eClinicalWorks

SYSTEM ADMINISTRATION GUIDE

V10 - November 2014

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About This Guide

This guide provides the office administrator with information needed to configure Security Settings; to set up the Provider, Staff, and Databases; and, to manage eClinicalWorks® V10.

The *Front Office Setup Guide*, *Electronic Medical Records Setup Guide*, and *Billing Setup Guide* provide the setup information for Front Office, EMR, and Billing features.

Product Documentation

The eClinicalWorks documentation supports the eClinicalWorks Electronic Medical Record (EMR), Practice Management (PM), and/or additional software features.

eClinicalWorks Documentation is available from:

- my.eclinicalworks.com Customer Portal https://my.eclinicalworks.com
  - click the *Documents and Videos* widget on the Knowledge tab to display the documents available in PDF format
  - click the *HelpHub* widget on the Helpdesk tab to display the documents available in HelpHub
- eClinicalWorks application - from the Help menu, click the *HelpHub* link

Webinars

For more information, take advantage of the free unlimited eClinicalWorks webinars — interactive seminars conducted online. These courses are presented by product trainers who are experts with eClinicalWorks and all of its capabilities. To sign up for an eClinicalWorks webinar, go to:

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Send messages directly to eClinicalWorks Support through the eClinicalWorks Customer Portal:

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You may also call or e-mail eClinicalWorks Support:

Phone: (508) 475-0450

E-mail: support@eclinicalworks.com

Conventions

This section list typographical conventions and describes the icons used to call out additional information and to indicate item keys, new features, and enhancements to the application.

- Typographical conventions:

Bold	Identifies options, keywords, and items in a description.
Italic	Indicates variables, new terms and concepts, foreign words, or emphasis.
`Monospace`	Identifies examples of specific data values, and messages from the system, or information that you should actually type.

- Icons are used to highlight new features and indicate enhanced features and item keys:

Icon	Description
	Indicates an item key.
	Identifies new features, suggested by clients, from the eCWIdeas website: http://ecwideas.eclinicalworks.com.
	Identifies a new feature.
	Indicates an enhanced feature.
	Points out helpful tips or additional information.

Icon	Description
	Indicates that a feature meets a Meaningful Use requirement.

Note to Cloud/SaaS Users: When accessing the eClinicalWorks application via RDP (Remote Desktop Protocol) as a backup, be advised that Microsoft Office applications such as Excel® and Word® will not be supported.

SECURITY

Security processes involve determining the providers and staff members that have access to certain areas of the program or to the records of certain patients.

The following sections describe how to set up security:

- Security Permissions
- Security Attributes
- Changing Passwords
- User Groups

Security Permissions

Assign security permissions either by selecting a user or group of users and a set of security attributes, or by selecting an attribute and the set of users who have permission to use it.

Normally, the admin assigns security access by role. From the Security Settings window, the admin can search for users, then search for and select Security Items by name, Security Items by description, and Security Groups.

Assigning Security Access by User

When specifying security access by user, all available security attributes display for a single user.

To set security by user:

1. From the File menu, click *Security Settings*.

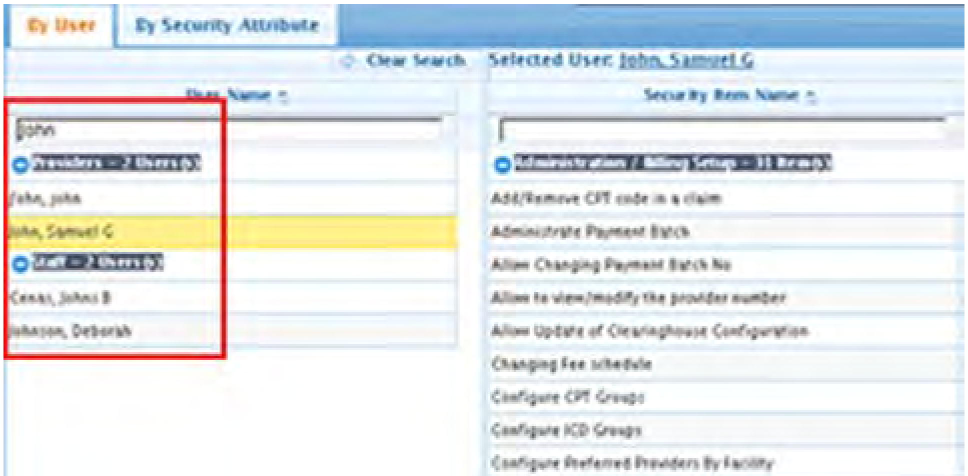
The Security Settings window displays.

2. Click the *By User* tab if it has not displayed by default.

A list of users displays in the left pane, arranged by category: Providers and Staff.

The remaining columns display the names and descriptions of the security items, and the name of the group to which they belong. All of these lists are searchable from the field at the top of the column.

3. Type the name of the user to narrow your search; then click a user's name to select it.



The Permission column, at the far right, displays a check box for each of the security attributes in the list.

4. Check the boxes next to all of the attributes that you want to give this user permission to use.

Note: Descriptive tooltips display when users point to any security attribute.

IMPORTANT! Initially, all permission check boxes display as grayed out and not checked, but the administrator usually grants all staff members access to most features. To grant access, select a staff member and then check the relevant permission check boxes for that person. Repeat this selection for each staff member.

- For new staff members, check the *Permission* check box at the top of the list in the right column. This selects all permissions; you can then remove check marks from those attributes that will not be granted to the new staff member.
- For existing staff members, the checked boxes in the right column indicate the permissions granted to that staff member. Select or remove features, as necessary.

5. Click *Save*.

The specified security permissions are set for the selected user.

6. Repeat steps 3 - 5 for all users.

Assigning Security Access by Attribute

In addition to assigning security access by user, the administrator can select a security attribute and assign it to all the users.

To assign security attributes:

1. From the File menu, click *Security Settings*.

The Security Settings window displays.

2. Click the *By Security Attribute* tab.
3. Select a Security Item from the list.

Note: Descriptive tooltips display when users point to any security attribute.

In the Permissions column, a check next to each user's name indicates the assigned security item.

4. Check the box next to each user for whom you want to add the selected security item.

   IMPORTANT! Initially, all permission check boxes display grayed out and not checked, but all staff members have access to most features. To grant or restrict access, select a staff member and then check the relevant permission check boxes for that person. Repeat this selection for each staff member.

5. Click *Save*.
6. Repeat the selection and save operations for all the attributes to be assigned.

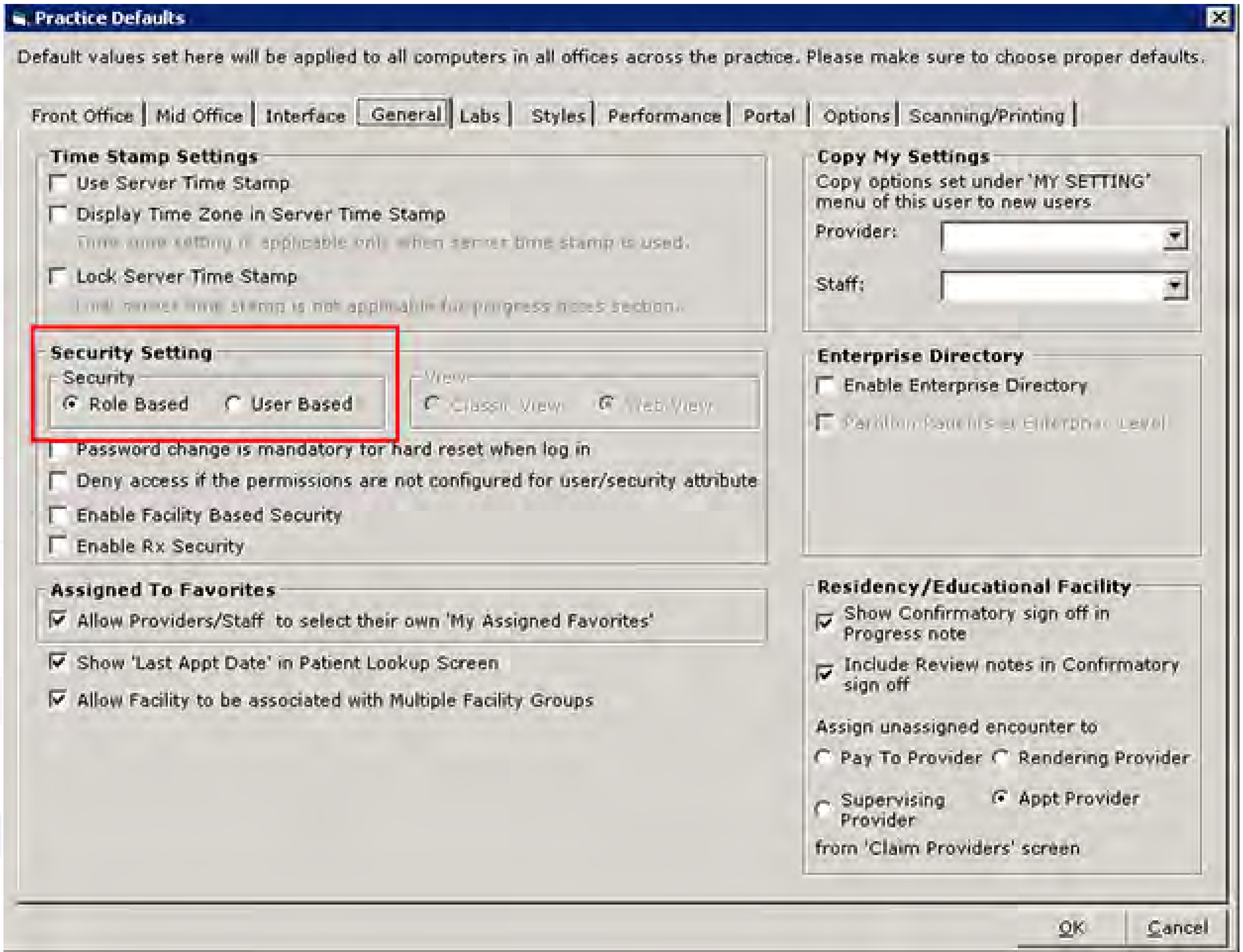
   IMPORTANT! Click *Save* each time that you assign a set of security attributes to a user and before assigning another set of attributes to a different user.

Role-Based Security

In addition to selecting security settings for users individually and by template, you can also assign security attributes by user roles. This is helpful if you have a large practice with many nurses, billing staff, and physicians.

Enabling Role-Based Security

Before configuring any roles or assigning security permissions by role, the administrator must select *Role-Based* Security from Practice Defaults to enable the role-based security feature:



For more information, refer to Enable Role-Based Security.

Creating Roles for Security

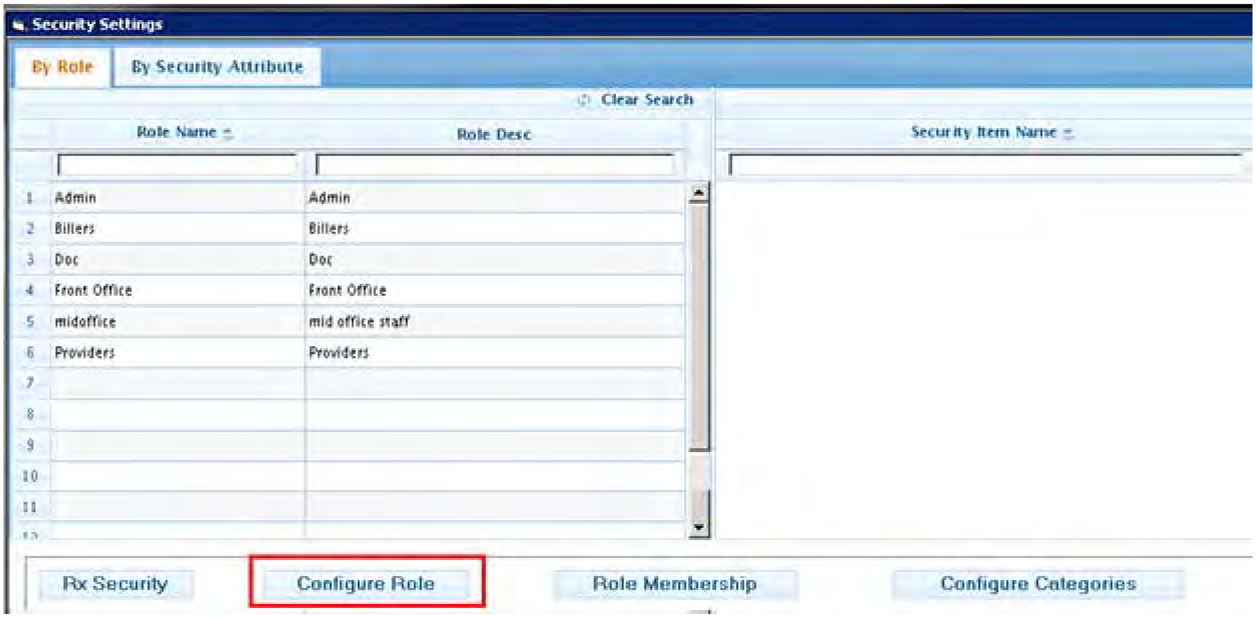
You must create the various roles of the staff members at your office, before determining the security permissions.

To create roles for security:

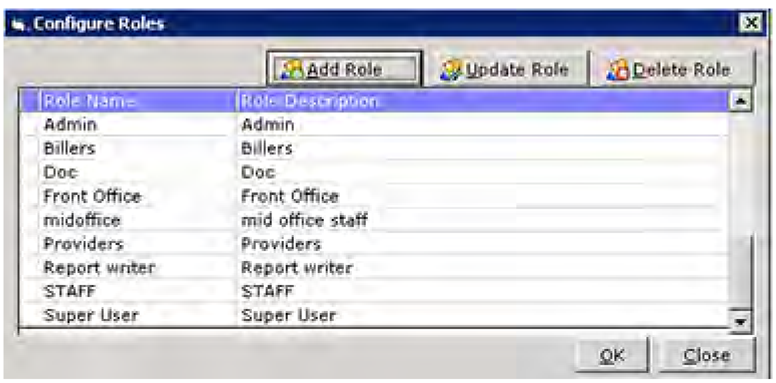
1. From the File menu, click *Security Settings*.

   The Security Settings window displays, with the *By Role* tab selected by default.

2. Click the *Configure Role* button at the bottom of the window:



The Configure Roles window displays, listing the existing roles that have already been added:



3. Enter the information as described in the following table:

To…	Then…
Add a Role	**1.** In the Configure Roles window, click *Add Role*. The Configure Role window displays. **2.** Enter the name of the new role in the Role Name field. **3.** Enter a description of this role in the Description field. **4.** Click *Save*. This role is added.
Update a Role	**1.** Check the box next to the role to be updated. **2.** Click *Update Role*. The Configure Role window displays. **3.** Edit the role name and/or description. **4.** Click *Save*. This role is updated.

To…	Then…
Delete a Role	**1.** Check the box next to the role to be deleted. **2.** Click *Delete Role*. A confirmation window displays. **3.** Click *OK*. This role is deleted.

Assigning Role Membership

After your roles have been created, place your staff members in the appropriate roles.

To assign role membership:

1. On the Role Security Settings window, click the *Role Membership* button at the bottom of the window.

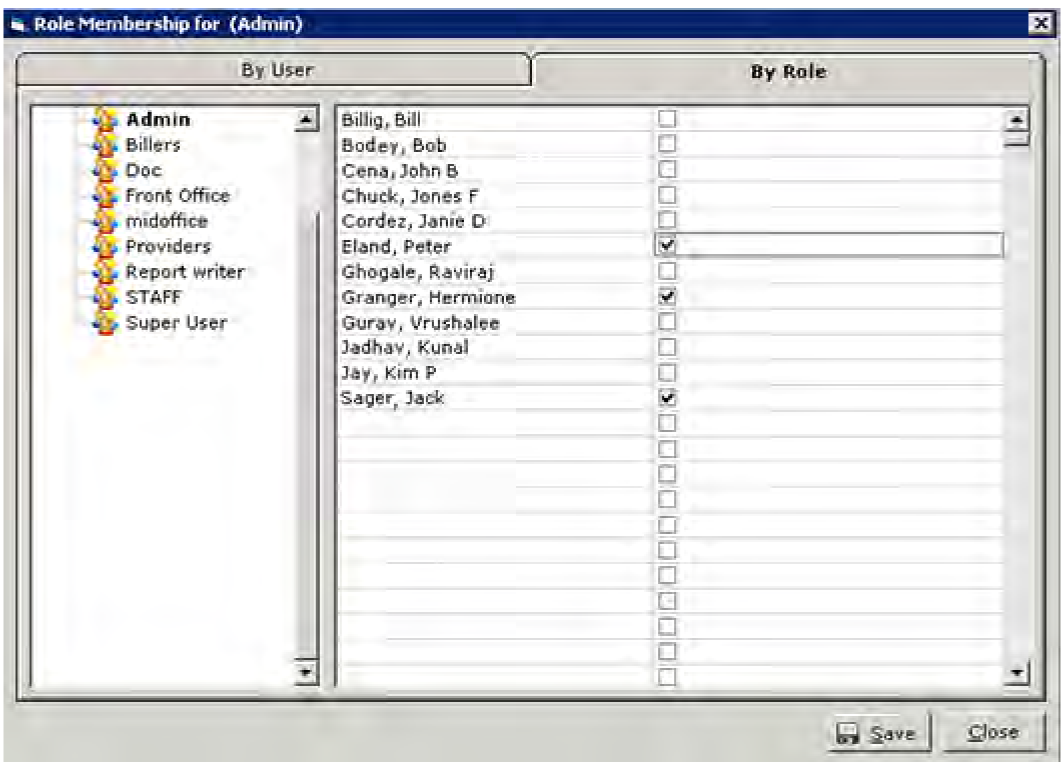
The Role Membership window displays.

The list of Roles displays in the left pane.

2. Click the name of one of the roles.

The list of staff members displays in the right pane.

3. Check the box for any staff member to be assigned to the selected role:



To select all staff for membership in the selected role, check the box at the top of the Role Member column.

4. Click *Save*.

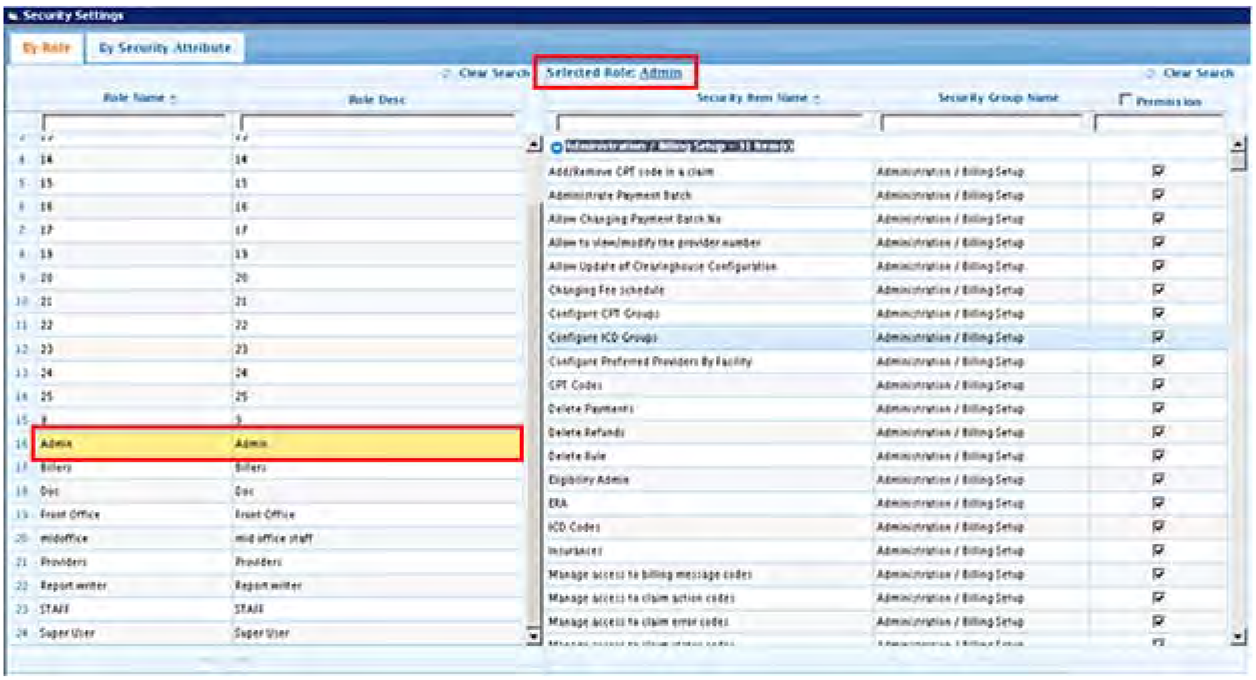
Configuring Role-Based Security Permissions

After adding staff members to the appropriate roles, configure the permissions for each of these roles By Role permission or By Security Attribute.

To configure security By Role:

1. On the Security Settings window with the Role tab selected, select one of the roles that were configured for your practice.

   The list of security attributes displays in the right pane, and the role you selected displays at the top of the window:



2. Check the box next to each attribute to assign the selected role for each member.
3. Click *Save*.

To configure security By Security Attribute:

1. On the Security Settings window, click the *By Security Attribute* tab.
2. Select one of the attributes listed in the left panel.

