

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., FAAFP
 - 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. 180,00 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!

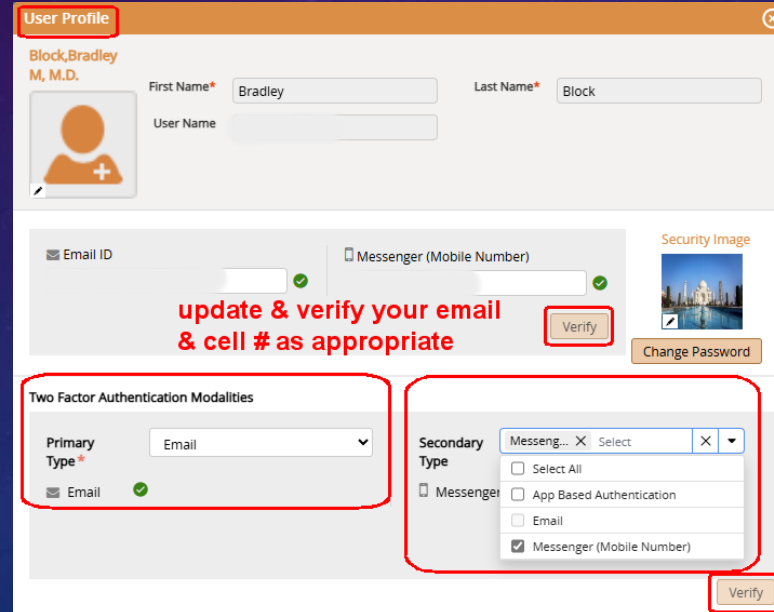
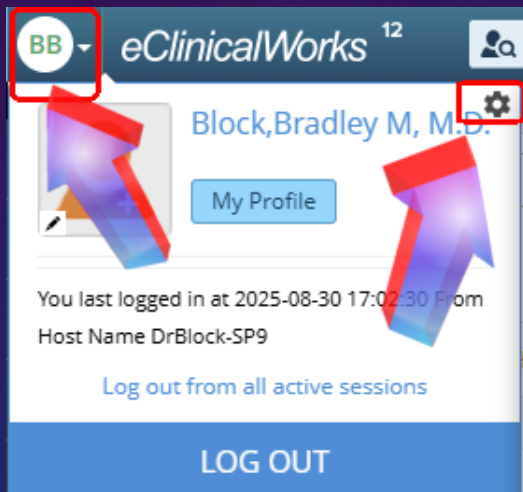
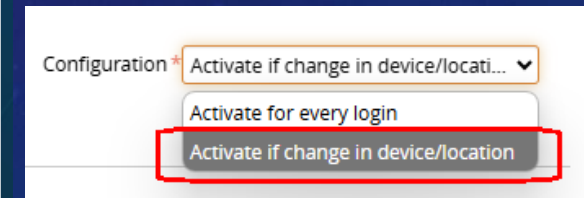
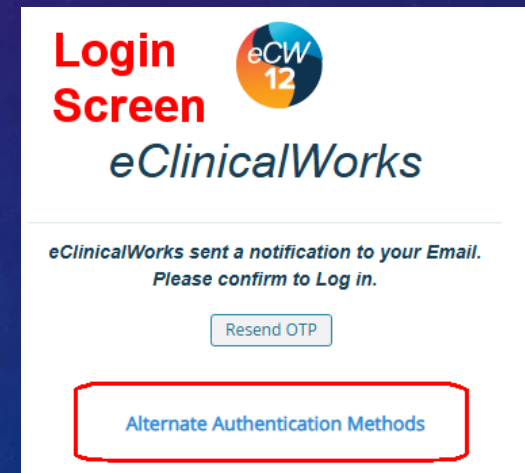
Settings to Help to Provide a More Optimal User Experience



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

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

A screenshot of the 'User Profile' configuration page for Bradley M. Block, M.D. The page shows fields for First Name, Last Name, User Name, Email ID, and Messenger (Mobile Number). A red box highlights the 'Email ID' field with the text 'update & verify your email & cell # as appropriate'. Another red box highlights the 'Two Factor Authentication Modalities' section, which includes a 'Primary Type' dropdown set to 'Email' and a 'Secondary Type' dropdown set to 'Messenger (Mobile Number)'. A 'Verify' button is located at the bottom right of the page.A screenshot of the configuration options for 2FA. The 'Configuration' dropdown is set to 'Activate if change in device/location'. Below it, there are two options: 'Activate for every login' and 'Activate if change in device/location'. The latter option is highlighted with a red box.

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

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 New
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 New
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 New
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 New
Allows access to Narx Score in RCP	Allows access to Narx Score in RCP Added on 09/06/2024	Administration / EMR Setup New

Manage access to referring providers

Export to Excel **save copy of all settings (old & new)**

A	B	C	D	E	F
1	Security Setting Name	Security Setting Description	Security	Security group Name	
2	277CA - Download 277CA All	Sort A to Z		Administration / Billing Setup	
3	Add/Delete Bank Account / All	Sort Z to A		Administration / Billing Setup	
4	Add/Remove CPT code in z All	Sort by Color		Administration / Billing Setup	
5	Administrative Payment Bat Gr	Sheet View		Administration / Billing Setup	
6	Allow access to Case Man All	Clear Filter From "Security Setting ..."		Administration / Billing Setup	
7	Allow access to Download All	Filter by Color		Administration / Billing Setup	
8	Allow access to edit the Se All	Text Filters		Administration / Billing Setup	
9	Allow access to expire Slid All	Search		Administration / Billing Setup	
10	Allow access to NADEAN C GH	<input checked="" type="checkbox"/> (Select All)		Administration / Billing Setup	
11	Allow access to Sliding Fee All	<input checked="" type="checkbox"/> New		Administration / Billing Setup	
12	Allow access to update Op All	<input checked="" type="checkbox"/> Old		Administration / Billing Setup	
13	Allow Bulk Adjust Claims C All			Administration / Billing Setup	
14	Allow Changing Payment E Gr			Administration / Billing Setup	
15	Allow Result Entry For Res All			Administration / Billing Setup	
16	Allow to view/modify the f All			Administration / Billing Setup	
17	Allow Update of Clearingh All			Administration / Billing Setup	
18	Change Appt Facility on lo 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			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 configu	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	

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

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)

The screenshot shows the 'Referring Physicians' section of the eCW system. A red box highlights the 'User Admin' > 'Referring Physicians' breadcrumb. A red arrow points to the 'Name' field in the 'Primary Search' section. Another red arrow points to the 'Add Referring Physician by NPI' button. A third red arrow points to a modal window titled 'Provider NPI' which contains a text input field, a 'NOTE' about NPPES NPI Registry, and 'Search' and 'Close' buttons. The main table below the search section has columns for Name, Phone #, Email, NPI, Specialty, and Location. The 'Select' filter shows 'T' is selected.

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

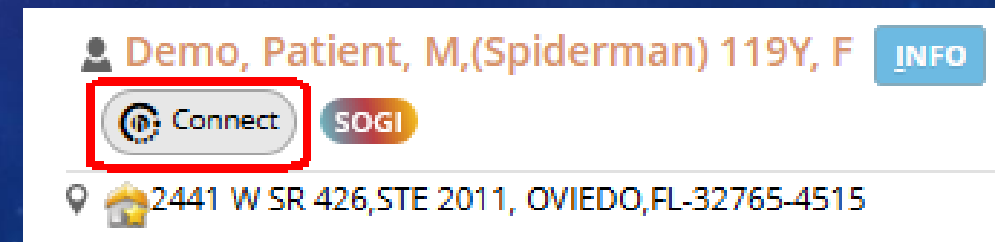
We've Got Futuristic Cures to Help Your Efficiency & eCW Experience for Patient Care



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 Healow Sign Consent is as Easy as 1-2-3

Create healow Sign Template - AUTH TO TREAT CHILDREN-Healow...

1 Details 2 Select File 3 Map & Tag

Create Copy from existing

Name* AUTH TO TREAT CHILDREN-Healow Sign **Document name when saved in eCW** Description* AUTHORIZATION TO TREAT MINORS-Healow Sign

Type* Consents + Add

Effective From* 09-01-2025

Assign to User zPortal,Front Office

Auto Review ☒

Publish to Portal ☒

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

Save to* Patient Documents

1st Screen

Create healow Sign Template - AUTH TO TREAT CHILDREN-Healow...

1 Details 2 Select File 3 Map & Tag

Favorite Tags All Tags

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 Time

Add tags that patients update

2nd Screen

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".

