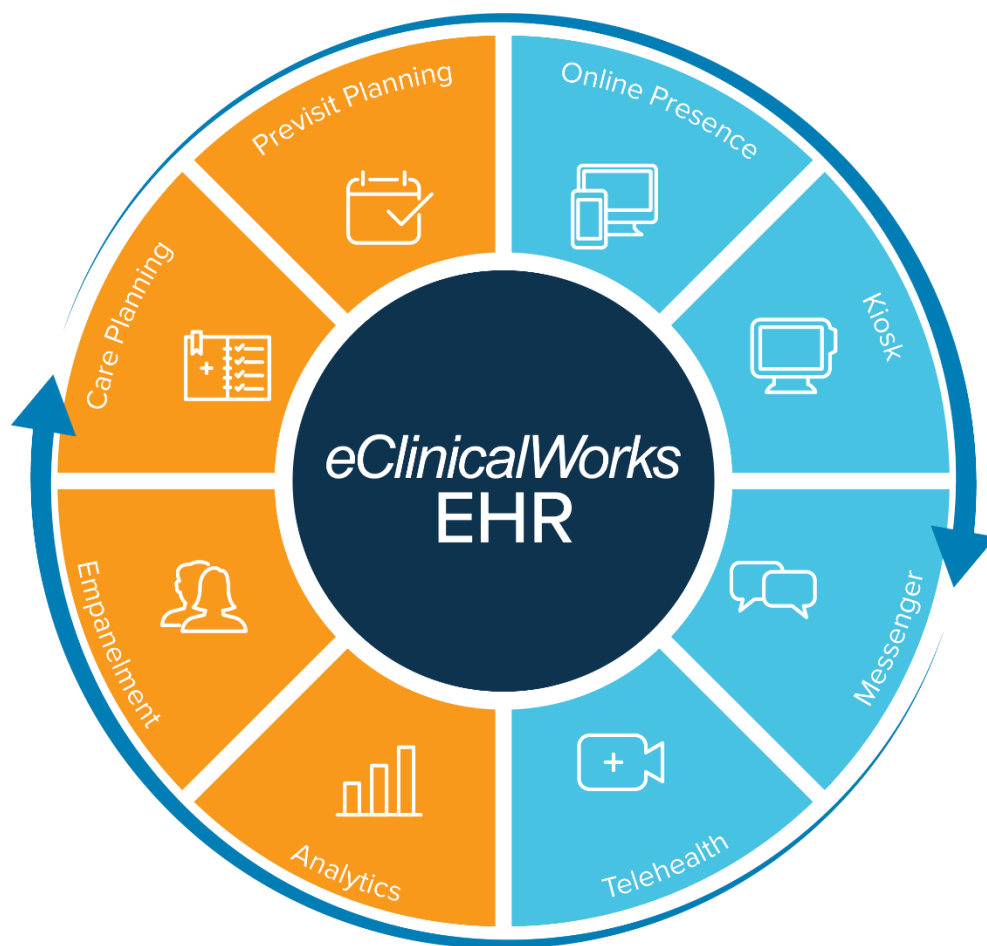


# eClinicalWorks

*Business Analysis Department*



*eClinicalWorks End User Front Office - I*

*Client Name: Katy Trail Community Health Center*

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# Overview of the System

The following sections provide an overview of the eClinicalWorks v11e application.

---

## Logging into eClinicalWorks

### **To log into the eClinicalWorks application:**

1. User logs into Windows and user will see two eCW icons.
2. Staff clicks on the eCW EHR icon.
3. Enter the user *Login ID* and *Password*:
4. Click *Sign in*.

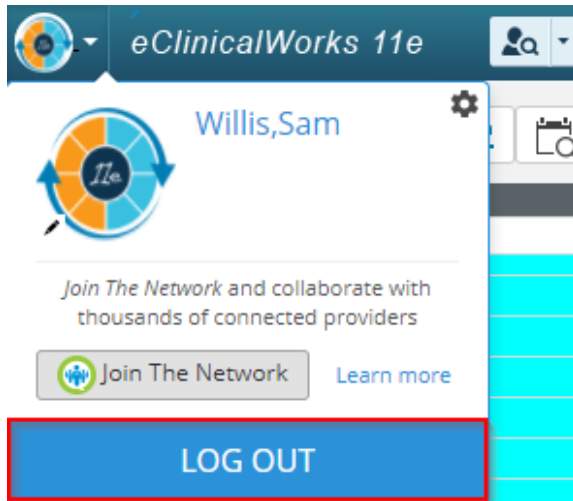
---

## Logging Out of eClinicalWorks

eClinicalWorks highly recommends that users should log out from the application using the *Log Out* button in the Profile window. Using this button ensures the security of the entered data and enables the application to shut down properly.

### To log out of eClinicalWorks:

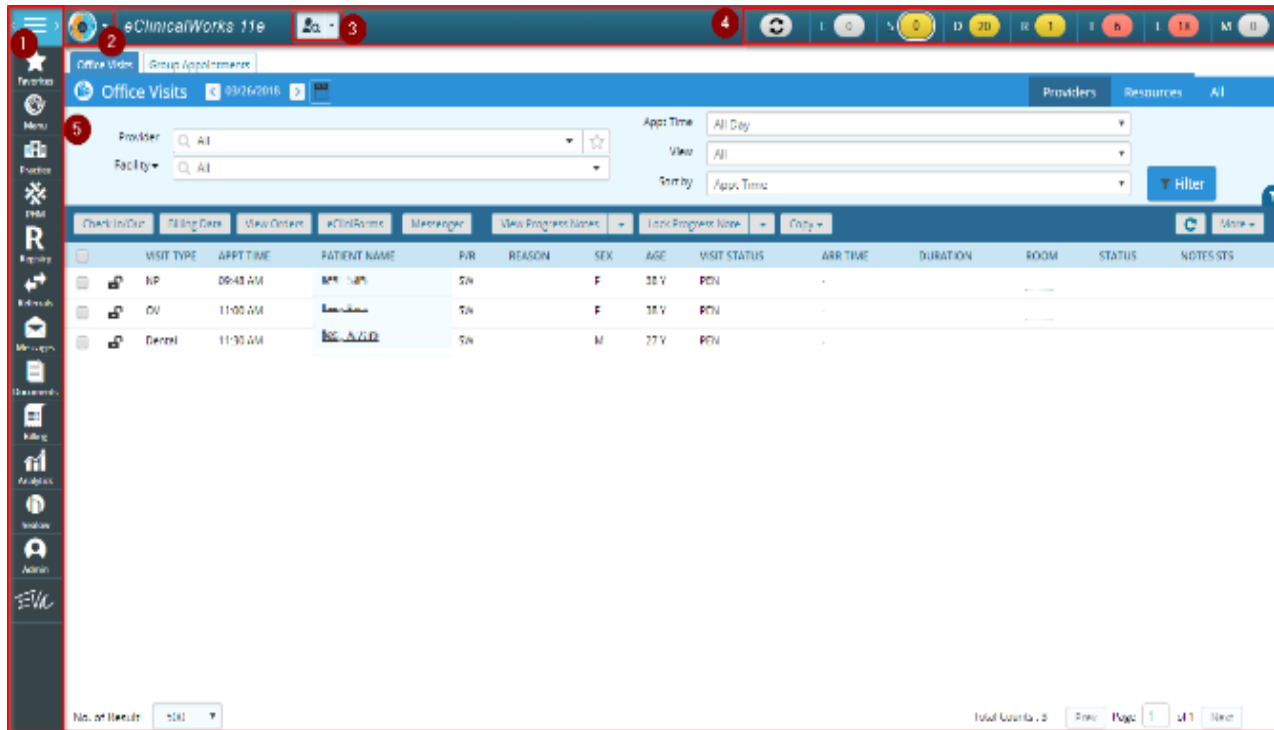
1. Click the Patient photo to display the Profile window.
2. Click *Log Out*:



## eClinicalWorks Workspace

The Top Menu and Left Navigation Bar from previous eCW versions have been redesigned for V11e and replaced with one icon-based *Main Menu* navigation bar, which can be hidden from view when not needed.

the following table describes the eClinicalWorks V11e workspace:












Area	Description
1. <b>Main Menu</b>	<ul style="list-style-type: none"> <li>Click the <i>Main Menu</i> icon to display the eCW Menu and navigation icons.</li> <li>Click the <i>eCW Menu</i>, or a navigation icon to display additional options.</li> </ul> <p>For more information about the eCW Menu, refer to <a href="#">Error! Reference source not found.</a></p>
2. <b>User Profile window</b>	<p>Click the user's photo to display the following:</p> <ul style="list-style-type: none"> <li>User Profile window</li> <li>Edit the profile photo</li> <li>View the user's profile</li> <li>Log out from the application</li> </ul>
3. <b>Patient Lookup icon</b>	Click to look up for patients and access the Patient Hub.

Area	Description
<b>4. Dashboard Taskbar</b>	<p>The taskbar provides a shortcut to information requiring attention and indicates the number and urgency of pending lab results, ePrescription requests, outstanding encounters, outgoing referrals, pending document reviews, and unread messages.</p> <p>For more information about the Dashboard Taskbar, refer to <a href="#">Quick-Launch Buttons or Keys</a>.</p>
<b>5. Workspace</b>	<p>The workspace displays the window related task that the user performs. For example, for the office receptionist checking in patients, the workspace displays the Resource Scheduling window, which displays the day (or week) with appointments and blocked hours.</p>

## Main Menu

Click an icon in the Main Menu to display additional options. Click an *Option* to display the corresponding window.

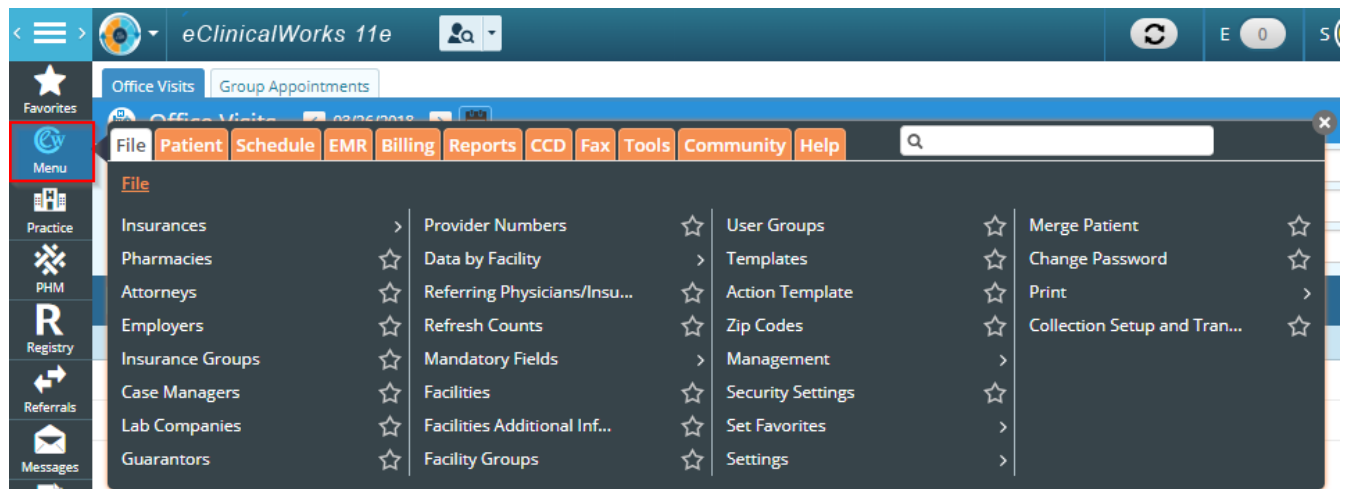
The following table describes the functionality available in each icon:

Icon	Description
 Favorites	Displays menu options configured as favorites by the user for quick access and ease of use. To add a menu option to this Favorites icon, click the adjacent <i>Star</i> icon.
 Menu	<b>eCW Menu</b> Includes all the menu functionality from the Top Menu of previous eCW Versions. For more information about the eCW Menu, refer to <a href="#">Error! Reference source not found.</a>
 Practice	<b>Practice</b> Access various scheduling windows (Resource Schedule, Provider and Resource Schedule), and other short cuts (Progress Notes, Office Visits, Telephone Encounters, Out-of-Office Visits windows).
 PHM	<b>PHM</b> Access CCMR features within eClinicalWorks.
 Registry	<b>Registry</b> Access the recalling system of the application (Lookup Encounter, Patient Recall, etc.)
 Referrals	<b>Referrals</b> Access the outgoing and incoming referrals that have been assigned to the user.
 Messages	<b>Messages</b> Access the internal messaging system and send and receive messages.
 Documents	<b>Documents</b> Access patient documents, faxes, and eCliniForms.
 Billing	<b>Billing</b> Access the billing modules, including the Encounters, Claims, Payments, ERAs, and Batches windows.



## eCW Menu

This icon provides access to the File, Patient, Schedule, EMR, Billing, Reports, Fax, Tools, Community, and Help menus. Use these menus to customize the application for a practice:



The following table describes the options available in the eCW Menu icon:

Tab	Description
<b>File tab</b>	Update the system dictionaries (insurances, pharmacies, facilities, <i>etc.</i> ), and manage security settings, user settings, and other administrative settings.
<b>Patient tab</b>	Look up patients, create new patients, and perform basic patient-related operations.
<b>Schedule tab</b>	Set and block provider or resource schedules.
<b>EMR tab</b>	Customize the EMR system by configuring alerts, labs, diagnostic imaging, Order Sets, <i>etc.</i>
<b>Billing tab</b>	Customize the billing system by organizing codes, creating code groups, and enabling billing options.
<b>Reports tab</b>	Run eBO Reports® within eClinicalWorks (End-of-Day Reports).
<b>CCD tab</b>	Export and import CCD information.
<b>Fax, Tools, and Community tabs</b>	Configure additional administrative settings.
<b>Meaningful Use tab</b>	Access Meaningful User reports.
<b>Help tab</b>	Navigate to the Customer Portal and view current system information.