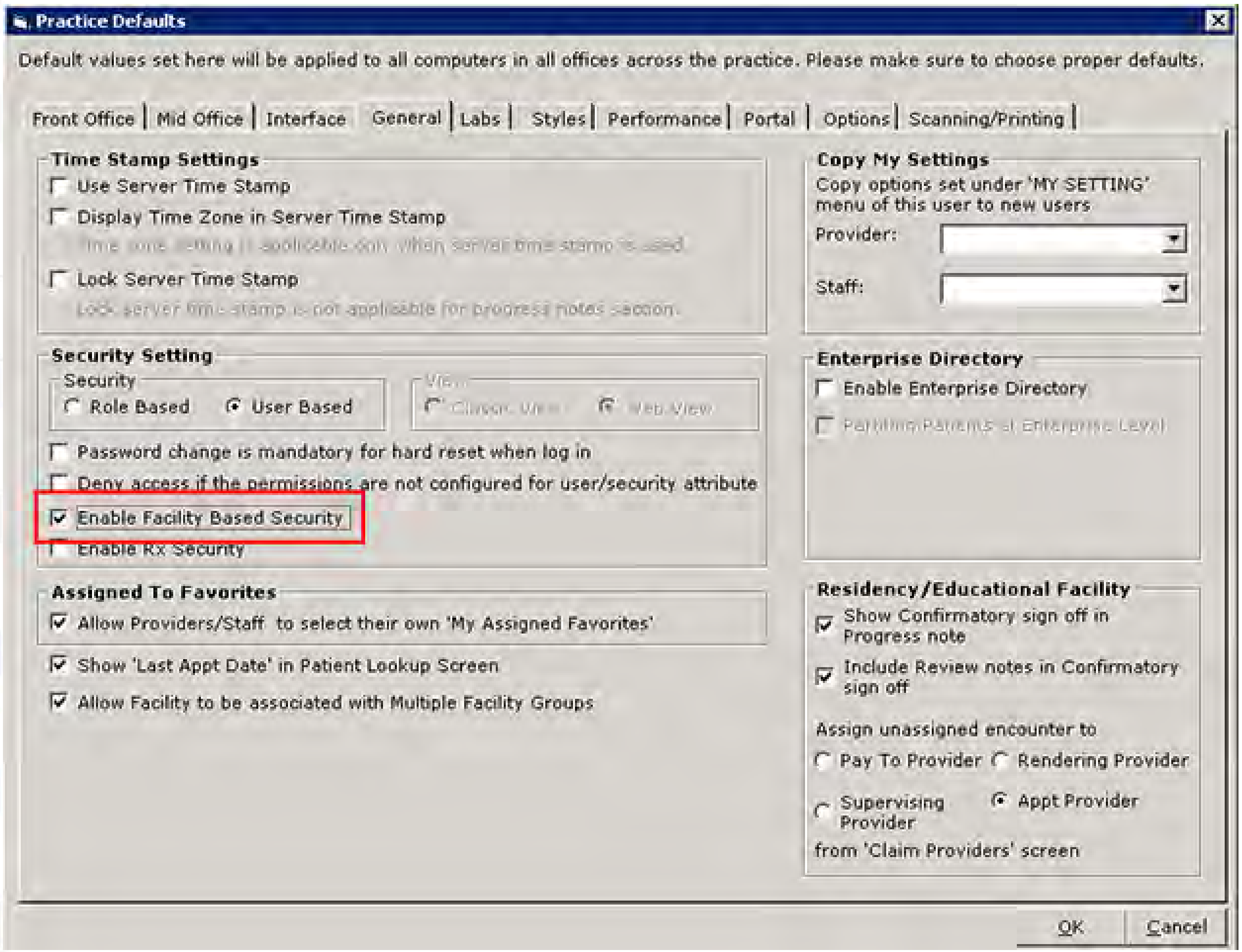
   The attribute you selected displays in the blue banner at the top of the window. The list of associated roles configured for your system displays in the right panel.

3. To grant permissions to a role, perform one of the following actions:
   - To grant permission to a role for the selected attribute, check the *Permission* box(es) next to the corresponding role.
   - To grant permission to all roles, check the box at the top of the Permission column.
4. Click *Save*.

Facility-Based Security

Configure Security Settings based on the facility where each staff member works.

To set up Facility-Based security, you must first select *Enable Facility-Based Security* from Practice Defaults:



For more information, refer to Enable Facility-Based Security.

You can now configure facility-based security settings.

Using Facility-Based Security Settings

When Facility-Based Security is enabled, the system adds a *By Facility* tab and a By User (Facility) tab to the Security Settings window. Administrators use these tabs to grant or restrict the users' access to certain facilities.

The default view enables administrators to assign access by facility. This is the same method as the assigning of permissions for security attributes.

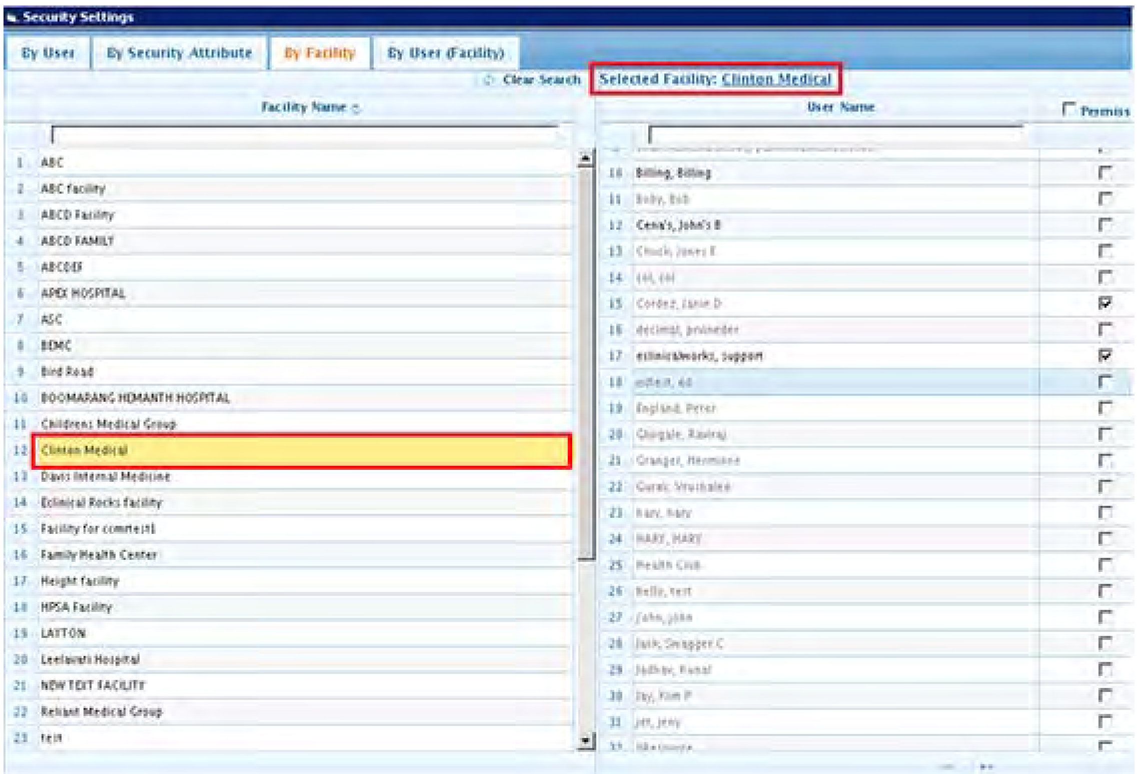
To designate facility-based security by facility:

1. On the Security Settings window (with Facility-Based Security enabled), click the *By Facility* tab.

   The *By Facility* options display, listing all the practice's facilities in the left pane.

2. Click one of the facilities.

   The user names of all staff assigned to the selected facility display in the right pane:



3. Click the names of those staff members given security access to the selected facility, then click *Save*.

   The system saves the selected security permissions by facility. Users are not able to access information (such as encounters, claims, *etc.*) associated with facilities they do not have permission to access.

To designate facility-based security by user:

1. On the Security Settings window (with Facility-Based Security enabled), click the *By User (Facility)* tab.

   The *By User (Facility)* options display, listing all the practice's users in the left pane and the facilities in the right pane.

2. Click the name of a staff member in the left pane.

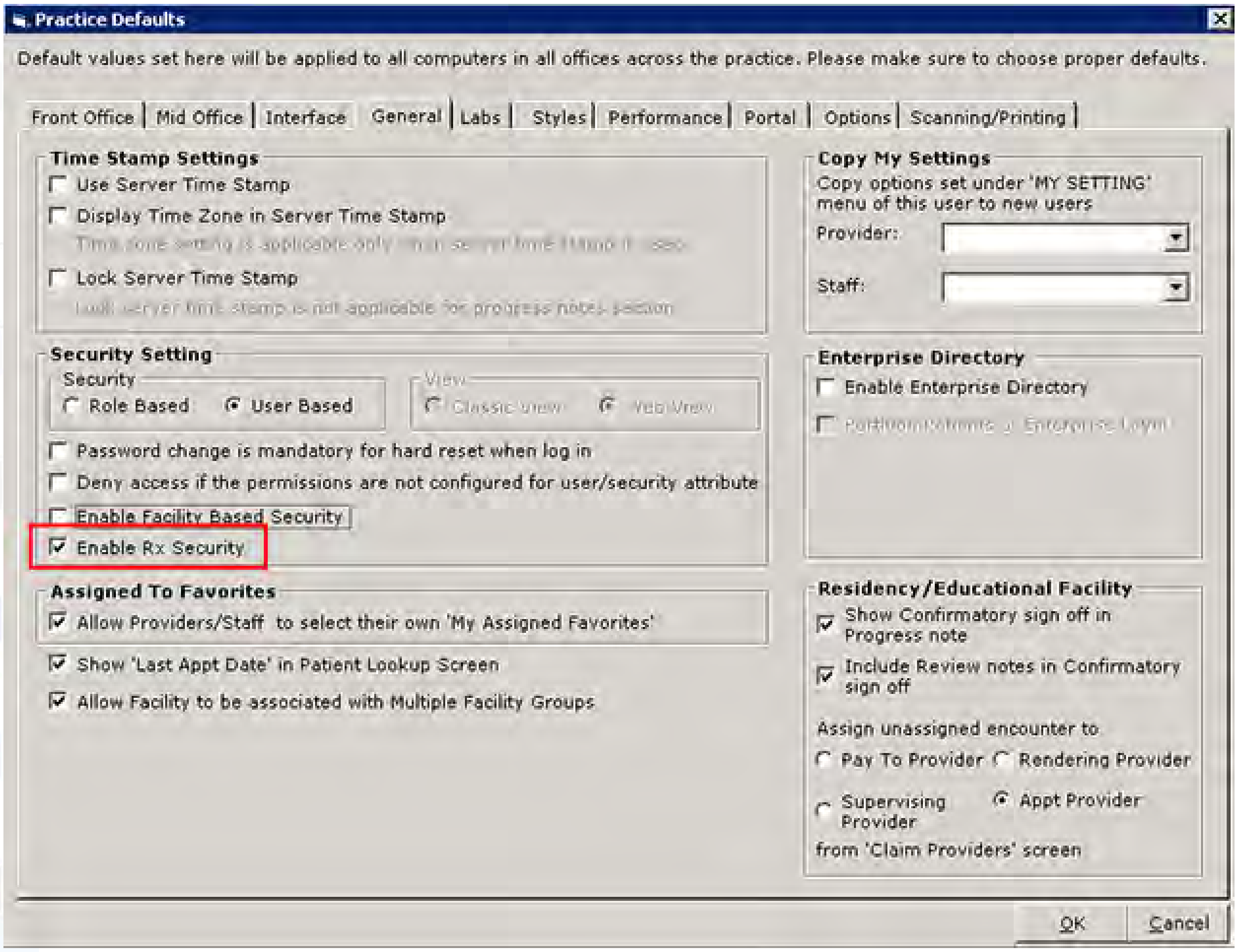
3. Click the *Permissions* check box in the right column for each facility at which the staff member will be granted security permissions.

> **Note:** Grant the user access to patient records in all facilities by clicking the check box at the top of the Permissions column.

Rx Security

The Rx Security feature enables providers to specify the staff members who are allowed to print and fax prescriptions for their patients.

Administrators enable this feature from Practice Defaults:



For more information, refer to Enable Rx Security.

Configuring Rx Security

The Rx Security window displays in two sections: one for staff and one for providers.

To configure Rx Security:

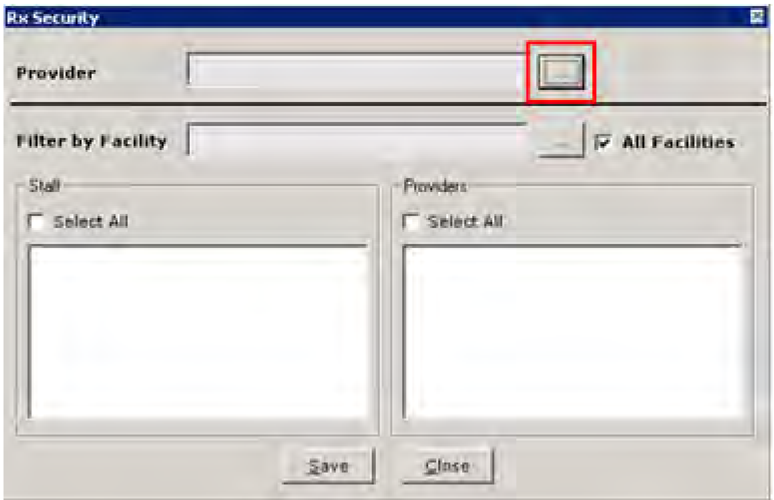
1. From the File menu, click *Security Settings*.

The Security Settings window displays.

2. Click *Rx Security*.

The Rx Security window displays.

3. To select the provider, click the *More* (...) button next to the Provider field:



The staff and provider sections populate with all the users at this practice, except the selected provider.

4. Click *Save*.

Configuring Security for a Specific Facility

To configure security for a specific facility:

1. From the Rx Security window, select the facility:
   - Click *More* (...) next to the Filter by Facility field and click the facility to select it.

     OR
   - Check the *All Facilities* box and click the facility.
2. Click *Save*.

   Security is configured for the selected facility.

Selecting Staff Members

To select staff members:

1. From the Rx Security window, select the staff members and providers:
   - Check the boxes next to all the staff members and providers that have permission to print, fax, or transmit prescriptions for the selected provider.

     OR
   - Check one or both of the *Select All* boxes if to select all staff members and/or providers simultaneously.
2. Click *Save*.

   Rx Security is configured for the selected provider(s). Users that attempt to print, fax, or transmit a prescription for a provider they do not have permission for, receive the following message: *You are not authorized to perform this function*.

Configure Categories

Configure the items to display for each Progress Notes category by user, role, and/or facility.

To configure the items displayed for each Progress Notes category:

1. From the File menu, click *Security Settings*.

The Security Settings window displays.

2. Click *Configure Categories* from the bottom of the window:

The Configure Categories window displays:

3. Enter the information as described in the table:

Feature	Description
Category	From the Category drop-down list, select a Progress Notes category to configure.
Filter By	From the *Filter By* drop-down list, choose to configure categories by user or by role.
Facility	From the Facility drop-down list, select a specific facility.

4. Click one of the following radio buttons:

- **All Licensed Providers** - Configure categories for providers with licenses.
- **All Other Staff** - Configure categories for all non-provider staff members.

Creating Duplicate Categories for Different Users or Roles

To create duplicate categories for different users or roles:

1. From the Configure Categories window, check the box next to one item in the left pane to duplicate.

2. Click *Copy*.

The Copy Category window displays:

3. Enter the name of the new category (the copy) in the Name field (*e.g.,* if Dr. Sam Willis wanted to copy the practice's OB/GYN category so that he could have his own personalized items, you would enter something like OB/GYN - Dr. Willis, SW - OB/GYN, *etc.*).
4. Click *OK*.

   The selected category is copied.

Selecting the Items to Display in the Progress Notes Category

To choose the items to display in the selected Progress Notes category:

From the Configure Categories window, select the Items to display.

- Check the box(es) next to the item(s) in the left pane to display.

  OR

- Check the *All Categories* box to select all the items at one time.

Displaying the Categories for a User or Role

To display the selected categories for a user or role:

1. From the Configure Categories window, select the roles or users:
   - Check the box(es) next to the user(s) or role(s) in the right pane.

     OR

   - Check the *All* box to select all the users or roles simultaneously.
2. Click *Apply*.

   The system applies the selected configuration.
3. Repeat the steps until all categories are configured for all users.
4. Click *OK*.

   The Configure Categories window closes, and the system saves the changes.

Locked Users

Users are locked out of the system if they enter incorrect login information too many times. The number of failed login attempts required for a user to be locked is determined by the administrator from File > Settings > Authentication Settings - Authentication Failure Lockout.

The administrator can unlock any locked user accounts from the Security Settings window.

To unlock a locked user:

1. From the File menu, click *Security Settings*.

   The Security Settings window displays.

2. Click *Locked Users*.

   The Locked Users window displays.

3. Click the check box next to the user(s) you want to unlock.

4. Click *Unlock User(s)*:

   The selected users are unlocked.

Security Templates

If you have many staff members who need the same settings, such as billers or nurses, you can streamline the process of assigning security settings. You can create and save a template, and then copy the template settings to each applicable staff member.

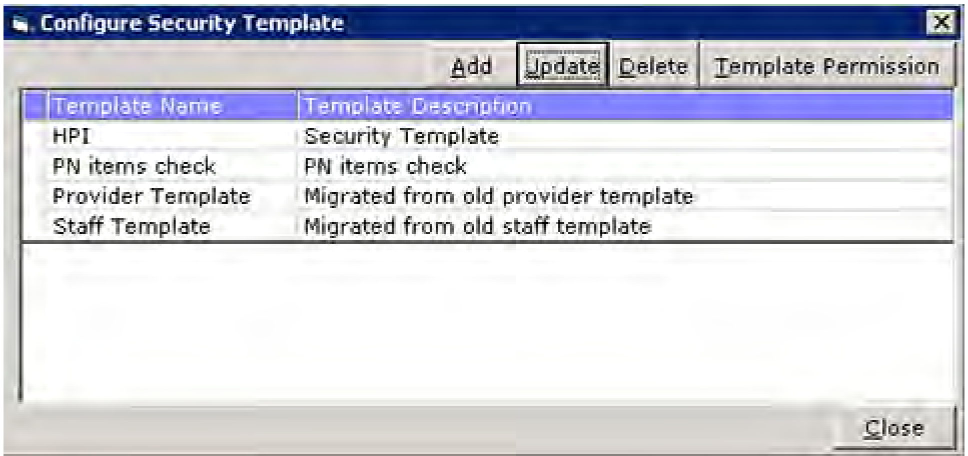
Configuring Security Templates

Configure the Security Templates before applying them to staff members.

To configure security templates:

1. Click *Configure Template* at the bottom of the Security Settings window.

   The Configure Security Template window displays, listing the templates that have already been created:



From this window, you can add, update, or delete templates or work with template permissions.

Creating Security Templates

You can create Security Templates for each type of staff member to use.

To create a security template:

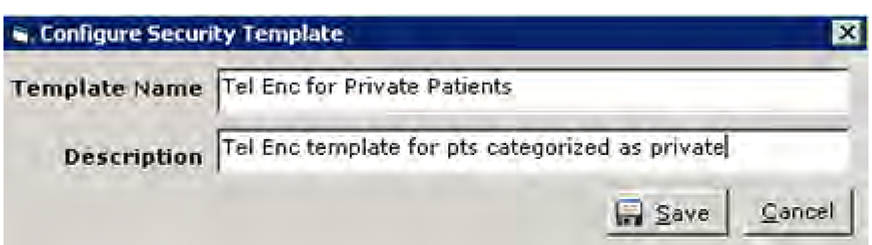
1. From the Security Settings window, click *Configure Template*.

> **Note:** This button is available only when working with User-Based security settings, under the By User tab. When using Role-Based security settings, this feature is redundant and therefore not available.

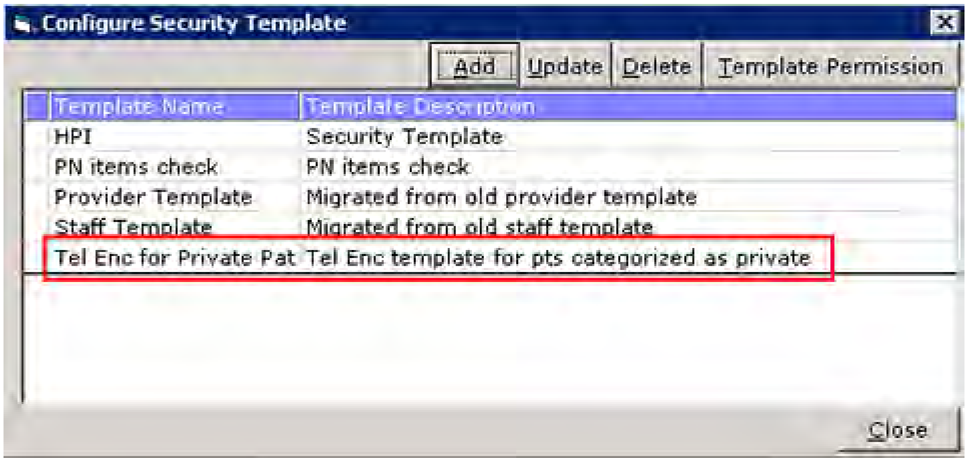
2. Click the *Add* button on the Configure Security Template window to create a new template.

   The blank Configure Security Template dialog displays:

3. Type the name of the new template.
4. Type a brief description of the new template.
5. Click *Save*:



The new template is added to the list:



Updating Security Templates

You can update the name and description of an existing Security Templates as needed.

To update a security template:

1. From the Security Settings window, click *Configure Template*.

The Configure Security Template window displays.

2. Click one of the templates in the list to select and highlight it.

3. Click the *Update* button to update the selected template.

4. Enter the name for this template in the Template Name field.

5. Enter a description of this template in the Description field.

6. Click *Save*.

The selected template is updated.

Populating Security Template Permissions

After creating a Security Template, populate it with permissions before applying it to staff members.