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".

ptname DOB

signature box **automated date signed box**

Field Type: Signature
Field Name: SignatureFormField 4

Sending a Healow Sign is Even Easier

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

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

Patient Preference | Yes | Yes | Yes | Yes

All Activities

- Audio Call
- Video Call
- Secure Text
- healow Sign**
- healow Survey
- healow Questionnaire
- Manage Templates**
- Custom Text
- e-Message
- Voice

SIGN Search

☒ **AUTH TO TREAT CHILDREN**

AUTH TO TREAT CHILDREN-Healow Si...

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

☐ **ANNUAL ADMIN FEE CONSENT FORM** Last sent date: Aug 21, 2025 12:59 PM

Annual Admin PCP Fee Acknowledge...

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

Preview and Send

Send as Written

Show 5 of 2 rows per page 1 of 1

Web EMR - healow Sign - Google Chrome

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

healow SIGN AUTH TO TREAT CHILDREN-Healow 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

HOME **SUBMIT**

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 recurrent 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 08/18/2025

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

☒ 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.
 - lamoTRigine 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 OTC.
 - Pioglitazone HCl 45 MG Tablet 1 tab(s) for diabetes orally once a day.
 - Primidone 250 MG Tablet take 1 table 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 bedtime.
 - 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

Assessment TEST, Buddy A Jan 2, 1966 (59 yo F) Acc No. 80701 Appt: (10/17/2024 03:00 pm, zAPO-HRMNY)

Encounters Facility All Specialty All Block, Bradley M All Providers

-	<input type="checkbox"/>	10/16/2024	30 MINS		Chase, Craig P
<input type="checkbox"/> N/A Other					
+	<input type="checkbox"/>	10/10/2024	TEL	Med Refill	Block, Bradley M
+	<input type="checkbox"/>	09/27/2024	0WORK-IN	Lab F/U, Flu vax & covidvaxs	Block, Bradley M
+	<input type="checkbox"/>	07/08/2024	NURSE	ekg	Block, Bradley M
+	<input type="checkbox"/>	06/18/2024	15 MINS	SPIROMETRY	Chase, Craig P

Merge selected with diagnosis:

- ☒ Assessment Details
- ☒ Treatment Notes
- ☒ Clinical Notes
- ☐ Medications
- ☐ Labs/DI/Procedures

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

The image displays two screenshots of a medical software interface, likely for a patient's medical history. Both screenshots show a header bar with patient information (TEST, Buddy A, Jan 2, 1966 (59 yo F), Acc No. 80701) and an appointment date (08/29/2025 10:15 am, 0... and 10/17/2024 03:00 pm, z...). The interface includes a navigation bar with tabs for 'All' and 'My Favorites'. Below this is a toolbar with various icons representing different medical functions. In the top screenshot, a red box highlights the 'HUB', 'INFO', 'New TE', 'Claim', and 'Settings' (gear icon) buttons. In the bottom screenshot, a red box highlights the 'ACO', 'Eye', 'Re', 'S', 'A', 'i', 'R', 'Dx', and 'PMHx' buttons. A large red arrow points from the 'Settings' button in the top screenshot to the 'Settings' button in the bottom screenshot, indicating a transition or a specific setting being highlighted.

Past Medical History TEST, Buddy A Jan 2, 1966 (59 yo F) Acc No. 80701 ASK EVA ? Appt: (08/29/2025 10:15 am, 0... →ICW X

All My Favorites HUB INFO New TE Claim Settings

Medical Hx Add ICD PMHx Denies Past Med Hx Pregnant BreastFeeding Hx Verified

Past Medical History TEST, Buddy A Jan 2, 1966 (59 yo F) Acc No. 80701 ASK EVA ? Appt: (10/17/2024 03:00 pm, z... →ICW X

All My Favorites HUB INFO New TE Claim Settings

ACO Eye Re S A i R Dx PMHx Add ICD PMHx Denies Past Med Hx Pregnant BreastFeeding Hx Verified

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

PN Window Customization

Display **My Favorites Configuration**

Need to also Save "My Favorites" configuration as your Default preference in the Display Tab

Choose sections to add in My Favorites tab:

- ☐ Global Sections
- ☒ Procedures
- ☒ Dx Assessment
- ☒ Treatment
- ☒ Billing
- ☒ Preventive Medicine
- ☒ Labs/Manage orders
- ☒ Diagnostic Imaging/Manage orders
- ☒ Procedure Orders/Manage orders
- ☒ CDSS
- ☐ Superbill
- ☐ Templates
- ☐ Specialty Forms
- ☒ Patient Orders
- ☐ Lab Requisition Form
- ☒ ACO Worksheet
- ☒ Screening

Uncheck Icons to Remove from Visit Note Window

Selected Sections (Specialty sections will display based on Visit Type Configuration)

- ☒ Surgical History
- ☒ Review of Systems
- ☒ Current Medication
- ☒ Vitals
- ☒ History Of Present Illness
- ☒ Physical Examination
- ☒ Dx Assessment
- ☒ Treatment
- ☒ Billing
- ☒ Preventive Medicine
- ☒ Labs/Manage orders
- ☒ Diagnostic Imaging/Manage orders
- ☒ Procedures
- ☒ Procedure Orders/Manage orders
- ☒ Patient Orders
- ☒ CDSS

Use Arrows to Drag & Drop Icons to Desired Position

Be Sure to Save Your Changes **Save** Cancel

The Floating Toolbar is Full of New Tricks These Days

966 (59 yo) | ACC | Eye | Re | [Icons] | S | A | [Icons]

By Dx | By Category | Dx | Rx | Labs | Diagnostic Imaging | Pr

Immunizations | N/A Other | OS | [Icon]

Referrals

Actions

PRISMA

Letters

Labs

Rx

More...

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

Pinned Features

PL | Patient Ed... | Encounters | Schedule

Treatment... | Documents | Summary

Manage Floating Toolbar

Floating Toolbar Settings

EMR Areas

To edit, select one of the following areas

Search

Actions

ASC

Claims

Documents Quick-Launch

Labs Quick-Launch

OB Flowsheet

Progress Notes

Telephone Encounters Quick-Launch

Available Features

Drag and drop features of your choice onto the Floating Toolbar and pin any *additional* features you'd like to have handy.

Search

Actions | Documents | Encounters | Eva | FS

Immunizations | Labs | Letters | Patient Education | Playlist

PRISMA | Problem List | Referrals | Rx | Schedule

Summary | Treatment Timeline

Account Inquiry | Alerts (Billing) | Case HX | Discharge Instruction | Discharge Reconcile

