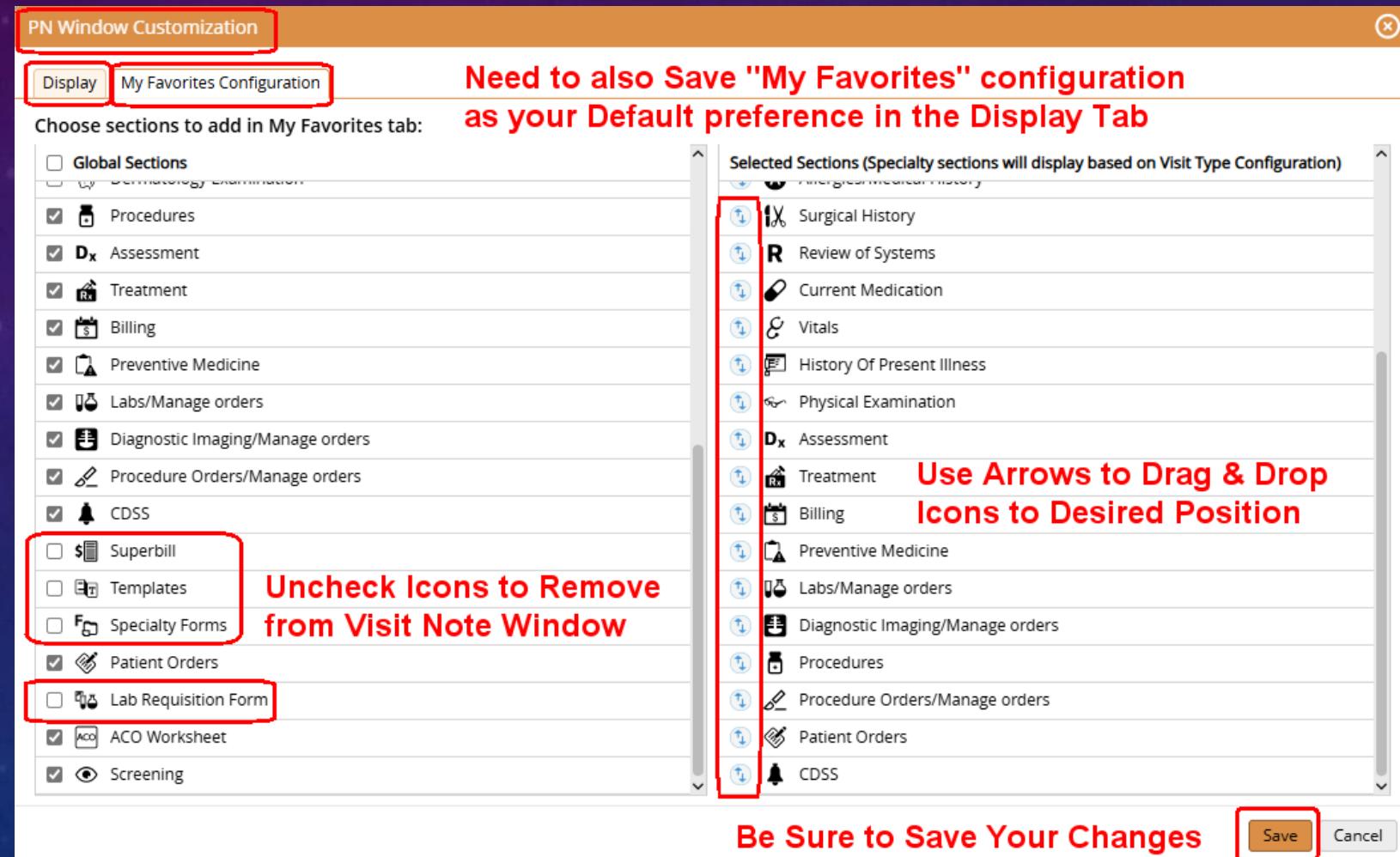
More New Visit Note Setting Options to Simplify Your Life

- Visit Note links from pop-up window for New TE, Claim, HUB, Info
- “Settings” can change appearance of visit note (& virtual visit) pop-up window



Customize Your Visit (& Virtual Visit) Notes To Make Them Unique to Only You

- “PN Window Customization”> “My Favorites Configuration”> Update & Rearrange icons as desired
- Save “Favorites” as default view in Display tab
- Changes order of the bottom hyperlinks too



The Floating Toolbar is Full of New Tricks These Days

LOADED with LOTS of Potential Links Now to Save You Time & Keep you Efficient so you do NOT Have to leave your current work

Configure Floating Toolbar for all areas of eCW from this one centralized screen

Options in middle section change depending on what area of EMR you are configuring

These appear in to the left of your window

Use Drag & Drop to Add Items and Rearrange Order

These appear when you click on the "More" link

EMR Areas

Actions
ASC
Claims
Documents Quick-Launch
Labs Quick-Launch
OB Flowsheet
Progress Notes
Telephone Encounters Quick-Launch

Available Features

Actions
Documents
Encounters
Eva
Flowsheets
Immunizations
Labs
Letters
Patient Education
Playlist
PRISMA
Problem List
Referrals
Rx
Schedule
Summary
Treatment Timeline

Progress Notes

Floating Toolbar *Drag and Drop here*

Immunizations
Referrals
Actions
PRISMA
Letters
Labs
Rx

Progress Notes

Pinned Features *Drag and Drop here*

PL
Problem List
Patient Education
Encounters
Schedule
Treatment Timeline
Documents
Summary

Layout Configuration

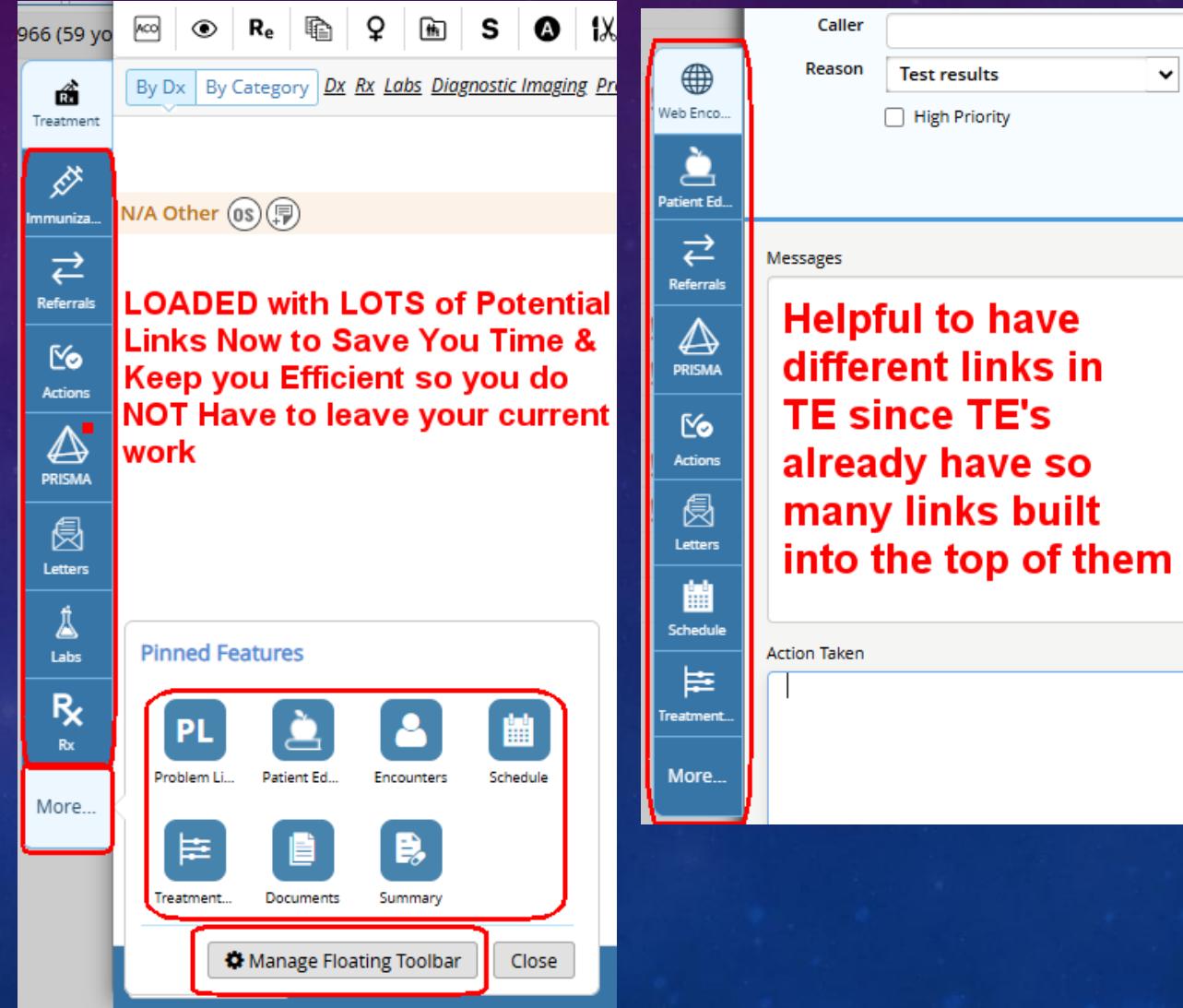
Manage Floating Toolbar

Request a Feature

Apply Close

Use Floating Toolbar to Efficiently get to Items w/o built-in Links & w/o Leaving Your Current Screen

- Immunizations, Encounters
- Referrals: Update & Print. Extra helpful in TE's for Creating them
- Action: Create & Review
- PRISMA: red dot when it has documents
- Letters: Create w/o leaving note
- Labs: Also connects to DI & Procedures
- RX HX w/ going into current med list screen
- Schedule: Very helpful when you need to squeeze in a pt appt on your schedule
- Pt Ed: Extra helpful in TE's for sending thru portal w/o need to go into virtual visit



Try the Floating Toolbar “Treatment Timeline” to Look at External Info

- Need enable “Treatment Timeline” security settings for each user for this to function!
- Mostly seems like an alternative way to see PRISMA reports
- Set Filter to show “External Encounters”
- Clicking on “External Note” link in right margin generates a PRISMA Highlights summary
- Example shows ability to get Diabetic Eye exam from the VA to close VBC Qual gaps for incentive bonus

The screenshot shows the Treatment Timeline floating toolbar. The toolbar has a header with 'Telephone Encounter' and 'Treatment Timeline' tabs, with 'Treatment Timeline' selected. It includes date pickers for 'Encounter' (09/01/2024 to 09/01/2025) and 'Encounter Type' (set to 'External Encounters'). A 'Filter' button is highlighted with a red box. The main content area displays a table of external encounters. The first row shows an external encounter with 'Facility: DOD-VA', 'Admission Date: 08/19/20...', 'Discharge Date: 08/19/20...', and 'Dx Principal Diagnosis: CAD - Co...'. The second row shows another external encounter with similar fields. A 'PRISMA' button is highlighted with a red box. A modal window is open, showing a 'Patient Summary (CCD)' for 'Department of Veterans Affairs (VA)'. The modal includes sections for 'Patient', 'DOB', 'Advance Directive' (with 'No Data Provided for This Section'), and 'Assessment' (with a table of diagnoses). The 'Assessment' table has columns for 'Date/Time', 'Primary/Secondary Diagnosis', 'Diagnosis Name', 'Provider', and 'Source'. The data in the table is as follows:

Date/Time	Primary/Secondary Diagnosis	Diagnosis Name	Provider	Source
Jun 29, 2025 04:37 PM	PRIMARY	Type 2 diabetes mellitus without complications	PIZZIMENTI, CLAIRE E	ORLANDO VAMC
Jun 29, 2025 04:37 PM	SECONDARY	Age-related nuclear cataract, left eye	PIZZIMENTI, CLAIRE E	ORLANDO VAMC
Jun 29, 2025 04:37 PM	SECONDARY	Age-related nuclear cataract, right eye	PIZZIMENTI, CLAIRE E	ORLANDO VAMC
Jun 29, 2025 04:37 PM	SECONDARY	Presbyopia	PIZZIMENTI, CLAIRE E	ORLANDO VAMC