## Quick-Launch Buttons or Keys


The Dashboard Taskbar consists of menus and buttons that provide quick access to the areas of the application practices use the most. Use the Dashboard Taskbar to access office visits, pending lab results, outstanding encounters, outgoing referrals, pending document reviews, and messages.

The following table describes the functionality available in the Dashboard Taskbar:



Click	Button	Link
<b>E</b>	Click to open the e-Prescription window. The number in the button indicates the number of refill requests waiting for approval. This number only displays for the Providers and not for any other staff member; other staff members will never see this number change from 0.	Click to access electronic prescription options.
<b>N</b>	Click to open the Transcriptions window. The number in the button indicates the number of transcriptions waiting for review.	Open the Transcriptions window to one of the following tabs: <ul style="list-style-type: none"> <li>▪ Dictation in Progress</li> <li>▪ Open</li> <li>▪ To be Reviewed</li> <li>▪ All</li> </ul>
<b>S</b>	Click to open the Office Visits window. The number in the button indicates the number of patients marked as <i>Arrived</i> . This number displays only for providers and not for any other staff member; other staff members will never see this number change from 0.	Click to display the following options: <ul style="list-style-type: none"> <li>▪ Review Progress Notes</li> <li>▪ Office Visits</li> <li>▪ Resource Schedule</li> </ul>
<b>D</b>	Click to open the Review Document window. The number in the button indicates the number of documents assigned to the logged in user by other staff members.	Click to display the following options: <ul style="list-style-type: none"> <li>▪ Fax Inbox</li> <li>▪ Fax Outbox</li> </ul>

Click	Button	Link
<b>R</b>	<p>Click to open the Outgoing Referrals window.</p> <p>The number in the button indicates the number of combined incoming and outgoing referrals. Click the button that has the number to open the Outgoing Referrals window or click on the R itself which will give you a drop down and from there you can select Incoming or Outgoing Referrals. The total number of referrals assigned to the logged-in user displays in parentheses next to each link.</p>	<p>Click to display the following options:</p> <ul style="list-style-type: none"> <li>▪ Incoming</li> <li>▪ Outgoing</li> </ul>
<b>T</b>	<p>Click to open the Telephone or Web Encounters window.</p> <p>The number in the button indicates the number of encounters assigned to the logged in user.</p>	<p>Click to display the following options (the number next to each option indicates the number of encounters of that type assigned to the logged in user):</p> <ul style="list-style-type: none"> <li>▪ Telephone Encounter</li> <li>▪ Web Encounter</li> <li>▪ Accounts</li> <li>▪ Claims</li> <li>▪ Action</li> <li>▪ New Telephone Encounter</li> <li>▪ New Action</li> </ul>
<b>L</b>	<p>Click to open the Labs or DI or Procedures window.</p> <p>The number in the button indicates the number of labs, diagnostic imaging, and procedures assigned to the logged in user.</p>	<p>Click to display the following options (the number next to each option indicates the number of items in that category assigned to the logged in user):</p> <ul style="list-style-type: none"> <li>▪ Labs</li> <li>▪ Imaging</li> <li>▪ Procedures</li> <li>▪ Pending Approval</li> <li>▪ Reconcile</li> </ul>
<b>M</b>	<p>Click to open the Messages window.</p> <p>The number in the button indicates the number of new messages in the inbox of the logged in user.</p>	<p>Click to display the following options:</p> <ul style="list-style-type: none"> <li>▪ Inbox</li> <li>▪ Outbox</li> <li>▪ Deleted Messages</li> <li>▪ Patient Communication</li> </ul>
	<p><b>Note:</b> Messages are not supposed to be patient related, and that unlike the other Quick-Launch buttons, they are private between the sender and recipient.</p>	

Click	Button	Link
	Refresh Count	Click to Refresh Quick-Launch Button Counts.




## Show or Hide Buttons

On the Progress Notes, the Show or Hide buttons enable the user to customize the workspace:



- **Left Show/Hide Button** – Displays, hides, or conditionally hides the Patient Dashboard.
- **Right Show/Hide Button** – Displays, hides, or conditionally hides the Interactive Clinical Wizard (ICW – formerly Right Chart Panel).

Click the *Show* or *Hide* buttons to set the visibility for the Patient Dashboard or ICW:

Color	Description
	Displays the feature always.
	Hides the feature when the user is working in the Progress Notes sections. Click the <i>Expand</i> icon to display this feature temporarily.
	Hides the feature always.

# Patient Lookup and Demographics Windows (Overview)


## The Patient Lookup window and Lookup Options

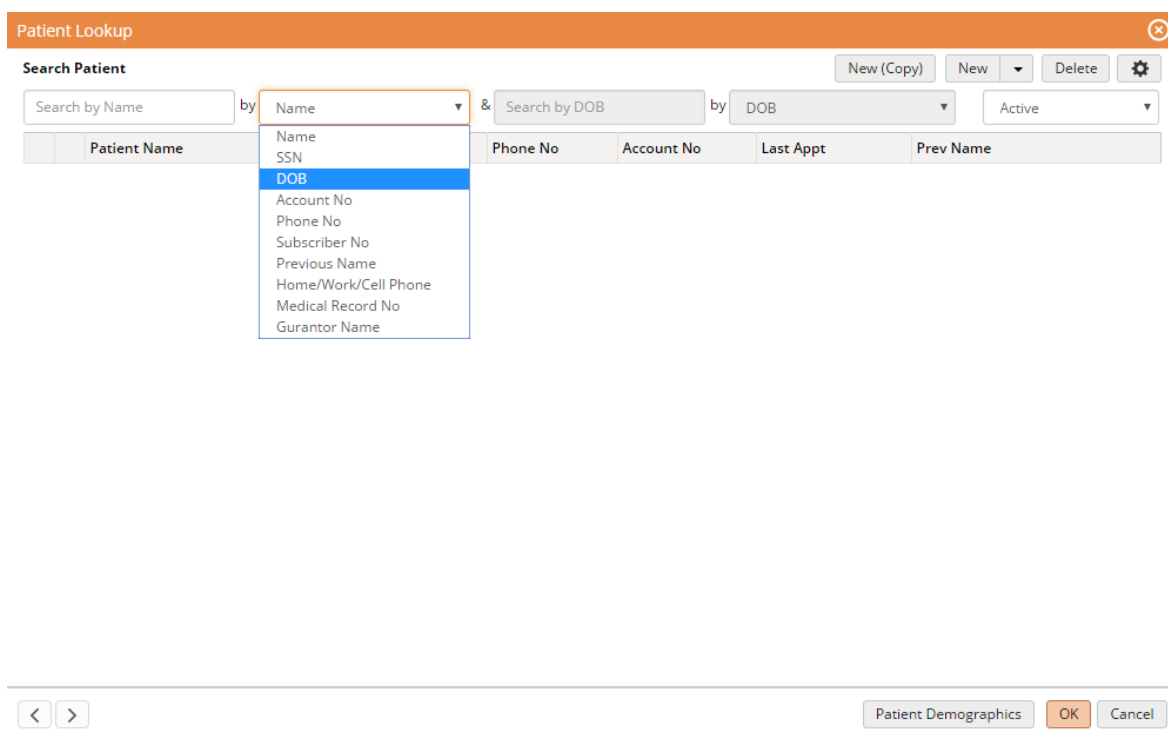
Patient Look-Up Screen allows users to:

- Search for Existing Patients
- Register New Patients
- Access Patients' Demographics and Patients' Hub

## Looking Up a Patient

To look up a patient:

1. Click the Patient Lookup Icon 



2. Select your search criteria from the drop-down options:

- Name
- Date of Birth (DOB)
- Phone Number
- Previous Name
- Medical Records Number
- Account Number
- Insurance Subscriber Number
- Home/Work/Cellphone
- Guarantor Name

3. Type patient information in the search field, this will display a patient list. It will also search in the eEHX directory also. Click on View to show results.

Patient Lookup

Search Patient

Curran

x

by

Name

&

Secondary Search

by

Active

New (Copy)

New

Delete

		Patient Name	DOB	Phone No	Account No	Last Appt	Prev Name
1	<div><div></div><div></div></div>	R Curran, Jeff, P	12/13/1960		9118	04/12/2018	
2	<div><div></div><div></div></div>	R Curran, Martha, M	03/31/1974	561-703-1234	9119	04/04/2018	
3	<div><div></div><div></div></div>	R Curran, Shannen	11/04/1986	232-031-2121	9120	04/02/2018	Pending With Error 2/1

<

>

Patient Demographics

OK

Cancel

## Accessing Patient Demographics

To access Patient Demographics:

Once the patient list appears, highlight the patient name and click on the “Patient Demographics” button.

Patient Lookup

Search Patient

New (Copy)NewDelete

curr| x by Name & Secondary Search by Active

	Patient Name	DOB	Phone No	Account No	Last Appt	Prev Name
1	Curran, Jeff	12/13/1960		9141	04/15/2016	

< >

Patient DemographicsOKCancel

## Patient Information Screen

**Patient Information (Test, BH1, Training)**

Account No: 150885 Prefix: [v]  
 Last Name\*: Test Suffix: [v]  
 First Name\*: BH1 MI: Training  
 Previous Name: [v]  
 Preferred Name: [v]  
 Address Line 1\*: 12345 Street  
 Address Line 2: [v]  
 City\*: Las Cruces [v] Validate  
 State\*: NM Zip\*: 88005 Country: US [v]  
 Home Phone\*: 575-555-5555 Cell No: 575-555-5555  
 Work Phone: [v] Ext: [v]  
 Email\*: xyz@eclinicalworks.com [v] Not Provided  
 Last Appt: 02/09/2012 08:15 Am

Date Of Birth\*: 07/01/1971 Age: 47Y  
 Sex\*: Female [v] S.O./G.I.  
 SSN: 000-00-0000 [v] Not Provided  
 Parent Info: [v] Select Set Emergency Contact  
 Resp Party\*: Test, BH1 Training DOB: 07/01/1971 Age: 47Y Sex: female Home: 575-555-5555  
 Relation: 1 [v] Self - patient is the insured  
 Family Hub: [v] Select Remove  
 Emergency Contact: [v]  
 Acct Balance: 0.00 [v] Details Gr.Bal  
 Pt Balance: 0.00 [v] Acc Inquiry  
 Next Appt: [v]

PCP\*: [v] [v] [v]  
 Referring Provider: [v] [v] [v]  
 Rendering Pr./PCG: [v] [v] [v]  
 Marital Status: Single [v]  
 Language\*: English [v]  
 Translator: [v]  
 Race\*: Hispanic [v]  
 Ethnicity\*: Hispanic Or Latino [v]  
 Characteristic: [v]  
 Birth Order: [v]  
 Release of Info\*: Y [v]  
 Rx History Consent\*: N [v] Scan  
 Signature Date\*: [v]  
 Advance Directive: [v]  
 Emp Status: [v] (None Sele...  
 Student Status: [v] (None Sele...  
 Gestational Age: [v]

Insurance (0) Pharmacies (0) Contacts Attorneys Case Management Circle of Care  
 Self Pay Sliding Fee schedule [v] Add Update  
 Name State Subscriber No Rel Insured Co Pay Group No  
 Additional Information [v] Alert Misc Info Options [v] OK Cancel

**S.O./G.I. for (Test, BH1 Training, 47) 01 Jul 1971 Account No: 150885**

Birth Sex: [v] Male [v] Female [v] Unknown  
 Sexual Orientation: [v] [v] [v] [v] [v] [v] [v]  
 Name SNOMED Code  
 [v] Lesbian, gay or homosexual 38628009  
 [v] Straight or heterosexual 20430005  
 [v] Bisexual 42035005  
 [v] Do not know UNK  
 [v] Choose not to disclose ASKU  
 [v] Something else, please describe OTH  
 Gender Identity: [v] [v] [v] [v] [v] [v] [v]  
 Name SNOMED Code  
 [v] Male 446151000124109  
 [v] Female 446141000124107  
 [v] Female-to-Male (FTM) / Transgender Male/Trans Man 407377005  
 [v] Male-to-Female (MTF) / Transgender Female/Trans Woman 407376001  
 [v] Genderqueer, neither exclusively male nor female 446131000124102  
 [v] Choose not to disclose ASKU  
 [v] Additional gender category or other, please specify OTH  
 Transgender [v]  
 Logs [v] OK Cancel

### NOTE:

- Select the appropriate language.
- If the patient needs a translator, please check the box off next to 'Translator'
- If the patient doesn't have an email id, it could be marked as 'Not Provided'. Patients under the age of 13 do not get to sign up for their own portal.



The screenshot shows a patient information form with fields for Prefix (Ms.), Suffix, MI, Address Line 1 (Boca Rio Dr), City (Boca Raton), State (FL), Zip (33433), Country (US), Home Phone (561-703-1234), and Cell No. A profile picture upload overlay is visible, showing a placeholder image and four icons: a left arrow, a camera, a trash can, and a right arrow. The camera icon is highlighted with an orange box.