Request a Feature

Progress Notes

Floating Toolbar ⓘ

Drag and Drop here

Immunizations

Referrals

Actions

PRISMA

Letters

Labs

Rx

Progress Notes

Pinned Features ⓘ

Drag and Drop here

PL | Patient Education | Encounters | Schedule

Treatment Timeline | Documents | Summary

These appear when you click on the "More" link

Use Drag & Drop to Add Items and Rearrange Order

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

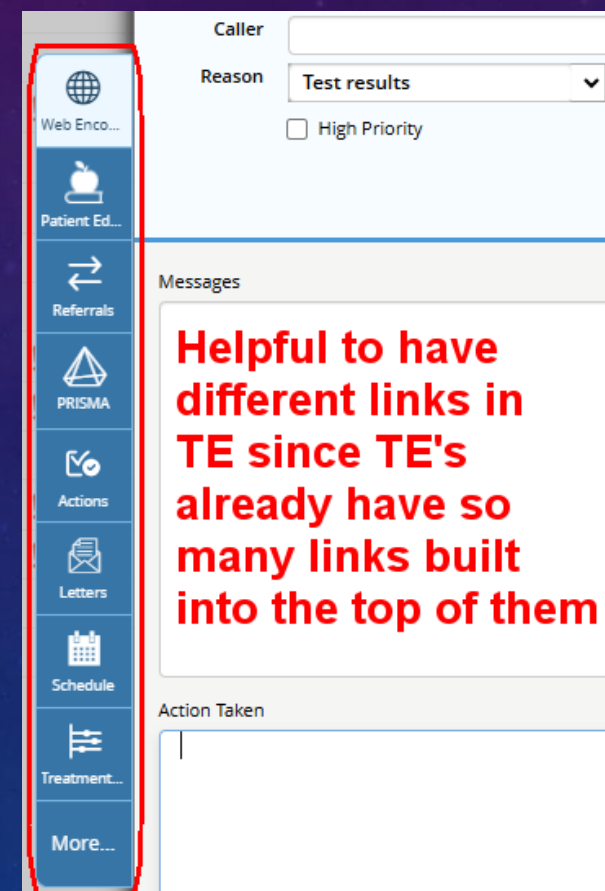
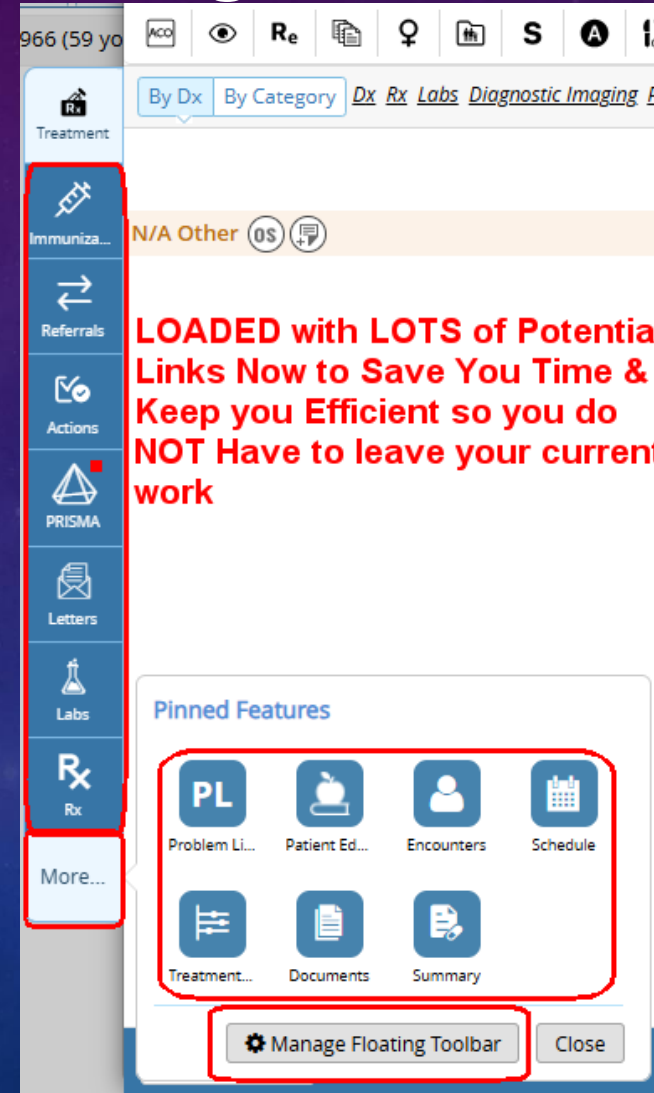
These appear in to the left of your window

Layout Configuration

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 displays the EHR interface with the 'Treatment Timeline' tab selected. The 'Encounter Type' is set to 'External Encounters'. The 'Filter' button is visible. The 'Show/Hide' section shows various checkboxes for data types. The main table lists external encounters, with one entry highlighted: 'External Encounter (Patient Summary (CCD)) 08/19/2025'. This entry is linked to a PRISMA report, which is displayed in a pop-up window. The PRISMA report shows the 'Advance Directive' section with 'No Data Provided for This Section' and the 'Assessment' section with a table of diagnoses.

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”

The screenshot shows a medical software interface with a table of lab results. The table has columns for Order Dt, Coll Dt, Result Dt, Labs, Reason, and Result. The 'View All Report (9)' button is highlighted in the top right corner. A red arrow points from this button to a red text box that says "View All Report Button" and "(9) tells us there are 9 unreviewed results".

Order Dt	Coll Dt	Result Dt	Labs	Reason	Result
05/16/2024	05/16/2024	05/17/2024	-Folate (Folic Acid)		
05/16/2024	05/16/2024	05/17/2024	-Vitamin B 12		
05/16/2024	05/16/2024	05/17/2024	-Vit D,25-Hydroxy, Tot		
05/16/2024	05/16/2024	05/17/2024	-CBC w Diff h/h,rbc,ind		
05/16/2024	05/16/2024	05/17/2024	-CMP (comprehensive met		
05/16/2024	05/16/2024	05/17/2024	-HEMOGLOBIN A1C		
05/16/2024	05/16/2024	05/17/2024	-Uric acid		
05/16/2024	05/16/2024	05/17/2024	-Lipid Panel (TChol,Tri		
05/16/2024	05/16/2024	05/17/2024	-proBNP		
12/06/2023	12/06/2023	12/08/2023	-proBNP		319
12/06/2023	12/06/2023	12/08/2023	-Vit D,25-Hydroxy, Tot		22
12/06/2023	12/06/2023	12/08/2023	-CBC w Diff h/h,rbc,ind		Normal
12/06/2023	12/06/2023	12/08/2023	-CMP (comprehensive met		Normal glu 113

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

Practice Defaults

Search

Front Office

Mid Office

Interface

General

Labs

Styles

Performance

Portal

Options

Scanning/Printing

Unsupported Char.

Jelly beans

healow Insights

Fax Settings

Sunoh

Default values set here will be applied to all computers in all offices across the practice. Please make sure

Labs/DI Default Company

Lab Company

DI Company

- User Level Default will overwrite the above selection

Defaults Bill To Physician Account

Lab Company **Can change to 4 or 5 years**

DI Company **for more side by side results**

☒ Save Setting for Future Orders

Lookup Date Range For Viewing

Lab Cumulative Report days View All Reports By Patient days

Maximum number of reports for the same test in Cumulative Report

Default ABN folder

☐ Do not select In House labs in Common Send 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

Rx New and Refill RX

Supervising Provider: [Search] [Star]

Send To: [Dropdown] [More]

Notes to Pharmacist: 0/210 [More] [Send]

Last Appt: 08/10/2025
Block, Bradley M
Height: 72 in

Provider: dme [Star] Referring Providers [Dropdown] All Specialties [Dropdown]

Provider Name	Speciality	Telephone	Fax	Address	City	State	Zip	E-mail
DME,BINSONS-WP	DME	407-679-2135	407-671-7303	2069 ALOMA AVE	WINTER PARK	FL	32792	
DME,COLONIAL MED.SUPPL...	DME	407-849-6455		915 S.ORANGE AVE	ORLANDO	FL	32806	
DME,NATIONAL SEATING AN...	DME	407-629-7845	800-305-4163					
DME,FL RESPIRATORY,FLH	DME	407-830-1938	407-830-0936					
DME,LINCARE,CENTER	DME	407-682-6644	407-682-6623	130 LIVE OAK BOULEVARD	CASSELBERRY	FL	32707	
DME,PREMIER-ORL,HOME H...	DME	407-228-4661	407-895-1261	2454 E MICHIGAN ST STE B	ORLANDO	FL	32806	
DME,VERUS,HEALTHCARE	DME	800-487-5566	877-764-5264	101 N WOODLAND BLVD#205	DELAND	FL	32720	
DME-ADVENTHEALTH,RESP ...	DME	407-830-1938	407-830-0936	556 FL CENTRAL PARKWAY, S...	LONGWOOD	FL	32750	
DME-AEROFLOW,SLEEP	Sleep Specialist	866-650-7508	800-769-8365	3165 SWEETEN CREEK RD	ASHEVILLE	NC	28803	
DME-APRIA,HEALTH	DME	407-297-0100	888-492-0010		Winter Park	FL	32792	
DME-APRIA HEALTH,BYRON	Sleep Specialist	407-297-0100	949-356-4105					
DME-FAMILY HOME CARE,GR...	HOME HEALTH	407-401-9146	407-517-4860	5401 S KIRKMAN RD #510	ORLANDO	FL	32819	
DME-ICON,MEDICAL SUPPLY	DME	407-276-6963	407-206-7236	900 EAST CHURCH STREET	ORLANDO	FL	32801	
DME-RESPITEC,MED-CARE-E...	DME	800-945-6685	407-834-3887					
DME-ROTECH,OXYGEN& ME...	DME	407-855-2296	407-855-2364	8350 PARLINE STE 9, CONTA...	ORLANDO	FL	32809	

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

Select Provider

Fax Documents Preview

(MMG BIL 08/2025 AH, Negative)

Add Documents Description: [Dropdown] First Page Last Page

Find: [Search] [Left] [Right] [Refresh] [Cancel]

To

Name: [Search by Providers]

Fax*: [Dialing Prefix] [Fax Number] [+1]

Add CC: [Name] [Search by Providers]

CC: [Dropdown]

Subject: Patient Documents

Company: [Dropdown]

From

Name: Block, Bradley M

Provider: Bradley Block

Voice: [Dropdown]

Company: Block,Nation,Chase,Smolen Family Medicine

Facility: Block,Nation,Chase,Smolen Family Medicine [Dropdown]

Options

Cover Letter: [Dropdown] [Include]

[Schedule] [Date/Time: 09/01/2025, 04:54 AM]

☒ Superimpose patient identifiers

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

Send

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

Practice Defaults

Search Find Setting

Fax Settings

Default values set here will be applied to all computers in all offices across the practice. Please make sure to choose proper defaults.