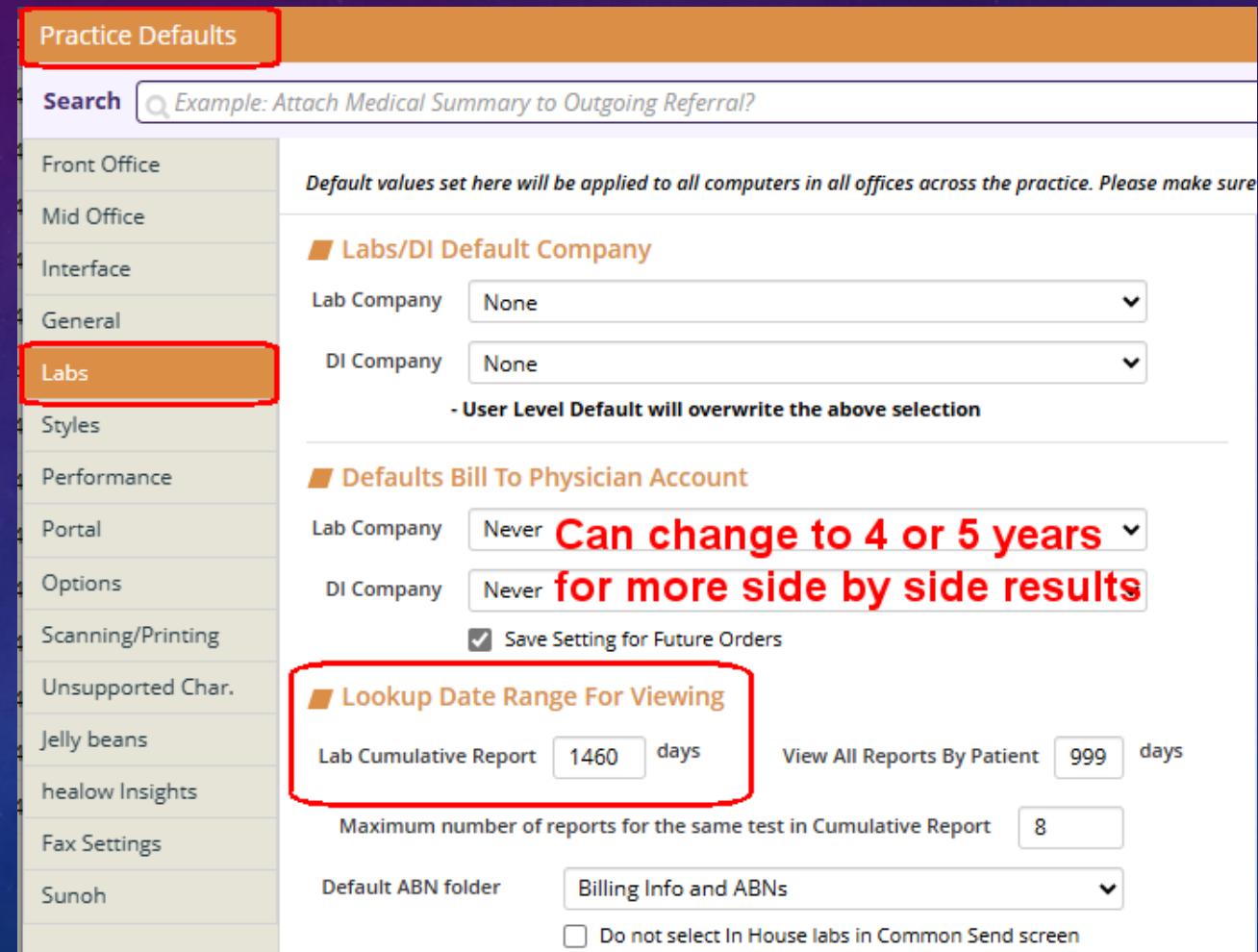
Tired of Having to Jump to the “L” Jellybean to “Review” New Reports When Providing Results to Patients – Try the New Combo View & Review Button in Lab & DI Link

- **“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”



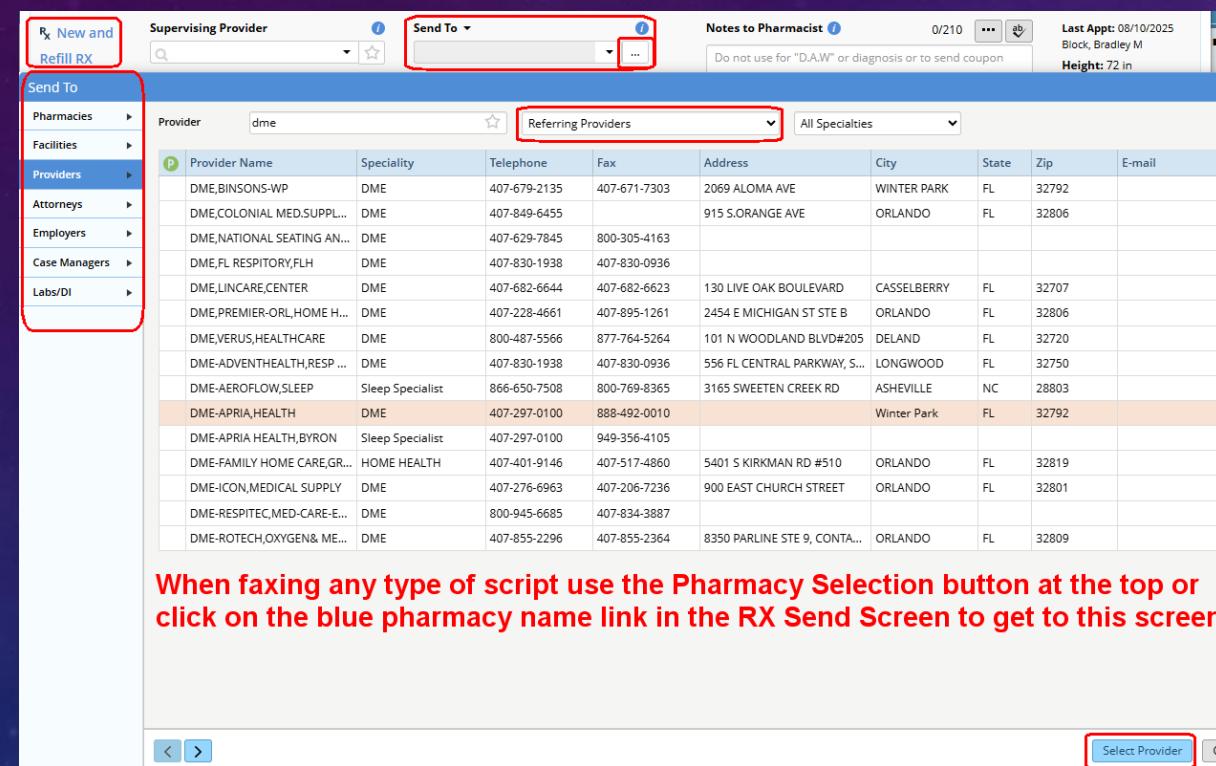
See & Compare More Lab Results in A Single Screen

- Menu>File>Practice Defaults>Labs: New Setting Option
- Cumulative Lab Lookup Date Range can show up to 5 yrs (1,825 days) at a time as compared to the 3 yr default setting to maximize how far back labs will appear in Cumulative Lab screen
- Boosting years can cause a little slower performance when using Lab Cumulative screen



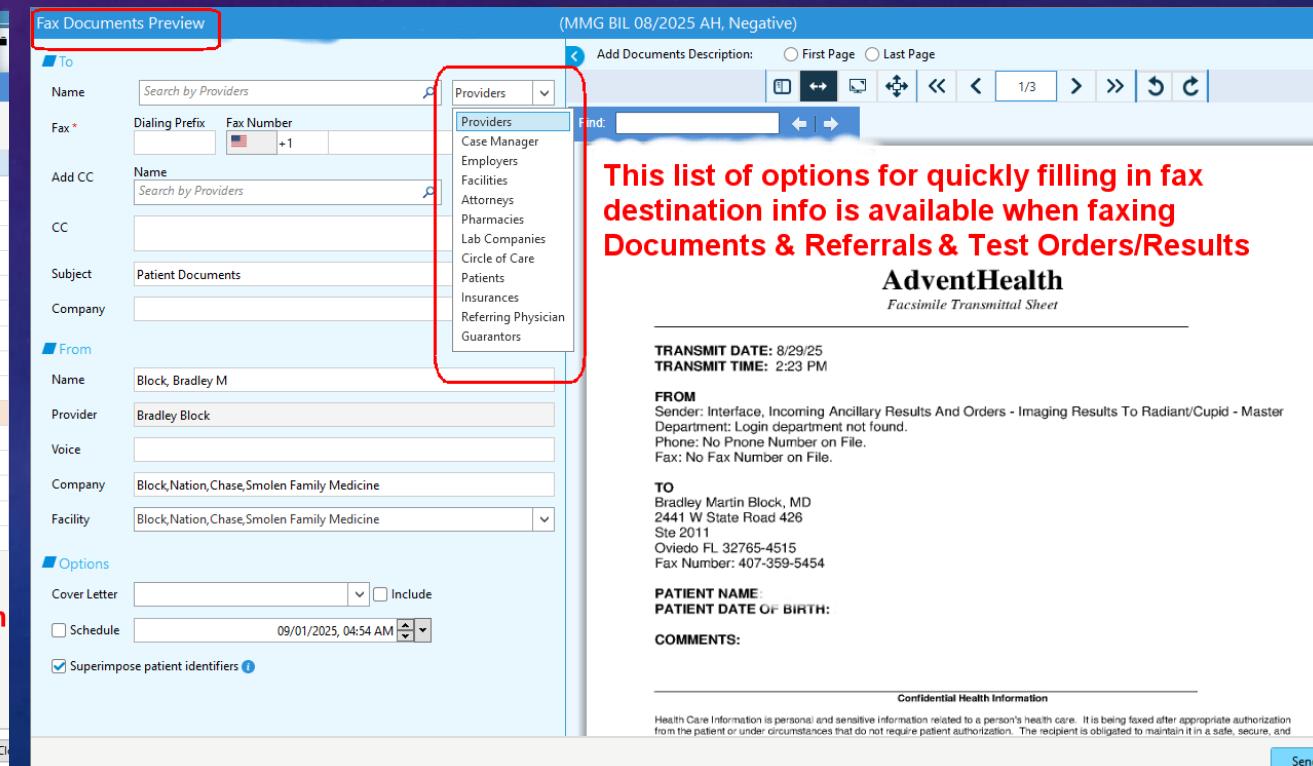
Fax Anything & Everything w/o Printing & Scanning Back In

- New links when faxing test results, test orders, scripts, referrals, documents, etc.
- Options include Referral “Providers” (we add DME providers, sleep study centers under this), Pharmacies, Labs (includes DI centers), Insurance Plans, Case Managers, Employers, Attorneys, etc.
- Should never have to print & scan items back into eCW to be able to fax them somewhere



The screenshot shows the RX Send screen. The 'Send To' dropdown is open, showing a list of providers categorized under 'Referring Providers'. The 'Referring Providers' dropdown is also open, showing a list of providers. The 'Send To' dropdown menu includes options for Pharmacies, Facilities, Providers, Attorneys, Employers, Case Managers, and Labs/DI. The 'Referring Providers' dropdown menu includes options for Provider Name, Specialty, Telephone, Fax, Address, City, State, Zip, and E-mail. The 'Send To' dropdown is highlighted with a red box.

When faxing any type of script use the Pharmacy Selection button at the top or click on the blue pharmacy name link in the RX Send Screen to get to this screen



The screenshot shows the Fax Documents Preview screen. The 'To' field is highlighted with a red box. The 'From' field is also highlighted with a red box. A dropdown menu for 'Providers' is open, showing a list of categories: Providers, Case Manager, Employers, Facilities, Attorneys, Pharmacies, Lab Companies, Circle of Care, Patients, Insurances, Referring Physician, and Guarantors. The 'Providers' category is highlighted with a red box. The 'From' field contains the name 'Block, Bradley M'. The 'To' field contains the name 'Bradley Block'. The 'From' dropdown menu is highlighted with a red box.

This list of options for quickly filling in fax destination info is available when faxing Documents & Referrals & Test Orders/Results

AdventHealth
Facsimile Transmittal Sheet

TRANSMIT DATE: 8/29/25
TRANSMIT TIME: 2:23 PM

FROM
Sender: Interface, Incoming Ancillary Results And Orders - Imaging Results To Radiant/Cupid - Master Department: Login department not found.
Phone: No Phone Number on File.
Fax: No Fax Number on File.