- **To Capture a patient's picture, click on the 'capture' button and use the webcam to take the patient's picture (Not every patient at Ezras will want to share their picture but this only applies to those who does)**

### Patient Additional Information Screen

To access *Additional Demographics Information*, click the "Additional Information" button.

The screenshot shows the "Patient Information (Curran, Jeff) - Additional Information" screen. The "General Information" tab is selected. The "Structured" section on the right is highlighted with an orange box and contains a table with the following data:

Name	Value	Notes
<input type="checkbox"/> Veteran		
<input type="checkbox"/> Seasonal		
<input type="checkbox"/> Migrant		
<input checked="" type="checkbox"/> Homeless	Yes	
<input type="checkbox"/> Homeless	Street	
Statu ...		
<input type="checkbox"/> Limited Englis ...		
<input type="checkbox"/> Public Housing		
<input type="checkbox"/> Reason patient ...		
<input type="checkbox"/> Date of inellg ...	Mm/Dd/Yyyy	

The "General Information" tab also contains fields for Street Address, Employer Address, Deceased status, and various other patient details. The "Structured" section is highlighted with an orange box.

## Understanding Demographics Mandatory Fields

In the Patient Demographics Screen, mandatory information is marked with an asterisk: \*

**NOTE:** There are mandatory fields in the “Additional Information” and “Structured data” that needs to be addressed.

All of these fields must be filled in to complete the registration process

Users will not be able to register a patient without completing these fields.

The screenshot displays the 'Patient Information (Test, BH1, Training)' form. Mandatory fields are indicated by an asterisk (\*) and highlighted with red boxes. The form is organized into several sections:

- Account Information:** Account No (150885), Prefix, Suffix, Last Name (Test), First Name (BH1), MI, Training.
- Address Information:** Address Line 1\* (12345 Street), Address Line 2, City (Las Cruces), State\* (NM), Zip\* (88005), Country (US).
- Phone Information:** Home Phone\* (575-555-5555), Cell No (575-555-5555), Work Phone, Ext.
- Email Information:** Email\* (xyz@clinicalworks.com), Not Provided checkbox.
- Date and Age:** Date of Birth\* (07/01/1971), Age (47Y).
- Gender and S.O./G.I.:** Sex\* (Female), S.O./G.I.\*.
- SSN:** SSN (000-00-0000), Not Provided checkbox.
- Parent Info:** Select, Set Emergency Contact.
- Reso Party\*:** Test, BH1 Training, DOB: 07/01/1971, Age: 47Y, Sex: Female, Home: 575-555-5555.
- Relation:** 1, Self - patient is the insured.
- Emergency Contact:** Family Hub, Select, Remove.
- Acct Balance:** 0.00, Details, Gr. Bal.
- Pt Balance:** 0.00, Acc Inquiry.
- Next Appt:**
- Insurance:** Insurance (0), Self Pay, Sliding Fee schedule, Add, Update.
- Table:** A table with columns: Name, State, Subscriber No, Rel, Insured, Co Pay, Group No.
- Additional Information:** Alert, Misc Info, Options.
- Structured Data:** PCP\*, Referring Provider, Rendering Pr./PCG, Marital Status (Single), Language\* (English), Race\* (Hispanic), Ethnicity\* (Hispanic Or Latino), Characteristic, Birth Order, Release of Info.\* (Y), Rx History Consent\* (N), Signature Date\*, Advance Directive, Emp Status, Student Status, Gestational Age.

Buttons at the bottom include 'Additional Information', 'Alert', 'Misc Info', 'Options', 'OK', and 'Cancel'.

S.O./G.I. for (Test, BH1 Training,47 01 Jul 1971 Account No: 150885)

**Birth Sex** ☐ Male ☒ Female ☐ Unknown

**Sexual Orientation**

	Name	SNOMED Code
<input type="radio"/>	Lesbian, gay or homosexual	38628009
<input type="radio"/>	Straight or heterosexual	20430005
<input checked="" type="radio"/>	Bisexual	42035005
<input type="radio"/>	Do not know	UNK
<input type="radio"/>	Choose not to disclose	ASKU
<input type="radio"/>	Something else, please describe	OTH

**Gender Identity**

	Name	SNOMED Code
<input type="checkbox"/>	Male	446151000124109
<input checked="" type="checkbox"/>	Female	446141000124107
<input type="checkbox"/>	Female-to-Male (FTM) / Transgender Male/Trans Man	407377005
<input type="checkbox"/>	Male-to-Female (MTF) / Transgender Female/Trans Woman	407376001
<input type="checkbox"/>	Genderqueer, neither exclusively male nor female	446131000124102
<input type="checkbox"/>	Choose not to disclose	ASKU
<input type="checkbox"/>	Additional gender category or other, please specify	OTH

☐ Transgender

Logs **OK** Cancel

Note: For UDS requirements, patient age, gender, Race/Ethnicity and language must be captured.

## Accessing Patient Hub

To access the Patient Hub:

1. Lookup the desired patient from the patient lookup screen.
2. Click on the patient's name.

The screenshot shows the 'Patient Lookup' window. At the top, there's a search bar with 'Curran' entered. A red circle with the number '1' is around the search bar. Below the search bar, there's a table of results. The table has columns: Patient Name, DOB, Phone No, Account No, Last Appt, and Prev Name. The first two rows are highlighted with a red box. A red circle with the number '2' is around the second row, which is 'Curran, Martha, M'. At the bottom right, there are buttons for 'Patient Demographics', 'OK', and 'Cancel'.

	Patient Name	DOB	Phone No	Account No	Last Appt	Prev Name
1	Curran, Jeff, P	12/13/1960		9118	04/12/2018	
2	Curran, Martha, M	03/31/1974	561-703-1234	9119	04/04/2018	
3	Curran, Shannen	11/04/1986	232-031-2121	9120	04/02/2018	Pending With Error 2/1

### 3. Patient Hub displays:

**Patient Hub (Curran, Martha, M)**

**Curran, Martha, M 44Y, F** INFO R

6417 Boca Rio Dr, Boca Raton, FL 33433  
 561-703-1234 | 561-703-1234 | 561-703-1234  
 jeff.curran@eclinicalworks.com | 03/31/1974  
 Account No: 9119 | Messenger Enabled: Yes

Advanced Directive :  
 Insurance : UNITED Healthcare  
 Last vMsg : 2009/02/06 00:40:20 ,...  
 PCP : Willis, Sam  
 Rendering Pr : Willis, Sam

**Billing**  
 Patient Balance : (\$50.00)  
 Collection Balance :  
 Account Balance : \$2.40  
 Collection Status :  
 Assigned to :  
 Billing Alert Guarantor Balance  
 Account Inquiry Billing Logs

**Appointments**  
 Last Appointment : 04/04/2018 09:45 AM  
 Facility : WMA:Westborough Medi  
 Next Appointment :  
 Facility :  
 Bumped Appt: NONE Case Manager Hx:  
 New Appointment

**Structured Data**

Color of Hair	Blonde	Labs	0	DI	0	Referrals	0
Color of Eyes	Blue	Actions	0	Tel Enc	0	Web Enc	0
		Docs	0	P2P	0		

Progress Notes Patient Docs Action New Tel Enc  
 Medical Summary Devices Logs New Web Enc  
 Medical Record Consult Notes Letters Send Message  
 Problem List Flowsheets Print Labels Messenger  
 eCliniForms Dental Exam

**Overview** DRTLA History CDSS

Curran, Martha, M, 44Y, F as of 04/13/2018  
 Problem List SNOMED

**Global Alerts**  
 Reminder  
 Additional Time  
 Insurance Alert

**Advance Directive**

**Problem List** All  
 530.81 Esophageal reflux  
 250.00 Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled

**Medication Summary**  
 Group By: Medication -- All --  
 Amoxicillin 125 MG/5ML Suspension Reconstituted: Taking  
 Coumadin 2.5 MG Tablet: Start  
 Crestor 20 MG Tablet: Start  
 Gaviscon 80-20 MG Tablet Chewable: Taking  
 Levaquin 500 MG Tablet: Start  
 Nexium 20 MG Capsule Delayed Release: Taking  
 Zetia 10 MG Tablet: Taking

**Allergies**  
 N.K.D.A.

**Immunizations**

### Patient Hub

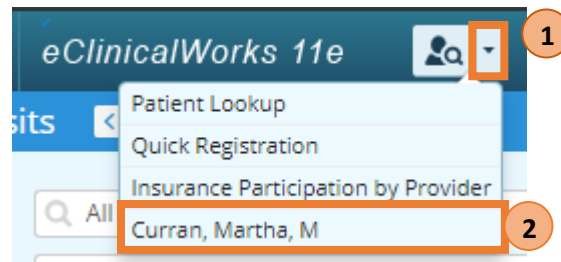
#### Note:

- The Patient Hub displays basic demographics, clinical and financial information.
- The Hub also allows the user to perform tasks associated with the patient:  
 (Ex: create a Telephone Encounter, Letter, New Appointment, etc.)

## Quick Access to the Patient Hub

The system will store up to 5 *previously viewed* patients. Take the following steps to quickly access their Patient Hub:

1. Click on the arrow next to the Patient Lookup icon.
4. Click on the patient name.



**Patient Hub (Curran, Martha, M)**

**Curran, Martha, M 44Y, F** INFO R Q

6417 Boca Rio Dr, Boca Raton, FL 33433  
561-703-1234 | 561-703-1234 | 561-703-1234  
jeff.curran@eclinicalworks.com | 03/31/1974  
Account No: 9119 | Messenger Enabled: Yes

Advanced Directive :  
Insurance : UNITED Healthcare  
Last vMsg : 2009/02/06 00:40:20 , ...  
PCP : Willis, Sam  
Rendering Pr : Willis, Sam

**Billing**

Patient Balance : (\$50.00)  
Collection Balance :  
Account Balance : \$2.40  
Collection Status :  
Assigned to :  
Billing Alert  
Guarantor Balance  
Account Inquiry  
Billing Logs

**Appointments**

Last Appointment : 04/04/2018 09:45 AM  
Facility : WMA:Westborough Medi  
Next Appointment :  
Facility :  
Bumped Appt: NONE Case Manager Hx:  
New Appointment

**Structured Data**

Color of Hair : Blonde  
Color of Eyes : Blue

Labs 0 0 0  
DI 0  
Referrals 0  
Actions 0 0 0  
Tel Enc 0  
Web Enc 0  
Docs 0  
P2P 0

Progress Notes Patient Docs Action New Tel Enc  
Medical Summary Devices Logs New Web Enc  
Medical Record Consult Notes Letters >> Send Message  
Problem List Flowsheets Print Labels Messenger  
eClniForms >> Dental Exam

**Overview** DRTLA History CDSS

Curran, Martha, M, 44Y, F as of 04/13/2018  
Problem List SNOMED

**Global Alerts**

Reminder  
Additional Time  
Insurance Alert

**Advance Directive**

**Problem List** All

530.81 Esophageal reflux  
250.00 Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled

**Medication Summary**

Group By: Medication -- All --

Amoxicillin 125 MG/5ML Suspension Reconstituted: Taking  
Coumadin 2.5 MG Tablet: Start  
Crestor 20 MG Tablet: Start  
Gaviscon 80-20 MG Tablet Chewable: Taking  
Levaquin 500 MG Tablet: Start  
Nexium 20 MG Capsule Delayed Release: Taking  
Zetia 10 MG Tablet: Taking

**Allergies**

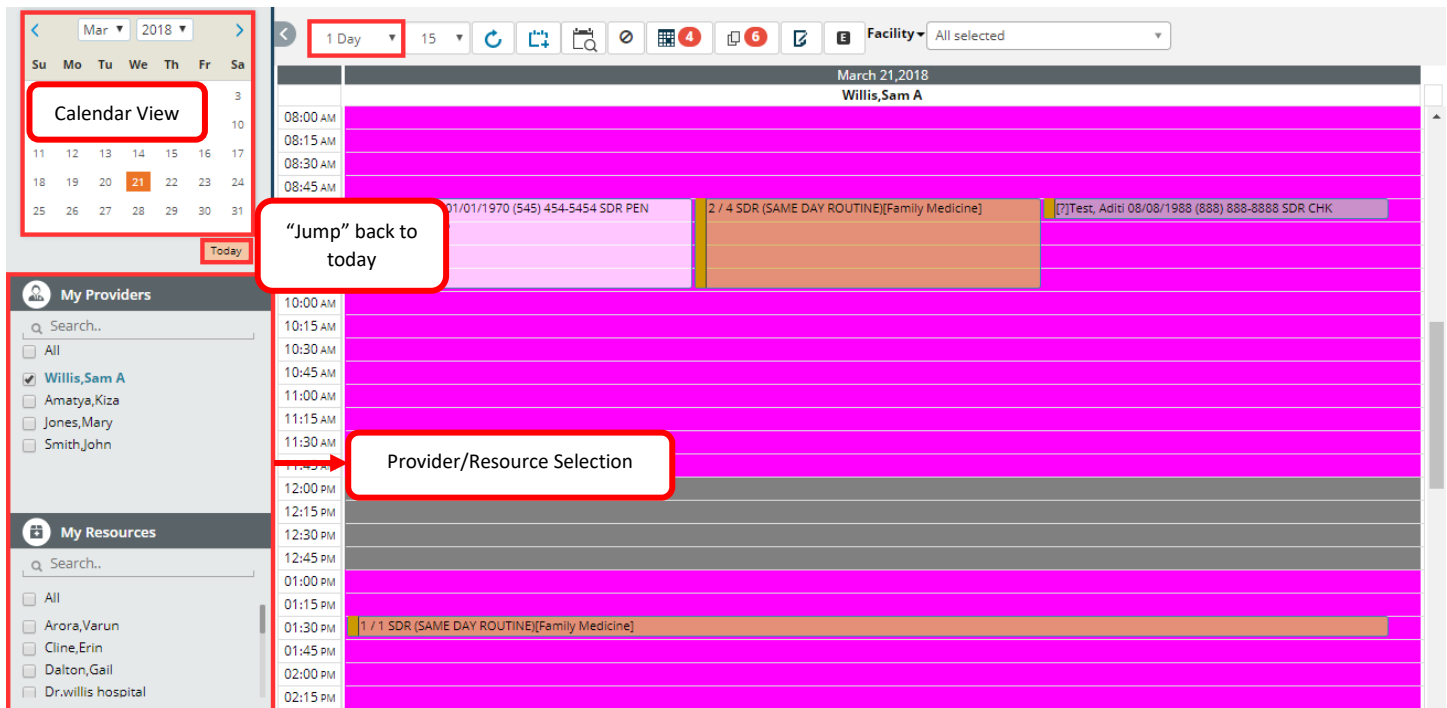
N.K.D.A.