Default Fax Settings

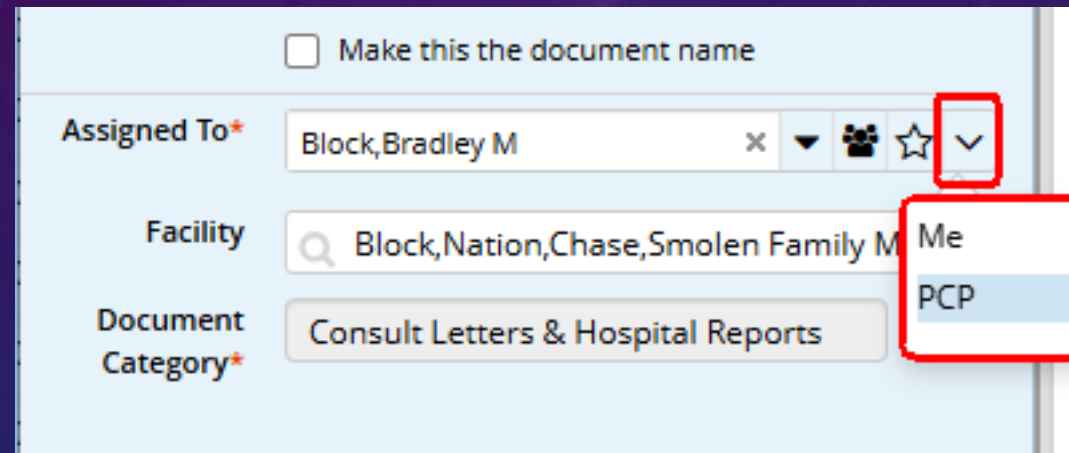
Use this tab to set the default recipient category and recipient for outgoing faxes in the Fax Documents Preview window. Select your preferences from the dropdowns provided in the table below.

EMR Area	Recipient Category	Recipient
Progress Notes	Providers	PCP
ConsultNotes	Referring Physician	Referring Provider
Patient Documents	Providers	Select
Referrals	Select	Select
Prescription	Providers	Primary Pharmacies
Lab Orders	Case Manager	Select
DI Orders	Employers	Select
Procedure Orders	Facilities	Select
Lab Reports	Attorneys	Select
DI Reports	Pharmacies	Select
	Lab Companies	Select
	Circle Of Care	Select
	Supplier	Select
	Insurances	Select
	Referring Physician	Select

OK Cancel

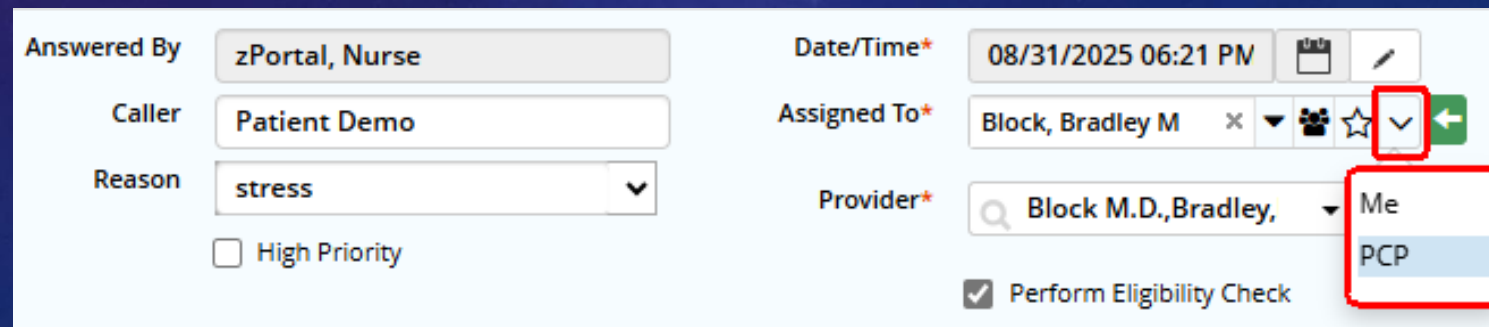
New “Assigned to” Quick Click Options

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



This screenshot shows a form section with the following fields:

- ☐ Make this the document name
- Assigned To***: A dropdown menu showing "Block, Bradley M" with a red box around the dropdown arrow. A red box also highlights the dropdown menu itself, which shows "Me" and "PCP" as options.
- Facility**: A search field containing "Block, Nation, Chase, Smolen Family M".
- Document Category***: A button labeled "Consult Letters & Hospital Reports".



This screenshot shows a form section with the following fields:

- Answered By**: A button labeled "zPortal, Nurse".
- Caller**: A button labeled "Patient Demo".
- Reason**: A dropdown menu showing "stress".
- ☐ High Priority
- Date/Time***: A date/time field showing "08/31/2025 06:21 PM".
- Assigned To***: A dropdown menu showing "Block, Bradley M" with a red box around the dropdown arrow. A red box also highlights the dropdown menu itself, which shows "Me" and "PCP" as options.
- Provider***: A search field containing "Block M.D., Bradley,".
- ☒ 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)

Compose New General Message

To: Message Intake Nurse

Subject: STRESS!

Please use messages for non-urgent communication only. If this is an URGENT or EMERGENT patient care issue, please call 911. DO NOT LEAVE A MESSAGE HERE.

I FEEL LIKE I AM SURROUNDED BY HUNDREDS OF PEOPLE WHO ARE ALL WATCHING ME!

Attach (Max. 5 files with a file size of 5MB each. jpeg, png, pdf only)

Discard **Send**

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

Document List (2) ☐ Show All

Date	Scanned By	Document Name
<input type="checkbox"/> 08/31/2025	(Patient)	Simon Medical CT
<input type="checkbox"/> 08/31/2025	(Patient)	BP Record

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

Add Update Compare Document Search

Description
Patient Uploaded Documents

1/1 150%

Page Layout Pages:

Rotate Pages:
Rotate Counterclockwise 90°

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

Document List (2) ☐ Show All

Date	Scanned By	Document Name
<input type="checkbox"/> 08/31/2025	(Patient)	Simon Medical CT
<input type="checkbox"/> 08/31/2025	(Patient)	BP Record

Add Update Compare Document Search

COMPUTERIZED TOMOGRAPHIC SCAN OF THE CHEST WITHOUT CONTRAST

CLINICAL INDICATION: Solitary pulmonary nodule.

COMPARISON: Prior CT chest without contrast report dated 08/05/2024.

CONTRAST USED: None.

Prior known CT or Cardiac Nuclear Medicine studies performed in the last 12 months: 1.

TECHNIQUE: A plain CT study of the chest is performed. Technique for this CT scan was done using principles of ALARA (As Low As Reasonably Achievable). Multiplanar reconstructions were obtained.

FINDINGS:

PDF of a CT Scan

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).

Reason: Form(s) Need to be Signed

Provider: Block M.D., Bradley,

Status: ☐ Open ☐ Addressed ☒ Addressed and Docs Reviewed

☐ High Priority

Messages

SEE ATTACHED PT SIG REQ

Telephone Encounter - Address and Close

Do you want to Address, Review the Documents and Close the Telephone Encounter?

Address, Review and Close Cancel

Save Time after looking at attached documents that do not require any attention after looking at them in the Preview screen. Skip having to "Update" them to "Review" them.

Action Taken

MONICA 08/24/2025 01:35:36 PM >

no action necessary

Block, Bradley M, M.D. 09/01/2025 04:18:17 AM >

Print Script Send Rx Print Report Progress Note Document Save as Template Apply Template Save Cancel

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

Problem List

Remove Undesired Columns

Problem List User Settings

Select at least 4 columns to display in the Problem List.

- ☐ Type
- ☐ Code
- ☒ SNOMED
- ☐ Diagnosis
- ☒ Risk
- ☒ Onset Date
- ☒ W/U Status
- ☐ Clinical Status
- ☒ Added On
- ☒ Modified On
- ☒ Modified By
- ☒ Discontinued

Save Cancel

Dx Type	Type	Code	SNOMED	Diagnosis	Risk	Clinical Status	Added On	Modified On	Modified By
<input type="checkbox"/>	▼	D12.6	428054006	Adenomatous polyp of colon Notes: COLONOSCOPY 9/10 +Adenomas x2, DR AGGARWAL, COLON...	--Select--	▼		08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	D35.00	255036008	Adrenal adenoma, unspecified laterality Notes: CT ABD 01/2023 Benign Adrenal Adenoma & ABNML Pulm ...	--Select--	▼	02/05/2023	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	E27.8	874912007	Adrenal nodule Notes: Chest CT 10/2023 stable Adrenal Nodule: Pulm Nodule Res...	--Select--	▼	07/11/2024	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	F41.9	197480006	Anxiety disorder, unspecified	--Select--	▼	06/03/2016	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	I70.0	81817003	Atherosclerosis of aorta Notes: CT CHEST 08/2022 +6 Pulm Nodules- T/C PET scan?, +LT 2.1c...	--Select--	▼	09/07/2022	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	I25.10	451041000124103	CAD - Atherosclerotic heart disease of native coronary artery WITHOU... Notes: s/p Acute MI 6/2022, PTCA & Stents x2 6/2022	--Select--	▼	09/08/2022	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	N18.30	433144002	CKD - Chronic kidney disease, Stage 3 (Mod), GFR 30-59 mL/min/1.73 s... Notes: US RENAL 04/2022 Normal x mild CKD changes AH	--Select--	▼	07/11/2024	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	N18.4	431857002	CKD - Chronic kidney disease, Stage 4 (Severe), GFR 15-29 mL/min/1.7... Notes: US RENAL 04/2022 Normal x mild CKD changes AH	--Select--	▼	12/07/2023	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	▼	I63.9	230690007	CVA (cerebral vascular accident) Notes: Head CT 03/2021 B/L old Lacunar Infarcts, Microvascular Is...	--Select--	▼	04/30/2021	08/31/2025	Block, Bradley ...