To populate security template permissions:

1. From the Security Settings window, click *Configure Template*.

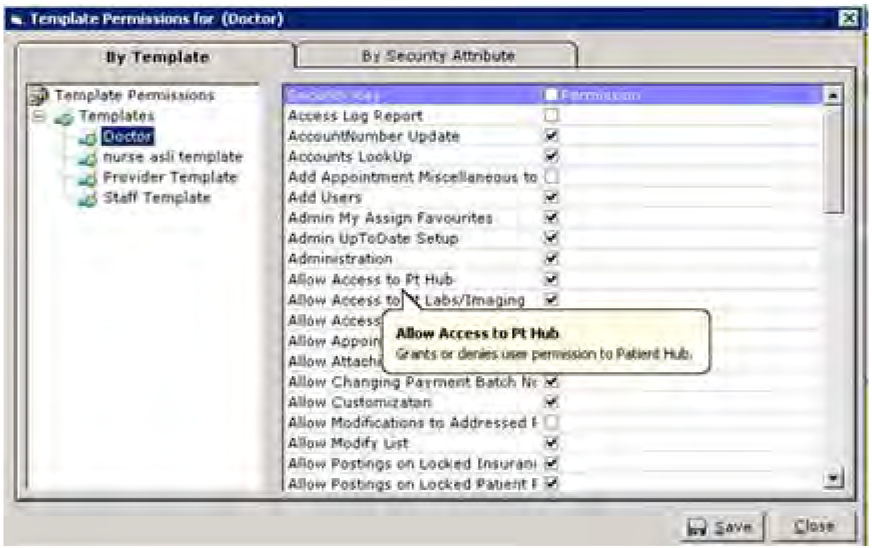
> **Note:** This button is available only when using User-Based security settings, under the By User tab. When using Role-Based security settings, this feature is redundant and therefore not available.

The Configure Security Template window displays.

2. Click *Template Permission*.

The Template Permission window displays.

3. Specify permissions for the templates in the same manner as you would for a user, either *By Template* or *By Security Attribute*:



4. Click *Save*.

   The system saves the permissions for each of the templates.

Using Security Templates

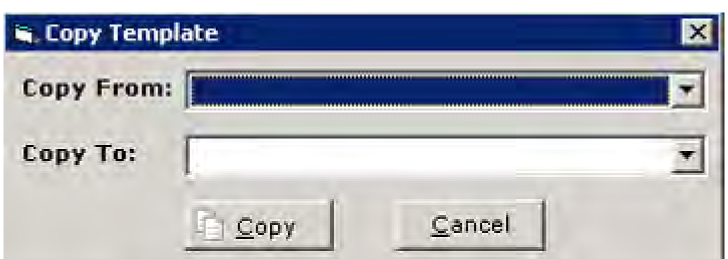
After you have created and configured a Security Template, you can apply it to all applicable users.

Note: This button is available only when using the User-Based security settings, under the *By User* tab. When using Role-Based security settings, this feature becomes redundant, so the system renders it unavailable.

To apply a Security Template to a user:

1. From the Security Settings window, click *Copy Template*.

   The Copy Template window displays:



2. Click the drop-down arrow for the *Copy From* field, and select the template you want to use.
3. Click the drop-down arrow for the *Copy To* field, and select the user to be assigned the template.
4. Click *Save*.

   The system copies the specified template to the selected user.

Security Attributes

Enhanced Feature

Federal regulations and your own practice standards provide guidelines about the staff members who should have access to segments of Patient information. For example, access to the Patient Progress Notes is essential to the providers, and is likely not required for the receptionist. In addition to these restrictions, eClinicalWorks® reserves some functions for the administrator and co-administrators only.

Each person who signs on to eClinicalWorks® should have permissions set only for the security items they need, to do their job.

- Clear the *Permission* check box (not checked), to disable the functionality.

  The text is grayed out on a menu; a *Permission Denied* message displays; or, the item may not display at all (for example, the Admin band is hidden for non-administrators.)

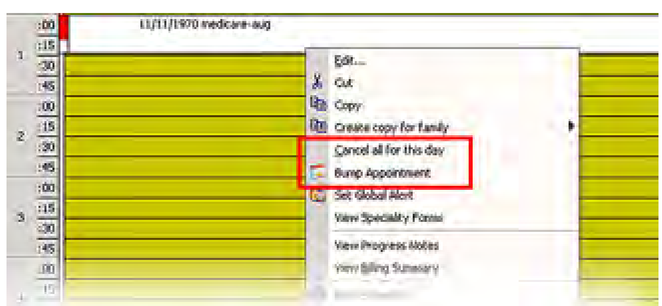
- Check the *Permission* box to grant that user permission for the security item.

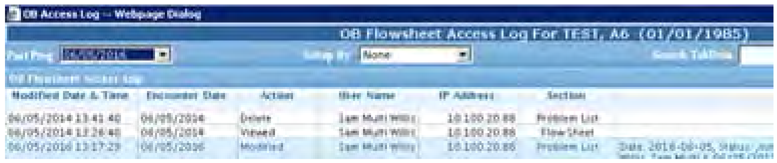
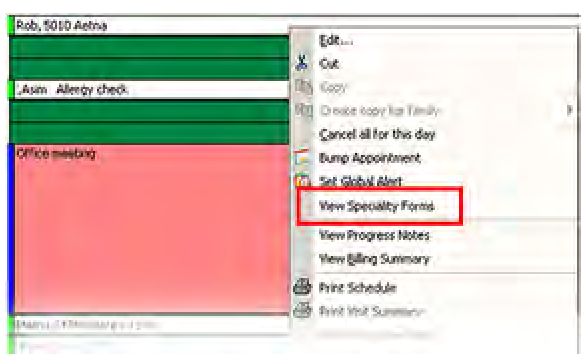
Work with your administrator to be sure that the right people in your practice have permission to view or change information.

Security Attributes for V10

New Feature

The following table describes the Security Attributes that have been added or enhanced for V10:

Security Attribute	Description
Allow access to Cancel All Appointments for the Day	With the security attribute *Allow Access to Cancel All Appointments for the Day* enabled: ■ To cancel all appointments for the day, right-click the appointment from the Resource Schedule and click *Cancel all for this day*. ■ To move appointments to the bump list, right-click an appointment and then click *Bump Appointment*: 

Security Attribute	Description
Allow Access to OB Flowsheet Access Log	This attribute enables access to the OB Access Log button in the OB Flowsheet. **To view OB Access Log:** **1.** Click the *OB Access Log* on the OB Flowsheet. The OB Access Log window displays:  **2.** Use one of the options to filter the logs: ◆ Click the *Past Preg* drop-down arrow, and then select a past pregnancy date. The OB Access logs display. **OR** ◆ Click the *Group By* drop-down arrow, and then select a category - None, Encounter Date, Action, User Name, IP Address, or Section. An additional field displays for all categories other than None. Click the drop-down arrow in the additional field to select a sub-category. The logs display by the sub-category. **OR** ◆ Enter tab data in the *Search TabData* field. The logs matching the tab data display.
Allow access to Pt Labs/ Imaging	This attribute allows access to Labs, Diagnostic Imaging, and Procedures from the Chart Panel.
Allow Access to Specialty Forms	To access security access forms, enable the security attribute *Allow Access to Specialty Forms*, right-click an appointment from Resource Schedule and select *View Specialty Forms* from the drop-down list: 

Security Attribute	Description
Allow Move Document to Another Patient	This attribute enables or disables the moving of documents from one patient to another using the *Move to Another Patient* option in Patient Documents.
Allow to Unlock OB Flowsheet Items	This attribute enables access to the *Unlock* button in locked OB Flowsheet sections. This attribute enables users to unlock tabs in an OB Flowsheet. Users have the ability to unlock a pregnancy based on this security attribute. Users are able to unlock a pregnancy if there is no active pregnancy, and if there is no closed pregnancy after that.
Allow user to edit multiple DEA	This attribute enables the user to add/edit/delete multiple DEAs.
Allow Wristband Label Printing	Enables the printing of wristband labels from the Patient Hub.
Approval Queue	This attribute enables users to access the Approval Queue for labs, diagnostic images, and procedures.
Billing Configuration	▪ This attribute enables access to the UPS address configuration ▪ This attribute enables access to the ERA CAS Configuration window and Global CAS Configuration window.
Blast eMsg	This attribute enables access to the Blast eMsg button in the Registry window.
Configure Preferred Providers By Facility	This attribute enables the configuration of preferred providers by facility.
Create New Patient	This attribute enables the user to create new patients
Customize links on Progress Notes based on visit type	This attribute enables the Customize button in the Visit Type Codes window.
Delete Telephone Encounters	With this security attribute enabled, the user may delete Telephone Encounters.
Enable Advice Button for Coumadin Flowsheet	This attribute enables the user to add to the Recommended Dose column on the Anti-Coagulation Flowsheet window.
Immunization - Quick Order Due Immunization	This attribute controls the Quick Order button in the Immunization Schedule window.

Security Attribute	Description
Immunization - Set Default for Immunization	This attribute controls the Immunization Series default setup accessed from EMR > Immunizations/Therapeutic Injections > Immunization Series Default Setup.
Interface Reconciliation - Quick-Launch Notification	This attribute controls the Reconcile menu option from the L Quick-Launch button.
Mass eMsg	This attribute enables access to the Send Mass eMsg button in the Registry window.
Patient Care Plan Access	This attribute controls the Care Plan Progress Notes. Version 10 extends this attribute to the Care Plan Manager. Only users with this attribute enabled can access the Care Plan Manager.
Permission to configure state specific controlled drug list	This attribute enables access to configuring State-Specific Controlled Drugs (EMR menu > Miscellaneous Configuration Options > Configure State Specific Controlled Drugs).
Show Toolbar on Progress Notes Screen	The attribute enables the user to see the hidden Progress Notes sections icon in the toolbar of any Progress Notes window, and to open the section from the toolbar. This feature is related to Visit Type Customization.
Telephone Encounters	This attribute enables user access to Telephone Encounters and Web Encounters.
Templates	The security attribute *Templates* no longer controls the Chart Group Visit option under *View Progress Notes* in the Office Visits window. If users do not have access to the *Templates* security attribute, they can still access the Chart Group Visit option.
Update Patient Insurance	This attribute enables the user to update a previously added insurance to the Patient Information (Demographics) window.

For a comprehensive list of all available security attributes, refer to the *Security Attributes and Logs Guide*.

For information about some additional features related to security attributes, refer to:

- Web View of Security Attributes
- Assigning Security for Specific Patient Documents Folders
- Specifying Co-Administrators
- Deny Access to All Security Attributes by Default
- Viewing Security Info

Web View of Security Attributes

Enhanced Feature

A Web View is available for user-based, role-based, and facility-based Security Attributes. Users can display security attributes by group name in the Web View.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 1669_AOOA.

Enabling the Web View for Security Attributes

To enable Web view for security attributes:

1. From the File menu, point to *Settings*, and then click *Practice Defaults*.

   The Practice Defaults window displays.
2. Click the *Role-Based* or *User-Based* radio button as required.
3. Click *Enable Facility-Based Security* to enable security attributes by facility.
4. Click *OK*.

Viewing the Security Attributes Window

To view of Security Attributes window:

1. From the File menu, click *Security Settings*.

   The Security Attributes window displays.
2. Click the *By User or By Security Attribute* tab, as applicable.
3. Enter the following information in a field to filter results:

By User tab:

Field	Information
User Name	Enter name to search attribute settings by users.
Security Item Name	Enter name of the security attribute to filter that attribute.

Field	Information
Security Item Description	Enter description of the security attribute.
Security Group Name	Enter a group name to search attributes by group name. eClinicalWorks configures the group names on the back end.
Permission	▪ Enter Yes to search for enabled security attributes for users. ▪ Enter No to search disabled security attributes for users.
Clear Search	Click to clear the Search fields.

By Role Name tab:

Field	Information
Role Name	Enter a name to search attribute settings by roles.
Security Item Name	Enter a name of the security attribute to filter that attribute.
Role Desc	Enter a description of the role.
Security Group Name	Enter a group name to search attributes by group name. eClinicalWorks configures the group names on the back-end.
Permission	▪ Enter *Yes* to search the enabled security attributes for users. ▪ Enter *No* to search the disabled security attributes for users.
Clear Search	Click to clear the Search fields.

By Facility Name/By Facility (User Name) tab:

Field	Information
Facility Name	Enter the name of the facility to view attributes by facility.
User Name	Enter the name of the user to filter results by users.
Permission	▪ Enter *Yes* to search the enabled security attributes. ▪ Enter *No* to search the disabled security attributes.

To expand providers, staff, roles, or security item name groups, click the *Plus* (+) icon.

To collapse providers, staff, roles, or security item name groups, click the *Minus* (-) icon.

Note: Functionality for the buttons in the bottom bar remains the same as in Classic View.

Assigning Security for Specific Patient Documents Folders

Enable security attributes to control access to specific Patient Documents folders. These attributes must be enabled by eClinicalWorks, and may incur some costs.

For more information, contact eClinicalWorks Support.

Specifying Co-Administrators

A co-administrator has most of the same security access as the administrator. You can have permanent co-administrators or assign the role only when the administrator is away.

To specify a co-administrator:

1. From the File menu, click *Security Settings*.

The Security Settings window displays.

2. Click the *By User* tab.

A list of users displays in the left pane.

3. Select the user to specify as a co-administrator from the left pane.

A list of available security attributes displays in the right panes.

4. Check the box for the *Manage Security* item.

Selected User: Cordez, Janie D — Clear Search

Security Item Name	Security Item Desc	Security Group Name	Permission
Employers Customization	Allows the user to add and edit employers and employer informatic	Administration / System Admin Setup	☐
Enable Practice Access	Allow user to add/update/delete Practice information	Administration / System Admin Setup	☐
Fax-Server Properties		Administration / System Admin Setup	☐
Fax_server_Restart	Allows the user to restart the fax server. From the Fax menu, selec	Administration / System Admin Setup	☐
Fax_Server_Shutdown	Allows the user to perform a Graceful Shutdown of the fax server. I	Administration / System Admin Setup	☐
Global Alerts - Administrator	Allows Access to configure global alerts	Administration / System Admin Setup	☐
Global Alerts - Assign To Patients	Allows access for assigning alerts to patients.	Administration / System Admin Setup	☐
Interface Dashboard	Authorizes to view interface dashboard	Administration / System Admin Setup	☐
Interface Dashboard - Modify Mappings	Authorizes to modify interface dashboard mappings	Administration / System Admin Setup	☐
Interface Dashboard - View HL7 Transaction in reports	Authorizes to view HL7 Transactions in Reports	Administration / System Admin Setup	☐
Interface Reconciliation - Electronic	Allow a user to reconcile failed electronic results	Administration / System Admin Setup	☐
Interface Reconciliation - Manual	Allow a user to manually reconcile failed electronic results	Administration / System Admin Setup	☐
Interface Reconciliation - View	Allow a user to reconcile failed electronic results	Administration / System Admin Setup	☐
Manage access to admin band	To show admin band and hide the admin icon	Administration / System Admin Setup	☑
Manage access to admin order set configuration	Manage access to admin order set configuration	Administration / System Admin Setup	☑
Manage access to admin providers	Manage access to admin providers	Administration / System Admin Setup	☑
Manage access to admin resources	Manage access to admin resources	Administration / System Admin Setup	☑
Manage access to admin staffs	Manage access to admin staffs	Administration / System Admin Setup	☑
Manage access to admin user logs	Manage access to admin user logs	Administration / System Admin Setup	☑
Manage access to referring providers	Manage access to referring providers	Administration / System Admin Setup	☑
Manage read access to admin providers	Permission to read access to admin providers	Administration / System Admin Setup	☑
Manage Security	Allows the Administrator to designate a co-Administrator who can	Administration / System Admin Setup	☑
Map vitals	Allows a user to configure column headings for the Vitals feature.	Administration / System Admin Setup	☑

5. Click *Save*.

The system sets the selected user as a co-administrator.

A list of current co-administrators displays on the eClinicalWorks Administrator window. For more information, refer to Changing the eClinicalWorks Administrator.

Deny Access to All Security Attributes by Default

Some of the security attributes in the eClinicalWorks system deny access to certain features, while other attributes permit access.

To ensure that the default for your practice denies access to features unless the practice specifically grants access, the Practice Default option provides this security measure.

To deny access to all features by default:

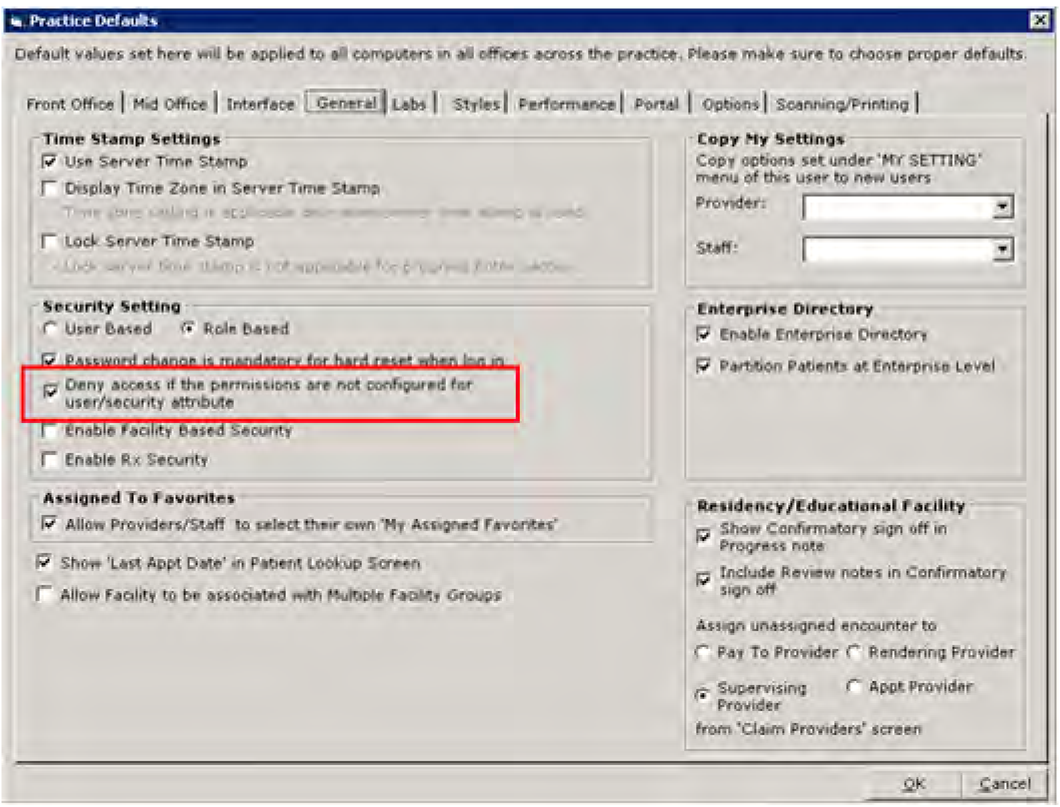
1. From the File menu, point to *Settings*, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display.

3. In the Security Setting section, check the *Deny access…* box:



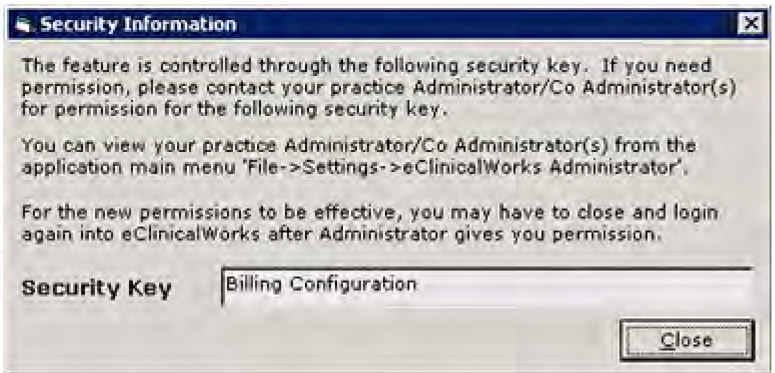
4. Click *OK*.

   Users are denied access to all security attributes by default. All users must log out and log back in to view these changes.

Viewing Security Info

A Security Info button displays on various windows if the user does not have permission to access or modify the information contained there.

Click *Security Info* to display information about the specific security attribute restricting your access:



Changing Passwords

Change your current password from the File menu.

To change your password:

1. From the File menu, click *Change Password*.

   The Change Password window displays.
2. Enter your current password in the Old Password field.
3. Enter the new password in the New Password field.
4. Re-enter your new password in the Confirm New Password field.
5. Click *OK*:

   A confirmation window displays.
6. Click *OK*.

   Your password is changed.

User Groups

Users with permission for the *Administrators* security attribute can create User Groups for doctors and staff members. User groups assign functions, such as work queues, to groups of staff members.

For more information about assigning user groups to work queues, refer to the following documents, available on the my.eclinicalworks.com Customer Portal, under Knowledge > Documents & Videos > Billing:

- *Rule Engine Users Guide - Claim Edits Rules* - Provides information about creating and processing Claim Edits rules using the Rule Engine available through the eClinicalWorks application.
- *Rule Engine Users Guide - Workflow Rules* - Describes how to write Workflow Rules to define the parameters needed by the system to group claims into work queues for analysis and action by assigned CBO (Central Billing Office) users and to enable CBO managers or administrators to track CBO user productivity as they work on claims in each queue.

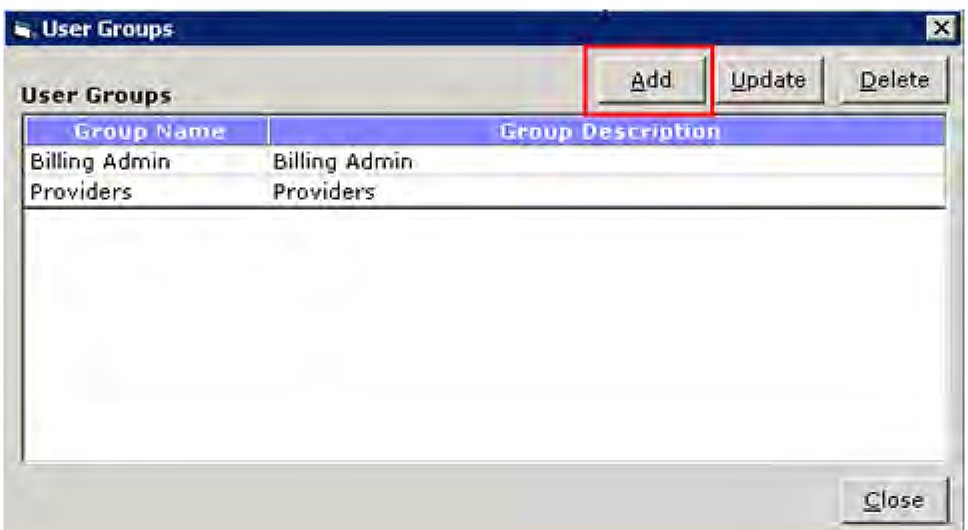
Add a User Group

Users with permission for the *Administrators* security attribute can create User Groups for doctors and staff members.