TO
Bradley Martin Block, MD
2441 W State Road 426
Ste 2011
Oviedo FL 32765-4515
Fax Number: 407-359-5454

PATIENT NAME:

PATIENT DATE OF BIRTH:

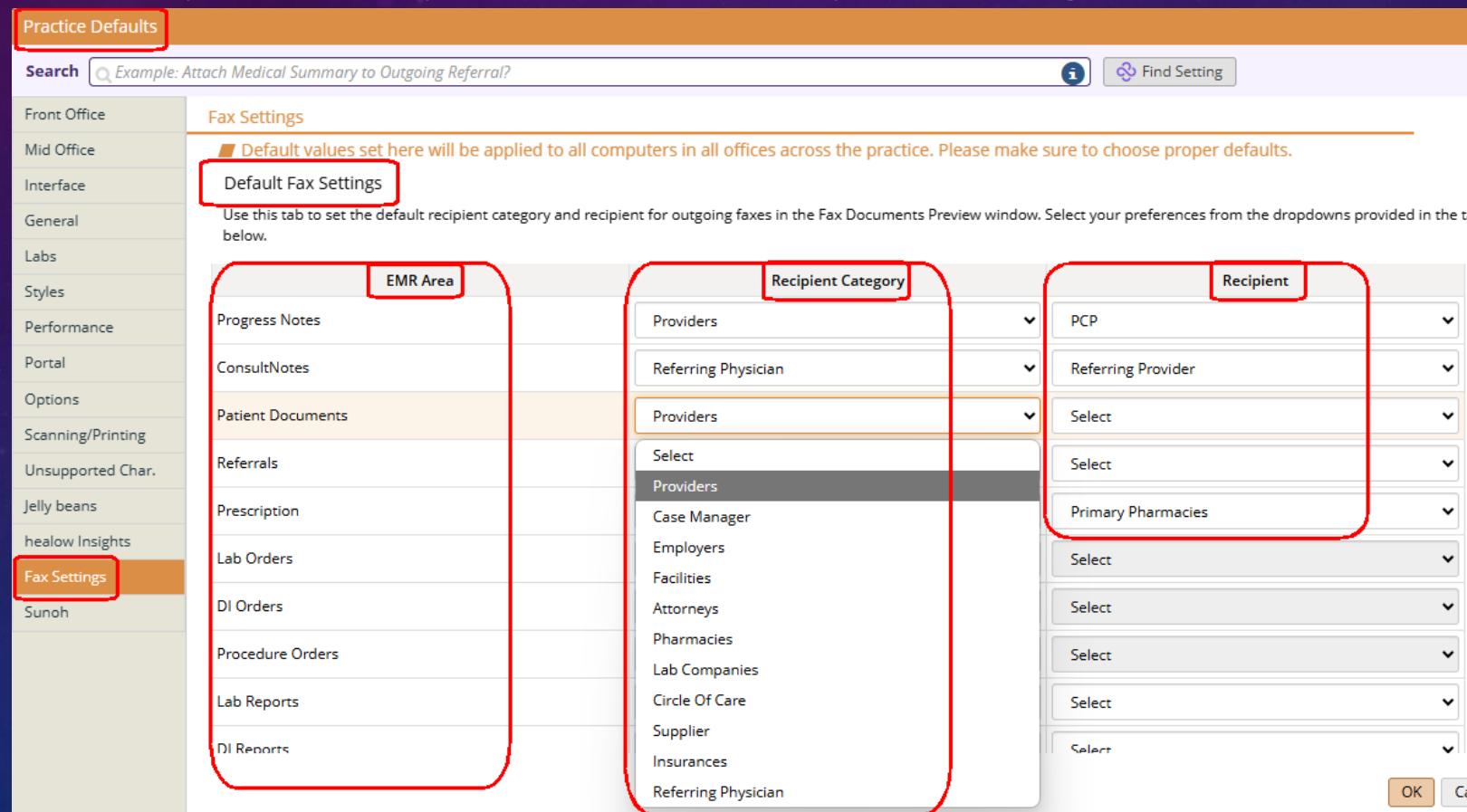
COMMENTS:

Confidential Health Information

Health Care Information is personal and sensitive information related to a person's health care. It is being faxed after appropriate authorization from the patient or under circumstances that do not require patient authorization. The recipient is obligated to maintain it in a safe, secure, and

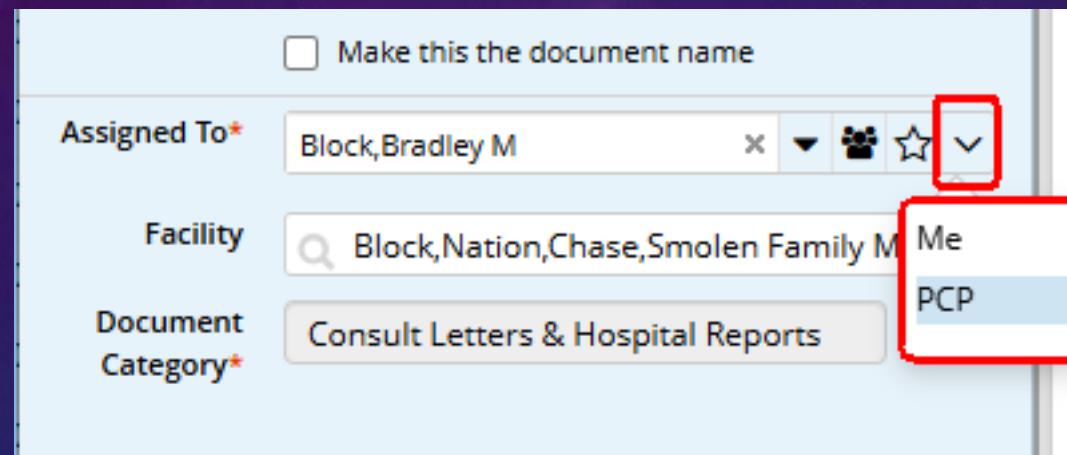
Fun Fax Option For Friendlier, Faster Fax Functionality

- Menu>File>Practice Defaults>Fax Settings
- Configure Default Fax Recipients by EMR area
- Can Choose more specific recipient in some Recipient Categories



New “Assigned to” Quick Click Options

- New “Me/PCP” option from within a single specific Document, Referral, or TE/WE



Make this the document name

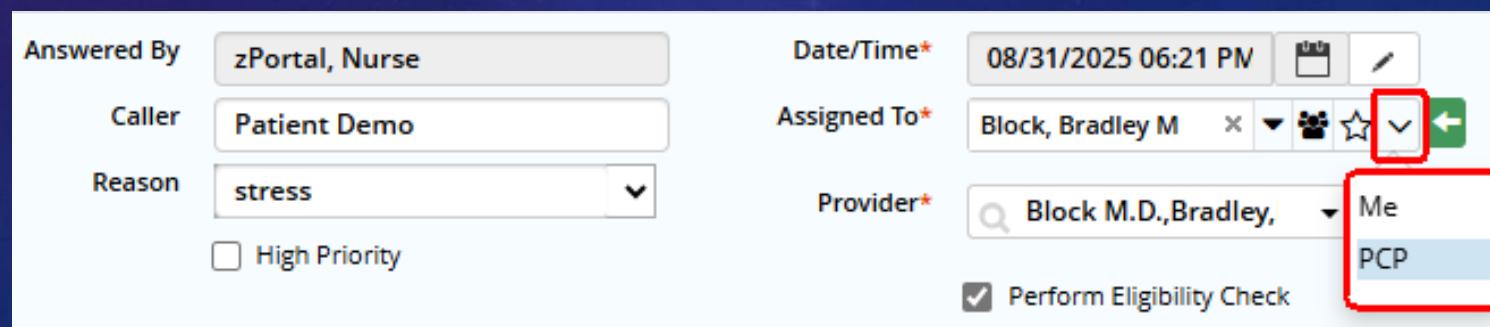
Assigned To* Block, Bradley M

Facility Block, Nation, Chase, Smolen Family M

Document Category* Consult Letters & Hospital Reports

Assigned To dropdown menu:

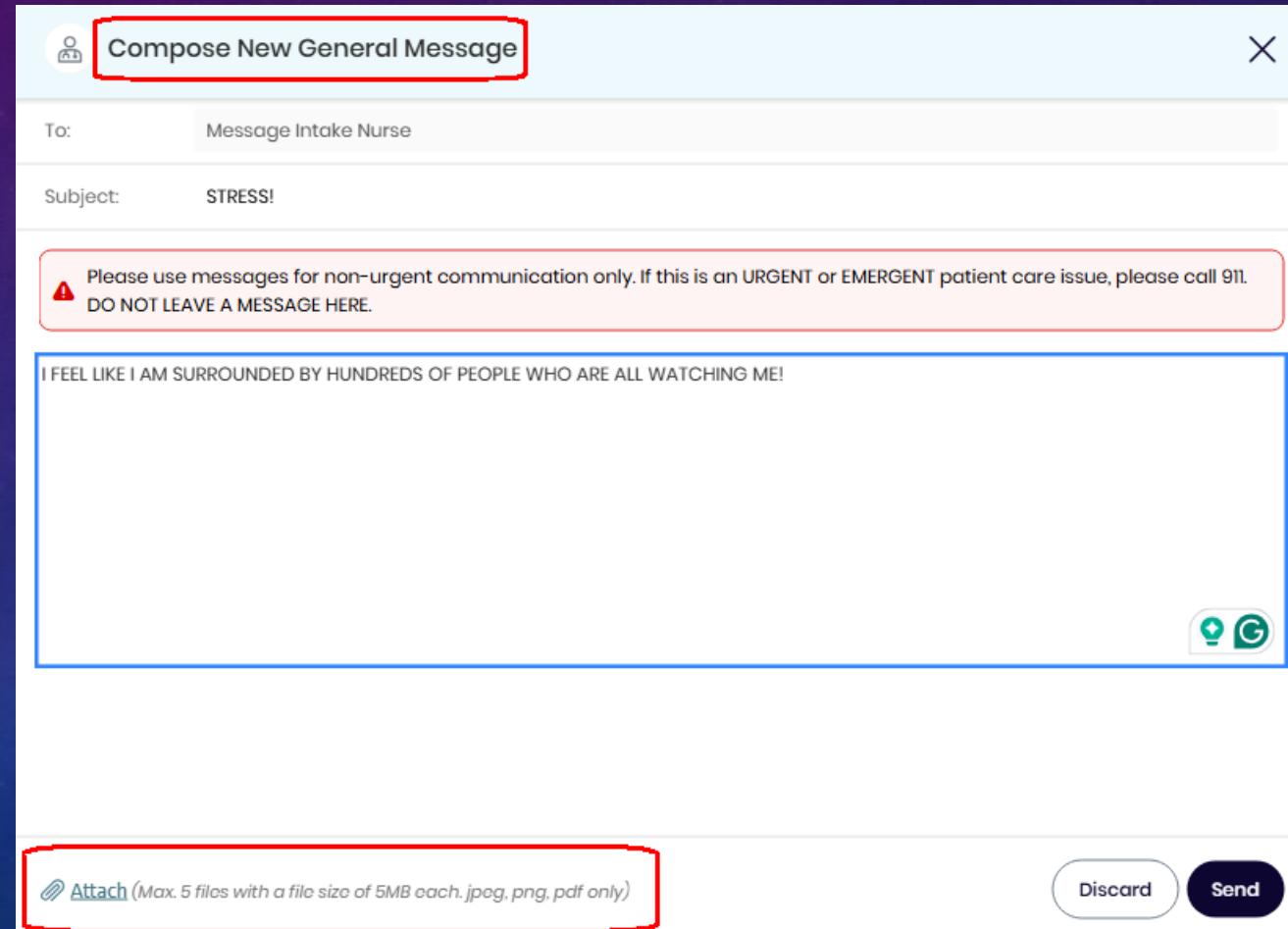
- Me
- PCP



Answered By	zPortal, Nurse	Date/Time*	08/31/2025 06:21 PM
Caller	Patient Demo	Assigned To*	Block, Bradley M
Reason	stress	Provider*	Block M.D., Bradley,
<input type="checkbox"/> High Priority		<input checked="" type="checkbox"/> Perform Eligibility Check	

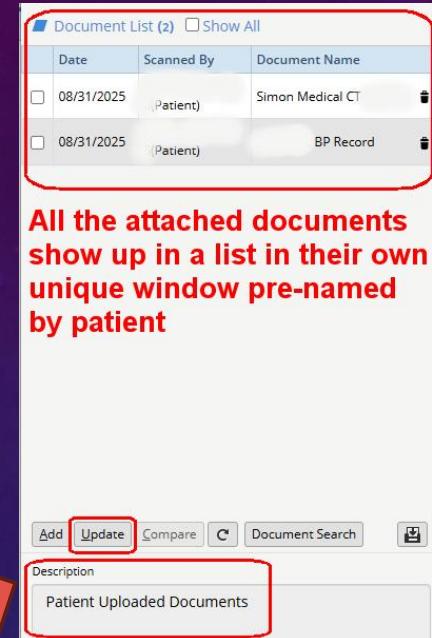
Remote Patient Portal Interactions Can Now Be Even More Informative With Our New Patient Engagement Tool