Problem List

Less Columns, More Organized Looking, & Individual Patient PL Columns

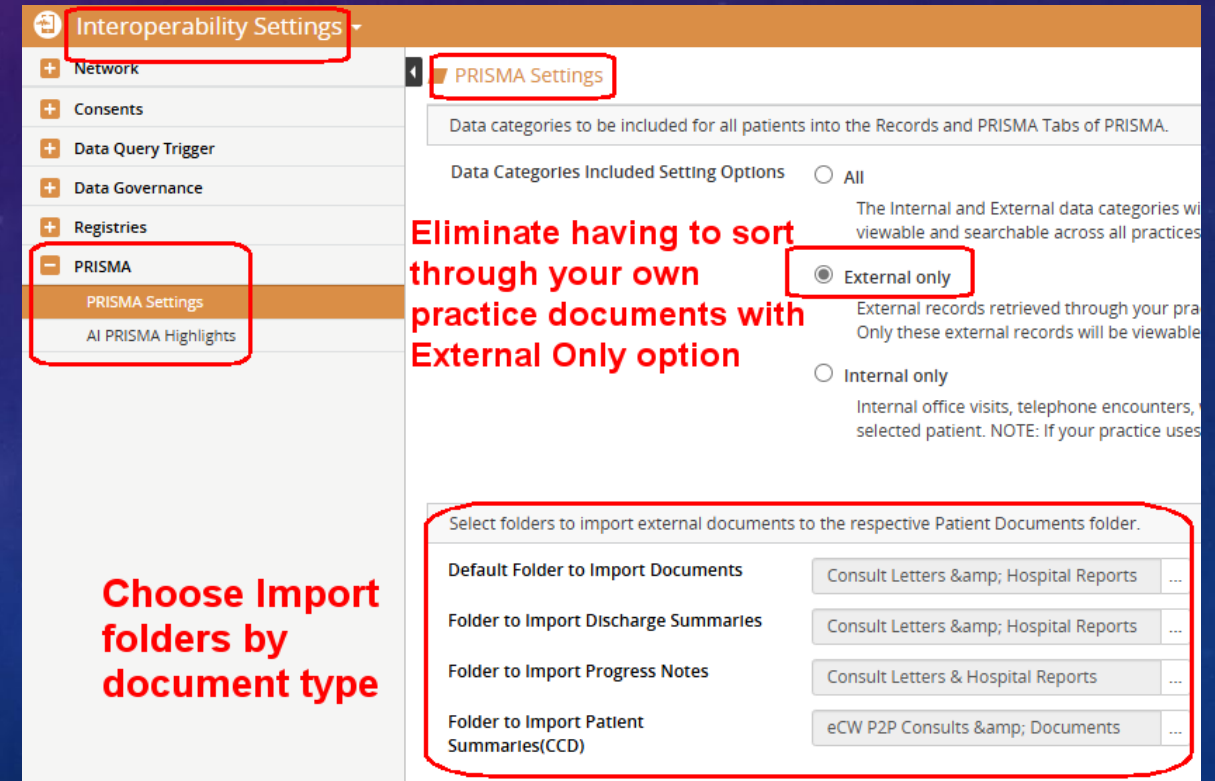
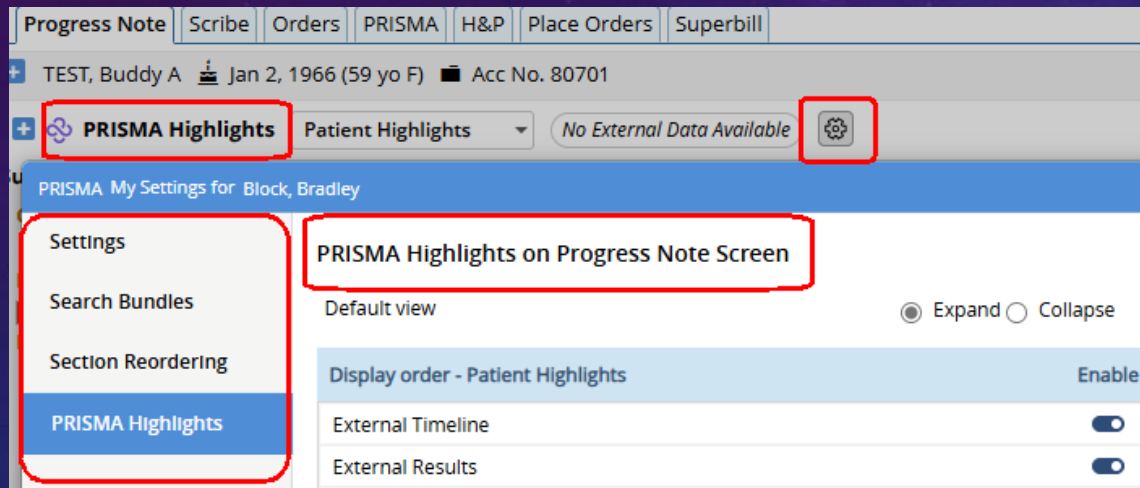
Can Be Sorted Using Headers

Dx Type	Code	Diagnosis	Clinical Status	Added On	Modified On	Modified By
<input type="checkbox"/>	D12.6	Adenomatous polyp of colon Notes: COLONOSCOPY 9/10 +Adenomas x2, DR AGGARWAL, COLONOSCOPY & polyp path 06/2015 +Adenoma Polyp DR AGGARWAL ; COLO...	▼		08/31/2025	Block, Bradley ...
<input type="checkbox"/>	D35.00	Adrenal adenoma, unspecified laterality Notes: CT ABD 01/2023 Benign Adrenal Adenoma & ABNML Pulm Nodule RAYUS ; COLONOSCOPY 07/2023+Adenoma(s)x2, Diverticulosis D...	▼	02/05/2023	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	E27.8	Adrenal nodule Notes: Chest CT 10/2023 stable Adrenal Nodule: Pulm Nodule Resolved Rayus	▼	07/11/2024	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	F41.9	Anxiety disorder, unspecified	▼	06/03/2016	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	I70.0	Atherosclerosis of aorta Notes: CT CHEST 08/2022 +6 Pulm Nodules- T/C PET scan?, +LT 2.1cm Adrenal Mass, +Aorta & Coronary ASCVD RAYUS	▼	09/07/2022	08/31/2025	Block, Bradley ...
<input type="checkbox"/>	I25.10	CAD - Atherosclerotic heart disease of native coronary artery WITHOUT angina pectoris Notes: s/p Acute MI 6/2022, PTCA & Stents x2 6/2022	▼	09/08/2022	08/31/2025	Block, Bradley ...