**Immunizations**

# The Resource Schedule

## Overview

The Resource Schedule screen is the “Home Screen” for the front office staff. This screen allows users to schedule appointments, check patients in and out, confirm appointments, and cancel appointments. The Resource Schedule can be accessed by clicking on the resource scheduling icon from the Practice Band or by hovering over the ‘S’ and choosing ‘Resource Schedule.’



### Note:

- A user can choose to view the schedule for multiple providers/resources from the Resource Schedule screen
- You can “jump” to a specific date by right-clicking on the Resource Schedule and selecting “Go To Date” (see below)

## Scheduling an Appointment

### To schedule an appointment:

1. Select the date from the calendar.
2. Select the Provider(s)/Resource(s) on whose schedule the appointment needs to be booked.
3. Double click on the desired time slot.
4. Select the Patient.
5. Select the Visit Type.
6. Document the Reason of the Visit.
7. (Optional) Document any General and/or Billing Notes.
8. Facility, Provider, Resource, and Time will be calculated automatically.
9. Click 'OK.'

The screenshot shows the 'Appointment on Wednesday, March 21, 2018' window. It is divided into several sections: Patient, Appointment, Visit, Billing, and a bottom navigation bar. Numbered callouts highlight specific fields: 4 points to the Patient search bar containing 'Jeff, P'; 5 points to the Visit Type dropdown menu; 6 points to the Reason text field; 7 points to the General Notes text area; 8 points to the Provider and Resource dropdown menus; and 9 points to the OK button in the bottom right corner. The interface includes various other fields like Date, Time, Facility, and POS, as well as buttons for 'Info', 'Hub', and 'New PT.'.



## Additional Buttons and Sections on the Appointment Window

1. Claim Provider allows you to configure billing related information. (Rendering, pay to, and supervising provider)
2. Visit Status allows you to change the status of the appointment. (Pending, Confirmed, Arrived, Canceled, etc.)
3. Case Manager allows you to add workers comp information to the appointment.
4. Add any billing related information to Billing Notes.
5. Document general information about the appointment or patient with General Notes. (Patient is running late, owes money from last visit, needs forms updated, etc.)
6. Appointment Right Chart Panel allows you to view and collect payments from the patient.
7. Change co-pay for this visit allows you to manually change the copay for today's encounter.
8. Manually mark appointments as non-billable by checking off 'Non-billable visit.'
9. For dental visit Treatment plan will be accessible to select the procedures to be done for the visit. (Treatment plan needs to be created from the initial visit for this button to be available)

Appointment on Wednesday, March 21, 2018

Patient\*  x Name   ☐ New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | saipramodm@gmail.com |

### Appointment

Facility\*  POS  Provider\*   1

Dept  Resource\*  Email

Date\*  Time\*

### Visit

Visit Type\*  Reason

Visit Status  2

### Billing

Open Cases  Case Manager  3

Billing Notes  4

General Notes  5

Co-Pay/ Claim changes for this visit only 7

☐ Change co-pay for this visit

☐ Non-billable visit 8

Encounters

Charge Details eCliniForms Rx Eligibility Misc Info Save And View **Treatment Plan** 9

Jeff P  
03/21/2018 08:00 AM

**Registration Rules**  
No registration rules to show

**Charges & Co-pay Details**

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

**Patient Account Summary**

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

**Insurance Eligibility**  
Not Verified

**RX Eligibility**

## Rescheduling, Cancelling, and Marking Appointments as a No-Show

### To Cancel an Appointment:

1. Navigate to the Resource Schedule.
2. Select the desired Provider/Resource.
3. Select the date of the appointment from the calendar.
4. Locate and double-click the appointment.
5. Change the Visit Status to 'CANC (Cancelled).'
6. Document the Reason for the cancellation under the General Notes section.
7. Click 'OK.'

Appointment on Wednesday, March 21, 2018

Patient\*  x Name ▾   ☐ New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | jeffcurran@gmail.com

### Appointment

Facility\*  POS  Provider\*

Dept  Resource\*

Date\*  Time\*

### Visit

Visit Type\*  Reason

Visit Status  Diagnosis

### Billing

Open Cases

Billing Notes

General Notes

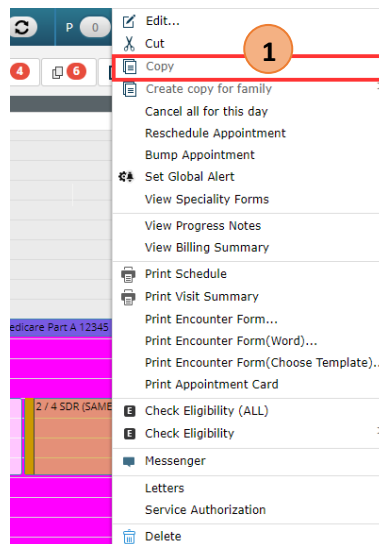
Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit

## To Reschedule an Appointment:

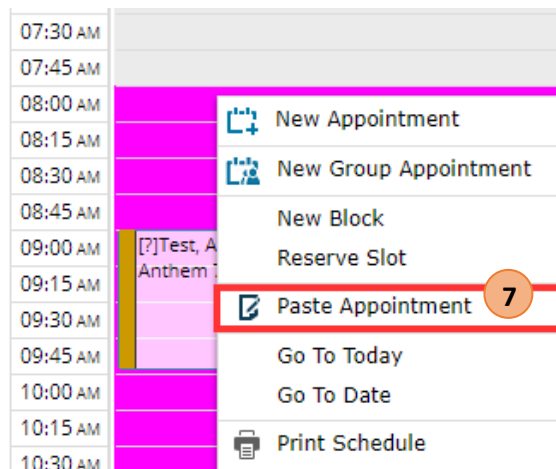
1. Right-click on the original appointment and select 'Copy.'



2. Double-click on the original appointment.
3. Change the Visit Status to 'R/S (Rescheduled).'
4. Document the reason for rescheduling under General Notes.
5. Click 'OK.'

A screenshot of a web-based appointment management form titled 'Appointment on Wednesday, March 21, 2018'. The form contains several sections: 'Appointment' with fields for Facility (Westboro Medical), POS (11), Date (03/21/2018), Time (08:00 am), Provider (Sam), and Resource (Sam A); 'Visit' with Visit Type (F/U (Follow Up Visit)) and Visit Status (R/S (Rescheduled), circled with a red box and a circled '3'); 'Billing' with Open Cases and Billing Notes; and 'General Notes' (circled with a red box and a circled '4'). At the bottom, there are buttons for 'Encounters', 'Find', 'Logs', 'Referrals', 'Orders', 'Checkout', 'Bubblesheet', 'Charge Details', 'eCliniForms', 'Rx Eligibility', 'Misc Info', 'Save And View', 'Treatment Plan', 'OK' (circled with a red box and a circled '5'), and 'Cancel'. The 'OK' button is highlighted with a red box.

6. Select the new date and time on the Resource Schedule.
7. Right click on the slot and select 'Paste Appointment.'



8. Open the newly created appointment and make any necessary adjustments.
9. Click 'OK' to save and exit the appointment window.

## Documenting No-Shows:

1. Go to the Resource Schedule.
2. Select the desired Provider/Resource.
3. Select the date of the appointment.
4. Locate and double-click the appointment.
5. Change the visit status to 'N/S (No-Show).'
6. Click 'OK.'

Appointment on Wednesday, March 21, 2018

Patient\*  x Name ▾ Info Hub ☐ New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | @gmail.com |

**Appointment**

Facility\*  POS  Provider\*  Resource\*  Email

Dept  Date\*  Claim Provider Time\*

**Visit**

Visit Type\*  Reason  ...

Visit Status  Diagnosis  Transition Of Care

**Billing**

Open Cases  Case Manager N

Billing Notes  S

General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit

Encounters Find Logs Referrals Orders Checkout Bubbleshe OK Cancel


### Note:

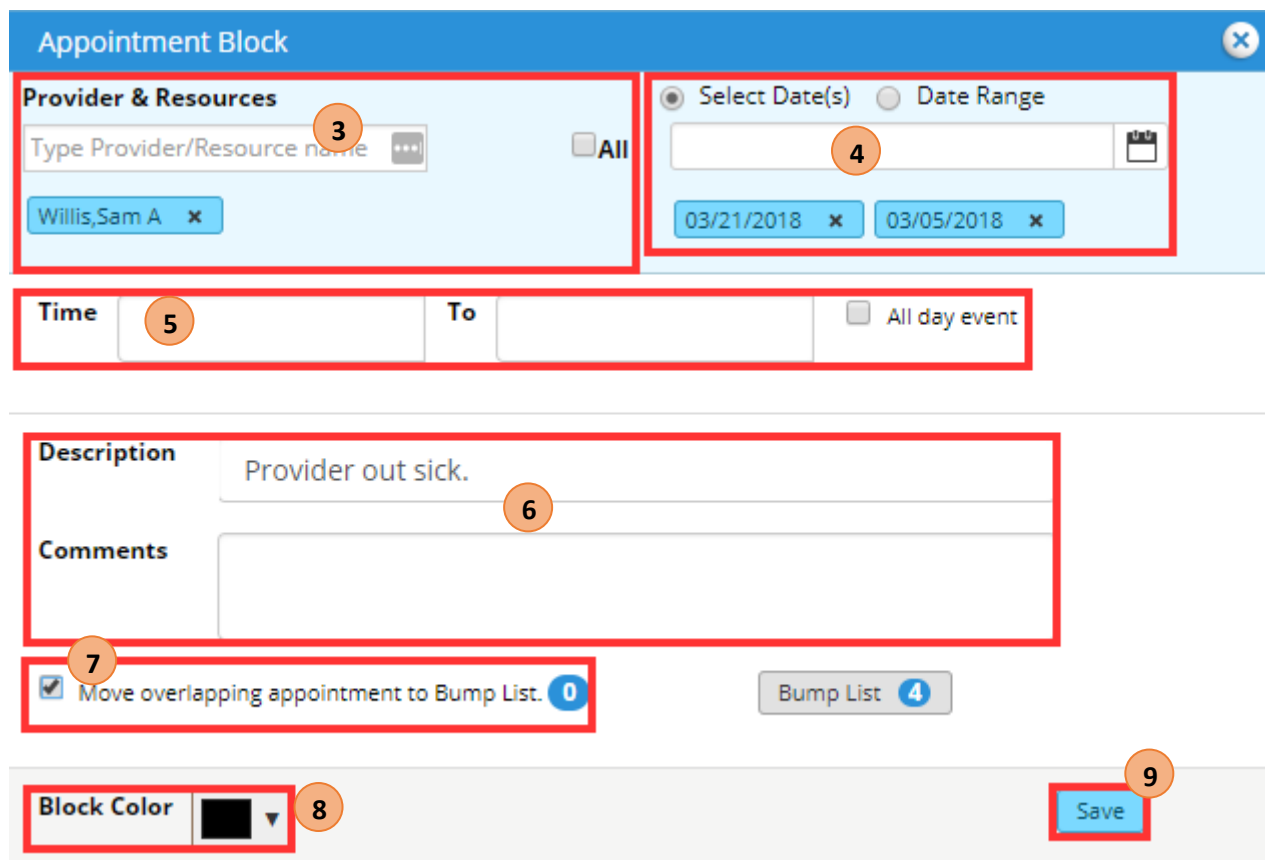
- **Do not delete** a Cancelled, Rescheduled or a No-Show appointment, as you will not be able to run a report on the number of those appointments.
- An appointment **cannot** be marked as Cancelled, Rescheduled, or No-Show if there are any charges associated with the appointment (co-pay or self-pay). The payment collected will have to be deleted before the appointment can be marked with one of those statuses.

## Bumping Appointments

The “Bump Appointment” feature can be used to create a list that contains all scheduled patients who the Provider/Resource was unable to see that day. Multiple appointments can be bumped when blocking the provider’s schedule.

### To bump multiple appointments:

1. Launch the Resource Schedule Screen.
2. Click on the block icon. 
3. Select the provider(s) or resource(s) that need to be blocked.
4. Select the date/date range for the block.
5. Select the time for the block.
6. Document a description and any comments for the block.
7. Check the box next to ‘Move overlapping appointments to Bump List’ to bump all appointments within that date/time range.
8. Select a color for the block.
9. Click ‘Save.’