To add user groups:

1. From the File menu, click *User Groups*.

   The User Groups window displays.
2. Click *Add*:



   A second User Groups window displays.
3. Enter the name of the new user group in the Group Name field.
4. Enter a description of the new group in the Group Description field.
5. Search for a username:

   - Enter the username to search against the list of groups in the Search field.

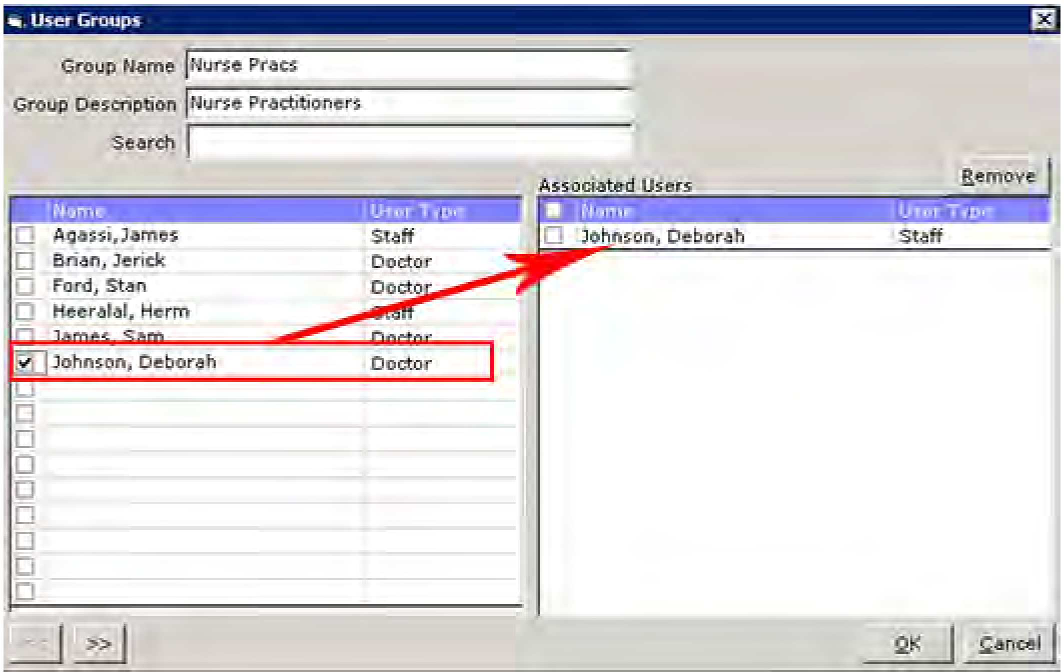
     OR

- ◆ Enter the first letter of a username to search for all users with that initial.

6. Check the boxes next to the users to add them to the group.

   As each box is checked, the associated names and user types display in the right panel.

7. To remove names from the right panel, check the box(es) next to the name(s) and click *Remove*:



8. Click *OK* to save the group.

   The new group displays in the User Groups window.

9. Click *Close* to exit.

Selecting User Groups from the Work Queue Detail Window

To select the User Groups from the Work Queue Detail window:

- From the Categories section:
  - ◆ Select the queue category.

    OR
  - ◆ Click *Add* in the Categories section to create a new category.
- From the Queues section:
  - ◆ Select the queue and click *Update*.

    OR
  - ◆ Click *Add* in the Queues section to create a queue.

    The Work Queue Detail window displays:


Work Queue Detail
Work Queue Detail
Queue Name
Benchmark
Days
Warning
Days
Escalation Level 1
Days
User
Clear
User
User Group
Escalation Level 2
Days
Clear
Escalation Level 3
Days
User
Clear
Operation Mgmt
User
Clear
Sort Order
Queue Type
Claim
Queue View Type
Single Item
OK
Cancel

MACHINE, USER, AND PRACTICE SETTINGS

Administrators may customize many types of settings through the File menu.

Click the category below to learn more about machine, user, and practice settings:

- Primary Facility
- Local Settings
- My Settings
- Practice Defaults
- eClinicalWorks Administrator
- Hard Reset Password
- Authentication Settings
- Print/Fax/Lock Settings
- eClinicalWorks APU ID Location
- Enable Tree View for Social History
- Format Progress Notes
- Upload Images
- UpToDate Setup

Primary Facility

The practice primary facility information must be added to the system from the Facility Information window.

To update your primary facility's information:

1. From the File menu, point to *Settings*, and then click *Primary Practice*.

The Facility Information window displays.

2. Update the information as you normally would for any facility.

For more information about updating facility information, refer to Facilities.

Local Settings

Local settings are specific to each machine.

The Local Settings window contains the following options:

Setting	Description
Specifying a Default Appointment Facility	To select the facility used by default when creating appointments from this computer, click *More* (…). For more information, refer to the *Front Office Setup Guide*.

Setting	Description
Fax Inbox Folder	To select the folder on this computer to store incoming faxes, click *More* (...). For more information, refer to the *Front Office Setup Guide*.
Enable DYMO® Label Printing	Check this box to enable the use of DYMO® label printers from this computer. For more information, refer to the *Front Office Setup Guide*.
DYMO® Printer Template File	To select the file used as a template for printing DYMO® labels from this computer, click *More* (...). For more information, refer to the *Front Office Setup Guide*.
Lab Specimen Label Template File	To select the file used as a template for printing lab specimen labels from this computer, click *More* (...). For more information, refer to the *Electronic Medical Records Users Guide*.
Lab Specimen Label Template File with Bar Code	To select the file used as a template for printing lab specimen labels with barcodes from this computer, click *More* (...). For more information, refer to the *Electronic Medical Records Users Guide*.
Audiometer: Get Data from Tremetrics Device	Check this box to enable Tremetrics® audiology devices on this computer. For more information, refer to the *Electronic Medical Records Users Guide*.
Show Printer Selection Dialog	Check this box to enable the selection of printers whenever you print from the eClinicalWorks application on this computer. If this box is not checked, then eCW automatically uses the default printer for this computer. For more information, refer to Showing the Printer Selection Dialog.
Use Microsoft Word for Printing check boxes	Check the box(es) next to the type(s) of claim forms to export into Microsoft® Word before printing from this computer. For more information, refer to Using Microsoft Word for Printing Claim Forms.
Show Multiple Bookings Warning	Check this box to display a warning when a user tries to add multiple bookings for the same provider at the same time on this computer. For more information, refer to the *Front Office Setup Guide*.
Refresh Interval For Resource Schedule	Enter the number of minutes between automatic refreshes of the Resource Scheduling window on this computer. For more information, refer to the *Front Office Setup Guide*.
Show All Visits / Show Only Billable Visits	Click one of these radio buttons to determine whether all visits or only billable visits will display on the Resource Scheduling window on this computer. For more information, refer to the *Front Office Setup Guide*.
Copy Data To: Excel File	Check this box to export information to a Microsoft Excel file instead of the default text file when a user clicks the *Copy* button in the eClinicalWorks application on this computer. For more information, refer to Copying Information to a Microsoft Excel File.
Enable JTECH® InstaCall™ Pager	Check this box to enable the use of a JTECH® pager system on this computer. For more information, refer to Enabling a Pager System.

Setting	Description
Titmus® Data Option check boxes	Check the box(es) in this section to configure the patient information included on Sperian® Titmus® stereogram tests. For more information, refer to the *Electronic Medical Records Users Guide*.
Manifest File Setting	Check this box if the practice is using multiple versions of the eClinicalWorks application on this computer, thereby preventing the system from accessing the required DLL (.dll) files appropriately. For more information, refer to Enabling the Manifest File Setting.

Showing the Printer Selection Dialog

Enable the printer selection dialog from Local Settings for each computer.

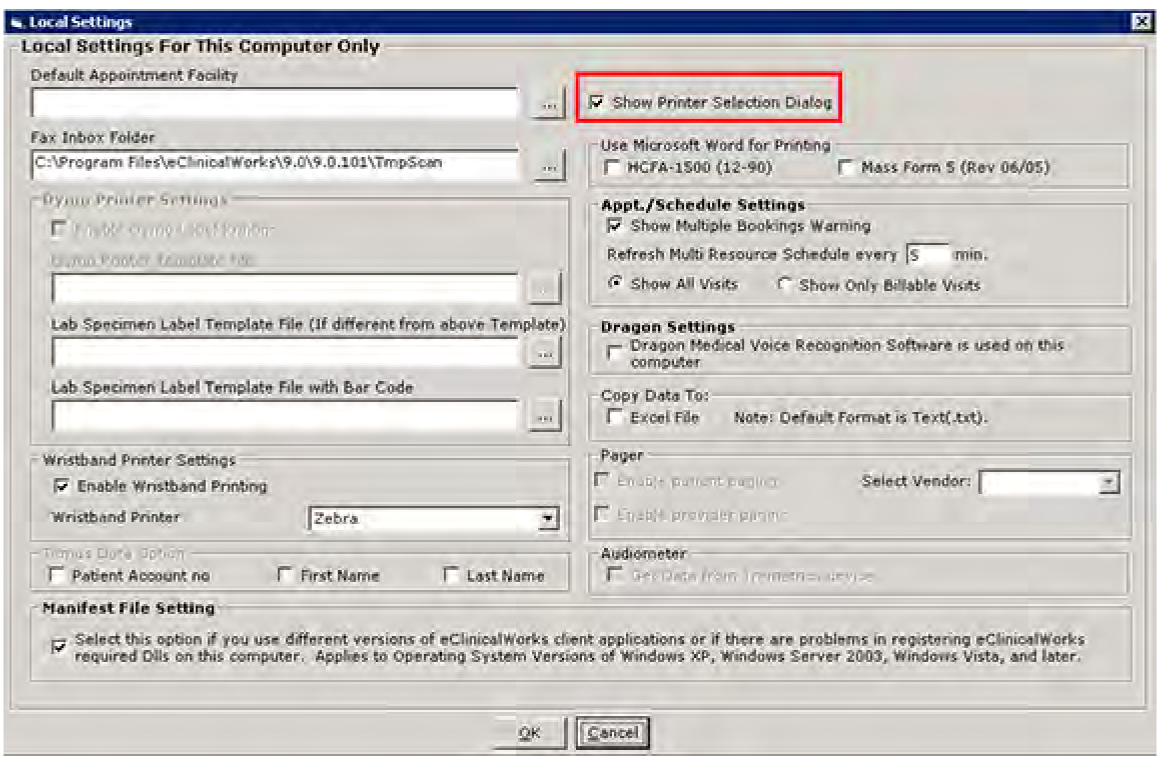
- With this option enabled, users may select which printer they want to use before printing a document.
- With this option not enabled, the default printer for this computer is used whenever you click a *Print* button in the eCW application.

To show the printer selection dialog:

1. From the File menu, point to *Settings*, and then click *Local Settings*.

   The Local Settings window displays.

2. Check the *Show Printer Selection Dialog* box:



3. Click *OK*.

The printer selection dialog displays whenever a document is printed from the eClinicalWorks® application on this computer.

Using Microsoft Word for Printing Claim Forms

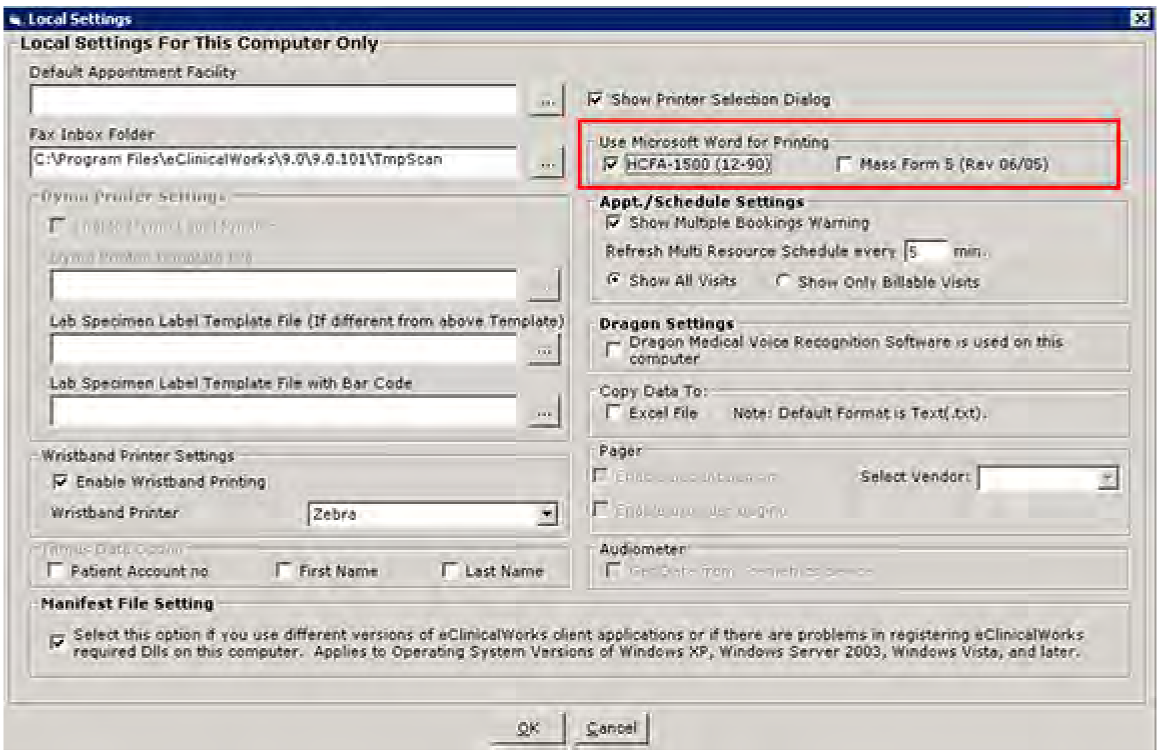
You can export claim forms to Microsoft Word to make adjustments before printing. Enable this option from Local Settings for each machine.

To use Microsoft Word for printing claim forms:

1. From the File menu, point to *Settings*, and then click *Local Settings*.

The Local Settings window displays.

2. Check the box(es) in the *Use Microsoft Word for Printing* section for the forms to use with Microsoft Word:



3. Click *OK*.

The system exports the selected claim forms to Microsoft Word before printing them from this computer.

Copying Information to a Microsoft Excel File

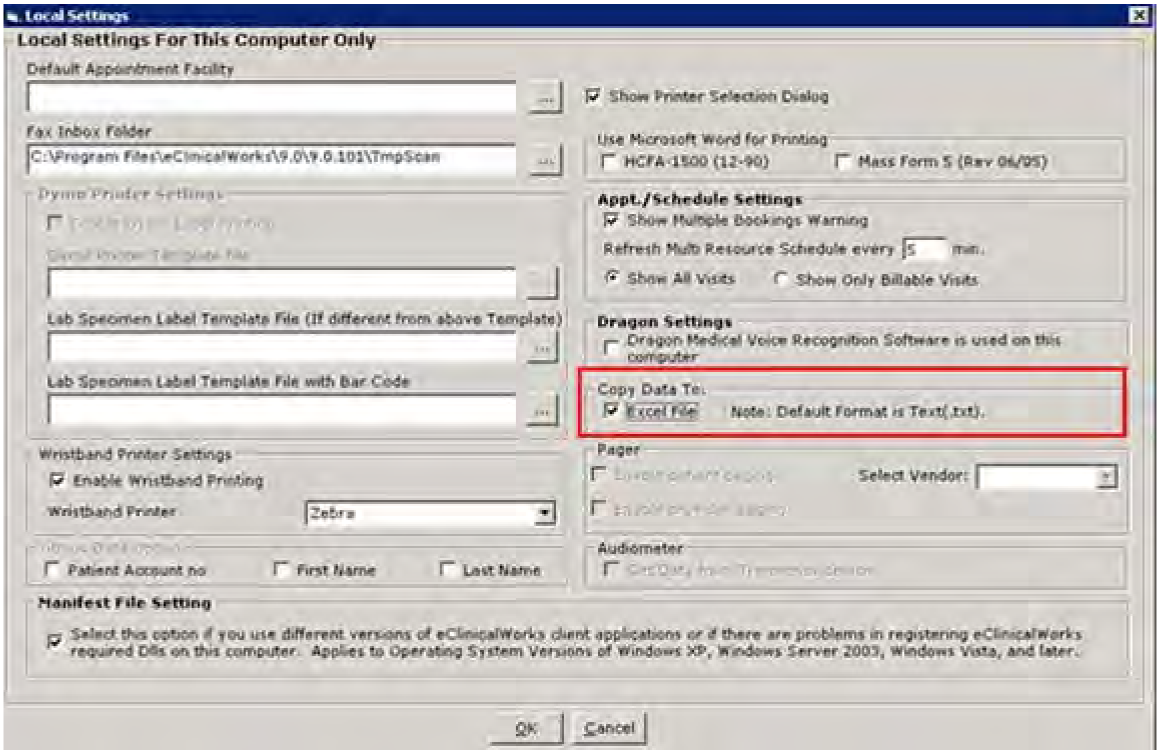
To copy information from the eClinicalWorks application, click one of the *Copy* buttons to export into a Microsoft Excel file instead of the default text file.

To copy information to a Microsoft Excel file:

1. From the File menu, point to *Settings*, and then click *Local Settings*.

   The Local Settings window displays.

2. Check the *Excel File* box:



3. Click *OK*.

   The system exports information copied from the eClinicalWorks application on this computer into a Microsoft Excel file.

Enabling a Pager System

Use the available pager system with eClinicalWorks to alert waiting patients and key personnel when it is their turn to be seen.

To use the pager system, install it on the computer and enable it from Local Settings under the File menu.

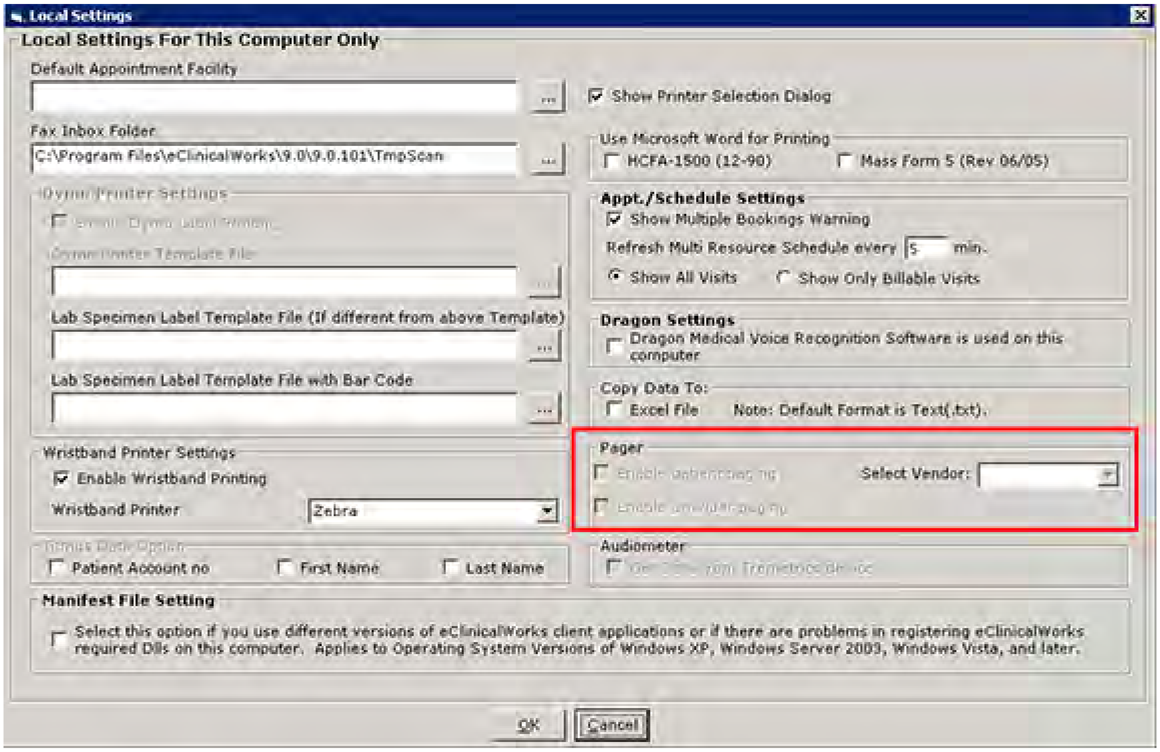
For more information about using the pager system, refer to the *Front Office Users Guide*.

To show a multiple bookings warning:

1. From the File menu, point to *Settings*, and then click *Local Settings*.

   The Local Settings window displays.

2. Check either the *Enable Patient Paging* box or the *Enable Provider Paging* box in the Pager pane:



3. Select a vendor from the drop-down list in the Select Vendor field.
4. Click *OK*.

   The pager system is enabled on this computer.

   For more information about pagers, refer to the *Devices Users Guide*.