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

New Ways to Improve Your PRISMA Experience Too

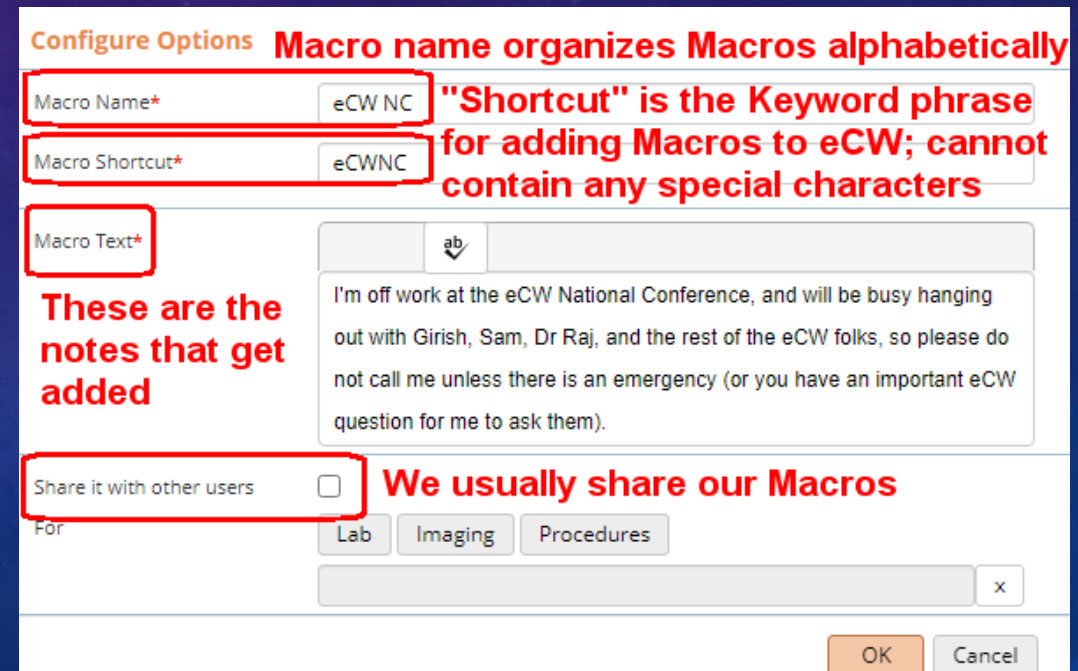
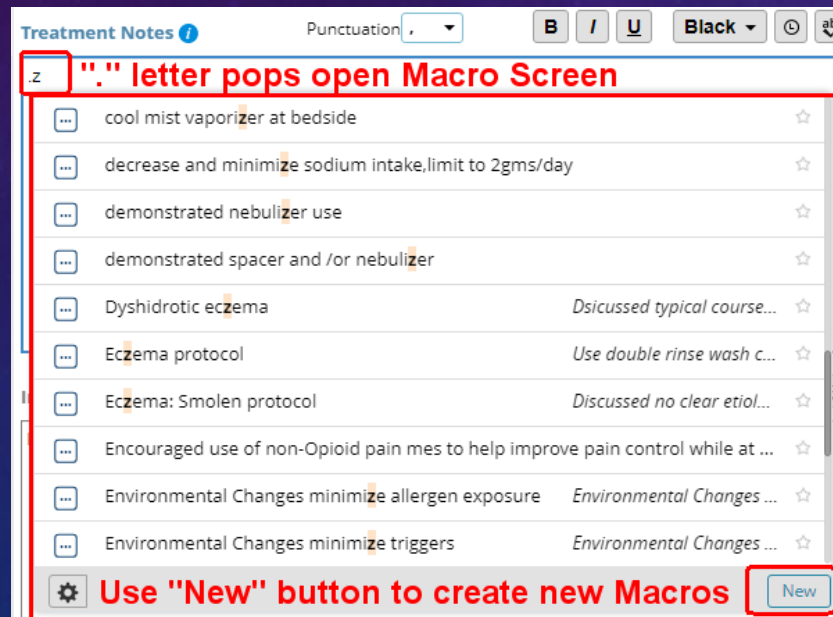
- Adjust visit notes PRISMA Highlights behavior using the settings PRISMA link
- Use Interoperability Settings (via Products Activation admin link) to make practice wide PRISMA changes such as only showing External Records and which folders PRISMA reports should import into



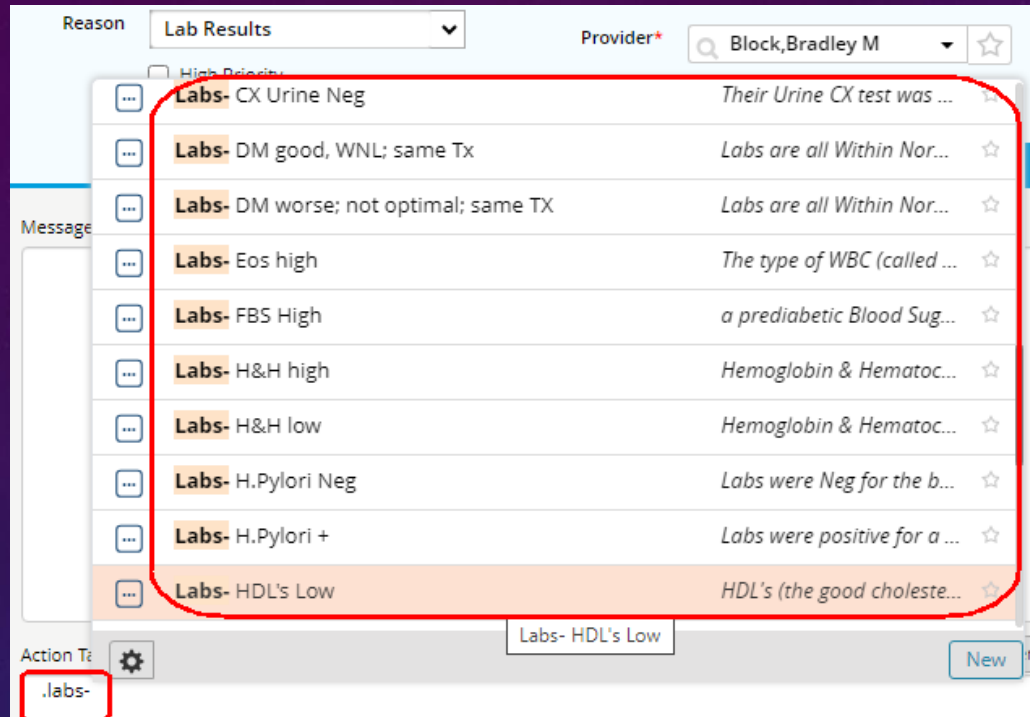
Mastering Keyword Macros!

Tips When Creating New Macros

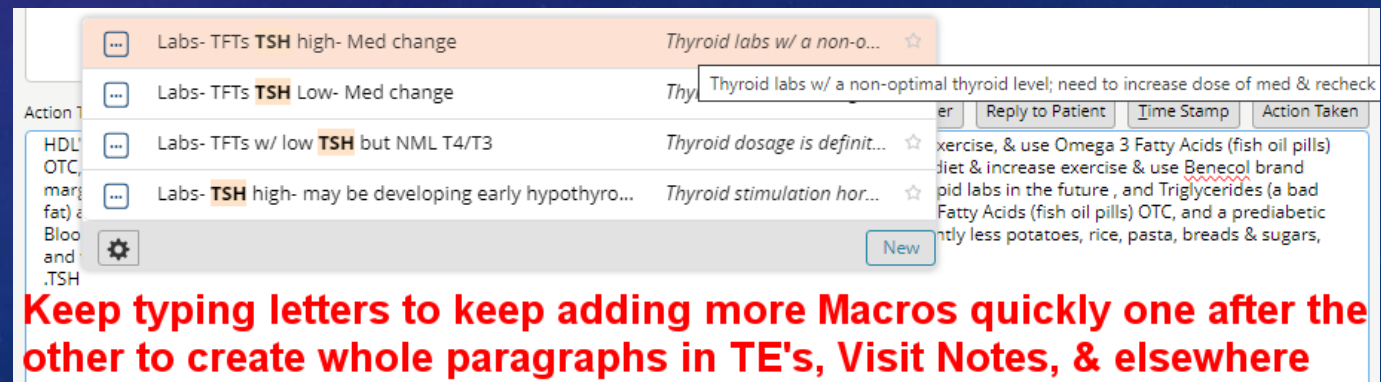
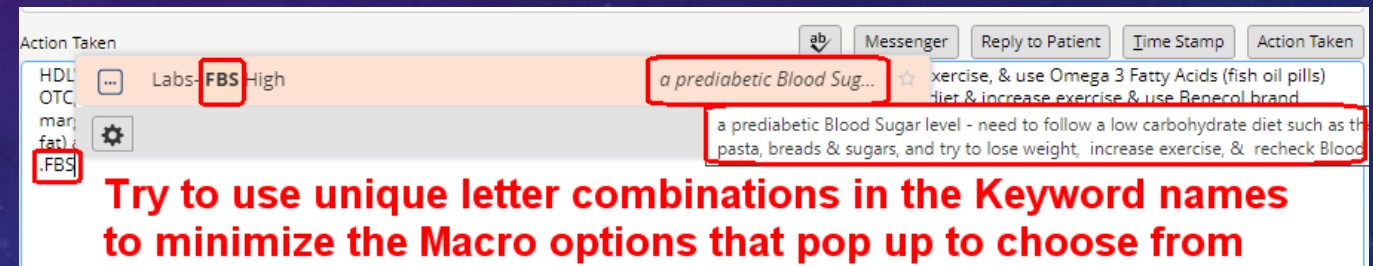
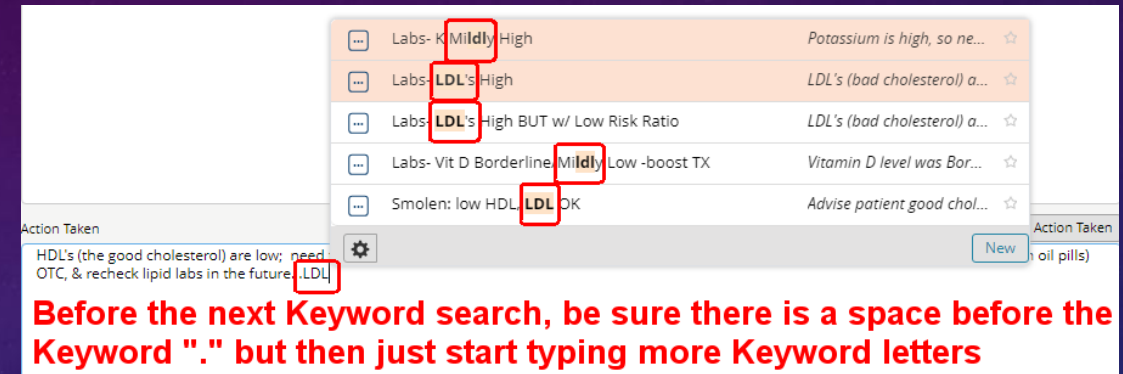
- “Keywords” are the same as the old traditional “Macros” in the “Browse” & “Action Taken” buttons
- Macros work anywhere in eCW: Visit notes, TE’s, RX Edit screens, Lab/DI Notes, internal Messages, etc.
- Easiest way to see a button to create new one is type “.” followed by any single letter
- Do NOT 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 in the “Macro Shortcut” phrase to bring up Keyword Macros to add to chart