- Pts can now upload up to 5 files of JPEG, PNG & PDF files up to 5 MB size each through portal & Healow app
- Healow app gives option to take photos or add photos from album
- Need to turn on this “Feature Setting” in pt portal settings
- Expect the unexpected
- Can bill G2010 for Remote evaluation & follow-up w/in 24H of images submitted by a pt. M/C rate ~\$11 (but be sure to review all the specific billing criteria)

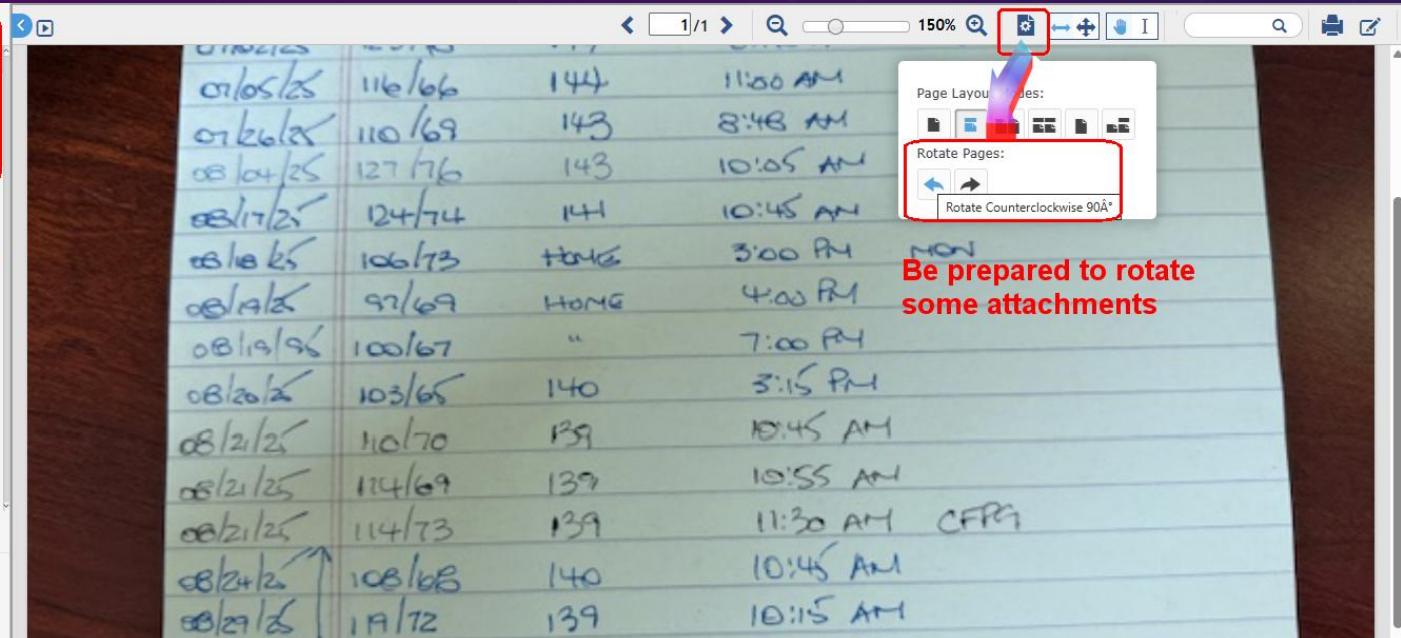


Portal Uploaded Attachments from Patients

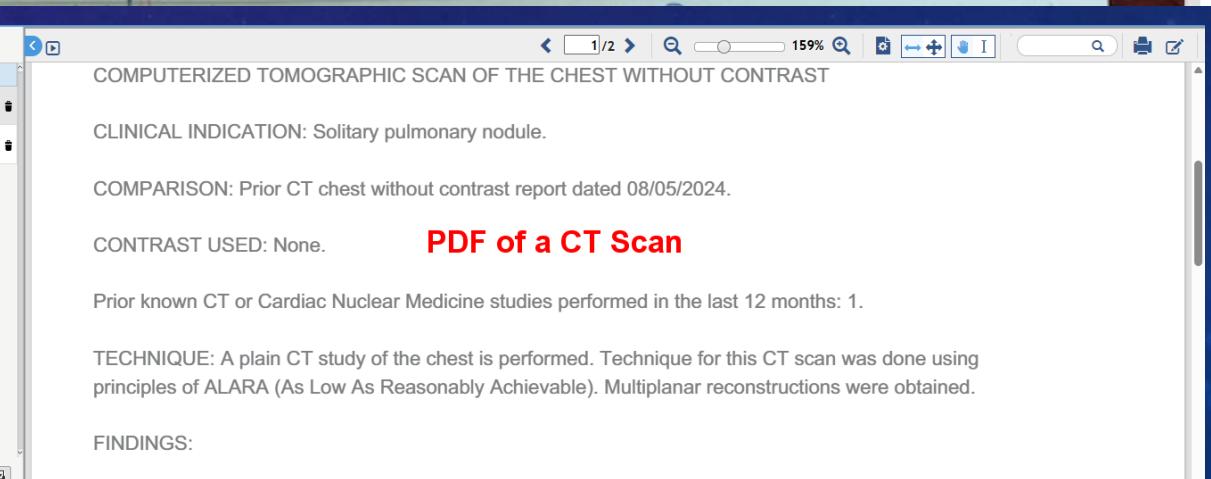
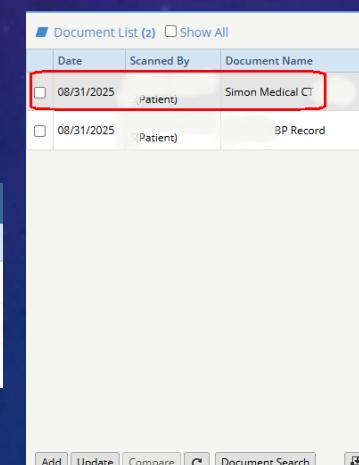
- Incoming WE looks like any other TE/WE with attached Documents (see below)
- Clicking WE Document link pops open a window containing all attached documents



All the attached documents show up in a list in their own unique window pre-named by patient



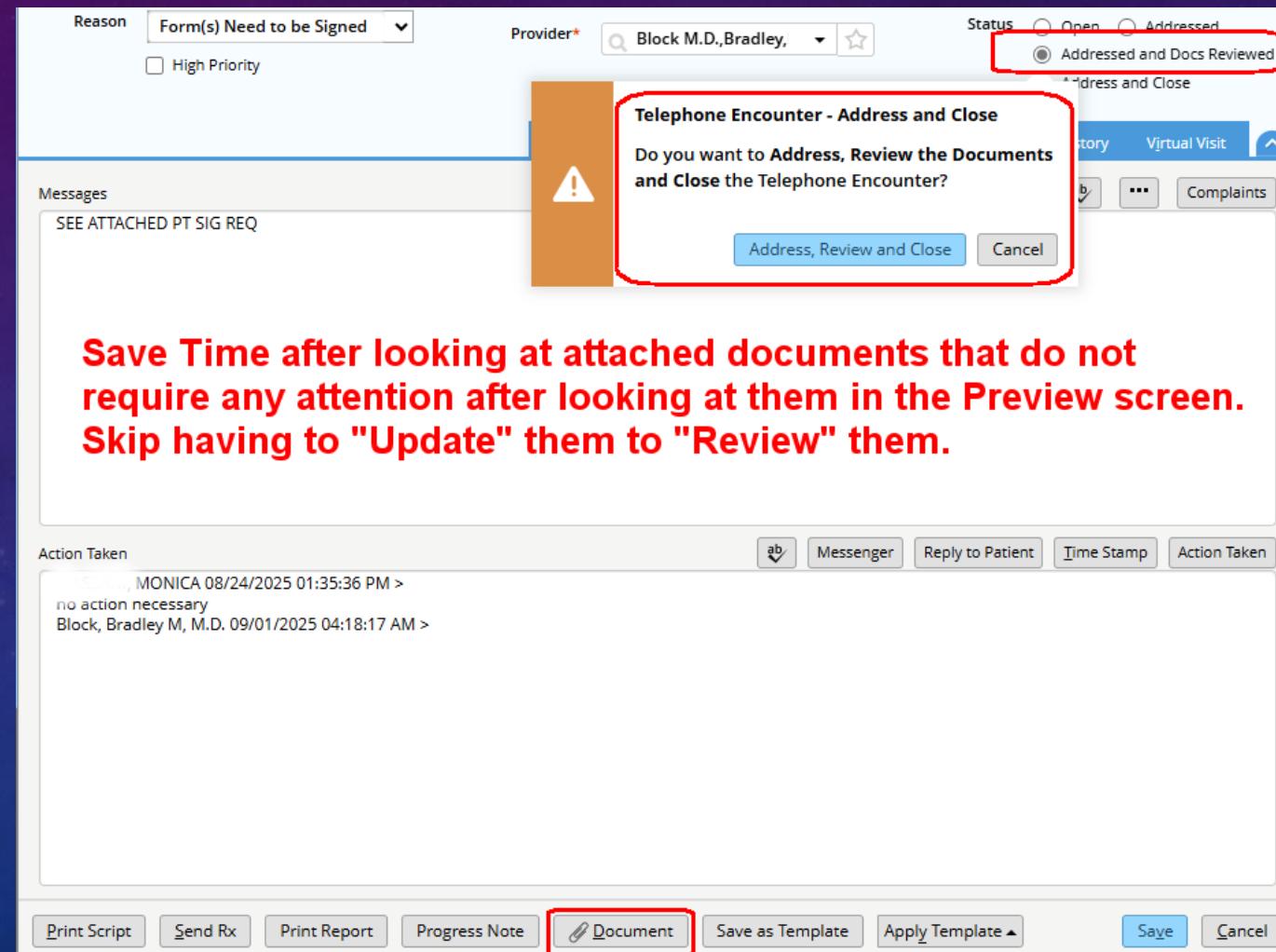
Be prepared to rotate some attachments



Incoming WE's with attached Documents from patients				
Date	Patient Name	Provider	Reason	
08/31/2025 6:21 PM	Demo_Patient M_(Spiderman)		BMB	stress
08/31/2025 4:39 PM			BMB	
08/31/2025 3:03 PM			BMB	Update

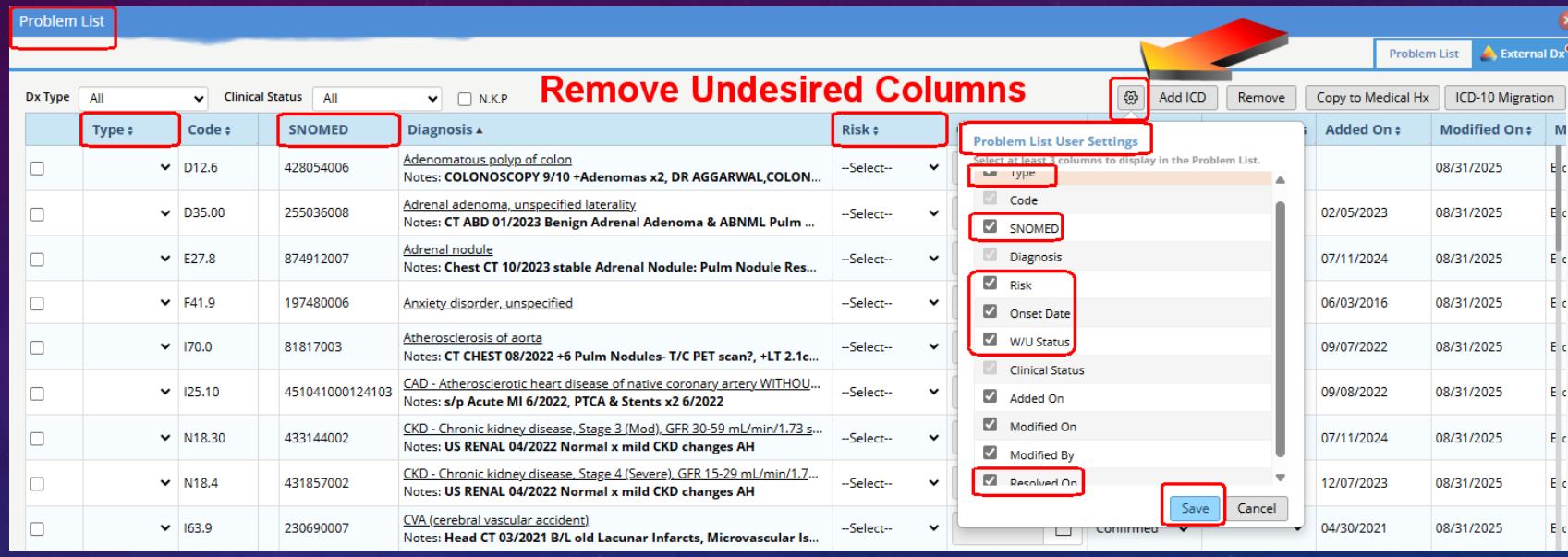
Efficiently Address & Review TE's & Associated Documents with a Single Click

- Use TE “Addressed & Docs Reviewed” to address both the TE & the attached document w/ single click w/o having to “update” & review” document (like with pharmacy notifications & duplicate DME orders & documents uploaded from pt portal).