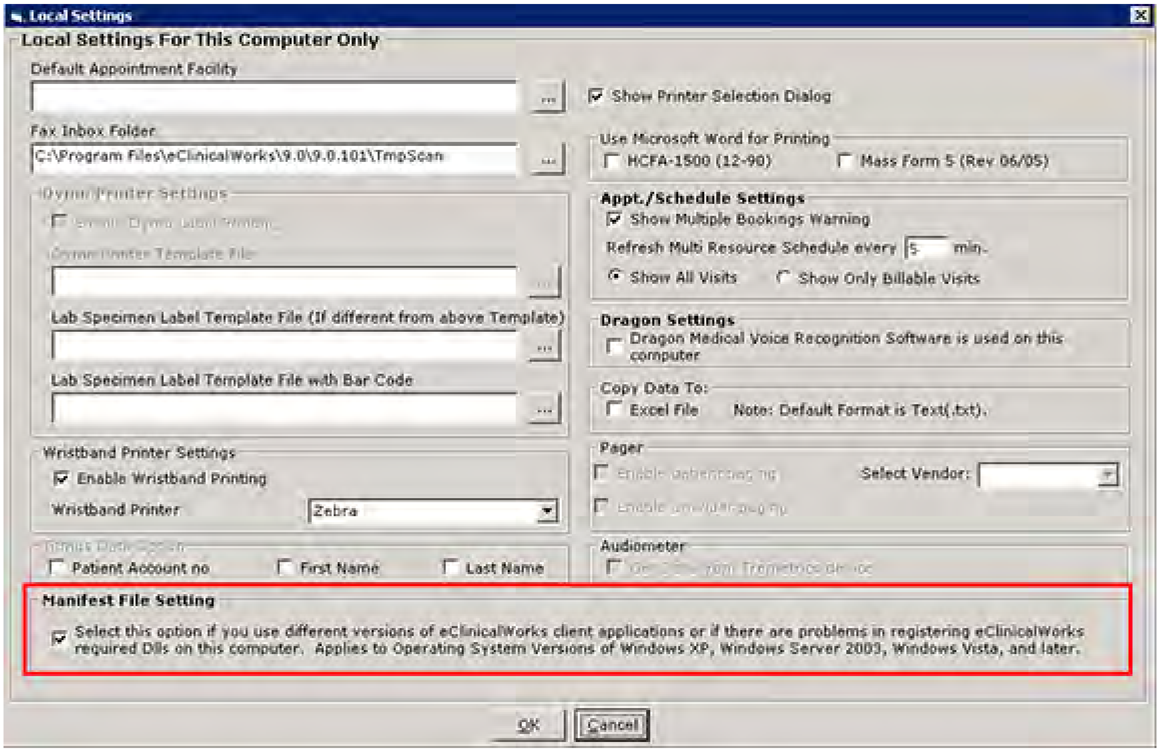
Enabling the Manifest File Setting

A setting is available for practices that use multiple versions of the eClinicalWorks application on one computer. When this multiple version use occurs, the system may not access the required DLL (.dll) files appropriately, so enabling this setting corrects this problem.

To enable the manifest file setting:

1. From the File menu, point to *Settings*, and then click *Local Settings*.

   The Local Settings window displays.
2. Check the *Manifest File Setting* box:



3. Click *OK*.

   The manifest file setting is enabled on this computer.

My Settings

The settings available in My Settings are specific to the current logged-in user.

For more information about the types of settings to configure, refer to:

- Global Settings
- My Providers Tab
- User Settings Tab
- Physician Reference Tab
- Views Tab
- Show-Hide Tab
- Defaults Tab
- Defaults 2 Tab
- Warnings Tab
- My Resources Tab
- eClinicalWorks P2P Tab

Global Settings

Access the following settings from any tab:

Setting	Description
Configure My Assigned Favorites	Click this button to configure your favorite staff members. For more information, refer to Configuring My Favorites from My Settings.
Copy My Settings	Click this button to copy your settings to another user. For more information, refer to Copying My Settings.

Configuring My Favorites from My Settings

Configure My Favorites from the My Settings window, as well as the Provider and Staff windows.

To enable this feature, refer to Enabling Users to Populate My Favorites Lists.

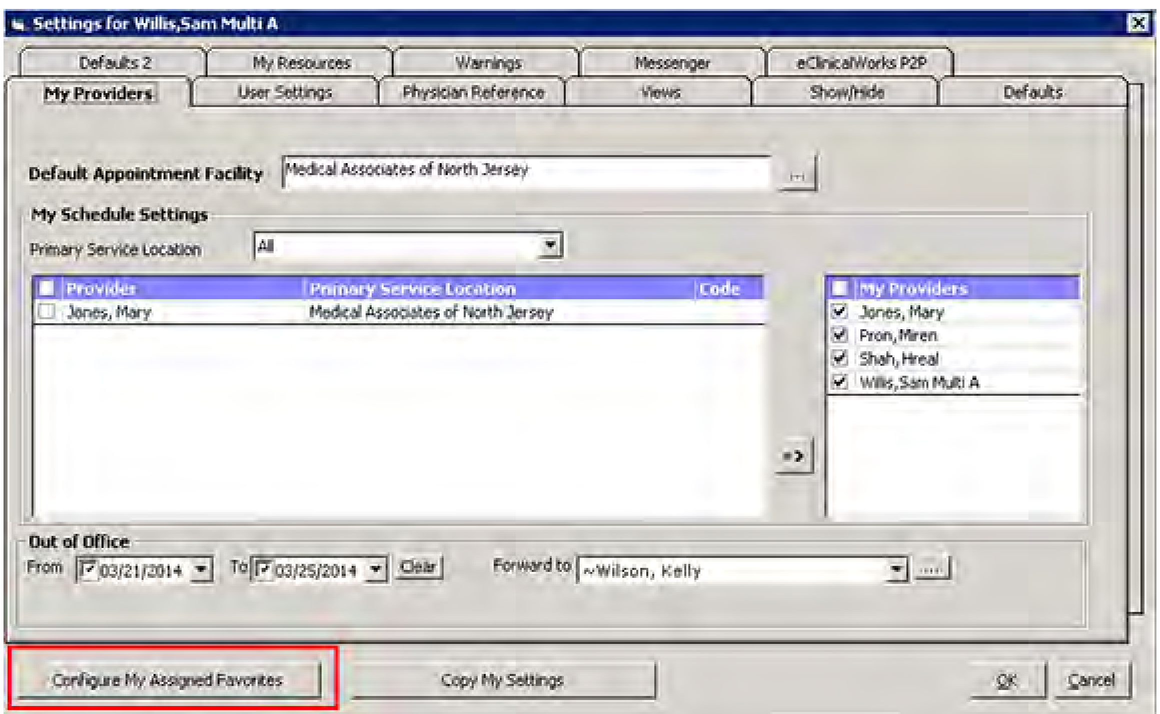
Note: This feature is enabled by item key. Contact eCW Support and refer to the item key 0024_UK.

To configure My Assigned Favorites using My Settings:

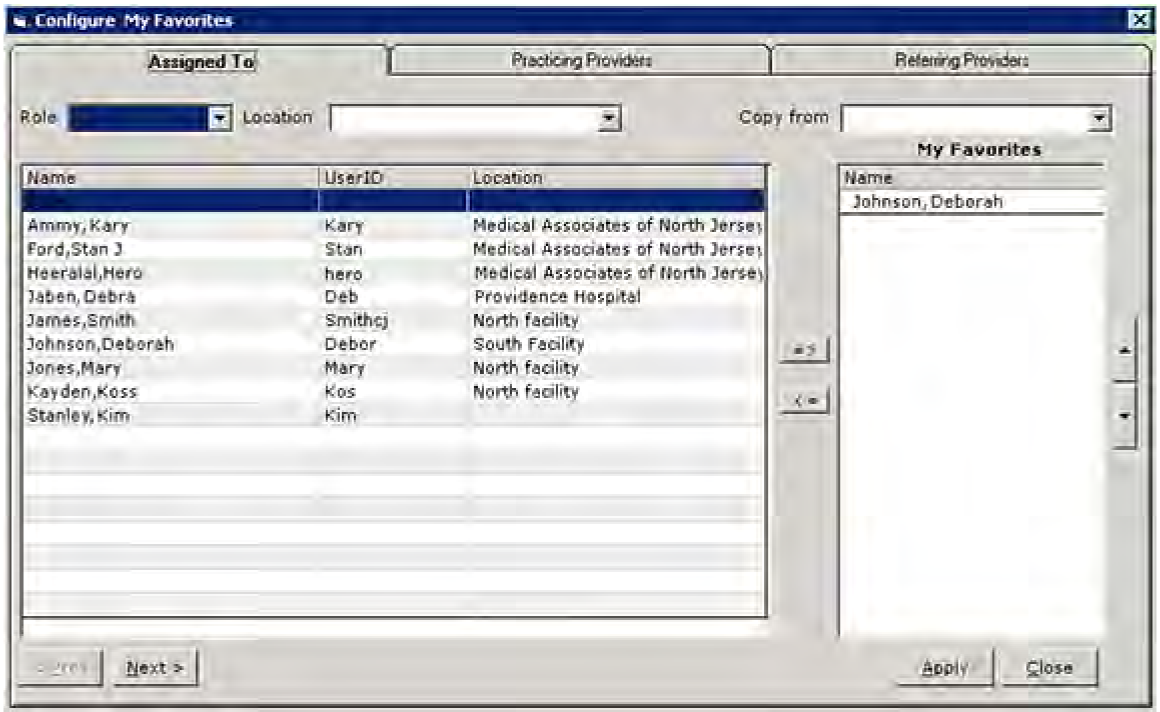
1. From the File menu, point to *Settings*, and then click *My Settings*.

   The My Settings window displays.

2. Click *Configure My Assigned Favorites*:



   The Configure My Favorites window displays:



3. Select the role of the users to add in the *Role* drop-down list.
4. Select a facility from the *Location* drop-down list.
5. Select the options specified in the table below to perform the corresponding function:

Function	Option
To copy favorites from another user	Select the name of that user in the *Copy from* drop-down list. The system copies the names of that person's favorites to the *My Favorites* list.
To copy names from the list in the grid	1. Highlight a name. 2. Click => to move the name to the *My Favorites* list.
To remove names from the My Favorites list	1. Highlight a name in the *My Favorites* list. 2. Click <= to remove the name.

6. Click *Save* to complete the selection of *Assigned To* favorites.

   Repeat the necessary steps to select names for *Assigned To* favorites from additional roles.

   Log out and log back in to view the changes.

Copying My Settings

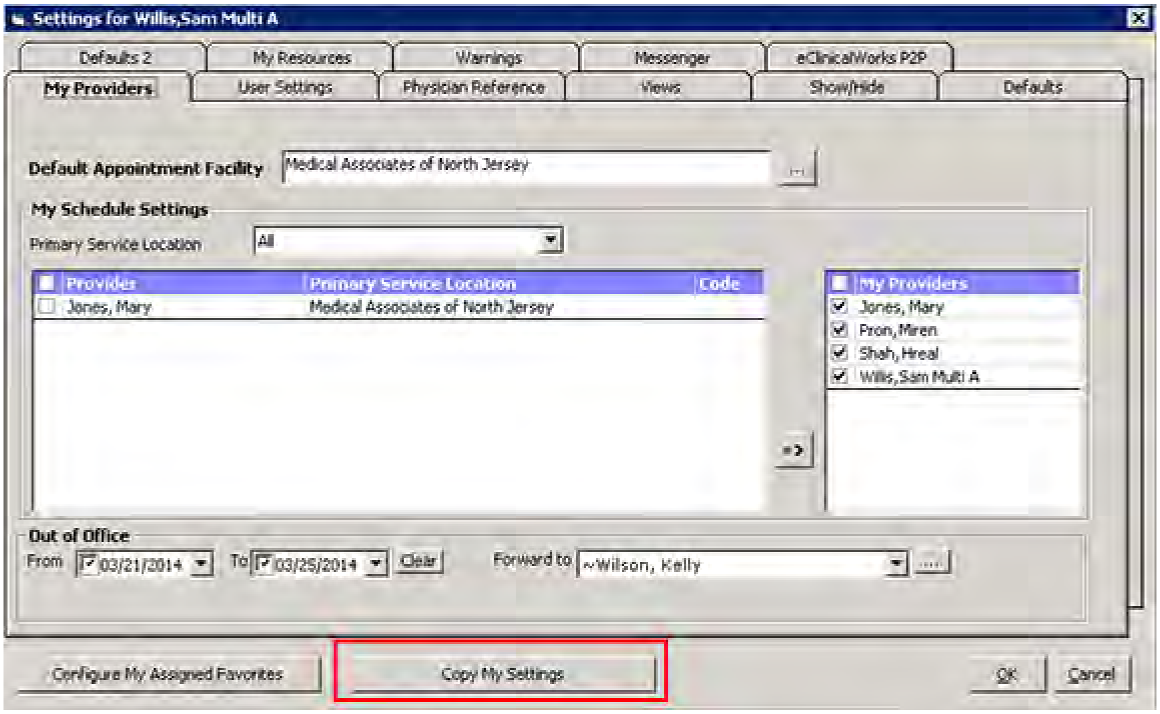
Copy the My Settings for one provider to other providers.

To copy My Settings:

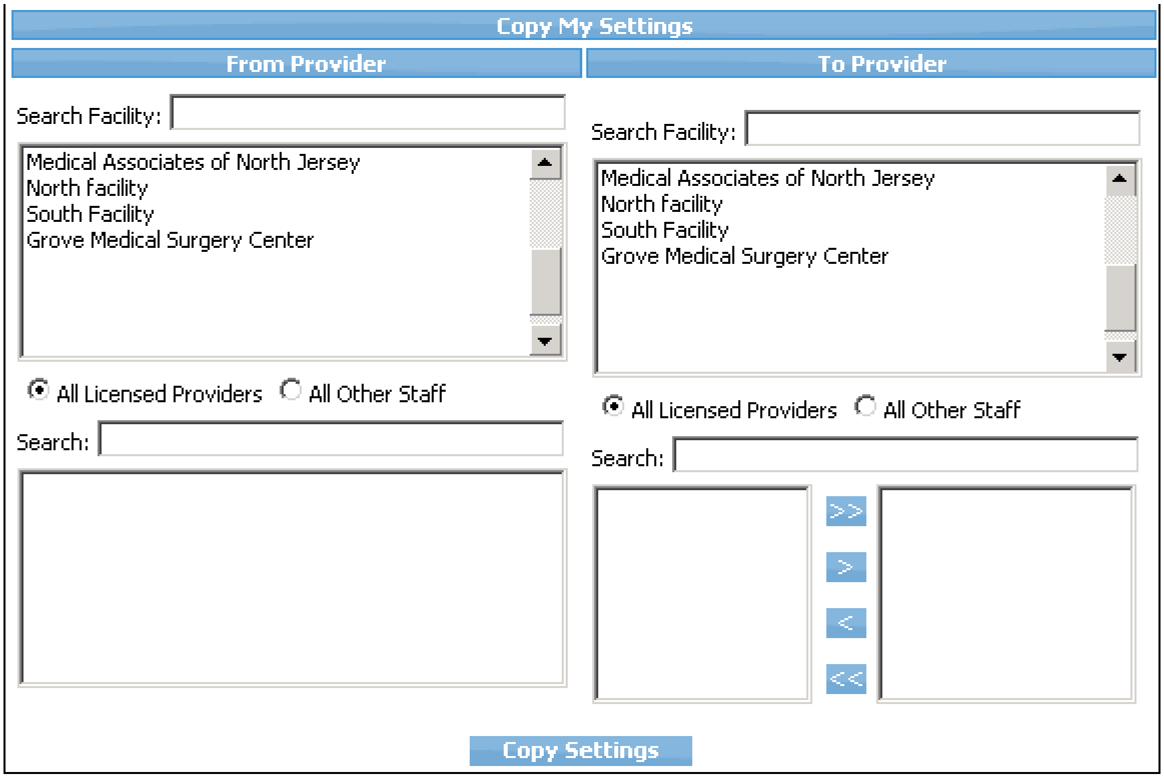
1. From the File menu, point to *Settings*, and then click *My Settings*.

   The Settings window displays.

2. Click *Copy My Settings*:



   The Copy My Settings window displays:



3. In the *From Provider* section, search for the practice and/or facility from which you want to copy the settings.

   The providers at the selected practice display in the bottom-left pane.

4. Highlight the provider from which you want to copy settings in the bottom-left pane.
5. In the *To Provider* section, search for the practice and/or facility to which you want to copy the settings.

   The providers at the selected practice display in the bottom-right pane.

6. Highlight the provider to which you want to copy settings in the bottom-right pane.
7. Click *Copy Settings*.

   A confirmation window displays.

8. Click *OK*.

   The system copies the settings from the selected provider to the other selected provider. Log out and log back in to view the changes.

My Providers Tab

Each user can specify the default appointment facility and the providers displayed on the Resource Schedule from My Settings.

The table below describes the options available from this tab:

Setting	Description
Default Appointment Facility	Click this button to configure your favorite staff members. For more information, refer to Specifying a Default Facility.
My Schedule Settings	Click this button to copy your settings to another user. For more information, refer to Configuring the Providers Displayed on the Resource Schedule.
Out of Office	Select a date range during which you will be out of the office using these drop-down calendars.

Specifying a Default Facility

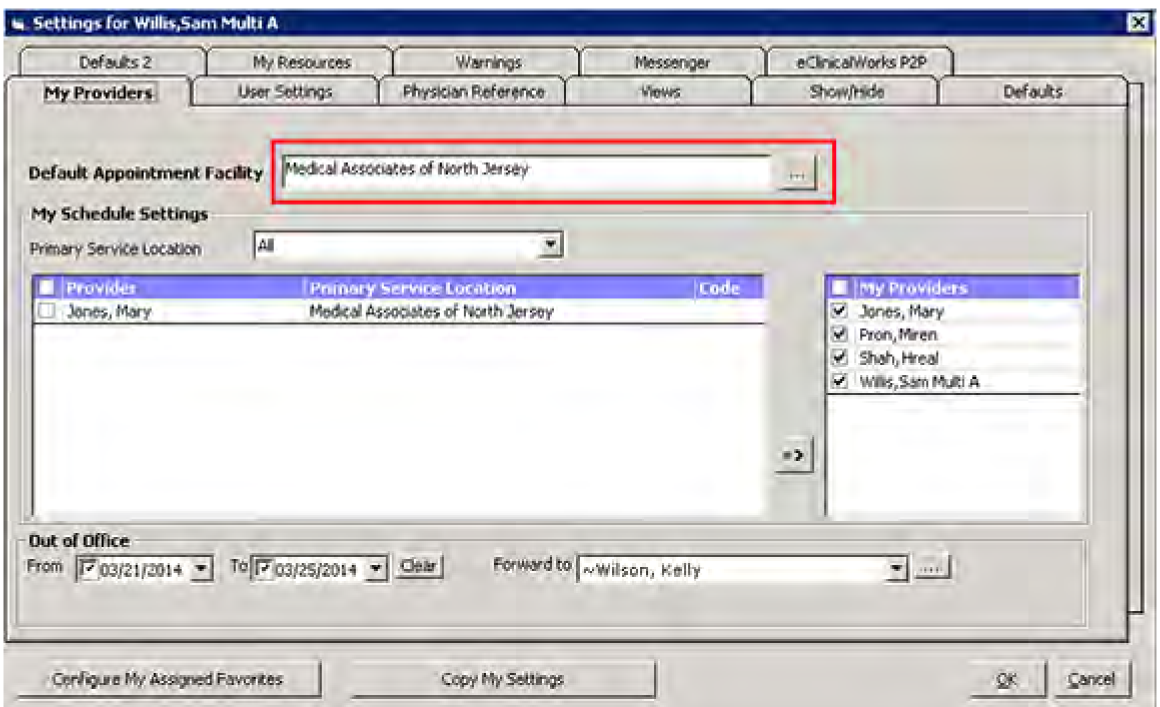
Specify the default appointment facility for each user from My Settings.

To specify a default facility for a user:

1. From the File menu, point to *Settings*, and then click *My Settings*.

   The Settings window opens with the My Providers tab displayed by default.

2. Click *More* (...) next to the field at the top of the window:



   The Facility List window displays.

3. Highlight the facility to use and click *OK*.

   The system closes the Facility List window and adds the selected facility to the top field on the Settings window.

4. Click *OK*.

   The default facility is specified for the current logged-in user. Log out and log back in to view the changes.

Configuring the Providers Displayed on the Resource Schedule

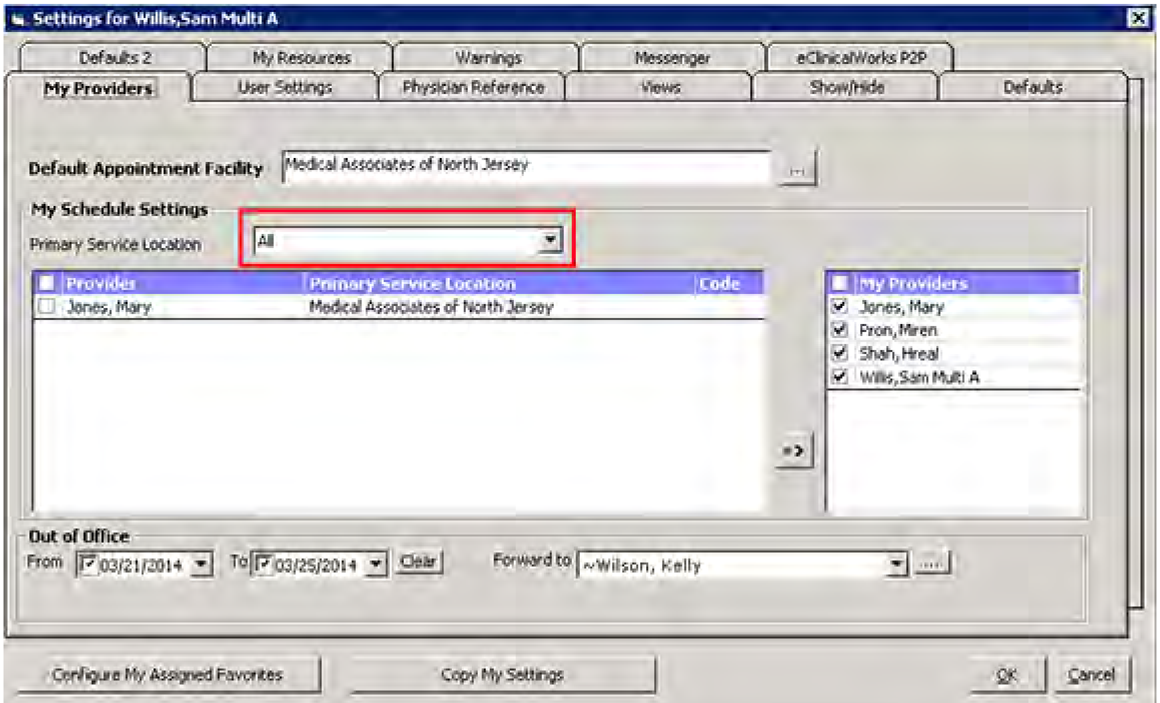
Configure the providers to display on the Resource Schedule for each user from My Settings.

To configure the providers displayed on the Resource Schedule:

1. From the File menu, point to *Settings*, and then click *My Settings*.

   The Settings window opens with the My Providers tab displayed by default.