Keyword Macro "Shortcut" Names Are the Key to Success



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.



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

Approve and Send

METFORMIN 500 MG TAB[**] ⚠

Tablet

500 MG

90 **New Links in E-Refill Request Screen** (Total Fills = 4) ✎

3

180

☐

2025-08-31

TAKE ONE TABLET BY MOUTH TWICE A DAY

No diagnosis indicated on the original prescription.

Cannot determine if there are any related tests.

Cannot determine if there are any related active or inactive medications.

No insurance information available since last time this medication was prescribed.

PUBLIX is the same as the most recent Rx and linked in the patient's pharmacy list.

There are no pending patient requested refills for this medication.

Major Interaction Allergies Send

TE PL ↺ ⋮

Send Rx & Next > Next >

CREATE TELEPHONE ENCOUNTER

(71 yo M) Acc No.

Provider
Block, Bradley M

Assigned To
Block, Bradley M

Reason
Call Patient

Facility
Block, Nation, Chase, Smolen Family Medicine

Caller
Script1MonthAPPTOVERDUE(Script1MonthA
Script1MonthLABSOVERDUE(Script1MonthL
Script1MonthPEOVERDUE(Script1MonthPEO

Message
Action ta
.script1

Use Default Button at bottom to save & automatically populate Assigned To, Reason, Facility

Use Keyword Macros to fill in Message or Action Taken field

Create TE Button

Create Cancel

Send Rx & Next > Next >

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

The screenshot displays the 'New Refill Screen' interface. A red box highlights the '100' day refill icon in the medication list. Another red box highlights the settings icon in the top right corner. A third red box highlights a tooltip for a medication, showing 'Remaining Supply: 22 days', 'Last Filled: 06/24/2025', 'Last Prescribed: 11/15/2023', and 'Start Date: 08/10/2023'. A fourth red box highlights the 'Include Remaining Supply Icons' checkbox in the settings menu.

Date	Medication	Provider	Assessment	Timeline	Summary Of	Date
C R 30 90 100 S	metFORMIN HCl ER 500 MG Tablet	?	H	Refill	90 days	360
C R 30 90 100 S	Torsemide 20 MG Tablet	?	H	Decrease	14 days	28
C R 30 90 100 S	Doxycycline Monohydrate 100 MG Capsule	?	H	Taking	90 days	90
C R 30 90 100 S	Atorvastatin Calcium 40 MG Tablet	?	H	Taking		
C R 30 90 100 S	Eliquis 5 MG Tablet	?	H	Taking		
C R 30 90 100 S	Entresto 24-26 MG Tablet	?	H	Taking		

Settings:

- 30 = 30 day with 11 refills
- 90 = 90 day with 3 refills
- 100 = 100 day with 3 refills
- Display for Medications as of Today:
 - ☒ Show Formulary Status
 - ☒ Include Remaining Supply Icons for Acute Meds/Med with

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)

H Ergocalciferol

Drug Product	Take	Route	Frequency	Duration	Dispense
1.25 MG (50000 UT) - Capsule	1 capsule (1.25 mg)	Orally	every 4 weeks	56	
50 MCG (2000 UT) - Capsule	2 capsule (2.5 mg)		every 3 weeks	60	
10 MCG/0.05ML - Solution	3 capsule (3.75 mg)		every 2 weeks	84	
200 MCG/ML - Solution			weekly	90	
10 MCG (400 UNIT) - Tablet			daily	100	
1.25 MG (50000 UT) - Capsule	1 capsule	Orally	2 times per week	90 Days	26 Capsule

4 times per week

weekly

3 times per week

2 times per week

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

- Very helpful to edit scripts that are missing desired pick 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

Frequency

Our RX Frequency Macros are named "RXF..."

Type Macro name into Frequency field & phrase populates this field

.rxf

FREQ 1x/day(RXFQD)	Once a day
FREQ 2x/day(RXFBID)	Twice a day
FREQ 3x/day(RXFTID)	FREQ 2x/day(RXFBID) times a day
FREQ 4x/day(RXFQID)	Four times a day
FREQ Four/Week(RXF4W)	4 times a week
FREQ Once/Week(RXF1W)	1 time a week
FREQ Three/Week(RXF3W)	3 times a week
FREQ Twice/Week(RXF2W)	2 times a week

Route

Frequency

Duration

Dispense

Macros are GREAT for adding special wording like the FL state required Opioid phrases which we named "RXO..."

.rxo

Opioid 30 Day Script(RXO30D)	For NONACUTE PAIN
Opioid 7 Day Script(RXO7D)	For ACUTE PAIN EXCEPTI

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



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

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	Criteria
1	Block-1		SBP > 139	3077F
2	Block-1	AND	HTN DX	I10
3	Block-1	AND	Commercial BCBS Plans	BCBS
4	Block-1	AND	DBP > 89	3080F

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

Visit Type Charge Configuration

Search Visit type **Need to uncheck "Pay Later" to automatically require a copay**

Visit Code	Visit Description	Bill To Patient	Pay Later	Charge			
15 MINS	15 MIN VISIT	No	No	0.00	+		
15 OV-MC	15 MIN VISIT-MC	No	No	0.00	+		
TV-15MINS	15 MIN-TV	No	No	0.00	+		
30 MINS				0.00	+		
30 OV-MC				0.00	+		
TV-30MINS				0.00	+		
45 MINS				0.00	+		
45 OV-MC				0.00	+		
TV-45MINS				0.00	+		
60 MINS				0.00	+		
60 OV-MC				0.00	+		
TV-60MINS				0.00	+		
REPAP				0.00	+		
AUTO	Auto Accident	No	No	0.00	+		
AUTO-MC	Auto Accident-MC	No	No	0.00	+		

Update Visit Configuration

Visit Type 15 MIN-TV(TV-15MINS)

Bill To Patient ☐

Charge

Pay Later ☐

Online Scheduling ☐

Last Updated on 10/29/2024 15:13:54 by Bradley Block

Save Cancel

Note : Configurations made for any Visit Types will be effective only for newly created appointments.
Any Visit Type marked as Yes under 'Bill to Patient' Will result in claim generation as 'Self Pay' with no insurance added.Please ensure only appropriate visit types are marked Bill to Patient as 'Yes'.

Close

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	[REDACTED]	Patient ID	[REDACTED]	Claim Status	1
Subscriber Name	[REDACTED]	Payer Claim ID	[REDACTED]	Claim Amount	\$283.00
Provider Name	MCCRARY LINDSEY	Provider Claim ID	LM251	Paid Amount	\$0.00
Claim Statement Dates	09/09/2025 - 09/09/2025	Received Date	09/12/2025	Pt Responsibility	\$95.41

Claim Status Description : Processed as Primary

Serv Date	Units	Serv Code	Billed	Paid	Allowed Adjustments
09/09/2025 - 09/09/2025	1	HC:99213	\$255.00	\$0.00	\$95.41 CO-45: \$159.59 PR-1: \$95.41
			REM: N22		
09/09/2025 - 09/09/2025	0	HC:G2211	\$28.00	\$0.00	- CO-97: \$28.00
			REM: N19		

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.