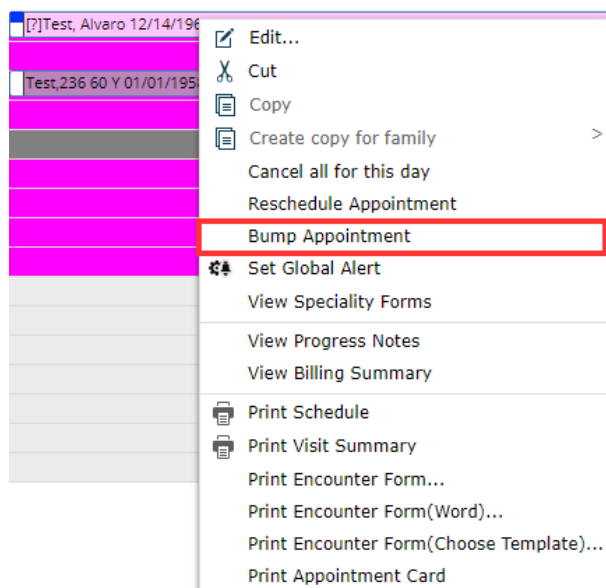


The image shows a screenshot of the "Appointment Block" form with numbered callouts 1 through 9 indicating the steps for creating a block. The form is divided into several sections:

- Provider & Resources:** Includes a text input field for "Type Provider/Resource name" (callout 3) and a dropdown menu showing "Willis, Sam A" (callout 3). There is also an "All" checkbox.
- Date Selection:** Includes radio buttons for "Select Date(s)" (selected) and "Date Range". Below are date pickers for "03/21/2018" (callout 4) and "03/05/2018" (callout 4).
- Time Selection:** Includes "Time" (callout 5) and "To" (callout 5) fields, and an "All day event" checkbox.
- Description:** A text area for "Description" (callout 6) containing the text "Provider out sick." (callout 6).
- Comments:** A text area for "Comments" (callout 6).
- Bump List:** Includes a checkbox for "Move overlapping appointment to Bump List." (callout 7) which is checked, and a "Bump List" button (callout 4).
- Block Color:** A color selection dropdown (callout 8) showing a black color.
- Save:** A "Save" button (callout 9).

### To bump single appointments:

1. Right-click on the desired appointment.
2. Select 'Bump Appointment.'



## Managing the Bump List

The Bump List can be managed by clicking on the Bump List icon from the *Resource Schedule*.



- The number on the Bump icon displays the *number of bumped appointments*.
- Appointments from the Bump List can then be *rescheduled* as required.

The screenshot shows the 'Bump List' window with a table of appointments. Annotations include:

- A red box around the 'Bump List' icon in the top left, with a callout: "Click here to reschedule the appointment. The system will display available slots for the provider."
- A red box around the 'Bump List' icon in the top right, with a callout: "Restore the appointment to its original slot."
- A red box around the 'Messenger' button at the bottom left, with a callout: "An SMS can be sent to patients regarding their appointment using the Messenger button."

The table contains the following data:

	Patient	Provider	Resource	Visit Type	Notes	Appt Date	Start Time	End Time	Phone	User
		Sam A	Sam A	Ann Visit	...	2017-08-11	09:00:00	09:15:00	713-5...	sam
		Sam A, Kiza	Sam A, Kiza	ESTPT	...	2017-09-08	09:00:00	09:15:00	713-5...	sam
		Mary	Mary	ESTPT	...	2017-09-08	12:00:00	12:15:00	999-8...	sam
					...	2017-09-13	15:00:00	15:10:00	333-3...	sam

At the bottom, there is a 'Total Counts : 4' and a 'Page 1 of 1' indicator. A 'Select appointment and paste on slot to reschedule.' instruction is also present.



# Appointment Preparation

## Printing a Provider Schedule

To Print a Provider/Resource schedule:

1. From Menu Band select File → Print → Print Schedule.
2. Select the Provider/Resource.
3. Select the date range.
4. Select the 'Sort By' order.
5. Select the facility.
6. Click the printer icon to print or 'Export.'

The screenshot shows the 'Print Schedule' dialog box with the following elements and numbered callouts:

- 1**: The title bar of the dialog box.
- 2**: The 'Display Providers & Resources at Facility' dropdown menu, currently showing 'Westboro Medical Associates'.
- 3**: The 'Provider(s) & Resource(s)' dropdown menu, currently showing 'All selected'.
- 4**: The date range selection area, showing 'From 03/21/2018' and 'To 03/21/2018' with calendar icons.
- 5**: The 'Sort By (Sort option Applies to print only)' dropdown menu, currently showing 'Appointment Date, Time'.
- 6**: The 'Print Schedule for the Facility' dropdown menu, currently showing 'All'.
- 7**: The 'Print Non Billing Visits' checkbox, which is currently unchecked.
- 8**: The 'Print Schedule for the Facility' dropdown menu, currently showing 'All'.
- 9**: The 'Print' button (printer icon) and the 'Export' button.
- 10**: The 'Cancel' button.

## Using Insurance Eligibility (IE Button and Right Chart Panel)

Insurance Eligibility is used to verify if a patient is eligible for insurance coverage on a specific date. Insurance Eligibility can be run 2 ways:

1. Individual – Right-click on the patient's appointment then select 'Check Eligibility' or you can check it from the right chart panel in the appointment window.

Appointment on Wednesday, March 21, 2018

Patient\*  x Name   ☐ New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | saipramodm@gmail.com

**Appointment**

Facility\*  POS  Provider\*  Resource\*  Email

Dept  Date\*  Claim Provider Time\*

**Visit**

Visit Type\*  Reason  Visit Status  Diagnosis

**Billing**

Open Cases  Case Manager  Billing Notes  S

General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit  ☐ Non-billable visit

**Insurance Eligibility**

03/21/2018 08:00 AM

**Registration Rules**

No registration rules to show

**Charges & Co-pay Details**

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

**Patient Account Summary**


Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

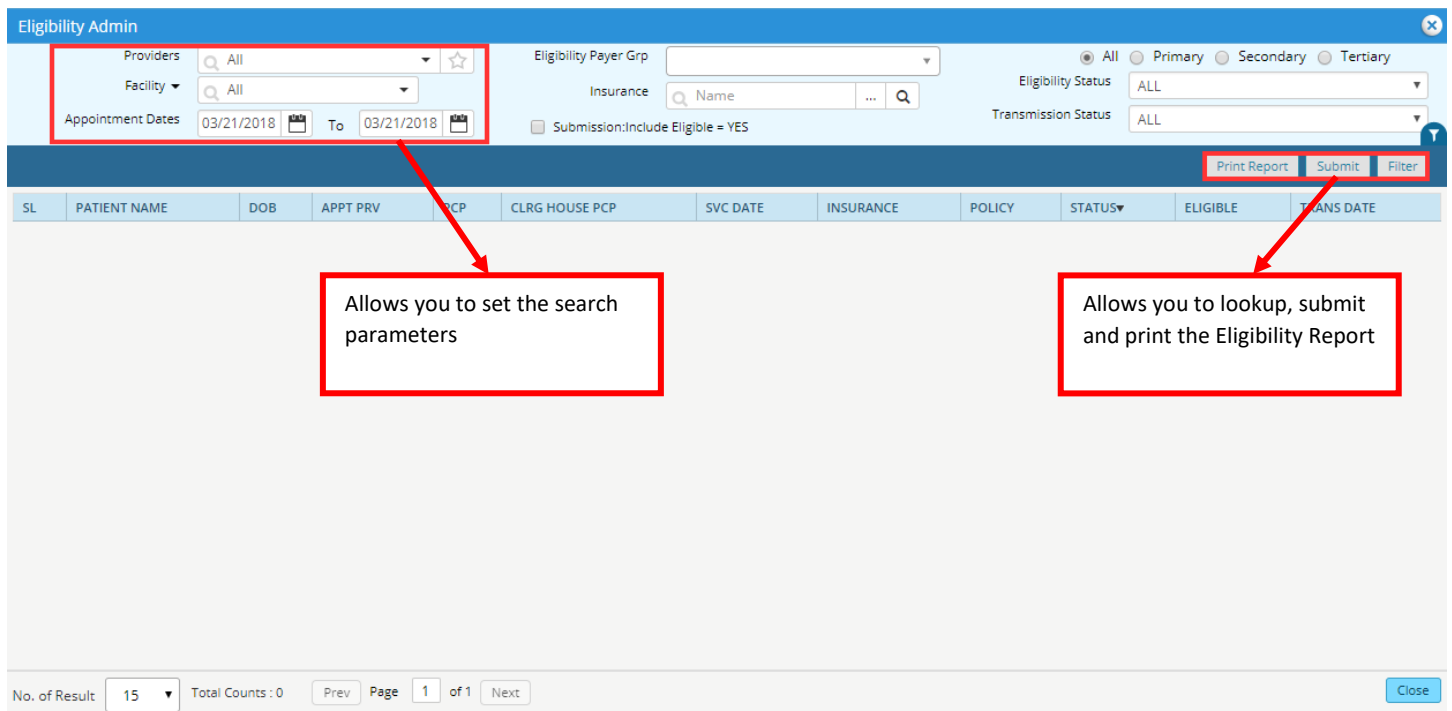
**Insurance Eligibility**

Not Verified

**RX Eligibility**

Charge Details eClniForms Rx Eligibility Misc Info Save And View Treatment Plan OK Cancel

2. Batch – Check the eligibility for all patients by selecting the  icon at the top of the Resource Scheduling screen.



The screenshot shows the 'Eligibility Admin' interface. A red box highlights the search filters on the left, including 'Providers' (set to 'All'), 'Facility' (set to 'All'), and 'Appointment Dates' (from 03/21/2018 to 03/21/2018). A red arrow points from this box to a text box that says 'Allows you to set the search parameters'. Another red box highlights the 'Print Report', 'Submit', and 'Filter' buttons on the right. A red arrow points from this box to a text box that says 'Allows you to lookup, submit and print the Eligibility Report'. The interface also includes fields for 'Eligibility Payer Grp', 'Insurance', 'Eligibility Status', and 'Transmission Status'. At the bottom, there is a pagination bar showing 'No. of Result' as 15, 'Total Counts : 0', and 'Page 1 of 1'.

SL	PATIENT NAME	DOB	APPT PRV	PCP	CLRG HOUSE PCP	SVC DATE	INSURANCE	POLICY	STATUS	ELIGIBLE	TRANS DATE
----	--------------	-----	----------	-----	----------------	----------	-----------	--------	--------	----------	------------

## Using Rx Eligibility (Batch & Individual)

Similarly, Rx Eligibility can be used to verify if medications will be covered during the visit and it allows for clinicians to check external Rx history in the progress note.

### To verify Rx eligibility for an individual patient:

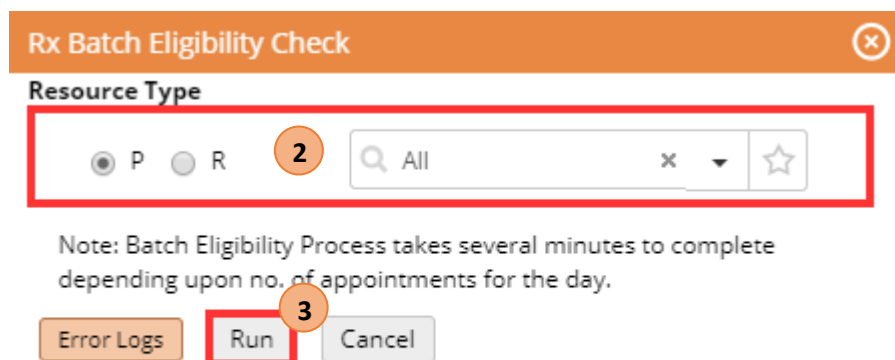
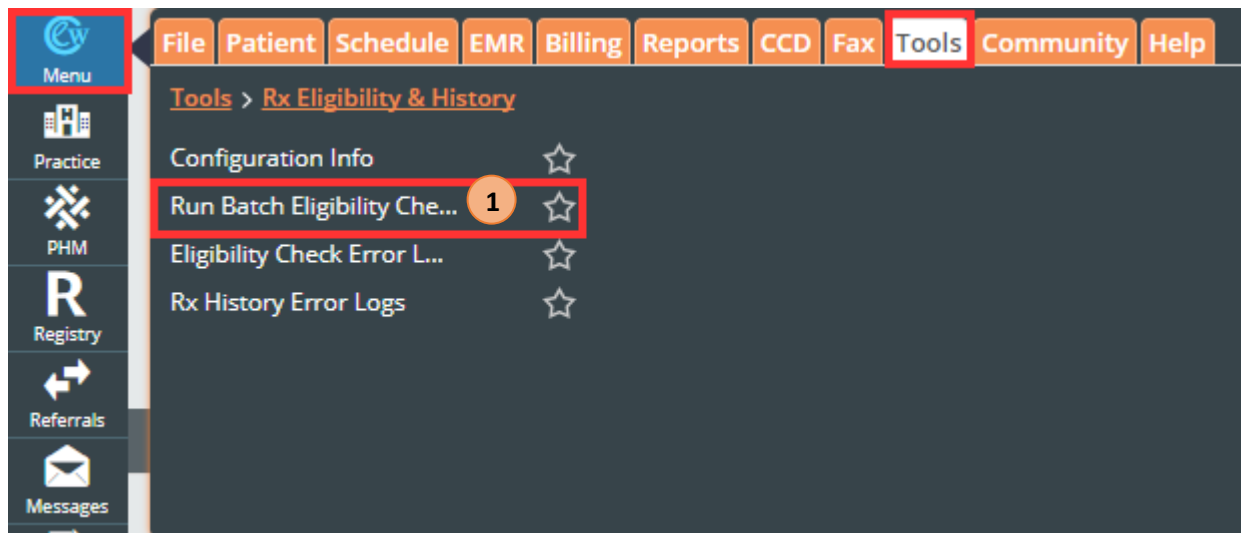
1. Open an appointment.
2. Click on 'Check' under Rx Eligibility section in the right chart panel.
3. Click on 'Check Rx Eligibility.'
4. Select 'Set Formulary.'