Clean Up Problem List Clutter with New Setting Options

- Lots of unnecessary columns present now for most users & which can be totally removed
- Sort any PL column by clicking on header at top to organize alphabetically by DX name, by ICD Code, by Modified Date, etc.
- Makes reviewing PL's and finding specific medical diagnoses faster
- Be sure to click "Save" button
- Only changes your personal view

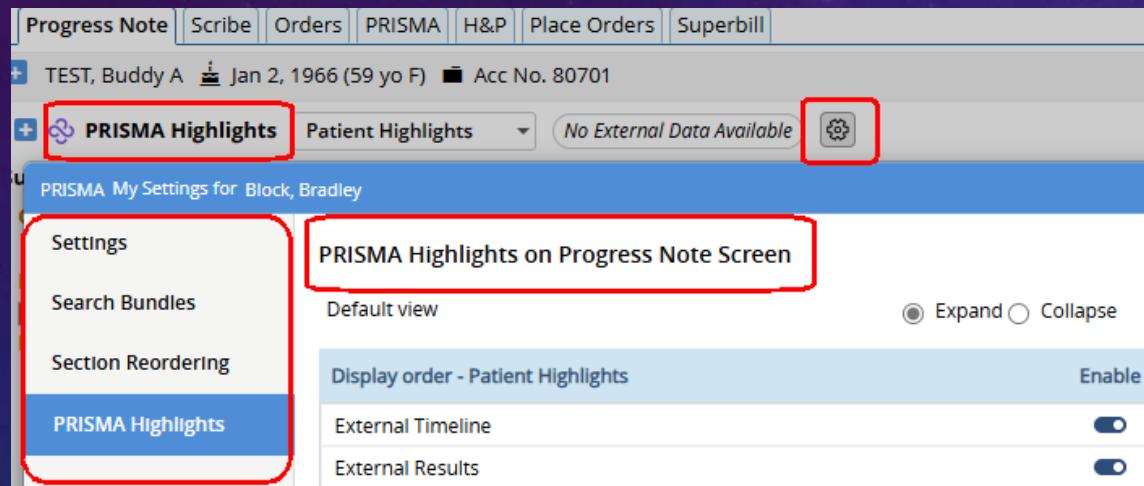


Less Columns, More Organized Looking, & Individual Patient PL Columns
Can Be Sorted Using Headers

Dx Type	All	Clinical Status	All	N.K.P	Clinical Status	Added On	Modified On	Modified By
	Code +	Diagnosis +						
	D12.6	Adenomatous polyp of colon						
	D35.00	Adrenal adenoma, unspecified laterality						
	E27.8	Adrenal nodule						
	F41.9	Anxiety disorder, unspecified						
	I70.0	Atherosclerosis of aorta						
	I25.10	CAD - Atherosclerotic heart disease of native coronary artery WITHOUT angina pectoris						
	N18.30	CKD - Chronic kidney disease, Stage 3 (Mod), GFR 30-59 mL/min/1.73 m ²						
	N18.4	CKD - Chronic kidney disease, Stage 4 (Severe), GFR 15-29 mL/min/1.73 m ²						
	I63.9	CVA (cerebral vascular accident)						

New Ways to Improve Your PRISMA Experience Too

- Adjust visit notes PRISMA Highlights behavior using the settings PRISMA link
- Use Interoperability Settings (via Products Activation admin link) to make practice wide PRISMA changes such as only showing External Records and which folders PRISMA reports should import into



This screenshot shows the 'Interoperability Settings' page with the 'PRISMA Settings' section highlighted. A red box highlights the 'PRISMA Settings' link. A large red box highlights the 'External only' radio button under 'Data Categories Included Setting Options'. A red box also highlights the 'Select folders to import external documents to the respective Patient Documents folder' section, which contains five dropdown menus for 'Default Folder to Import Documents', 'Folder to Import Discharge Summaries', 'Folder to Import Progress Notes', 'Folder to Import Patient Summaries(CCD)', and 'eCW P2P Consults & Documents'.

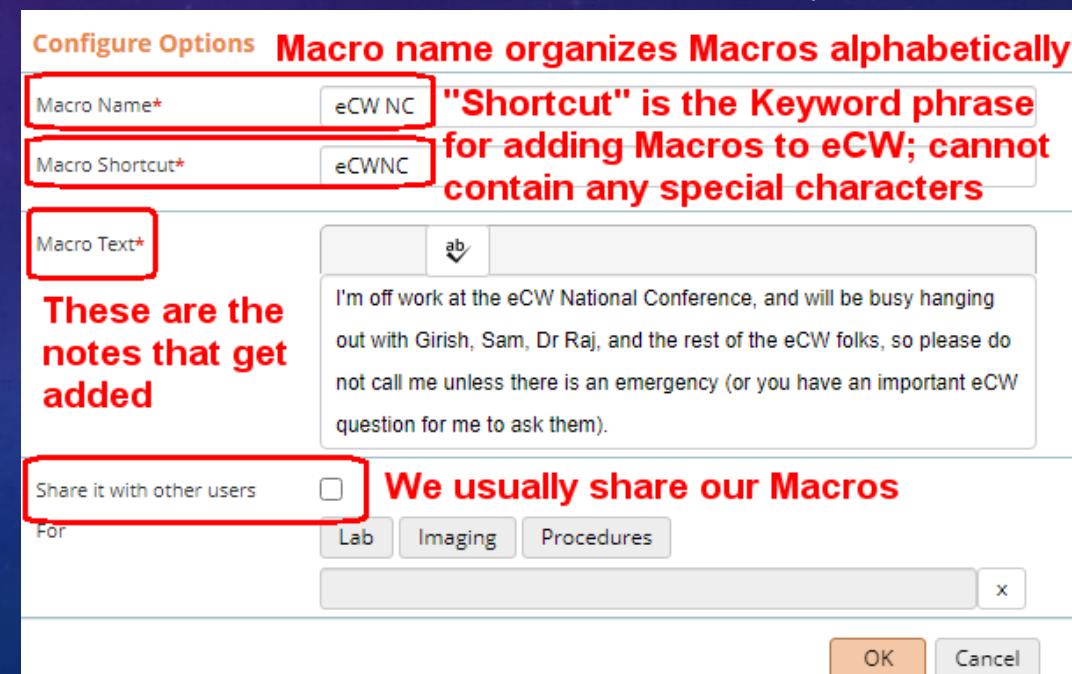
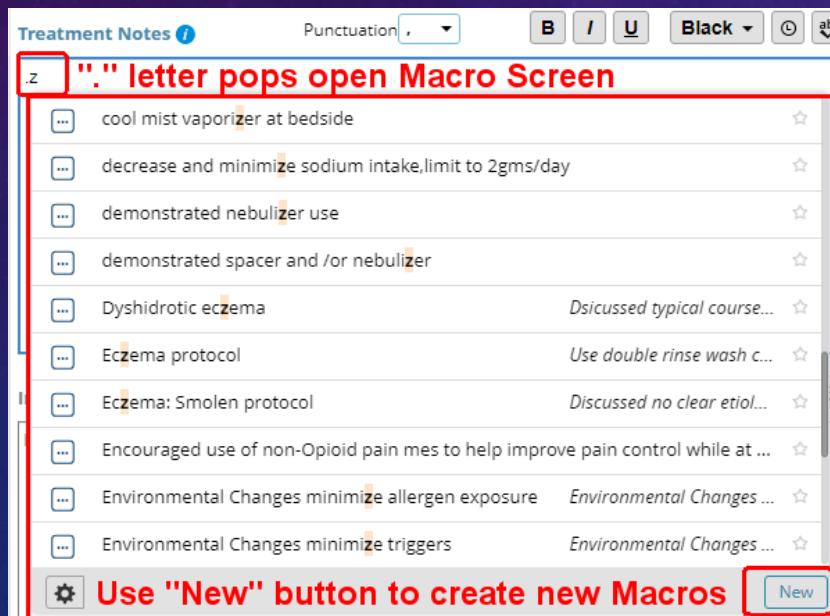
Choose Import folders by document type

Eliminate having to sort through your own practice documents with External Only option

Mastering Keyword Macros!

Tips When Creating New Macros

- “Keywords” are the same as the old traditional “Macros” in the “Browse” & “Action Taken” buttons
- Macros work anywhere in eCW: Visit notes, TE’s, RX Edit screens, Lab/DI Notes, internal Messages, etc.
- Easiest way to see a button to create new one is type “.” followed by any single letter
- Do NOT include any “.” in the middle of the keyword “Macro Name” or “Macro Shortcut” phrase
- “Macro Shortcut” cannot contain any spaces and only accepts alphanumeric characters
- Just type a “.” immediately followed by letters or words in the “Macro Shortcut” phrase to bring up Keyword Macros to add to chart



Keyword Macro “Shortcut” Names Are the Key to Success

The screenshot shows a list of keyword macros for 'Labs' in a medical charting system. The list is sorted alphabetically and includes the following entries:

- Labs- CX Urine Neg
- Labs- DM good, WNL; same Tx
- Labs- DM worse; not optimal; same TX
- Labs- Eos high
- Labs- FBS High
- Labs- H&H high
- Labs- H&H low
- Labs- H.Pylori Neg
- Labs- H.Pylori +
- Labs- HDL's Low

A red box highlights the first four entries: 'Labs- CX Urine Neg', 'Labs- DM good, WNL; same Tx', 'Labs- DM worse; not optimal; same TX', and 'Labs- Eos high'. The search bar at the bottom left contains the text '.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.

The screenshot shows a list of keyword macros for 'Labs' in a medical chart. The list includes:

- Labs- K Mildly High
- Labs- LDL's High
- Labs- LDL's High BUT w/ Low Risk Ratio
- Labs- Vit D Borderline Mildly Low -boost TX
- Smolen: low HDL LDL OK

A red box highlights the first three entries: 'Labs- K Mildly High', 'Labs- LDL's High', and 'Labs- LDL's High BUT w/ Low Risk Ratio'. A red box also highlights the 'LDL' in 'LDL's High'. A red box highlights the 'LDL' in 'Smolen: low HDL LDL OK'. A red box highlights the 'LDL' in 'HDL's (the good cholesterol) are low; need OTC, & recheck lipid labs in the future LDL'. A red box highlights the 'Labs' in 'Action Taken'.

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

The screenshot shows a list of keyword macros for 'Labs' in a medical chart. The list includes:

- Labs- FBS High

A red box highlights the 'Labs' in 'Action Taken' and the 'FBS' in 'Labs- FBS High'. A red box highlights the 'FBS' in 'HDL's (the good cholesterol) are low; need OTC, & recheck lipid labs in the future LDL'. A red box highlights the 'FBS' in 'Action Taken'.

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

The screenshot shows a list of keyword macros for 'Labs' in a medical chart. The list includes:

- Labs- TFTs TSH high- Med change
- Labs- TFTs TSH Low- Med change
- Labs- TFTs w/ low TSH but NML T4/T3
- Labs- TSH high- may be developing early hypothyro...

A red box highlights the 'Labs' in 'Action Taken' and the 'TSH' in 'Labs- TFTs TSH high- Med change'. A red box highlights the 'TSH' in 'Labs- TFTs TSH Low- Med change'. A red box highlights the 'TSH' in 'Labs- TFTs w/ low TSH but NML T4/T3'. A red box highlights the 'TSH' in 'Labs- TSH high- may be developing early hypothyro...'. A red box highlights the 'TSH' in 'HDL's (the good cholesterol) are low; need OTC, & recheck lipid labs in the future LDL'. A red box highlights the 'TSH' in 'Action Taken'.