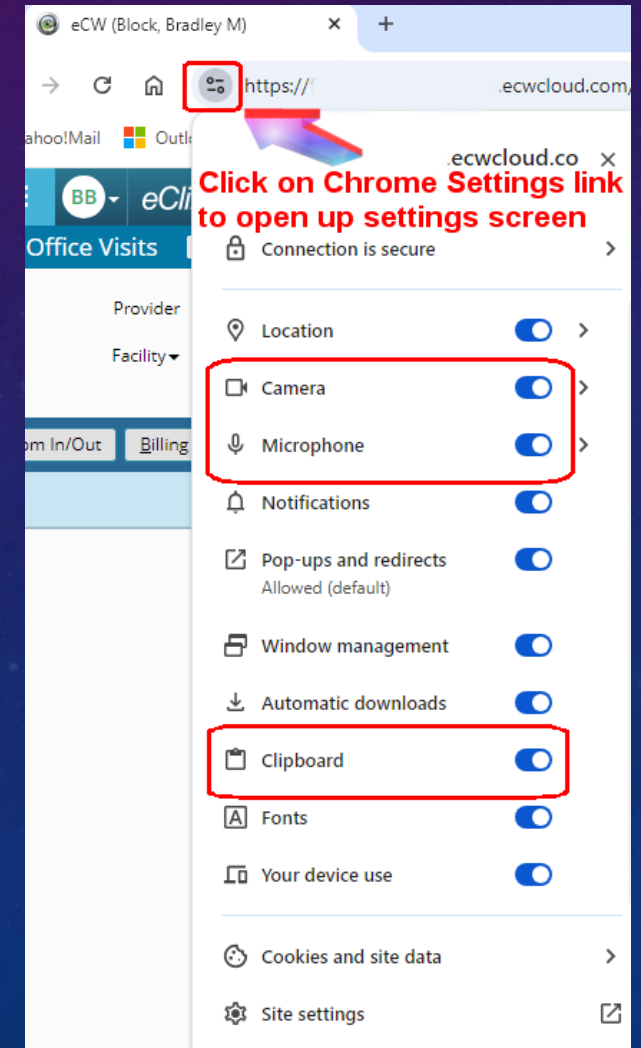
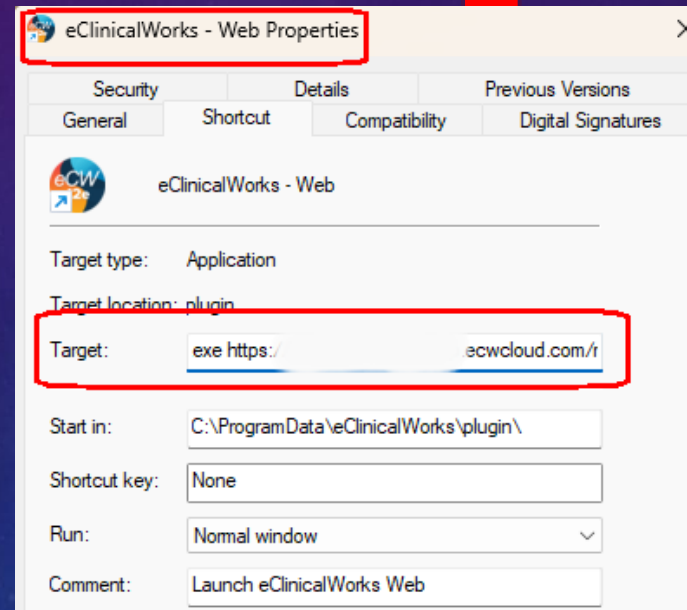


- If earning CME/CE Credit this is session ID “4213”
- For copy of our current & past presentations & bonus slides go to:
www.BlockAndNation.com/BlockAndBiggs
And try out eCW University Webinars & Knowledge Base to learn about other topics

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

Send Message - DEMO, Patient "Spiderman" M Jun 6, 1906 (119 yo F) Acc No. 70248 407-341-6964 2441 W SR 426 OVIEDO, FL 32765-4515 docblockmd@yahoo.com

Patient Preferences on Modality

Choose Modality

☒ eMessage ☐ Voice ☐ Text/SMS

Choose Template

Provider/ Staff Block, Bradley M

Message Type All

PEDS Flu Vaccine Reminder-MID-SEASON	Influenza Vaccine Reminder	
Regular FLU VACCINE REMINDER MID-SEASON	INFLUENZA VACCINE REMINDER	

Preview Message

Patient Portal / Healow App

Subject Test results

Message

The follow up PSA lab was in the normal expected range. Block, Bradley M, M.D. 09/01/2025 03:43:00 AM >

Use the Default Icon to Save your modality preference when using the "Reply" button to initiate a message to patients from a TE or WE (such as eMessage for sending portal messages)

Action Taken

ab Messenger Reply to Patient

The repeat Liver labs are all normal and good, and your repeat potassium lab was in the normal or expected range.
Block, Bradley M, M.D. 09/20/2025 01:41:40 AM >
Block, Bradley M 09/20/2025 01:41:50 AM - Replied to Patient eMessage

Notation only appears after you leave this screen

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

ORDER SET (GI-IBS, Celiac, Abd Pain) TEST, Buddy A Jan 2, 1966 (59 yo F) Acc No. 80701

Order Set

Assessments

☐ Outgoing R... Gastroenterology

3 Options now from left to right: Print Publish to Portal Print at Checkout

Custom Patient Education (PDF)

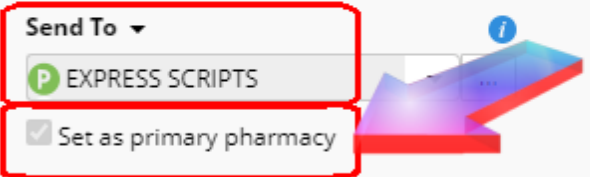
<input type="checkbox"/>				PDF	Name	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Web Sites for and Und...	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		IBS.pdf	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Going Gluten Free.pdf	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Heartburn and GERD....	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Lactose_Content_of_C...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		LOW-FODMAP DIET O...	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		LOW-FODMAP DIET C...	

Publish to Patient Portal

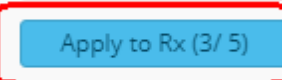
A Long Lost Prescribing Feature is Back At Last

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

Certificate to Prescribe No.

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

Assign Future Requests From Pharmacy To

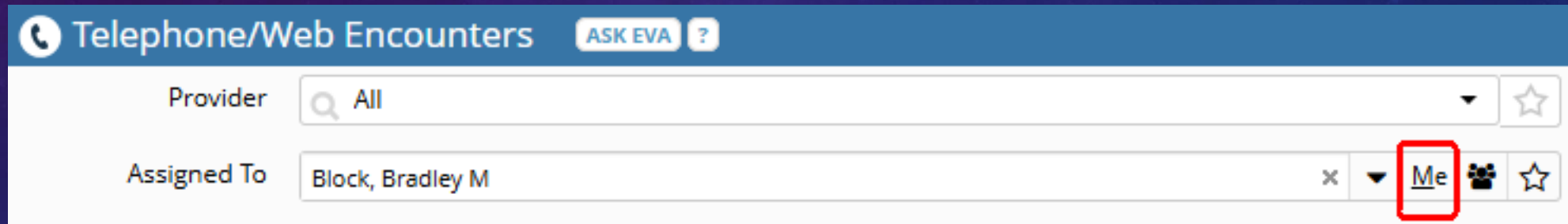
Major Interaction

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 ☎ : 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

☒

BCBS PPS,PPC,BChoi (01-15-2025 to 01-31-2026)

☒

CIGNA (08-01-2024 to 02-28-2027)

☐

FHCP (01-01-2025 to 01-31-2026)

☐

FirstHealth (01-01-2025 to 01-31-2026)

☐

Master Fee Schedule (02-01-2021 to 02-28-2026)

☐

MC-BCBS PPO (01-01-2025 to 01-31-2026)

☒

MEDICARE (01-01-2025 to 01-31-2026)

☒ Show fee column

☐ Show CPTs with atleast one non-zero allowed fee

Select CPT

...

☐ All

Remove All

Item Id	CPT Code	Description	
449	99213	Office Visit, Est Pt., Level 3	
450	99214	Office Visit, Est Pt., Level 4	
451	99215	Office Visit, Est Pt., Level 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	\$147.00	\$147.00	\$147.00	\$147.00	\$147.00
450	99214		\$208.00	\$208.00	\$208.00	\$208.00	\$208.00	\$208.00
451	99215		\$291.00	\$291.00	\$291.00	\$291.00	\$291.00	\$291.00

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

Prev

Page 1 of 1

Next

Close