The screenshot shows a patient chart panel with a sidebar on the left and a main content area on the right. The sidebar contains a search bar with 'ahoo.com' and several dropdown menus. The main content area has a blue header with a back arrow and a close button. Below the header, there are two sections: 'Charges & Co-pay Details' and 'Patient Account Summary'. The 'Charges & Co-pay Details' section has a table with columns for item and amount, showing 'Total Charges', 'Allowed Fee', 'Co-Pay', 'Patient Portion', 'Patient Total', and 'Balance', all with amounts of 0.00. The 'Patient Account Summary' section has a table with columns for item and amount, showing 'Guarantor Balance', 'Account Balance', 'Insurance Balance', 'Patient Balance', 'UnPosted Payment', and 'Credit(s)', with amounts of 72646.56, 268.00, 168.00, 100.00, 0.00, and 0.00 respectively. Below these sections, there is an 'Insurance Eligibility' section with a 'Not Verified' status and a 'Check' button. A red arrow points from this 'Check' button to the 'Check Rx Eligibility' button in the 'Rx Eligibility' window shown in the next screenshot.

The screenshot shows the 'Rx Eligibility' window. At the top, there is a header with the patient's name 'Jeff, P' and contact information. Below the header, there is a section titled 'Rx Eligibility Plans' with a table that has columns for Group ID, Benefit Source, Plan Name, Retail Eligibility, Mail Order Eligibility, and Primary/Dependent. Below this table, there is a section titled 'Rx Eligibility Details' with a form containing fields for Group Id, Subscriber DOB, Subscriber Address, Subscriber Address 2, Subscriber City, Subscriber State, Subscriber Zip, Subscriber Country, Subscriber Pharmacy Eligibility, Subscriber Mail Order Eligibility, Group Name, Member ID, Card Holder Name, Plan Name, Subscriber Last Name, Subscriber First Name, Subscriber Middle Name, Subscriber Suffix, Subscriber Gender, and Subscriber LTC Eligibility. At the bottom right of the window, there are two buttons: 'Demographic Info' and 'Set Formulary'. A red box highlights the 'Set Formulary' button, and a red circle with the number '4' is next to it. Another red circle with the number '3' is next to the 'Check Rx Eligibility' button at the top right of the window.

### To verify Rx eligibility for a batch of patients:

1. From Menu Band → Tools → Rx Eligibility & History Option → Run Batch Eligibility Check.
2. Select the 'P' for providers, 'R' for resources then select them from the drop-down.
3. Click 'Run.'



**NOTE:** RX eligibility must be check during the checking process of the appointment.

# Patient Check In

## Alerts

An alert window will appear after double-clicking on the patient's appointment from the Resource Schedule window.

1. Add any 'Global Alerts' by clicking on the gear icon.
2. Timestamp and free type in any 'Billing Alerts.'
3. Insurance and Meaningful Use (MU) Alerts will appear automatically.
4. Payment Plan information will appear if that patient is enrolled in a payment plan for past due balances.
5. Click 'OK' to exit the Alerts window.

The screenshot shows a software window titled "Alerts for Jeff" with a close button in the top right corner. The window is divided into several sections, each highlighted with a red border and a numbered callout:

- Global Alerts (1):** A table with two columns: "Name" and "Notes". It contains three entries: "Information Missing" (black square icon) with note "demographic information missing", "Reminder" (green square icon) with note "remind patient to bring their medication bottles with them", and "Office Manager" (red square icon) with note "have the patient speak to office manager upon arrival". A gear icon is in the top right of this section.
- Billing Alerts (2):** A section with a clock icon and a "add" icon. It contains one entry: "Sam A 04/11/2018 08:59:56 AM EDT > Patient on monthly payment plan."
- Insurance Alerts (3):** A section with a grey square icon containing the text "This patient has no insurance alerts."
- MU Alerts:** A section with a grey square icon containing the text "This patient has no Meaningful Use alerts."
- Payment Plan (4):** A section with an orange square icon. It contains the text "Payment plan is pending." and "Due Date : 05/11/2018". The "Total Due Amount : \$20.00" is partially visible on the right.
- Buttons (5):** At the bottom right, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with a red border.

## Verify Demographics

1. Locate and double-click on the appointment.
2. Click on 'Info' to verify/update the patient's demographics information.

Appointment on Wednesday, March 21, 2018

Patient\*  x Name **Info** **Hub** ☐ New PT.

**Curran, Jeff, P** | 06 Oct 2013 | 561-703-0241 | saipramodm@gmail.com |

### Appointment

Facility\*  POS  Provider\*  Resource\*  Email

Dept  Date\*   Time\*

### Visit

Visit Type\*  Reason  Visit Status  Diagnosis

### Billing

Open Cases    Billing Notes   General Notes

**Co-Pay/ Claim changes for this visit only**

☐ Change co-pay for this visit  ☐ Non-billable visit

### Registration Rules

No registration rules to show

### Charges & Co-pay Details

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

### Patient Account Summary

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

### Insurance Eligibility

☐ Not Verified

### RX Eligibility

### 3. Verify/Update Demographics Information:

- Address. (Line 1, City, State, Zip and Country)
- Date of Birth.
- Phone Number.
- Responsible Party.
- Emergency Contact
- Insurance Information.
- Pharmacy Information.
- Email.
- Race.
- Ethnicity.
- Language.

### 4. Click 'OK' to save the updated information.

The screenshot shows the 'Patient Information' form for 'Jeff, P - MRN:12345'. The form is divided into several sections with callouts:

- Account Information:** Account No (9118), Prefix, Last Name\*, First Name\* (Jeff), MI, P, Previous Name, Preferred Name.
- Address:** Address Line 1\* (2500 Madison Ave), Address Line 2, City (Miami), State (FL), Zip (01581), Country (US).
- Phone Numbers:** Home Phone\* (561-703-0241), Work Phone (561-703-0241), Email (jeff@gmail.com).
- Date of Birth:** 10/06/2013 (Callout b).
- Age:** 4Y 5M.
- Sex:** Male.
- SSN:** 161-42-1111.
- Responsible Party:** Resp Party (DOB: 10/06/2013, Age: 4Y 5M, Sex: male, Home: 561-703-0241) (Callout d).
- Relation:** 1 (Self - patient is the insured).
- Emergency Contact:** Relation: Spouse, Address: 6417 Boca Rio Dr (Callout e).
- Insurance:** Insurance (1), Self Pay, Sliding Fee schedule, IE, New Case, Master Fee Schedule, Add, Update.
- Pharmacy Information:** Pharmacies (4), Contacts, Attorneys, Case Management, Circle of Care.
- Insurance Table:**

Name	State	Subscriber No	Rel	Insured	Co Pay
P Medicare Part A	MA	893247923847	1	Jeff P	25.00
- Demographics:** PCP\* (Sam), Referring Provider (Andrew), Rendering Pr./PCG\* (Sam A), Marital Status (Married), Language\* (English) (Callout k), Race\* (White) (Callout i), Ethnicity\* (Not Hispanic Or Latino) (Callout j), Characteristic (STREET), Birth Order (1), Release of Info\* (Y), Rx History Consent\* (Y), Signature Date (01/13/2009), Advance Directive (DNR), Emp Status (1, Employed), Student Status (None Sele...), Gestational Age (35.3/7).
- Buttons:** Additional Information, Alert, Misc Info, Options, P.S.A.C, OK (Callout 4), Cancel.

### 5. In the appointment window, change the Visit Status to 'ARR.'

### 6. Click 'OK' to close the appointment window.



Appointment on Wednesday, March 21, 2018

Patient\*  x Name   ☐ New PT.

Jeff, P | 10/06/2013 | 561-703-0241 | @gmail.com |

### Appointment

Facility\*  POS  Provider\*  Resource\*  Email

Dept  Date\*  Claim Provider Time\*

### Visit

Visit Type\*  Reason  Visit Status  Diagnosis  Transition Of Care

### Billing

Open Cases  Case Manager  Billing Notes  S General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit  ☐ Non-billable visit

Encounters Find Logs Referrals Orders Checkout Bubblesheet

Charge Details eCliniForms Rx Eligibility Misc Info Save And View Treatment Plan OK Cancel

### Jeff P

03/21/2018 08:00 AM

#### Registration Rules

No registration rules to show

#### Charges & Co-pay Details

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

#### Patient Account Summary

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

#### Insurance Eligibility

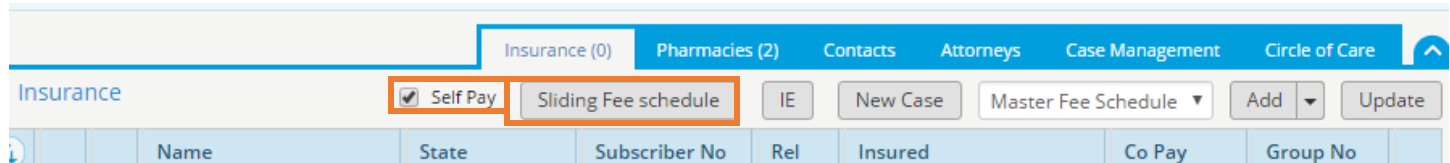
Not Verified

#### RX Eligibility

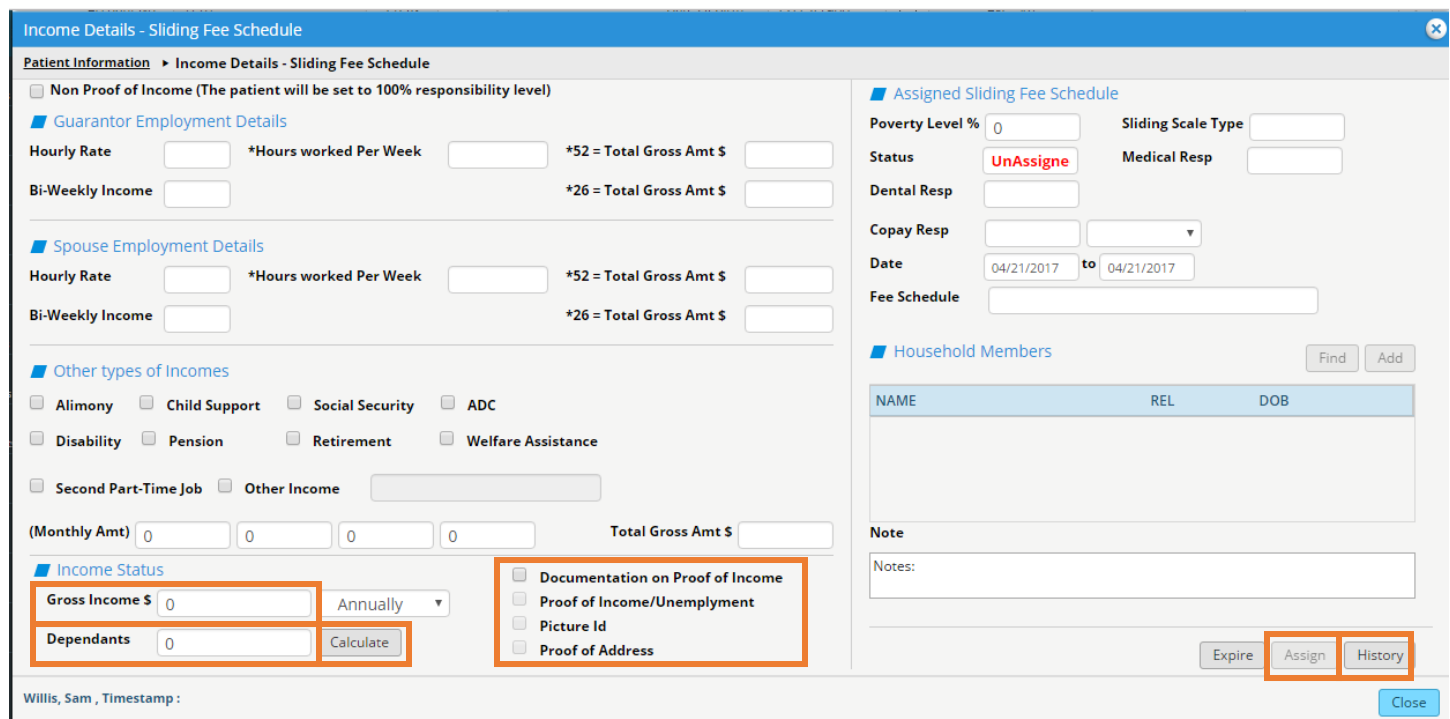
## Applying a sliding fee scale

As a part of the patient check-in process, front office staff will calculate and apply an appropriate sliding fee scale to the patient. The steps for doing the same are outlined below:

1. In patient demographics, check the “Self-Pay” check box
2. Click “Sliding Fee Schedule” button located in the ‘Insurance’ section of the ‘Patient Demographics’ screen.



3. The sliding fee schedule window will then open up. The following tasks must be done on this screen: (please see screen shot below)



- a. Enter the patient’s income appropriately in the “Income” field.
- b. Enter the number of dependants in the “Dependants” field.
- c. Click on the “Calculate” button. The system will automatically compute the sliding fee status for the patient and display the details on the screen. The “date” option denotes the duration for which this patient’s sliding fee status needs to applied.
- d. If patient has provided the required documentation for his/her proof of income, check off the “Documentation of Proof of Income” check box.