2. Select the facility that to configure providers for from the Primary Service Location drop-down list:



   A list of the providers available at the selected location displays in the left pane.

3. Check the box(es) next to the provider(s) to display for this user on the Resource Schedule.

4. Click **=>**.

   The system adds the selected providers to the right pane.

5. Clear any providers in the right pane so they will not display to this user.

6. Click *OK*.

   The specified providers display on the Resource Schedule for the selected facility. Log out and log back in to view the changes.

Configuring an Out-of-Office Date Range

Enhanced Feature

The Out-of-Office date range can be configured from the My Settings window under the My Providers tab.

When this feature is enabled, it will prompt the user with an alert message that a staff member is out of the office, when that user tries to assign documents, referrals, Telephone Encounters, labs, actions, and Progress Notes to the staff member who is out.

Users can assign Telephone Encounters to staff members and or providers who are out of the office. Although the system lets the user assign the Telephone Encounter to out-of-office staff, it prompts the user with an alert message that the staff member is out of office.

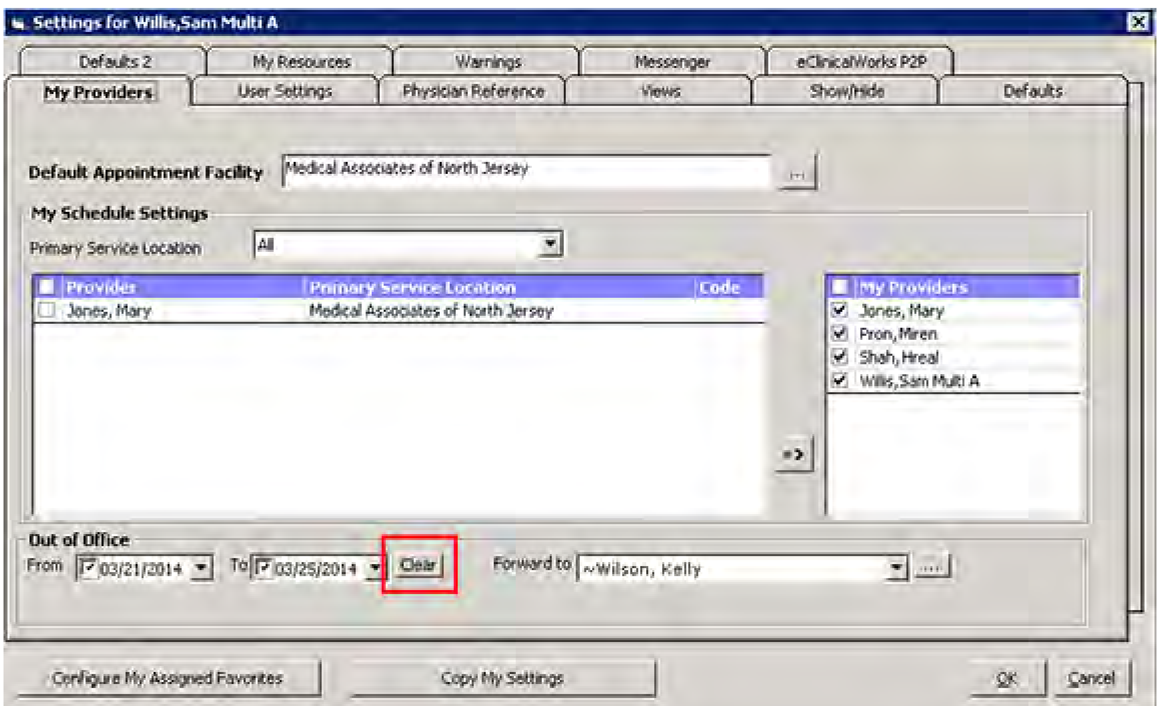
1. On the File menu, point to *Settings* option and then click *My Settings*.

   The Settings window displays.

2. Click the *My Providers* tab.

3. Select the period of time for which the staff member/provider will remain out of office.

   To clear the dates, use the *Clear* button:



4. Click *OK*.

> **Note:** The system makes these changes only for the logged-in user.

> **Note:** To remove this out-of-office date range, clear the boxes in the *From* and *To* drop-down calendars, or click *Clear*.

5. Log out and log back in for the changes to take effect.
6. In the Telephone Encounter window, assign the encounter to the out-of-office staff member.
7. Click *OK*.

   The system displays a prompt showing the dates the staff member will be out of the office, asking if you still want to assign the encounter to that person.
8. To proceed, click *Yes*.

   The encounter is assigned.

User Settings Tab

Several user-based settings enable users to customize eClinicalWorks from the File menu, click the *Settings* drop-down list, and select *My Settings*.

For more information, refer to:

- Configuring the Method of Provider Selection in Office Visits and Encounters Lookup
- Enabling the Server Object Setting
- Enabling Pick Lists by Facility
- Specifying a Home Screen
- Configuring the Default Right Panel

The table provides a description of the options available from this tab:

Setting	Description
pop-up Drug Interaction Window	Click a radio button to determine the severity of a drug interaction before the Interaction window pops up. For more information, refer to the *Electronic Medical Records Setup Guide*.
Provider/Resource Selection in Office Visits and Encounters Lookup	Click a radio button to determine the method of selecting providers and resources on the Office Visits and Encounters windows. For more information, refer to Configuring the Method of Provider Selection in Office Visits and Encounters Lookup.
Enable Centralized Resource Scheduling (Facility Based)	Click a radio button to enable or disable facility-based scheduling on the Resource Scheduling window. For more information, refer to the *Front Office Setup Guide*.
Apply My Facility to Filter Encounters	Click a radio button to determine whether the system will filter encounters automatically by the default facility selected on the My Providers tab. For more information, refer to the *Electronic Medical Records Setup Guide*

Setting	Description
ICD Association for the Procedure Codes Entered in EMR Billing	Click a radio button to determine which ICD codes are automatically associated with the procedure codes entered on the Billing window in Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.
Copy Treatment Notes for an Assessment in Carets	Click a radio button to determine whether the system carries Treatment notes from the previous visit forward to the current encounter when using the caret feature. The system carries all other information forward with the caret feature when this option is disabled. For more information, refer to the *Electronic Medical Records Setup Guide*.
Automatically get the Diagnosis in the Outgoing Referral	Use the radio buttons and check box in this section to determine whether diagnoses populate automatically in outgoing referrals. For more information, refer to the *Front Office Setup Guide*.
View eCliniForms Toolbar in Progress Notes	Check this box to display the eCliniForms toolbar on the Progress Notes window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Enable UpToDate in Progress Notes Right Panel	Check this box to enable the UpToDate® clinical reference tool in the right Chart Panel. For more information, refer to the *Electronic Medical Records Setup Guide*.
Interval in Minutes to Refresh Fax Inbox	Enter the number of minutes between automatic refreshes of the Fax Inbox in this field. For more information, refer to the *Front Office Setup Guide*.
Latest Fax in Fax Inbox Arrives at	Click a radio button to determine where new faxes display in the Fax Inbox. For more information, refer to the *Front Office Setup Guide*.
Enable Signature Pad in Fax Preview Window	Click a radio button to enable or disable the signature pad for use on the Fax Preview window. For more information, refer to the *Front Office Setup Guide*.
Enable ServerXMLHTTP Object	Click a radio button to manage communication between the eClinicalWorks client and server. For more information, refer to Enabling the Server Object Setting.
pop-up instruction window when ordering Labs/Xrays/ Procedures	Click a radio button to determine whether to add pop-up instructions to lab, imaging, and procedure orders. For more information, refer to the *Electronic Medical Records Setup Guide*.
Load PickList by Facility	Click a radio button to determine whether staff members can use different pick lists at different locations. For more information, refer to Enabling Pick Lists by Facility.

Setting	Description
Display style for Structured data elements in Progress Notes	Select a display style for Structured Data on the Progress Notes window using this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
My home window	Click a radio button to determine the window that displays by default when the eClinicalWorks application opens. For more information, refer to Specifying a Home Screen.
Default Right Panel	Configure the tab selected by default when the right Chart Panel opens. For more information, refer to Configuring the Default Right Panel.
Automatically add previously associated assessment when Rx is continued or refilled from Right panel (Medication Summary Screen)	Click a radio button to determine whether assessments that were previously associated with a prescription are automatically added to a patient's Progress Notes when continuing or refilling a prescription from the right Chart Panel. For more information, refer to the *Electronic Medical Records Setup Guide*.

Configuring the Method of Provider Selection in Office Visits and Encounters Lookup

Configure the method of selecting a provider on the Office Visits and Encounters Lookup windows for each user from My Settings.

To configure the method of selecting a provider on the Office Visits and Encounters Lookup windows:

1. From the File menu, point to *Settings*, and then click *My Settings*.

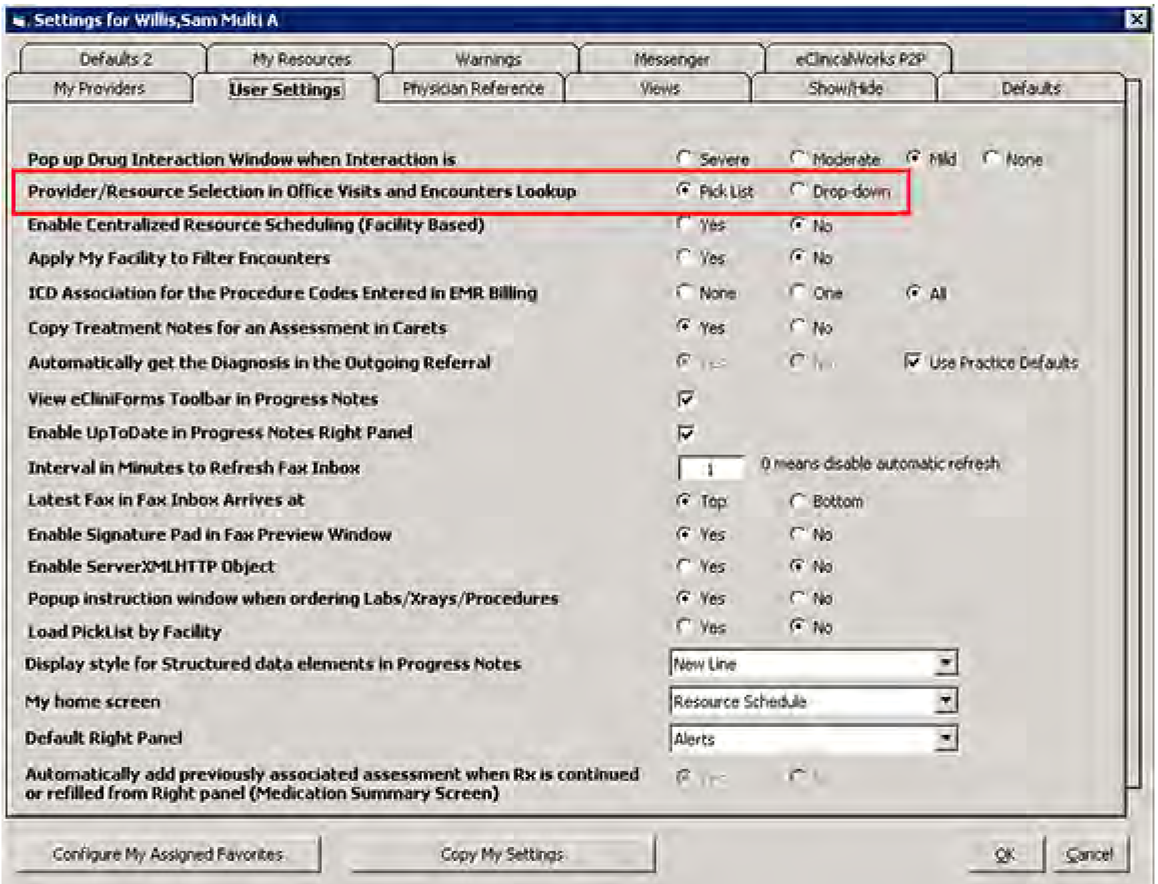
   The Settings window displays.

2. Click the *User Settings* tab.

   The User Settings options displays.

3. Click one of the following radio buttons in the *Provider/Resource Selection in Office Visits and Encounters Lookup* row:

   - **Pick list** - To select the provider, click *More* (...) and select from the list of providers.
   - **Drop-down** - Select the provider from a drop-down list:



4. Click *OK*.

The method of selecting a provider from the Office Visits and Encounters Lookup windows is configured. Log out and log back in to view the changes.

Enabling the Server Object Setting

The Enable ServerXMLHTTP Object setting on the User Settings tab on the My Settings window governs the communication between the eClinicalWorks client and server.

IMPORTANT! The default setting is *Yes* and must not be changed by the user.

To enable communication between the eCW client and server:

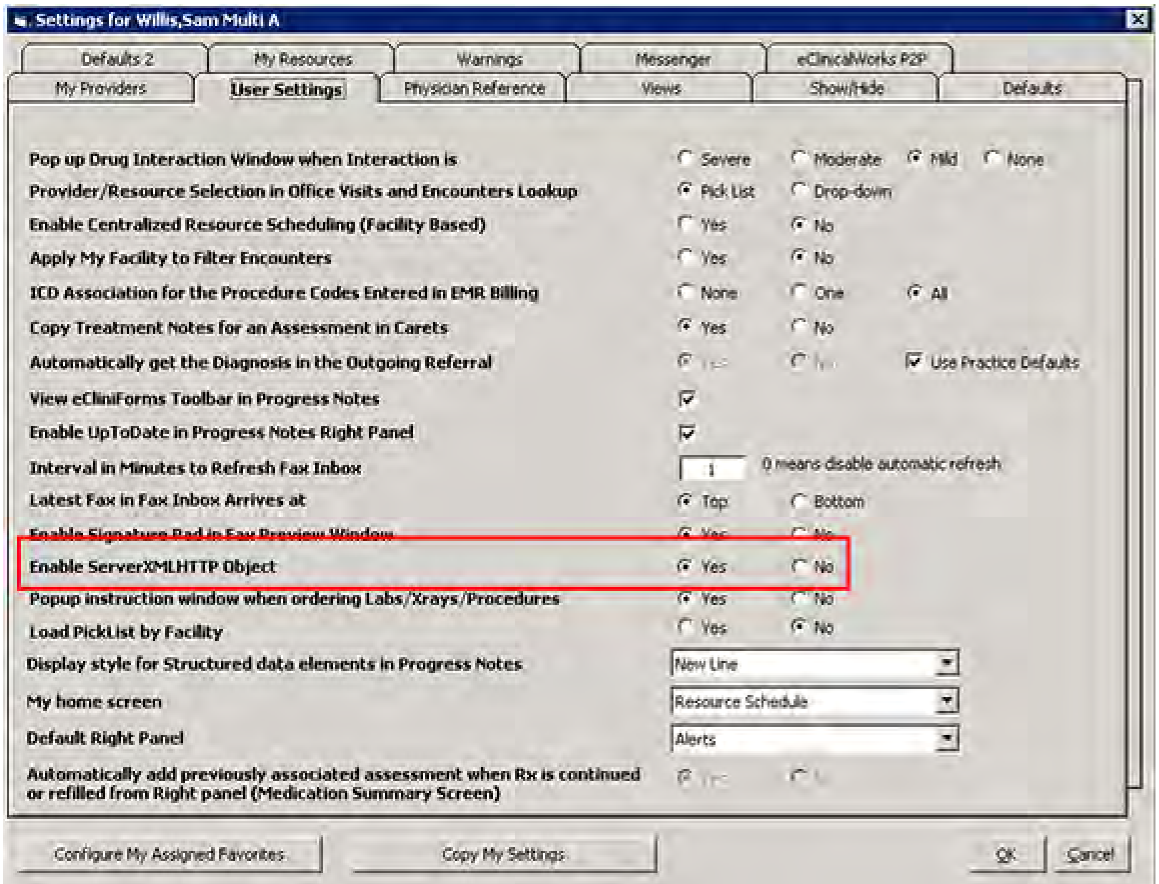
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *User Settings* tab.

The User Settings options display.

3. Click *Yes* in the Enable ServerXMLHTTP Object row:



4. Click *OK*.

The communication between the eCW client and server is configured. Log out and log back in to view the changes.

Enabling Pick Lists by Facility

Users can configure pick list categories by facility, enabling them to use different pick lists at different locations.

To enable pick lists by facility:

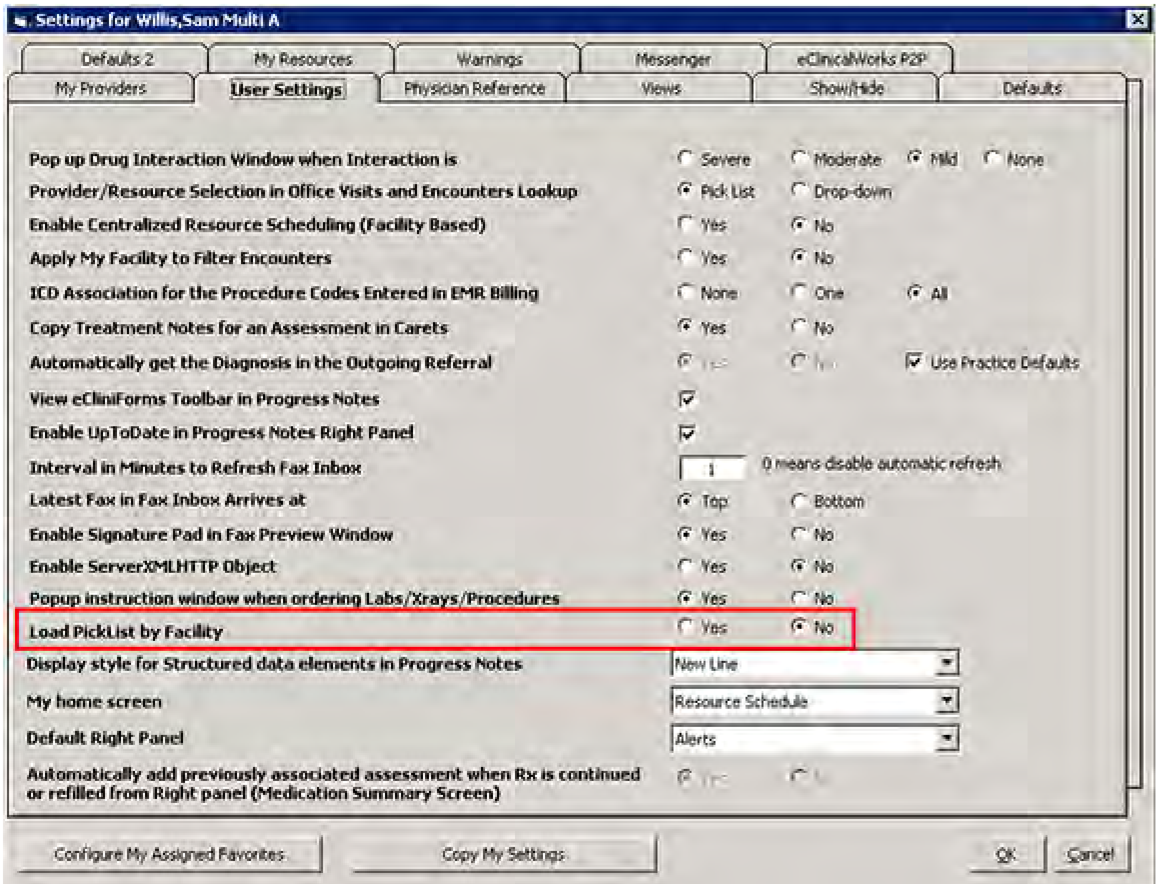
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *User Settings* tab.

The User Settings options display.

3. Click *Yes* in the Load Pick List by Facility row:



4. Click *OK*.

Pick Lists by facility are enabled. Log out and log back in to view the changes.

Note: After this feature has been enabled, when this user logs in to eClinicalWorks, the Facility List window displays so the user can select the current facility.

Specifying a Home Screen

Users can specify the window that displays by default when they log into the eClinicalWorks application. The following windows are available as home screens:

- Provider Schedule
- Office Visits
- Resource Schedule
- Telephone Encounters
- Claims
- Labs/Imaging
- Payments

To specify a home window:

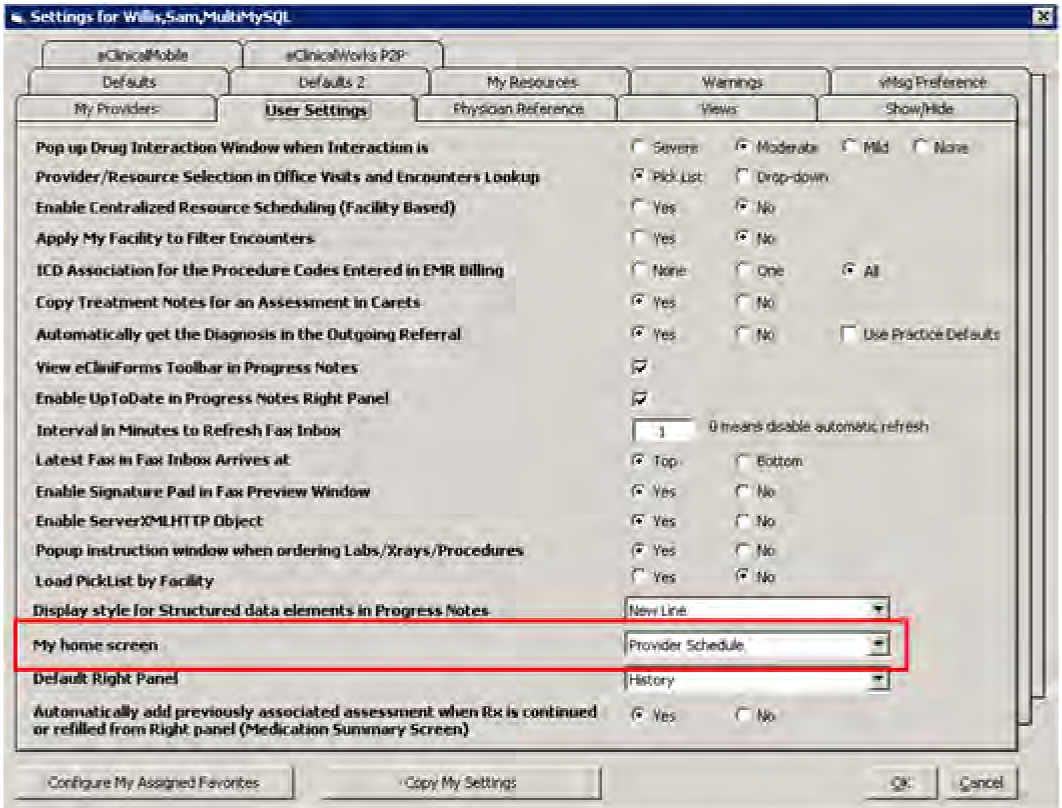
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *User Settings* tab.

