

eClinicalWorks

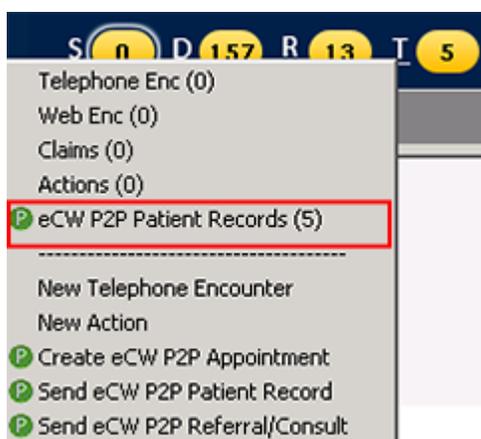
RECEIVING PATIENT RECORDS VIA P2P

This document explains how to receive patient records via eClinicalWorks® P2P®. The T jelly bean notifies recipients of the pending patient records.

Attaching Patient Records

To attach a pending patient record:

1. From the T jelly bean, click *eCW P2P Patient Records*:



The eCW P2P patient records window opens:

The screenshot shows the 'eCW P2P Patient Records' window. The window title is 'eCW P2P Encounters'. The window has tabs for 'Open', 'Addressed', 'All', and 'All Open(All Dates)'. The 'Assigned to' dropdown is set to 'Scott, Kenneth'. The table below shows the following data:

#	Date	Patient Name	Phone	From	Reason	Assigned To	View Encounter	Delete
1	05/05/2014 09:28 AM	Test, Diane		Horgan, Joseph	test pan	Scott, Kenneth		
2	05/04/2014 02:50 PM	Test, Sarah	999-999-9999	Horgan, Joseph	FE	Scott, Kenneth		
3	11/20/2013 3:33 PM	Test, Sarah	999-999-9999	Horgan, Joseph	testing	Scott, Kenneth		
4	11/20/2013 1:07 PM	A, Newbie		Horgan, Joseph	Here you go P11	Scott, Kenneth		
5	11/20/2013 12:35 PM	A, Newbie		Horgan, Joseph	P11 pt rec	Scott, Kenneth		

At the bottom right of the table, it says 'Patient Records 1 to 5 of 5'.

2. Select the provider from the *Assigned to* drop-down list.
3. Select the patient by clicking anywhere on the row.

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The eCW P2P Patient Record window opens:

Patient: O'Donnell, Richard

DOB: 01/01/1960 Age: 54 Y Sex: M
Tel:
Subject: testing patient record - Match patient

From: Willis, Sam, Multi
Date: 04/22/2014 7:06 AM
Status: Open Addressed
Assigned To:
Willis, Donald L

Message
testing

4. Click *Match Patient* to link incoming records to a patient. This process must be completed each time new info is received for an existing patient.

The Patient Lookup window opens:

Search Patient Include Appointment Facility

O'Donnell, Richard by Name & by
Active by All Facilities RGS

Id	Name	DOB	Phone	Account No.	Last Appt Dt	Previous Name
1	O'Donnell, Richard	01/01/1960		9194		

We found O'Donnell, Richard in the system.
(matched using , DOB, DOB).
Name: O'Donnell, Richard
DOB: 01/01/1960
Gender: male
Phone:
(Patient not matched)

5. Search the database for the individual associated with the record.
New patients can be registered at this point if needed.
 - a. Click the *Register* button to open the Demographics window and document the patient information according to the normal new patient workflow. Records from an eCW provider will populate the basic fields such as Name, Address, Date of Birth, and Gender.
6. When the patient has been located within eClinicalWorks, click the patient row to highlight, and then click the *Match and Select* button.



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Existing matched patients will display as *Patient Already Matched*. Click the *Use Matched Patient* button to confirm the link.

The patient record is attached.

7. *(Optional)* To reassign the record to an authorized user, use the *Assigned To* drop-down list on the Patient Record window.
8. *(Optional)* Click the *Addressed* radio button to mark the record as reviewed.
9. Click *OK* to download the attachments to the patient's documents under Patient Documents or to the DRTLA tab in the Right Chart Panel (ICW).