*This documentation must be scanned into the system appropriately. Scanned documents can be accessed from pt. hub → pt. documents.*

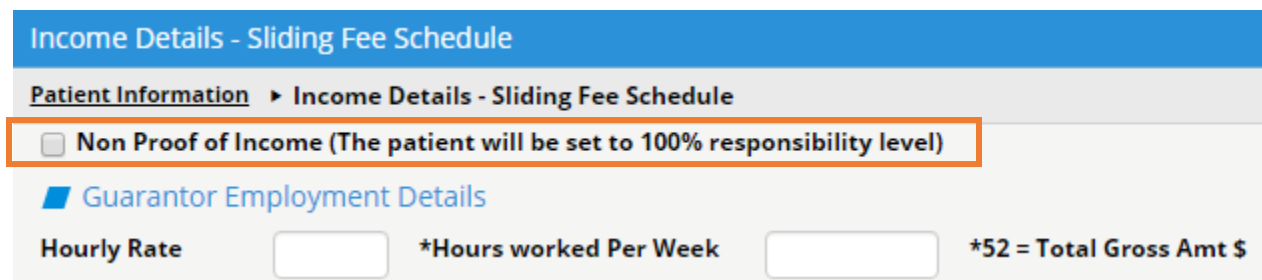
*Please note: that if this check box is left un-checked, the sliding fee will expire after the grace period. The check box has to be the last thing check before the “assign” button is selected.*

e. Click on the “Assign” button to apply the corresponding sliding fee status for the patient.

f. To look at Sliding fee level history, click on History in sliding fee window.

**Note:** . Household income needs to be completed for patients with insurance and non-insurance follow the above steps then click on Sliding Fee Schedule again and expire the sliding fee. This is done to capture patient’s income for UDS reporting

For UDS,household gross income and dependence has to be collected annually from all patients.



**\*Do not use ‘no proof of income’ box at the top left\***

- Enter the Gross income
- Enter Dependents
- Select Calculate
- Assign

The system has recorded the patient income for UDS reporting purposes and assigned the patient to the highest slide level with 100% patient responsibility.

**Note:** For UDS requirment income must be captured for all the patients.

## Scanning Driver's License, Forms, and Insurance Cards

Licenses, forms, and insurance cards can be scanned directly into the patient's chart in eClinicalWorks.

### To scan documents:

1. Open patient demographics → Additional Info → Patient Docs.

**Patient Information (Jeff)**

Patient Information ▸ **Additional Information**

☐ Don't Send Statements ☐ Inactive ☐ Don't add finance charge ☐ Exclude From Collections

General Information **Student Information**

**Street Address (if different then mailing address)**

Address Line 1  
Address Line 2  
City County  
State Zip  
Leave Message ☐ Home ☐ Cell  
Residence Type (None Selected)  
VFC Eligibility  
Consent to Report Immunization  
MOMember ID  
Plan Type (None Selected)  
Notes

**Employer Address**

Name  
Address Line 1  
Address Line 2  
City  
State Zip  
Leave Message ☐ Work  
Exclude from Registry Search  
Use Street address for prescription  
Default Facility  
MRN (External System)  
Default Lab Company  
Default DI Company  
Registered On

**Deceased**

Date Mm-DD-Yyyy ☐ Deceased  
Notes

**Structured**

Name	Value	Notes
4A2 Do you ha ...	▼ x	
4A3 Do you hav ...	▼ x	
4A4 Are you I ...	▼ x	
4A5 Are you re ...	▼ x	
4A1 nail bitin ...	▼ x	
4A3 do you hav ...	▼ x	
4A4 are you em ...	▼ x	
4A5 are you re ...	▼ x	
PCMH: Patient ...	▼ x	
PCMH: High cos ...	▼ x	
...		
PCMH: Poorly c ...	▼ x	
PCMH: Social d ...	▼ x	
PCMH: Referral ...	▼ x	
4A2 High cost/ ...	▼ x	
4A3 Poorly con ...	▼ x	

**1**

Patient Docs Consult Notes Adv Directive Addl Student Info OK Cancel

2. Click 'Select Scanner.'

**Patient Documents (Jeff) : INS Card Info.jpg**

Document List (2) Show All

Date	Scanned By	Document Name
01/16/2009	Sam	INS Card Info.jpg
01/16/2009	Sam	Jeff ID.jpg

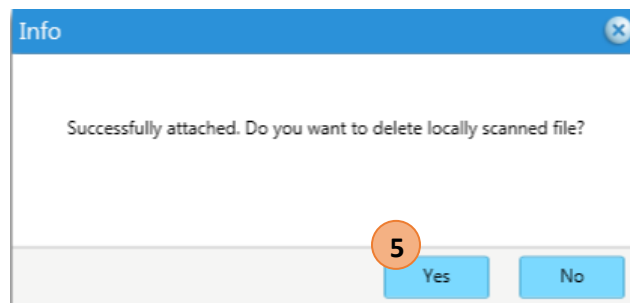
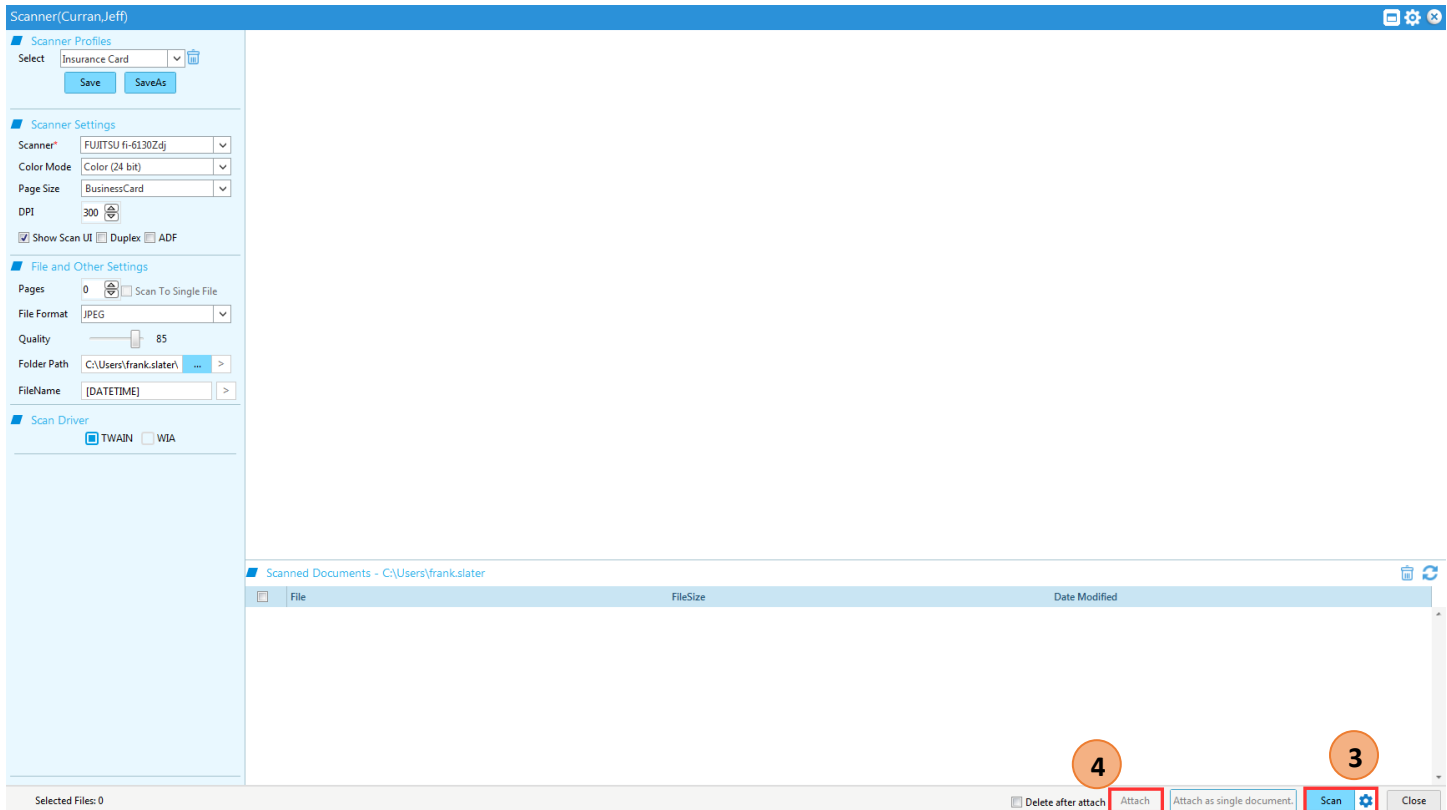
Add Update Compare Ink/Edit

Description

**2**

Select Scanner Close Scanned By: On:

3. Insert the cards/paperwork into the scanner and click 'Scan.'
4. Once the scanning is completed, check the box next to the file name and select 'Attach.'
5. Click 'Yes' to delete the file after uploading it to the patient's chart.



#### Note: Scanning Options

- **Color Mode** – Select the mode (Black and White, Grey Scale, Color) in which the document will be scanned
- **Scan Duplex** – Scan both sides of the document
- **Show Scan UI** – Launch the Scanner's User Interface

## Web and vMsg Enabling

### To web enable a patient:

1. Click 'Options' at the bottom of the Patient Information screen.
2. Select 'Web Enable.'
3. Document the patient's email then click 'Web Enable.'
4. Once the patient is web enabled they will receive an email with a link to the portal and a username and temporary password.

The screenshot shows the 'Patient Information' screen for a patient named Jeff P. (MRN:12345). The screen is divided into several sections: Patient Demographics, Insurance, and a right-hand panel for medical history. A dropdown menu is open at the bottom, showing the 'Options' menu. The 'Options' menu is highlighted with a red box and a circled '1'. The 'Web Enable' option is highlighted with a red box and a circled '2'.

**Patient Information** (Jeff, P - MRN:12345)

Account No: 9118 Prefix: [v]  
Last Name\*: [v] Suffix: [v]  
First Name\*: Jeff MI: P  
Previous Name: [v]  
Preferred Name: [v]  
Address Line 1\*: 2500 Madison Ave  
Address Line 2: [v]  
City: Miami Validate  
State: FL Zip: 01581 Country: US [v]  
Home Phone\*: 561-703-0241 Cell No: 000-000-0000  
Work Phone: 561-703-0241 Ext: [v]  
Email: [v]@gmail.com [v] Not Provided  
Last Appt: 09/03/2017 05:00 Pm

Date Of Birth\*: 10/06/2013 Age: 4Y 5M  
Sex\*: Male S.O./G.I.: [v]  
SSN: 161-42-1111 [v] Not Provided  
Parent Info: [v] Select Set Emergency Contact  
Resp Party: [v] DOB: 10/06/2013 Age: 4Y 5M Sex: male Home: 561-703-0241  
Relation: 1 [v] Self - patient is the insured  
Family Hub: [v] Select Remove  
Emergency Contact: [v] Relation: Spouse Address: 6417 Boca Rio Dr  
Acct Balance: 15572.69 Details Gr.Bal  
Pt Balance: 5068.14 Acc Inquiry  
Next Appt: [v]

**Insurance\***

Name	Rel	Insured	Co Pay	Group No
Medicare Part A	MA	Curran, Jeff P	25.00	

Additional Information [v] Alert Misc Info Options P.S.A.C

**Options**

- Copy Demographics
- Medicscan
- Web Enable ✓
- Opt out of Paper Statement
- View Log
- View Fee schedule Log
- Generate Log
- Registry Settings
- Print Demographics

The screenshot shows the 'Patient Communication Settings' screen for a patient named Jeff 55yrs, Male (13 Dec 1960). The screen is divided into several sections: Communication Types, Reminder Types, and Notes. The 'Web Enabled' section is highlighted with a red box and a circled '3'. The 'Web Enable' button is highlighted with a red box.

**Patient Communication Settings** (Jeff 55yrs, Male 13 Dec 1960 2 TECHNOLOGY DR WESTBOROUGH MA-01581-1727)

**Communication Types**

Web Enabled: [v] Jeff is NOT web enabled  
Enter Email ID: [v] Web Enable  
Voice Enabled: [v] English Spanish  
Text Enabled: [v] English Spanish

**Reminder Types**

- Select All
- Appointments
- Lab Results
- Health Maintenance
- Rx Confirmation
- General Notification

**Notes**

Max 255 characters (255 characters remaining) [v] Patient opts out all practice communication

Log Send Message Now OK Close

### To enable the patient for vMsg:

1. Click on the speech bubble icon next to Ext in the Patient Information screen.
2. Make sure 'Voice Enabled' is checked off.
3. Check the 'Text Enabled' box to enable the patient to receive appointment reminder via SMS text.
4. Select the different 'Reminder Types.'
5. Click 'OK' to save.

**Patient Communication Settings**

Jeff 4yrs, Male 06 Oct 2013 561-703-0241 2500 Madison Ave Miami FL-01581 @gmail.com

#### Communication Types

**Web Enabled** is web enabled  
Username: test2  
Enter Email ID:  
@gmail.com  
Edit Set Password Reset Password Unlock Disable

☒ **Voice Enabled** ☒ English ☐ Spanish  
Home (561-703-0241) Morning

☒ **Text Enabled** ☒ English ☐ Spanish  
Cell (000-000-0000)

#### Reminder Types

☐ Select All  
☒ **Appointments**  
☐ Lab Results  
☐ Health Maintenance  
☐ Rx Confirmation  
☐ General Notification

#### Notes

Max 255 characters (255 characters remaining)

☐ Patient opts out all practice communication

Log Send Message Now

OK Close

## Collecting Co-Payments & Payments for Previous Patient Balances.

Any type of patient payment can be collected by selecting Charge Details → Co-Pay or the Co-pay/Patient Portion/Patient Total hyperlinks from the appointment right chart panel or from the patient Hub.