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

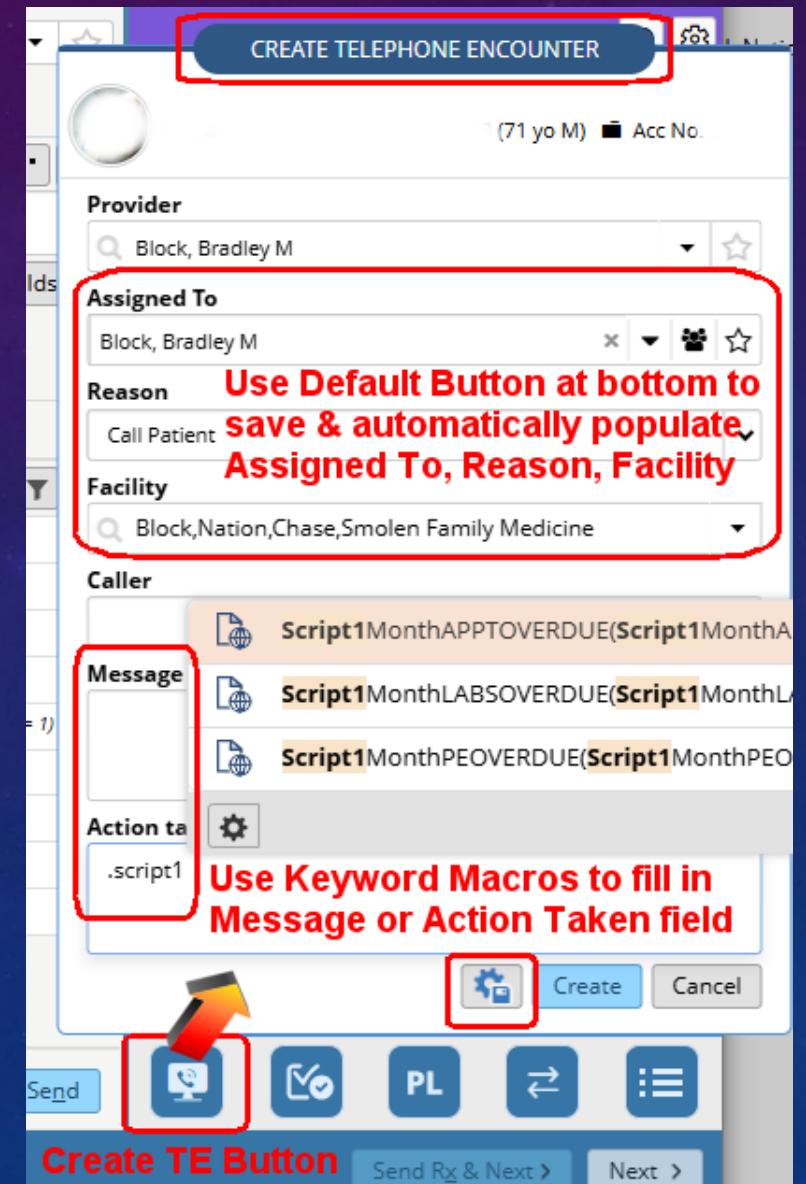
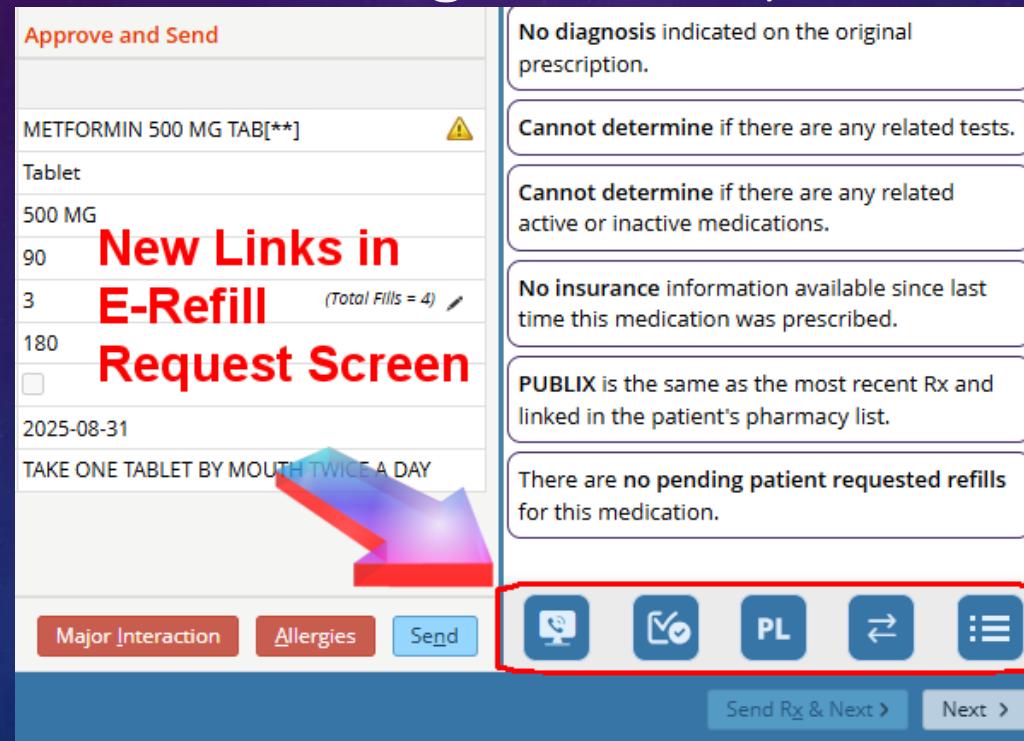
Listen Closely to Discover Many Ways to Manage Medication Related Care Faster & Easier



Super Users Roadshow: Bradley M. Block, M.D. & William "Reddy" Biggs, M.D.

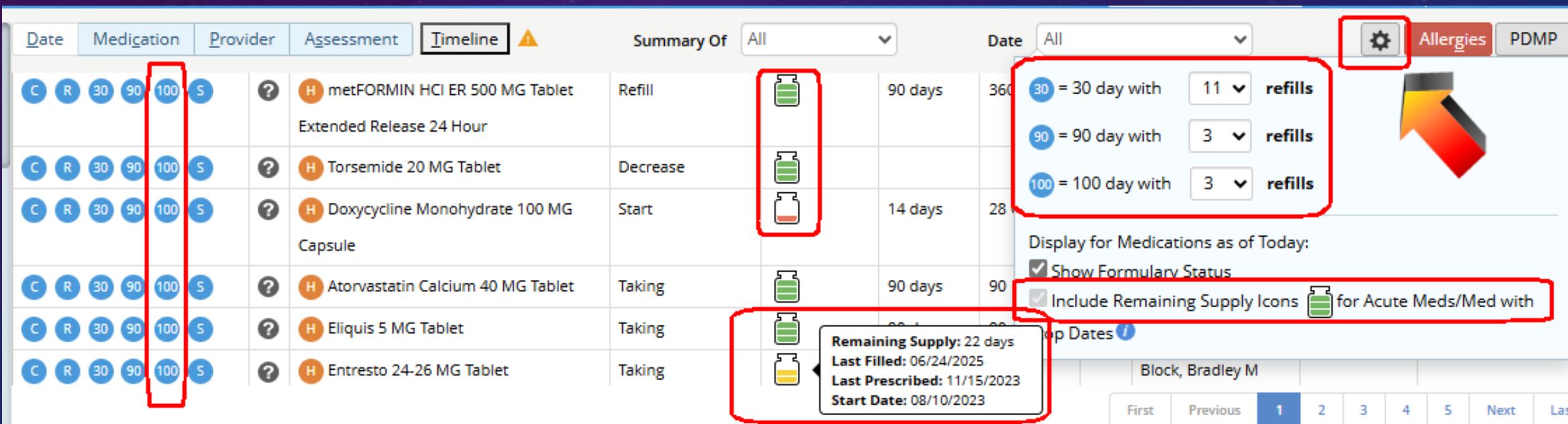
The Electronic Refill Request Screen Now Has New Tricks

- e-Refill has new links in “Insights” to create TE (w/ option to save a template), Action Items, Referrals, Test Orders (via creating a TE virtual visit for ordering labs &DI), & Add new PL DX's



LOTS TO LOVE in the New Refill Screen

- RX Edit screen 100 day refill icon now included and works
- RX Edit default refill settings (upper right settings icon)
- VERY HELPFUL new color-coded bottle icons to see what meds are running low and when last prescribed/refilled to help decide what needs to be refilled



RX Edit Now Calculates Dispense Quantities Better Than Ever

- RX Edit calculates the correct quantity for oral weekly meds with the right frequency wording
- Some meds calculate monthly dosing accurately too (but many do not yet)

The screenshot shows the RX Edit software interface for a prescription of Ergocalciferol. The prescription details are as follows:

- Drug Product:** 1.25 MG (50000 UT) - Capsule
- Take:** 1 capsule (1.25 mg)
- Route:** Orally
- Frequency:** 2 times per week
- Duration:** 90 Days
- Dispense:** 26 Capsule

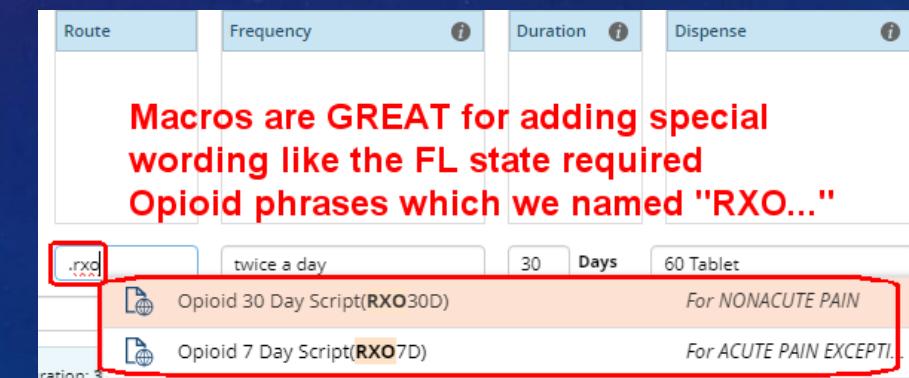
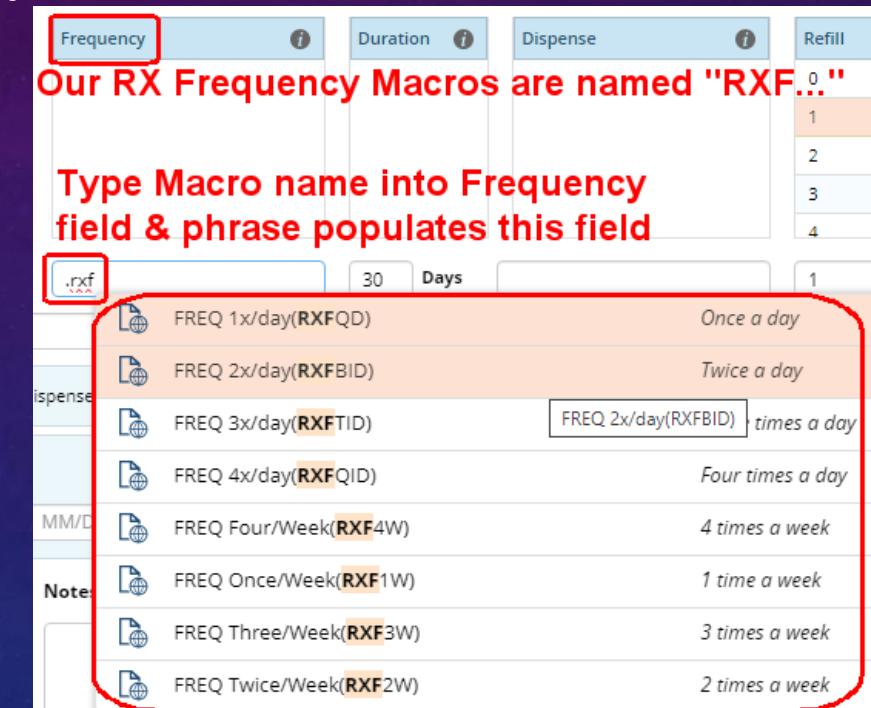
On the right, there is a legend indicating the frequency of dosing:

- 4 times per week
- weekly
- 3 times per week
- 2 times per week

The "2 times per week" entry in the frequency field is highlighted with a red box.