The User Settings options display.

3. Choose the home screen from the My Home Screen drop-down list:



4. Click *OK*.

The user’s home screen is specified. Log out and log back in to view the changes.

Configuring the Default Right Panel

Configure the tab to select by default on the right Chart Panel from the My Settings window.

To configure the default tab on the right Chart Panel:

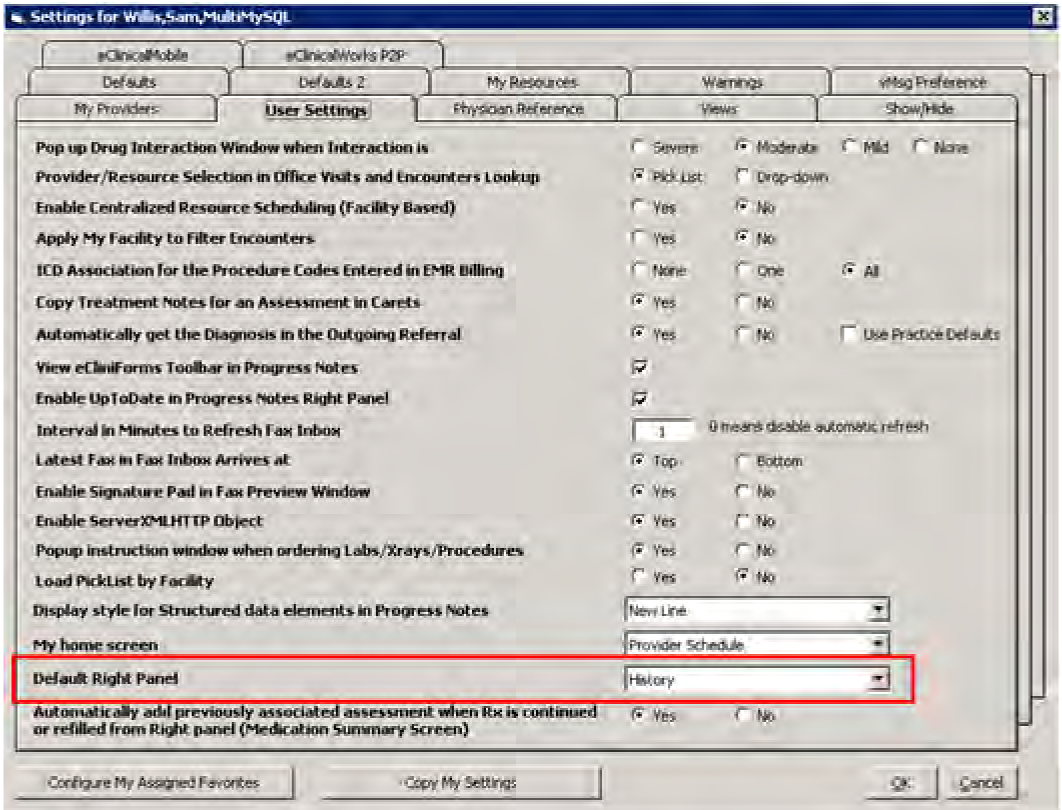
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *User Settings* tab.

The User Settings options display.

3. Select a tab from the Default Right Panel drop-down list:



4. Click *OK*.

The default tab for the right Chart Panel is configured. Log out and log back in to view the changes.

Physician Reference Tab

Set up the physician reference tools from My Settings.

The table provides a description of the options available from this tab:

Setting	Description
Installation Information	The installation status of various physician reference tools display in this section. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Library Settings	Select the default libraries for several areas of the system from the drop-down lists in this section. For more information, refer to the *Electronic Medical Records Setup Guide*.

Views Tab

Configure the view for Claims Lookup, and select either the Modern or Classic view for printing and faxing prescriptions, the Manage Prescriptions window, and the Rx Edit window, and select to display the CDSS and/or Classic alerts from My Settings.

The table provides a description of the options available from this tab:

Setting	Description
Left Panel Icons	Select the appropriate radio button to enable either the Modern or the Classic view of the icons that display in the left panel.
Claims Lookup	Click the radio buttons and check boxes to configure the information that displays on the Claims Lookup window. For more information, refer to the *Billing Setup Guide*.
Rx List View for Print and Fax	Click the appropriate radio button to use the Modern View or Classic View when printing or faxing prescriptions. For more information, refer to the *Electronic Medical Records Setup Guide*.
Alerts	Click a radio button to indicate whether CDSS Alerts, Classic Alerts, or both will be available on the Progress Notes window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Manage Rx	Click the appropriate radio button to use the Modern View or Classic View for the Manage Prescriptions window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Rx Edit	Click the appropriate radio button to use the Modern View or Classic View for the Rx Edit window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Patient Labs, DI, and Procedure Hx	Click the appropriate radio button to use the Modern View or Classic View for patient Labs, Diagnostic Imaging, and Procedures windows. For more information, refer to the *Electronic Medical Records Setup Guide*.
Cumulative Lab Report	Click the appropriate radio button to use the Modern View or Classic View for the Cumulative Lab Report window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Formulary Rx Screen	Click the appropriate radio button to use the Modern View or Classic View for the Formulary Rx window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Lab/DI/Procedure Order Screen	Click the appropriate radio button to use the Modern View or Classic View for the Labs, Diagnostic Imaging, or Procedures order windows. For more information, refer to the *Electronic Medical Records Setup Guide*.
Device DI window	Enables the display of the intermediary Classic View of the device window, when an administrator has enabled the Modern View from Practice Defaults. For more information, refer to the section Enabling the Outlook Tree View.

Setting	Description
CCMR Care Plan View	Select the appropriate radio button to indicate that the CCMR Care Plan view should appear as either a pop-up or in place in the window.
Progress Notes pop-up windows	Use the sliding scale to indicate the size of the pop-up windows that will display on the Progress Notes window. The scale can be set up to 70% of the size of the Progress Notes window.
Apply Medication Summary Modern View in	Check the boxes in this section to indicate which windows will display the Medication Summary in the Modern View. For more information, refer to the *Electronic Medical Records Setup Guide*.
Quick-Launch Buttons	Check the boxes in this section to indicate which Quick-Launch buttons will display in the upper-right of the eClinicalWorks application. For more information, refer to Configuring Quick-Launch Buttons.

Configuring Quick-Launch Buttons

Configure the Quick-Launch buttons (also known as jelly beans) that display in the upper-right of the application window, from the Views tab of the My Settings window. These quick-launch buttons display the count for such items as labs, referrals, and messages in the respective jelly beans. To hide the count, disable the Quick-Launch button settings.

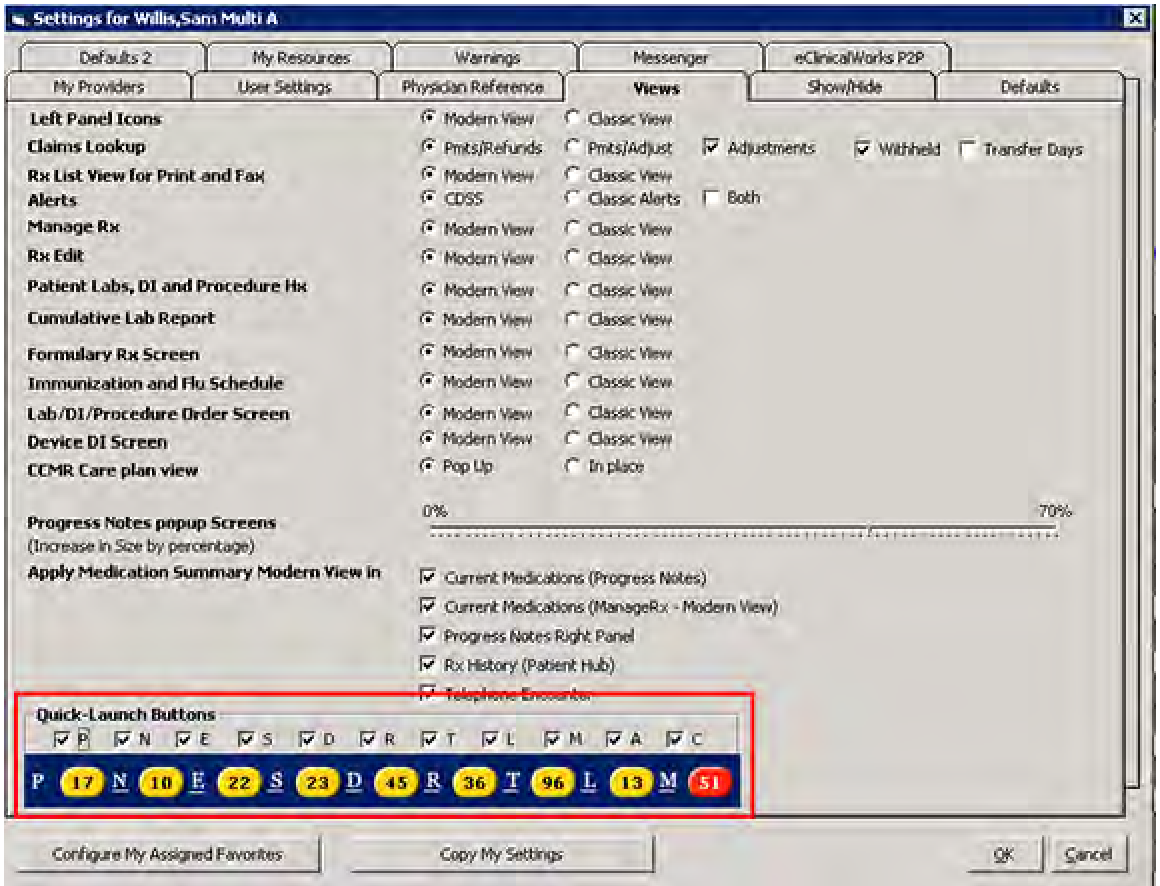
Note: The system determines the options displayed in this section by the interfaces available to your practice.

To configure the Quick-Launch buttons:

1. From the File menu, point to *Settings*, and then click *My Settings*.

   The Settings window displays.
2. Click the *Views* tab.

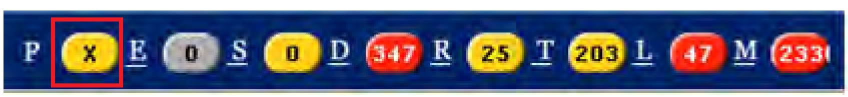
   The Views options display.
3. Clear the Quick-Launch Button boxes for which you want to hide the count:



4. Click *OK*.

The count is disabled for the selected Quick-Launch buttons. The user must log out and log back in to see the changes.

An *X* displays in the jelly bean for any disabled Quick-launch button:



Enabling the Device DI Window

New Feature

If the administrator enabled the Modern View for a device window at the practice level, an individual can choose either to use just the Modern View of the device window or to use the Modern View through the Classic View of the device window.

For more information about enabling the Modern View, refer to Enabling the Modern View for Devices.

To enable the Device DI window:

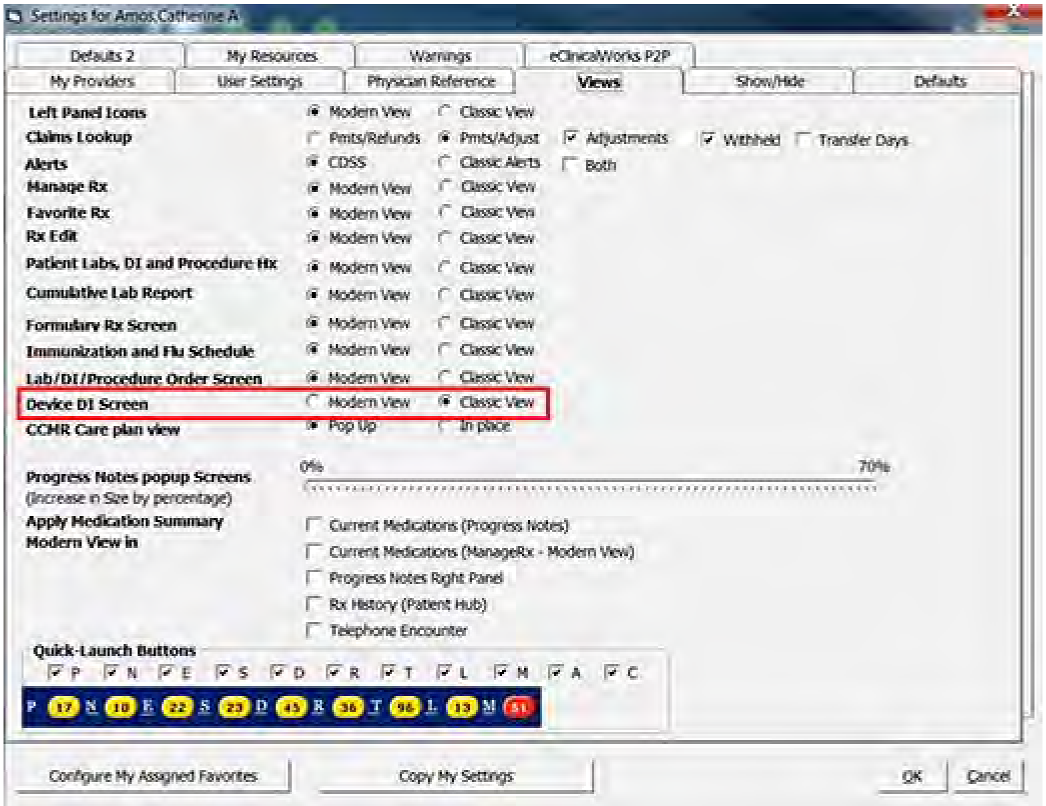
1. From the File menu, point to Settings, and then click *My Settings*.

   The My Settings window displays.

2. Click the *Views* tab.

   The View options display.

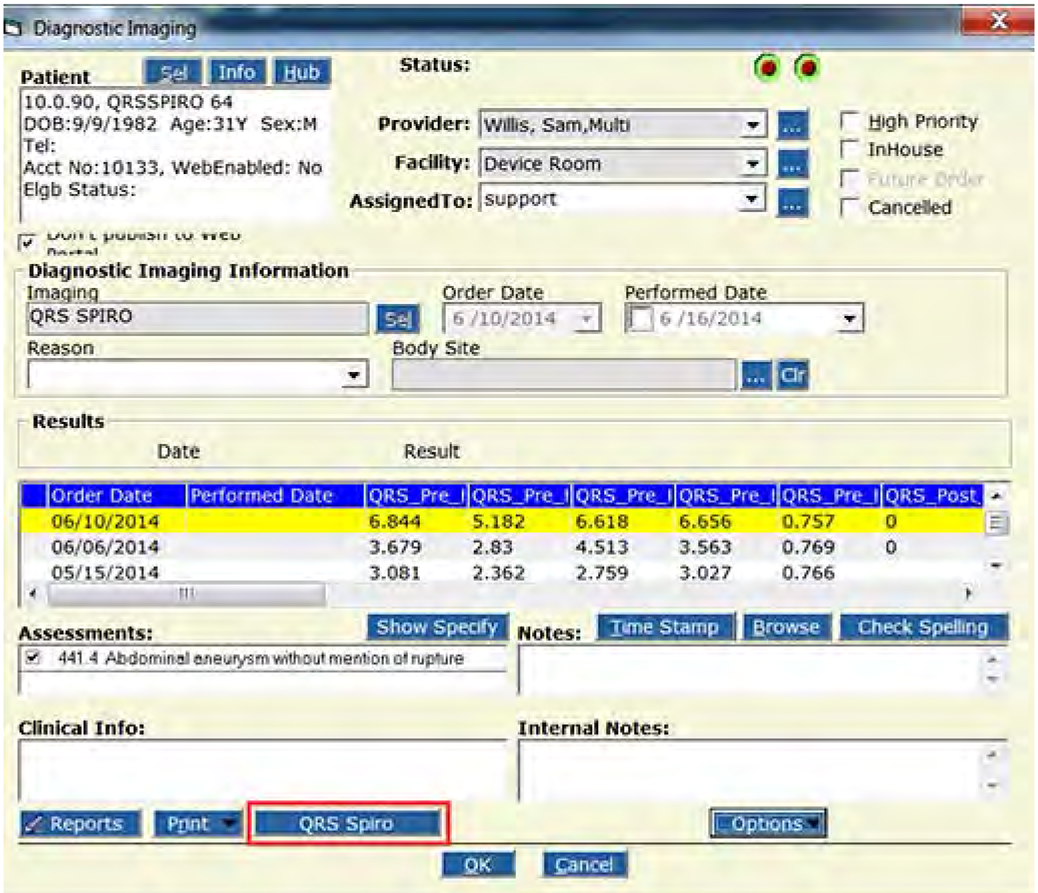
3. Click the *Classic View* radio button for the *Device DI Screen* option:



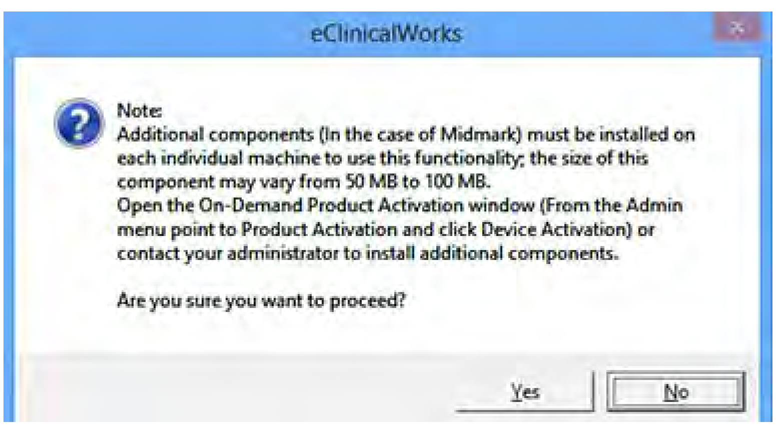
4. Click *OK.*

   The intermediary Classic View of the device window is enabled.

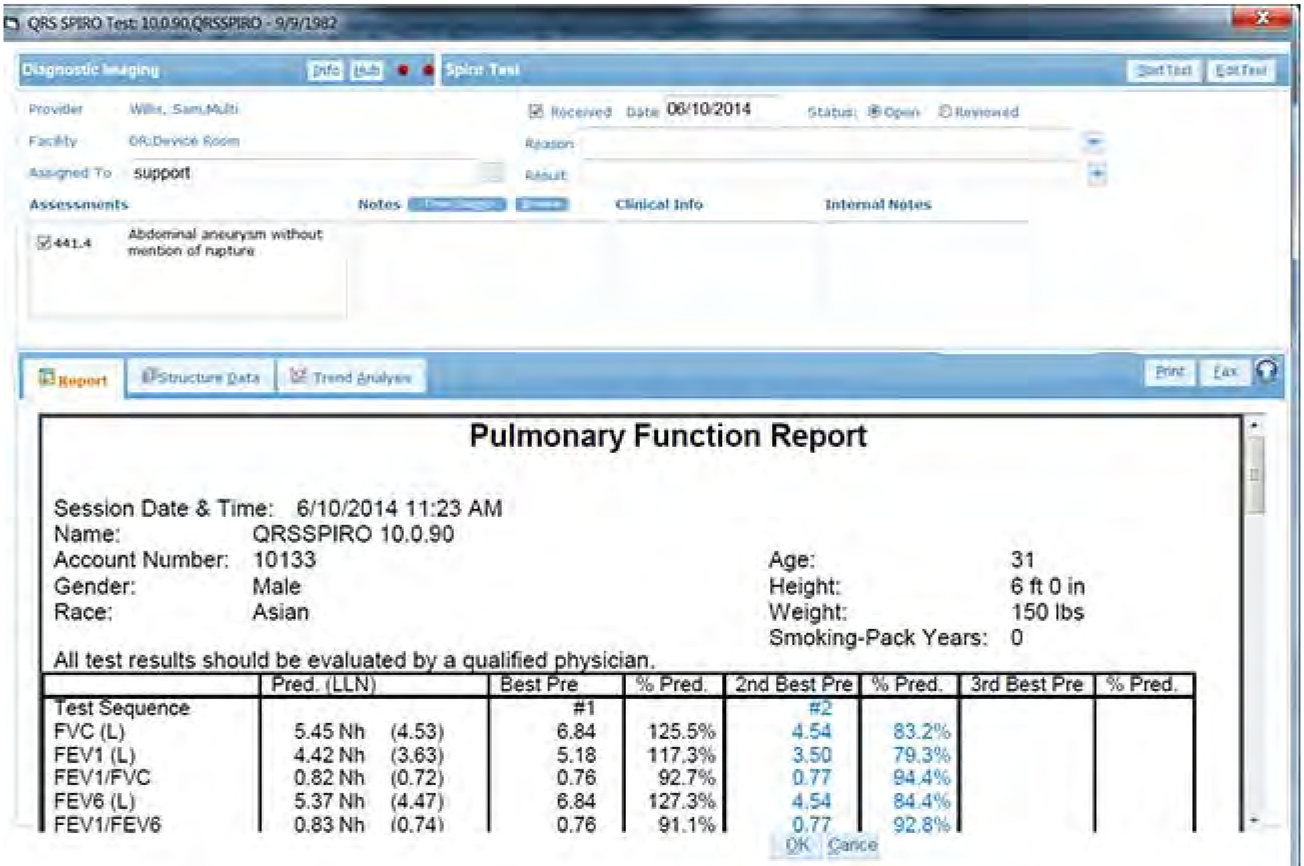
   If the provider selected the *Classic View* option from My Settings, the Classic View of the window displays when they click the device name from the Patient Hub:



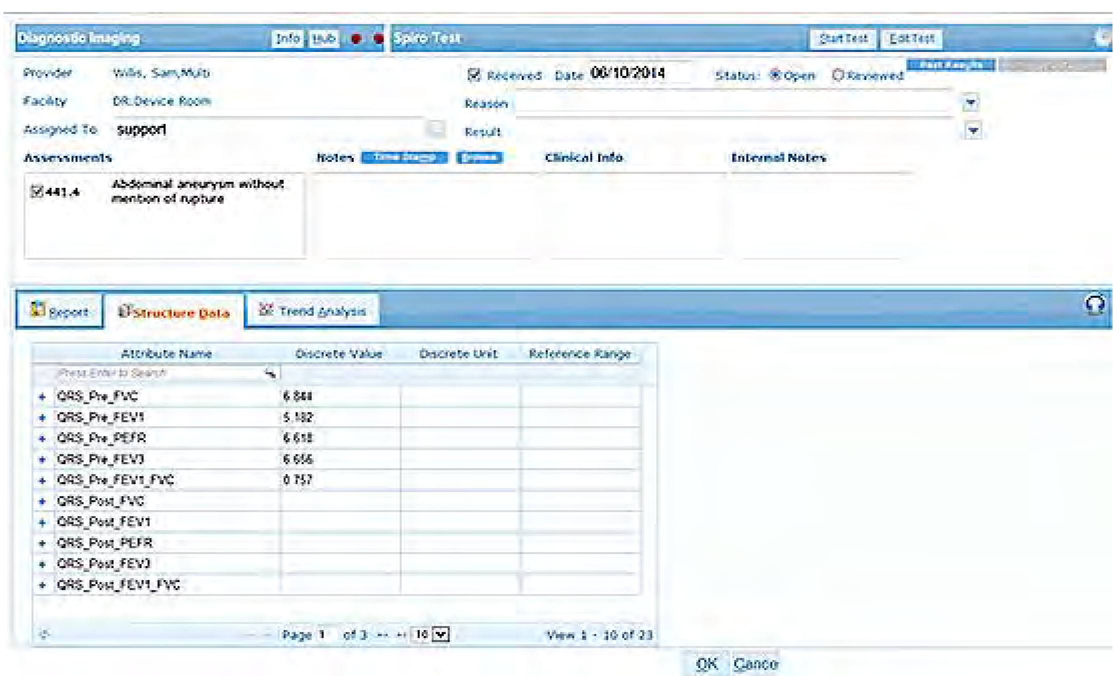
A pop-up window displays when the Modern View is selected by the user, indicating which SDK version is required in order to enable the devices window:



When the provider clicks the device button from the Classic View of the device window, the Modern View of the window displays:



If the provider selects the Modern View option for the Device DI window, and then clicks the *Orders* link from the Progress Notes, the Modern View displays. eClinicalWorks does not display the intermediary window—it displays the Modern View of the window for the device:



For more information about using the Modern View for the devices window, refer to the *Devices List*.