### To Collect Copay/Payments:

1. Click on 'Co-Pay' from the appointment right chart panel or click on 'Charge Details' then select 'Co-Pay.'

Appointment on Wednesday, March 21, 2018

Patient\*  x Name ▾ Info Hub ☐ New PT.

Jeff, P | 10/06/2013 | 561-703-0241 | @gmail.com

#### Appointment

Facility\*  POS 11

Dept

Date\* 03/21/2018

Time\* 08:00 am 08:15 am

Provider\*  Resource\*  Email

Claim Provider

#### Visit

Visit Type\*  Reason

Visit Status  Diagnosis

Transition Of Care

#### Billing

Open Cases  Case Manager

Billing Notes

General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit

#### Charges & Co-pay Details

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

#### Patient Account Summary

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

#### Insurance Eligibility

Not Verified

#### RX Eligibility



2. Verify and enter the co-pay amount in the 'Amount' field.
3. Select the Payment Method from the dropdown options.
4. The check number can be entered in the 'Check No.' field.
5. Add a 'Memo' to the payment if needed.
6. Click on Auto Post Gr. Claims or Auto post Pt. Claims.
7. Click on 'Print Receipt.'
8. Click 'OK.'

Receive Payments

Patient Payment

Guarantor

Jeff

DOB: 10/06/2013

Age: 4Y 5M

Sex: M

Tel: 561-703-0241

Acct No: 9118

WebEnabled: Yes

Sel

Info

Hub

Batch No

22

Date

3/21/2018

Amount

\$ 25.00

25.00

Scan

Pmt. Method

Cash

Check No.

Unapplied Amount:0.00

Facility

Family Medicine

Memo

Patient Insurance (s)

Insurance: Medicare Part A

Co Pay: 25.00

Claims Paid (with this payment)

Auto Post Gr. Clms (F3)

Auto Post Pt. Clms (F4)

Auto Post

Claim Id	Patient Name	Svc Dt.	Appt. Reason	Clm Balance	Pat Balance	Payment
	Jeff	03/21/2018				25.00

Posted By: Sam

Locked By:

Date & Time: 3/21/2018, 4:09:59 PM

Print Receipt

Visits

Claims

Delete

Post CPT

Save & New (F7)

OK (F8)

Cancel (F9)

#### Note:

- If any additional payments are collected (copay or old balance), the Front Desk can collect the entire amount, specify the copay under the "Payment" Column (bottom of the screen), and document under the memo section

## Linking a Referral to an Appointment

To associate an Incoming Referral with an appointment:

1. Click on 'Referrals' at the bottom of the appointment window.

Appointment on Wednesday, March 21, 2018

Patient\* Jeff, P | 10/06/2013 | 561-703-0241 | @gmail.com | New PT.

Info Hub

Appointment

Facility\* Family Medicine: POS 11 Provider\* Sam Resource\* Sam A Email: @gmail.com

Dept: Date\* 03/21/2018 Time\* 08:00 am 08:15 am Claim Provider

Visit

Visit Type\* F/U (Follow Up Visit) Reason: Enter reason

Visit Status: ARR (Check-In) Diagnosis: Transition Of Care

Billing

Open Cases: Case Manager N

Billing Notes: S

General Notes:

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit

Encounters Find Logs Referrals Orders Checkout Bubblesheet OK Cancel

Charge Details eClniForms Rx Eligibility Misc Info Save And View Treatment Plan

Registration Rules

No registration rules to show

Charges & Co-pay Details

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

Patient Account Summary

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

Insurance Eligibility

Not Verified Check

RX Eligibility

2. Select the referral that needs to be associated with the appointment.

Referrals for Jeff P

Patient: Jeff P

Incoming Outgoing

Delete New

BC No	Date	Reason	Referral From	Referral To	Speciality	Start Date	End Date	Allow	Used Visits
<input checked="" type="checkbox"/>	10/08/2012	chest pain				10/08/2012	10/08/2015	5	3
<input type="checkbox"/>	01/04/2012					01/04/2012	01/04/2013	6	0

eReferral Requests

BC No	Date	Reason	Referral From	Referral To	Speciality	Start Date	End Date	Allow	Used Visits
<input type="checkbox"/>	05/17/2012				0	05/17/2012	05/17/2013	3	0

Print Close

- Referral (Incoming)**

**Jeff P**, 4 Yrs MALE      10/06/2013    Yes    Acc#: 9118    561-703-0241

---

**From**

Provider\* [Sam] ☆

Facility [ ]

**To**

Provider [Arnold] ☆

Specialty [--- Specialities ---]

Facility [ ]

Insurance [Pt Ins]

Auth Type [ ]

Auth Code [Authorization Code]

Open Cases [N]

Unit Type [V (VISIT)]

Assigned To\* [Arnold] ☆

Priority [Routine]

POS [11]

Start Date [10/08/2012]

End Date [10/08/2015]

Received Date [03/21/2018]

Referral Date [10/08/2012]

Appt Date [03/21/2018] Time [ ]

Sub Status [ ]

Status: ☒ Open    ☐ Consult Pending    ☐ Addressed

Visit Allowed [5]    Visit Used [3]

**Details**

Visit No	Encounter Name	Status
1	03/22/2014   PEN	PEN
2	04/08/2014   PEN	PEN
3	05/12/2014   PEN	PEN
4	03/21/2018   ARR	ARR
5		

[Scan] [Attachment (10)] [Logs]
[OK] [Cancel]
[Print]

## Change Appointment Status

- Change the Status of the appointment from 'PEN (Pending)' to 'ARR (Check-in).'

**Appointment on Wednesday, March 21, 2018**

Patient\*  x Name   ☐ New PT.

**Curran, Jeff, P** | 06 Oct 2013 | 561-703-0241 | @gmail.com |

**Appointment**

Facility\*  POS  Provider\*  Resource\*  Email

Dept  Date\*   Time\*

**Visit**

Visit Type\*  Reason  ...

Visit Status  Diagnosis  ...

**Billing**

Open Cases ☐ ARR (Check-In) ☐ ARR(Ortho) (Check-In(Ortho)) ☐ ARR1 (ARR1) ☐ CANC (Cancelled) ☐ CANCEPHONE (Voice) ☐ CANCESMS (Voice) ☐ CHK (Check Out) ☐ CONFPHONE (Voice)

Billing Notes

General Notes

Co-Pay/ Claim ☐ Change co-pay for this visit  ☐ Non-billable visit Payment Received 25.00

- The color of the appointment slot on the schedule will change to the corresponding color set for the ARR (Check-In) visit status.

08:00 AM	[Jeff, P 10/06/2013]
08:05 AM	
08:10 AM	
08:15 AM	

# Checking Out

## Check for Orders

1. Open the appointment screen and select 'Orders.'

Appointment on Wednesday, March 21, 2018

Patient\*  x Name   ☐ New PT.

Jeff, P | 10/06/2013 | 561-703-0241 | @gmail.com

**Appointment**

Facility\*  Provider\*  Resource\*  Email

Date\*  Time\*

**Visit**

Visit Type\*  Reason  Visit Status  Diagnosis

**Billing**

Open Cases  Billing Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit ☐ Non-billable visit

**Jeff P**  
03/21/2018 08:00 AM

**Registration Rules**

No registration rules to show

**Charges & Co-pay Details**

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	25.00
Patient Portion	0.00
Patient Total	25.00
Balance	25.00

**Patient Account Summary**

Guarantor Balance	7044.14
Account Balance	15572.69
Insurance Balance	10504.55
Patient Balance	5093.14
UnPosted Payment	25.00
Credit(s)	0.00

**Insurance Eligibility**

☐ Not Verified

**RX Eligibility**

2. On the Patient Orders Screen, you will see all the orders requested by the provider.
3. Double-click on any order to enter any additional details. (appointment date, authorization number, etc.)

Patient Orders (Jeff P)

**Current Labs**

Description	Schedule Date	Notes	In Office	Done
Urinalysis, Routine	03/21/2018		Yes	No
HbA1c	03/21/2018		No	No

**Future Labs**

Description	Schedule Date	Notes	In Office	Done
-------------	---------------	-------	-----------	------

**Current Diagnostic Imaging**

Description	Schedule Date	Notes	In Office	Done
-------------	---------------	-------	-----------	------

**Future Diagnostic Imaging**

Description	Schedule Date	Notes	In Office	Done
-------------	---------------	-------	-----------	------

**Current Procedures**

Description	Schedule Date	Notes	In Office	Done
-------------	---------------	-------	-----------	------

**Future Procedures**

Description	Schedule Date	Notes	In Office	Done
-------------	---------------	-------	-----------	------

**Rx**

Prescribed Med	Direction
Humalog	100 UNIT/ML, as directed, Subcutaneous, , ,

**Immunizations/Therapeutic Injections**

Imm/T.Inj	Name	Date	Given By	Location	Lot Number	Dose	Done
-----------	------	------	----------	----------	------------	------	------

**Referrals**

Doctor Name	Reason	Date	Diagnosis
-------------	--------	------	-----------

## Search and Schedule Follow-up Appointments

1. Double-click on the appointment slot to open the appointment and select 'Search.'

Appointment on Wednesday, March 21, 2018

Patient\*  x Name ▾ Info Hub ☐ New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | jeffcurran@gmail.com

### Appointment

Facility\*  POS  Provider\*  Resource\*  Email

Dept

Date\*  Claim Provider

Time\*

### Visit

Visit Type\*  Reason  ...

Visit Status  Diagnosis

### Billing

Open Cases  Case Manager

Billing Notes

General Notes

Co-Pay/ Claim changes for this visit only

☐ Change co-pay for this visit

☐ Non-billable visit Payment Received 25.00

**Follow Up**

Reason : 1

Encounters Find Logs Referrals Orders Checkout Bubblesheet

Charge Details eCliniForms Rx Eligibility Misc Info Save And View Treatment Plan

2. Select the Visit Type
3. Click on the “Adv” button to fill out additional information such as day preference, start date, etc.
4. Click Search.

The screenshot shows the 'Multiple Appointments' form. At the top, there's a patient search bar with 'Jeff P' and buttons for 'Info' and 'Hub'. Below this, there's a section for 'Visit Type\*' with a dropdown menu showing 'F/U (Follow Up Vi)' and a button labeled '2'. To the right of this is a section for 'Facility\*' with a dropdown menu showing 'All' and a button labeled '3' with the text 'Adv'. Below these are fields for 'Day Preference' (set to 'ALL'), 'Start Date' (set to '3 W' and '04/11/2018'), 'Start Time' (set to '08:00 am'), 'Finish Time' (set to 'Time'), 'Next appointment after' (set to '0'), and 'Start at the same time' (checkbox). At the bottom right, there's a 'Search' button labeled '4'.

5. Click on the ‘Book’ button to schedule the appointment.
6. Once the appointment is booked, a message will display stating ‘Appointments created successfully!’

The screenshot shows the 'Multiple Appointments' search results. At the top, there's a patient search bar with 'Jeff P' and buttons for 'Info' and 'Hub'. Below this, there's a section for 'Search Results' with a date dropdown set to '04/23/2018'. The table has columns for 'Duration', 'Starting at', 'Visit Type', 'Resource', and 'Facility'. There are five rows of data, each with a 'Book' button in the rightmost column. The 'Book' button in the first row is highlighted with a red box and a callout '5'.

Duration	Starting at	Visit Type	Resource	Facility	
09:00 am to 09:10 am	Apr 23, 2018	F/U	[Redacted], Kiza	Northboro Medical	Book
09:10 am to 09:20 am	Apr 23, 2018	F/U	[Redacted], Kiza	Northboro Medical	Book
09:20 am to 09:30 am	Apr 23, 2018	F/U	[Redacted], Kiza	Northboro Medical	Book
09:30 am to 09:40 am	Apr 23, 2018	F/U	[Redacted], Kiza	Northboro Medical	Book
09:40 am to 09:50 am	Apr 23, 2018	F/U	[Redacted], Kiza	Northboro Medical	Book

7. Change the status of the appointment from ARR (Check-In) to CHK (Check Out).
8. Click 'OK.'

Appointment on Wednesday, March 21, 2018

Patient\*
Jeff, P
Name
Info
Hub
New PT.

Curran, Jeff, P | 06 Oct 2013 | 561-703-0241 | @gmail.com

Appointment

Facility\*
Family Medicine:
POS
Provider\*
Willis, Sam
Resource\*
Willis, Sam A
Email
@gmail.com
Date\*
03/21/2018
Claim Provider
Time\*
08:00 am
08:15 am

Visit

Visit Type\*
F/U (Follow Up Visit)
Reason
Enter reason
Visit Status
CHK (Check Out)
Diagnosis
Transition Of Care

Billing

Open Cases
Case Manager
Follow Up
Reason :
3 Weeks
Billing Notes
General Notes
Co-Pay/ Claim changes for this visit only
Change co-pay for this visit
Non-billable visit
Payment Received 25.00

Encounters
Find
Logs
Referrals
Orders
Checkout
Bubblesheet
OK
Cancel



# Appendix A: Notices

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