A Secret Weapon to Quickly Update RX Edit Screen Verbiage: Keyword 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 (just type “.” followed by letters in the macro “shortcut name”)
- All of our RX Edit Screen Macros are named “RX....” in the “Shortcut” name to simplify use
- Be sure to save newly configured scripts as “Favorites” for future use



The New Visit Summary Is Much More Helpful For Patients

- NEW Visit Summary with very clear details of meds adjusted and refilled and with pharm details for all meds sent

Visit Summary Print Preview

B / U Black Arial Size 2

Medication Changes and Refills as of 01/16/2025 at 02:00 PM

Please review your treatment medication list with your provider to ensure it is accurate

Medication Updates: Stopped: (1) Changed: (5) Refilled: (10) Started: (2)

Medication Name	Medication Details
Stop Tamsulosin HCl 0.4 MG Capsule	2 cap(s) q hs for prostate orally once a day
Change Pramipexole Dihydrochloride 1 MG Tablet	1 tab in am and 2 tabs each evening for restless legs & mouth clicking orally once a day , Duration: 90 days , Dispense: 270 Take changed to "1 tab in am and 2 tabs each evening for restless legs & mouth clicking" Medication will be delivered by EXPRESS SCRIPTS HOME DELIVERY (4600 North Hanley Road, St. Louis, MO, 63134)
Change Poly-Iron 150 150 MG Capsule	1 cap(s) Orally once a day , Duration: 90 days , Dispense: 90 Capsule Frequency changed to "Once a day" Pick up from WALGREENS DRUG STORE #07314 (2000 HOWELL BRANCH RD, WINTER PARK, FL, 32792)
Change Vitamin D (Ergocalciferol) 1.25 MG (50000 UT) Capsule	1 cap for vitamin-D orally 1 time every 2 weeks , Duration: 90 days , Dispense: 7 Take changed to "1 cap for vitamin-D" Medication will be delivered by EXPRESS SCRIPTS HOME DELIVERY (4600 North Hanley Road, St. Louis, MO, 63134)
Change Bumetanide 0.5 MG Tablet	1 tabs PRN for fluid retention orally once a day , Duration: 180 days , Dispense: 90 Take changed to "1 tabs PRN for fluid retention" Medication will be delivered by EXPRESS SCRIPTS HOME DELIVERY (4600 North Hanley Road, St. Louis, MO, 63134)
Change Valsartan 40 MG Tablet	1 tab for bp & kidneys & heart failure orally once a day , Duration: 30 days , Dispense: 30 Tablet Strength changed to "40 MG" Pick up from WALGREENS DRUG STORE #07314 (2000 HOWELL BRANCH RD, WINTER PARK, FL, 32792)
Refill Armodafinil 250 MG Tablet	1 tab in am orally once a day , Duration: 90 days , Dispense: 90 This printed prescription was provided to you

How About Boosting VBC Incentive Bonuses to Your Practice



Use Clinical Rules Engine to Report Patient BP Control to Boost Quality Measure VBC Incentive Bonuses (including MIPS)

- Use chart to create Criteria for BP w/ proper BP values so the CRE works properly
- Create Rules that insert both Systolic & Diastolic codes as part of the same rule
- CRE Rule can be configured to factor in insurance plans to include or exclude based on BP status (i.e.- our BCBS plans give equal credit for reporting high & normal BP's, but other plans only want quality codes for normal BP's)

CRE BP Criteria	CPT Code Rule Name (CPT Code Description)
BP < 130/0	3074F Most recent systolic blood pressure less than 130 mm Hg
BP < 0/80	3078F Most recent diastolic blood pressure less than 80 mm Hg
130/0 < BP < 139/0	3075F Most recent systolic blood pressure 130 – 139 mm Hg
0/80 < BP < 0/89	3079F Most recent diastolic blood pressure 80-89 mm Hg
BP > 139/999	3077F Most recent systolic blood pressure greater than or equal to 140 mm Hg
BP > 999/89	3080F Most recent diastolic blood pressure greater than or equal to 90 mm Hg

More Clinical Rules Engine Tips

- No extra cost but needs Item Key turned on by eCW Support
- Use CRE to automatically use Vitals data to add approp DX codes & Qual Reporting codes to visit note for BP control (& BMI's in Morbid Obesity range)
- Helps avoid missed Quality Measure or HCC coding opportunities for Incentive Bonuses in VBC Programs

Add New Criteria

Code*	3080F
Name	DBP > 89
Category	BP CODES
Notes	BP Criteria
Master File	Vitals
Data Element	Vital Type
Vital *	BP(L)
Operator	>
Value*	999/89

Rule List

Available Clinical Rule Query			
Id	Block	Operator	Criteria Name
1	Block-1		SBP > 139
2	Block-1	AND	HTN DX
3	Block-1	AND	Commercial BCBS Plans
4	Block-1	AND	DBP > 89

Some BP Rules

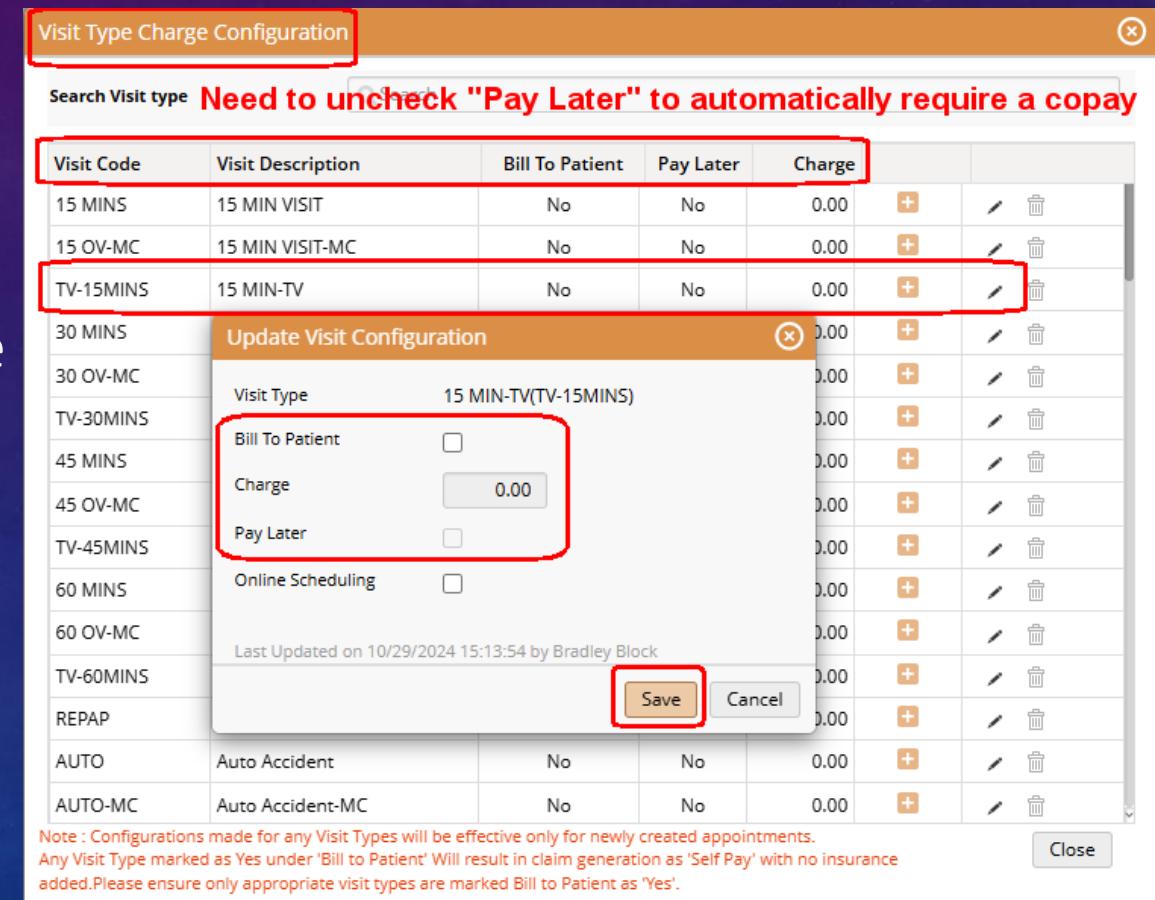
19	SBP > 139 and DBP < 80	Vitals	Adds 3077F Qual Reporting Code with HTN if SBP > 139 and Adds 3078F for DBP < 80 and on Comm BCBS
20	SBP > 139 and DBP 80-89	Vitals	Adds 3077F Qual Reporting Code with HTN if SBP > 139 and Adds 3079F for DBP 80-89 and on Comm BCBS
21	SBP > 139 and DBP > 89	Vitals	Adds 3077F Qual Reporting Code with HTN if SBP > 139 and Adds 3080F for DBP > 89 and on Comm BCBS
22	DBP > 89 and SBP < 130	Vitals	Adds 3080F Qual Reporting Code with HTN if DBP > 89 and Adds 3074F for SBP < 130 and on Comm BCBS

More Ideas to Help Protect Your Practice Finances



Tired of Patients Not Paying Copayments When Doing TV's (or any other type of visit)

- Enable Security setting: “Visit Type Charge Configuration”
- Use “Configure Visit Type Charge” link (from Menu screen) to open “Visit Type Charge Configuration” Settings to Configure TV’s (& other visit types) to require copay
- Default setting for ALL visits is “Pay Later”
- Need to check “Bill Patient” to be able to change the “Pay Later” option
- Uncheck “Pay Later” to change this to “No” to require all patients to pay their copay for TV’s or any type of self-checking in process



Look for Downcoding by Aetna & Cigna

- Go to Billing > ERA and look for EOBs from Aetna or Cigna
- View Selected ERA, Use Ctrl-F
- Search for N22
- This example, provider billed 99214 but Aetna paid as if 99213
- Appeals usually successful

U	285298	306773	AETNA
U	285299	306774	AETNA
U	285313	306788	AETNA
U	285314	306789	AETNA
U	277554	298999	AETNA
U	284608	306083	AETNA
U	281507	302982	AMBETTER

Patient Name Subscriber Name Provider Name Claim Statement Dates	MCGRARY LINDSEY 09/09/2025 - 09/09/2025	Patient ID Payer Claim ID Provider Claim ID Received Date	LM251 09/12/2025	Claim Status Claim Amount Paid Amount Pt Responsibility	1 \$283.00 \$0.00 \$95.41
Claim Status Description : Processed as Primary					
Serv Date 09/09/2025 - 09/09/2025	Units 1	Serv Code HC:99213	Billed \$255.00	Paid \$0.00	Allowed Adjustments \$95.41 CO-45: \$159.59 PR-1: \$95.41
09/09/2025 - 09/09/2025	0	HC:G2211	\$28.00	\$0.00	- CO-97: \$28.00

Take Home Message

- Share ideas from today with your practice to optimize workflow, efficiency, and patient care (& reduce provider EMR burnout) while boosting productivity & practice 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 “4213”
- For copy of our current & past presentations & bonus slides go to:

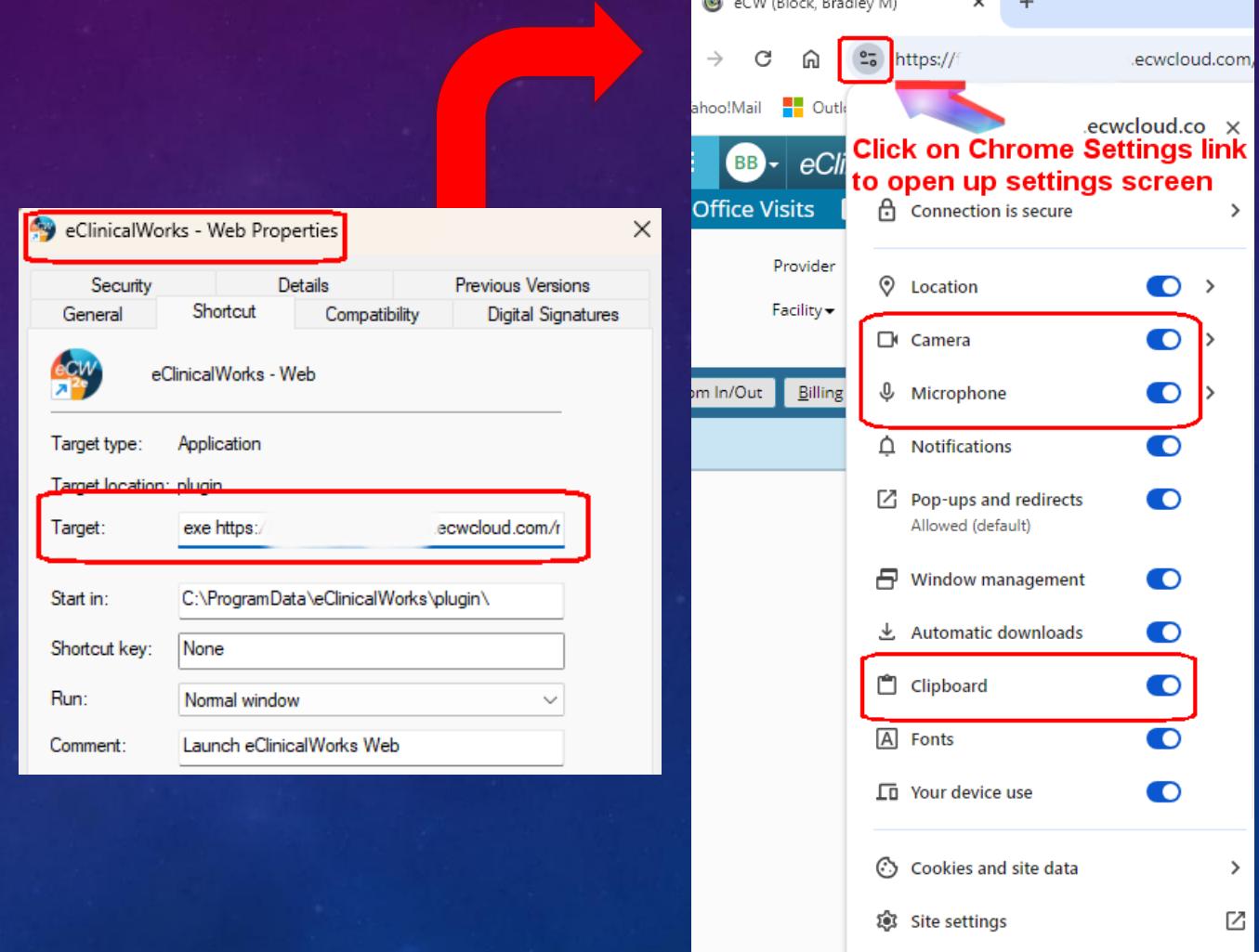
www.BlockAndNation.com/BlockAndBiggs

And try out eCW University Webinars & Knowledge Base to learn about other topics

KEEP SCROLLING FOR BONUS SLIDES

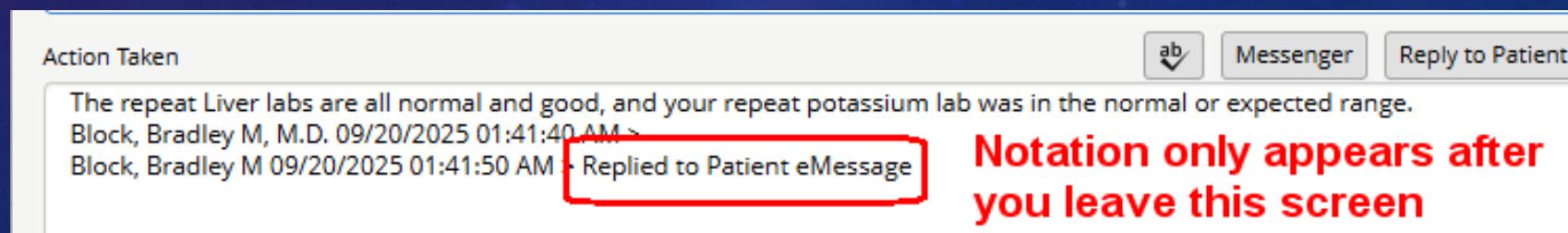
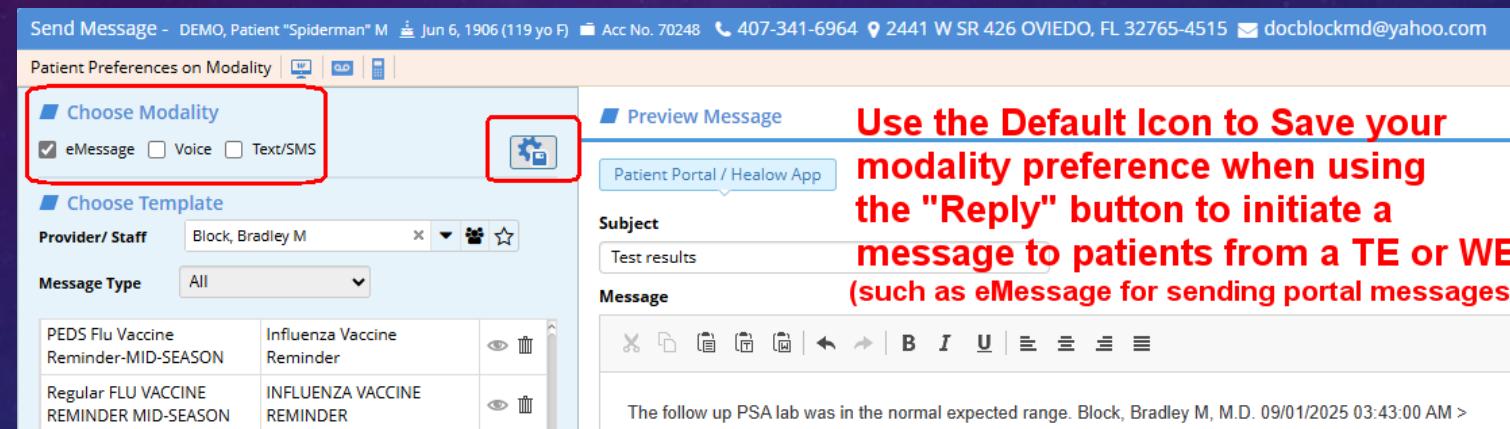
End Annoying Pop-Up Televisit Approvals by Updating Chrome Browser Settings to Permanently “Allow” eCW Features

- Go to your eCW Cloud Server URL on Chrome Browser by using Https URL from eCW plugin>right click> properties> copy & paste portion starting with: HTTPS:// & ending with: /newLogin.jsp
- Set Chrome Browser settings to “Always Allow” camera & microphone
- **EXTRA TIP:** Can login & run & use eCW in Chrome (or MS Edge) Browser window w/o using eCW Plugin by going to Cloud Server URL (be sure to bookmark this)



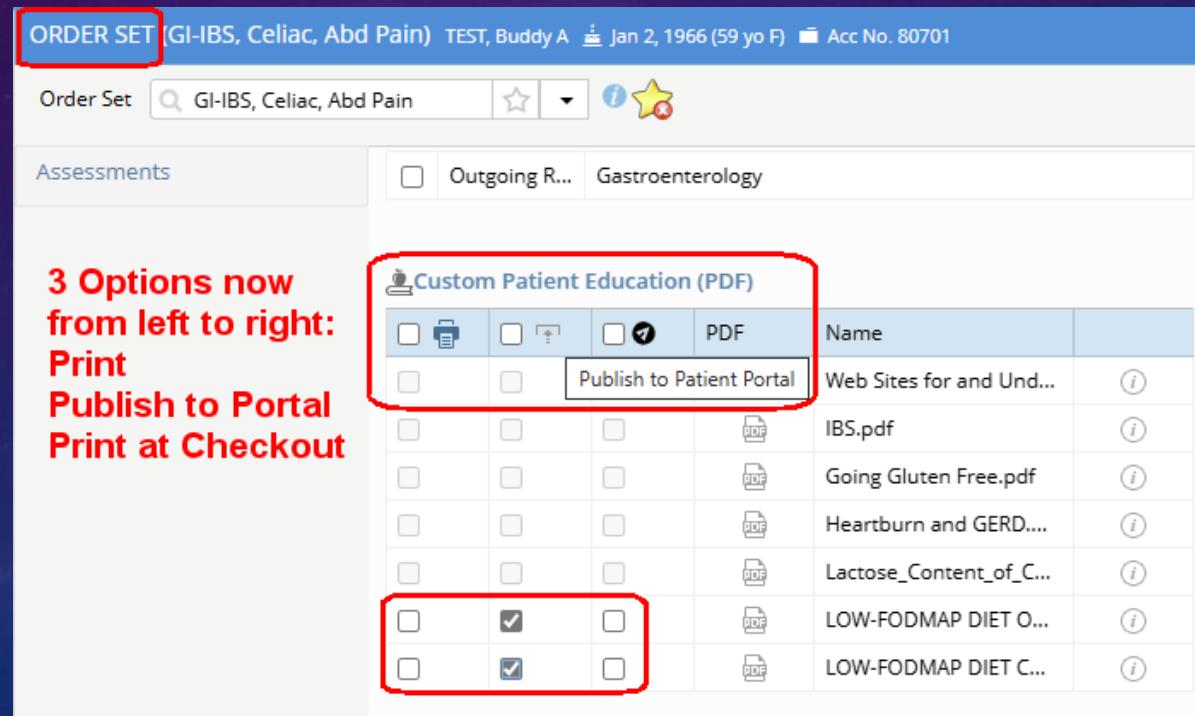
Improvements to Your Portal Experience

- Set your preferred “Default” method for sending pt messages when you initiate the message. Use the default icon below to avoid having to choose modality every time
- New quick & easy way to confirm that you did indeed send a portal message from a WE or TE w/o having to go to full screen progress note view



Publish Custom PDF's from OS's to the Portal

- New options with Custom Pt Ed PDF's in visit note & virtual visit OS's to not only print on demand, directly upload to portal, & print at check-out
- Depending on when your Custom PDF's were imported into eCW, these new options may be grayed out and not usable w/o importing these PDF's all over again



A Long Lost Prescribing 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

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

Requested Fill Message Types

Assign Future Requests From Pharmacy To

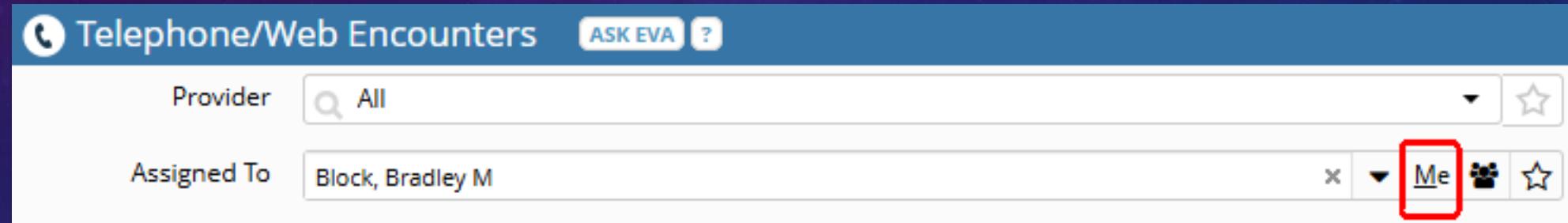
Major Interaction

Apply to Rx (3/ 5)

No.	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 📞 : 407-657-7363 📠 : 407-657-3834	Notes to Pharmacist: SP: Block, Bradley M DEA#: Fill Message Type:

New “Assigned to” Quick Click Options

- New “Assigned to” “Me” option in Jellybean for TE’s, Documents, Referrals, & Labs to quickly get back to your own Jellybean from someone else’s Jellybean of assigned items screen



Do You Know How Your Insurance Plan Reimbursement Rates Compare Between Your Biggest Plans (or any plans for that matter)

- Use “Compare Fee Schedule” from Menu > Billing link
- Choose Plans & CPT Codes, then click Lookup

Compare Fee Schedule

Select Fee Schedule: Current Fee Schedules

Fee Schedules selected: BCBS PPS, PPC, BChoi (01-15-2025 to 01-31-2026), CIGNA (08-01-2024 to 02-28-2027), MEDICARE (01-01-2025 to 01-31-2026)

Select CPT: 99213, 99214, 99215

Item Id: 449, 450, 451; CPT Code: 99213, 99214, 99215; Description: Office Visit, Est Pt., Level 3, 4, 5

Lookup Export to Excel

Comparison

ItemId	CPT	Mod	CIGNA (08-01-2024 to 02-28-2027)		BCBS PPS, PPC, BChoi (01-15-2025 to 01-31-2026)		MEDICARE (01-01-2025 to 01-31-2026)	
			Fee	Allowed	Fee	Allowed	Fee	Allowed
449	99213		\$147.00	\$ 14	\$147.00	\$ 17	\$147.00	\$ 14
450	99214		\$208.00	\$.05	\$208.00	\$.91	\$208.00	\$.03
451	99215		\$291.00	\$.30	\$291.00	\$.33	\$291.00	\$.31

Highest non zero allowed fee across all fee schedules. Lowest non zero allowed fee across all fee schedules. \$ Insufficient or equal allowed fee.

Total Counts: 3 Page: 1 of 1 Close