Show-Hide Tab

Use the Show/Hide tab to display or conceal available options to customize eClinicalWorks from My Settings.

For more information, refer to:

- Enabling the Outlook Tree View
- Displaying the Chart Panel on the Patient Hub
- Displaying the CPT Copyright Pop-Up when Logging In
- Configuring Tabs Displayed in the Chart Panel
- Selecting a Default Signature Pad
- Selecting a Default Timeout for Server Communications

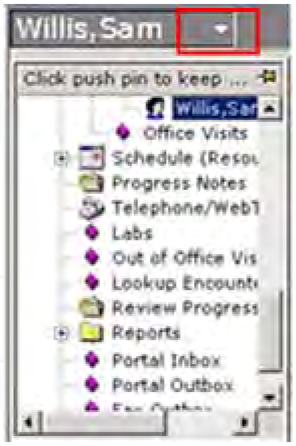
The table provides a description of the options available from this tab:

Setting	Description
Outlook Tree View	Click the appropriate radio button to show or hide the Outlook® Tree View, which is an alternate method of navigating through the various windows in the application. To access this view, click the gray heading with a downward-facing arrow at the top of all windows: For more information, refer to Enabling the Outlook Tree View.
Handwritten Signature (Applies to Progress Notes printing, faxing, and locking)	Click the appropriate radio button to show or hide provider signatures when printing, faxing, or locking Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.
Dispense, Duration, and Refill Info in Select Rx Screen for Standard Drugs	Click the appropriate radio button to show or hide dispense, duration, and refill information about the Select Rx window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Progress Notes Top Panel	Click the appropriate radio button to show or hide the Patient Dashboard at the top of the Progress Notes window by default. For more information, refer to the *Electronic Medical Records Setup Guide*.
Progress Notes Right Panel	Click the appropriate radio button to show or hide the right Chart Panel on Progress Notes by default. For more information, refer to the *Electronic Medical Records Setup Guide*.
Patient Hub Chart Panel (Right Pane)	Click the appropriate radio button to show or hide the right Chart Panel on the Patient Hub by default. For more information, refer to Displaying the Chart Panel on the Patient Hub.
Providers Initials in Progress Notes - Visits Drop-down	Click the appropriate radio button to show or hide provider initials in the Encounters drop-down list on the Progress Notes window. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Discontinued Drugs	Click the appropriate radio button to show or hide discontinued medications. For more information, refer to the *Electronic Medical Records Setup Guide*.
Display Insurance Group at Line Item Level Payment Posting	Click the appropriate radio button to show or hide Insurance Groups at the line-item level when posting payments. For more information, refer to the *Billing Setup Guide*.
Invalid CPT Codes	Click the appropriate radio button to show or hide Current Procedural Terminology (CPT®)* codes that are marked Invalid. For more information, refer to the *Electronic Medical Records Setup Guide*.
Dosage Information for Custom Drugs Linked to Drug Libraries	Click the appropriate radio button to show or hide dosage information for custom medications linked to drug libraries with NDC codes. For more information, refer to the *Electronic Medical Records Setup Guide*.
Single Button for Prescription Based on Patient's Default Pharmacy	Click the appropriate radio button to show or hide a single button for transmitting prescriptions to a patient's default pharmacy. For more information, refer to the *Electronic Medical Records Setup Guide*.
Examination Categories (Tree)	Click the appropriate radio button to show or hide categories by default on the Examination window in Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.
CPT Copyright pop-up when logging into the application	Click the appropriate radio button to show or hide the CPT copyright pop-up window when logging in to the eClinicalWorks application. For more information, refer to Displaying the CPT Copyright Pop-Up when Logging In.
Custom dosages in Rx Edit Screen	Click the appropriate radio button to show or hide custom dosages on the Rx Edit window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Reconcile menu from Quick-Launch Notification (L Jelly Bean)	Click the appropriate radio button to show or hide the menu.
Tabs to display in Progress Note Chart Panel	Check the boxes in this section to configure the tabs that display in the right Chart Panel. For more information, refer to Configuring Tabs Displayed in the Chart Panel.

Enabling the Outlook Tree View

The Outlook Tree View is an alternate method of navigating through the various windows in the application. To access this view, click the gray heading with a downward-facing arrow at the top of any window:



To enable the Outlook Tree View:

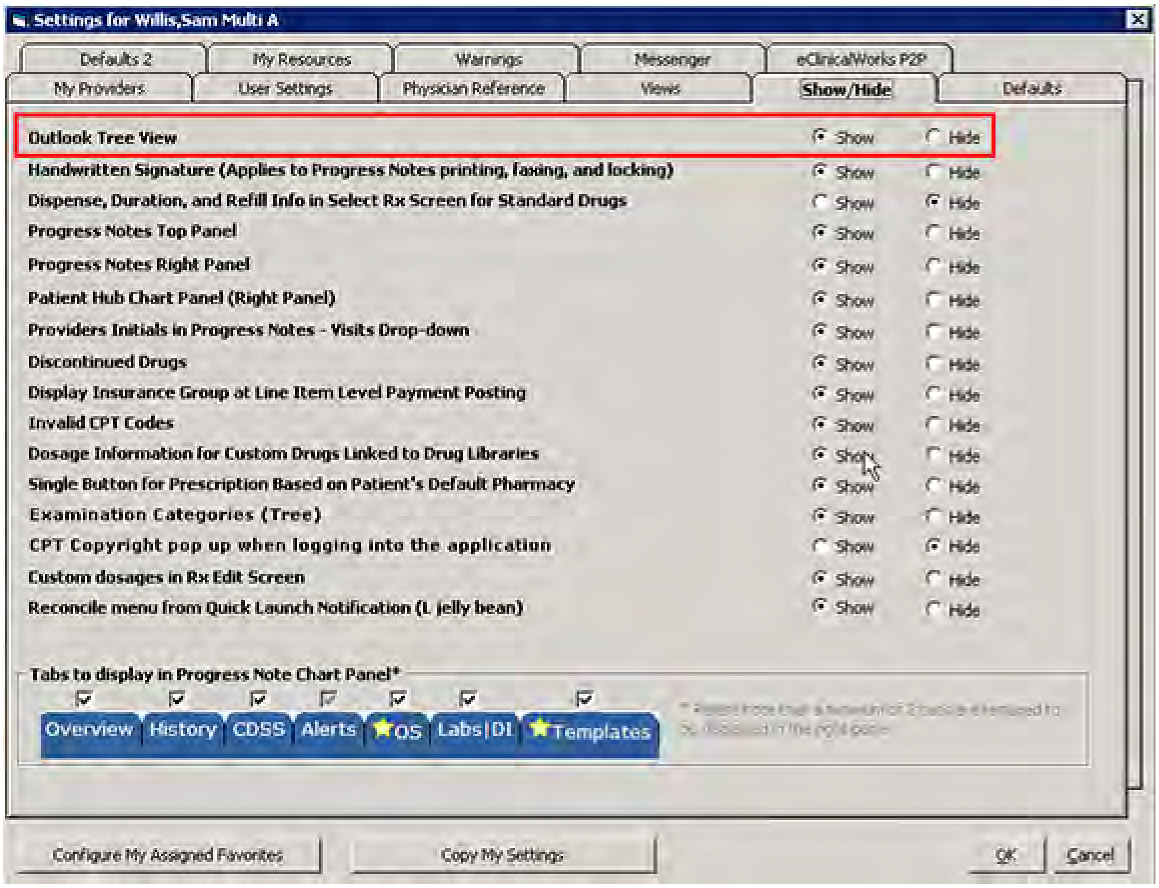
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *Show/Hide* tab.

The Show/Hide options display.

3. Click the *Show* radio button in the *Outlook Tree View* row:



4. Click *OK*.

   The Outlook Tree View is enabled. Log out and log back in to view the changes.

Displaying the Chart Panel on the Patient Hub

Show or hide the Chart Panel (the right panel on the Patient Hub window) from My Settings.

To display the Chart Panel on the Patient Hub:

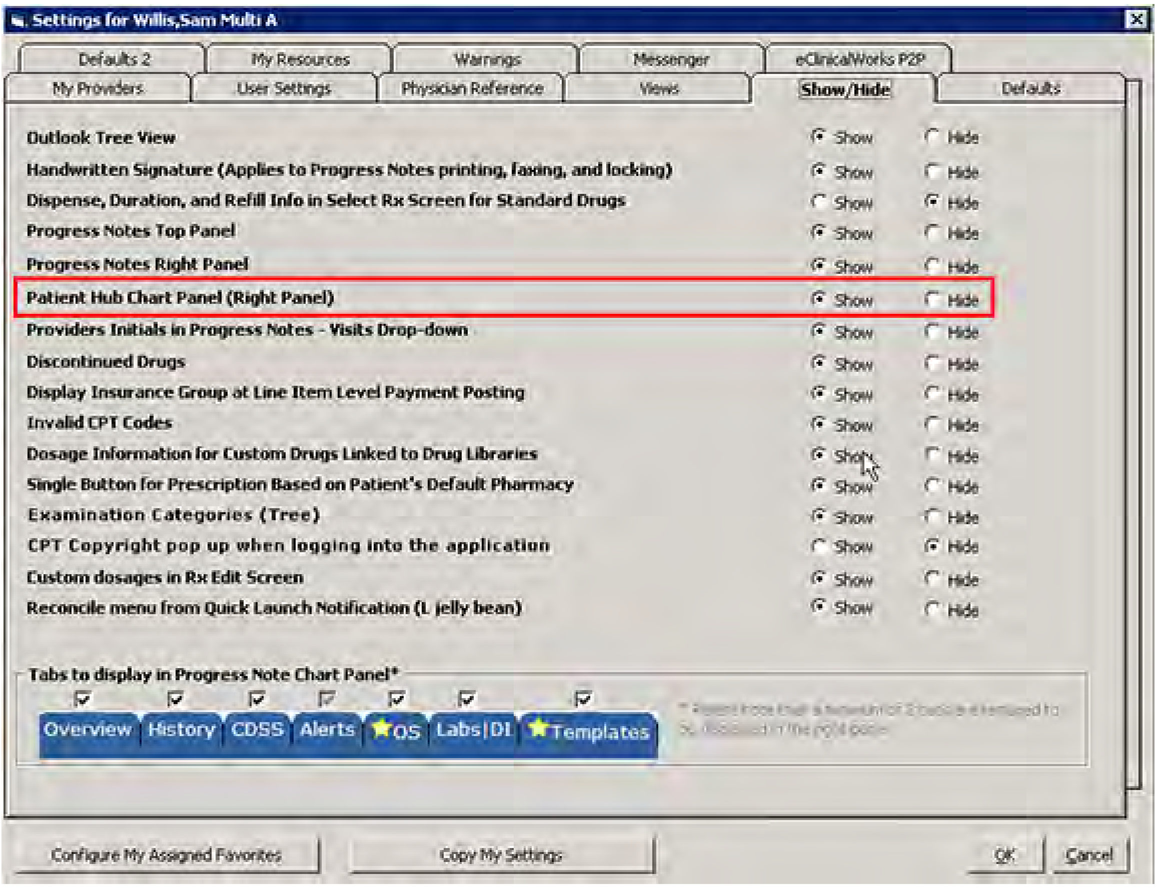
1. From the File menu, point to *Settings*, and then click *My Settings*.

   The My Settings window displays.

2. Click the *Show/Hide* tab.

   The Show/Hide options display.

3. Click the *Show* radio button in the *Patient Hub Chart Panel (Right Pane)* row:



4. Click *OK*.

   The Chart Panel on the Patient Hub window displays. Log out and log back in to view the changes.

Displaying the CPT Copyright Pop-Up when Logging In

Enhanced Feature

The system provides the option to display a pop-up to explaining the CPT* copyright information whenever a user logs in to the eClinicalWorks application. The option is available from the Show-Hide tab on the My Settings window.

To display the CPT copyright pop-up when logging in to eClinicalWorks:

1. From the File menu, point to *Settings*, and then click *My Settings*.

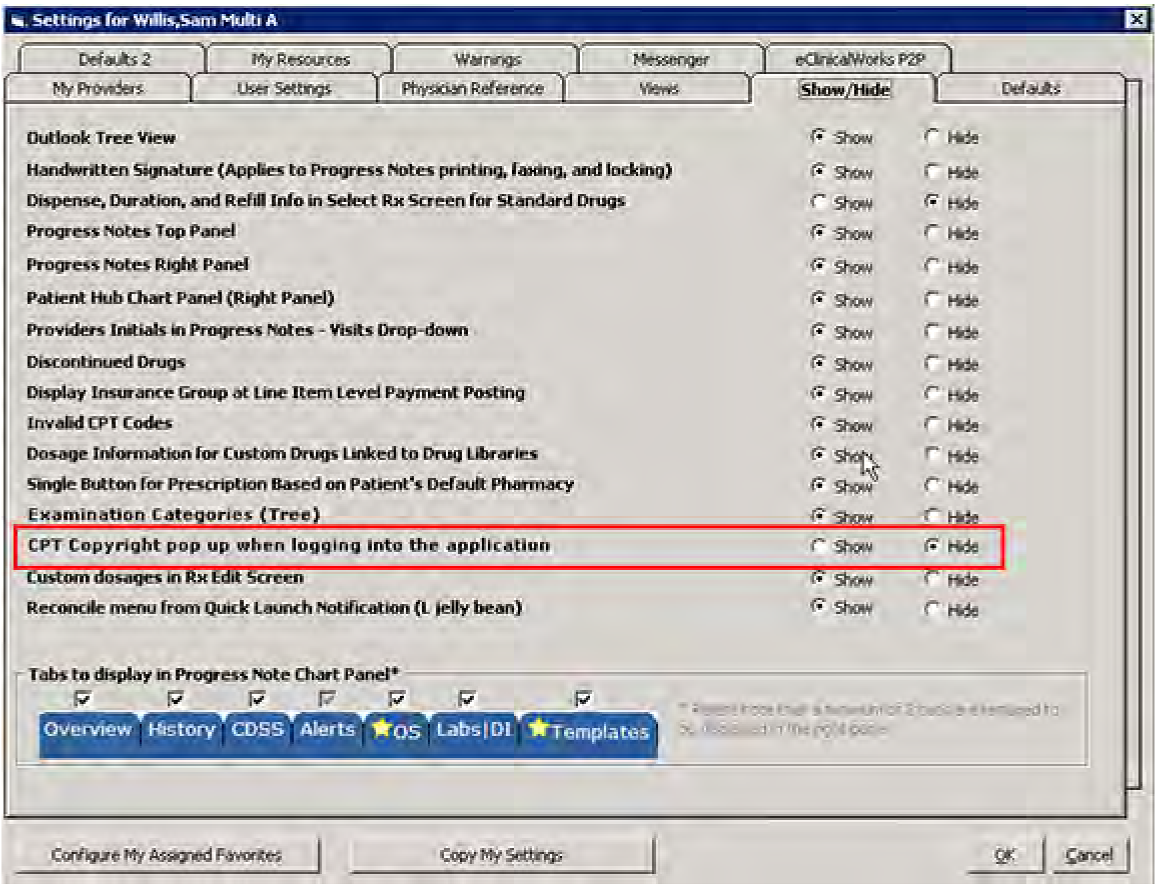
   The My Settings window displays.

2. Click the *Show/Hide* tab.

   The Show/Hide options display.

3. Click the *Show* radio button in the *CPT Copyright pop-up…* row:

*. CPT only © 2012 American Medical Association. All rights reserved.



4. Click *OK*.

   The CPT copyright pop-up window displays whenever you log in to the eClinicalWorks application. Log out and log back in to view the changes.

Configuring Tabs Displayed in the Chart Panel

Meaningful Use

Configure the tabs to display on the Chart Panel for each user, from My Settings.

> **Note:** This section is related to Meaningful Use Measure OBJ: 170.304 (e) - Implement one clinical decision support rule.
> For more information, refer to the *Meaningful Use Training Scenarios Guide*.

To configure the tabs displayed in the Chart Panel:

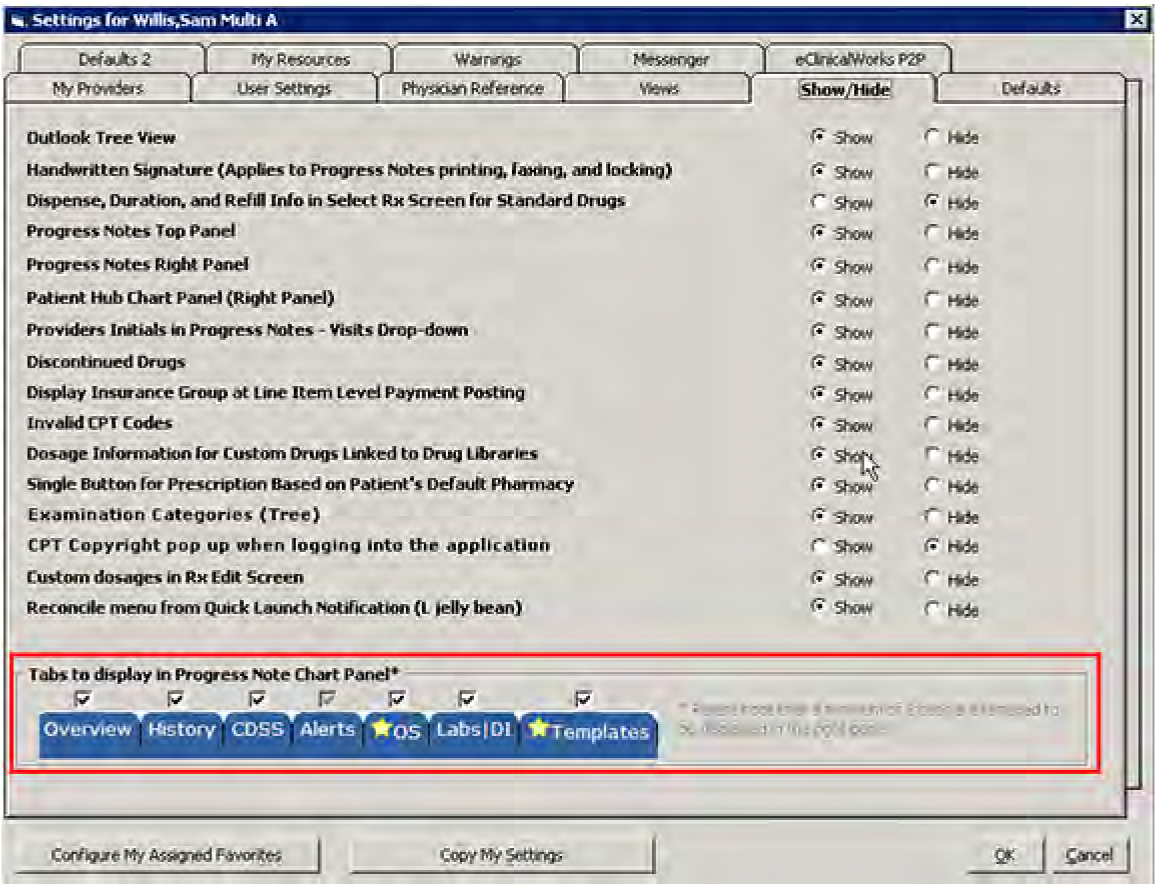
1. From the File menu, point to Settings, and then click *My Settings*.

   The My Settings window displays.

2. Click the *Show/Hide* tab.

   The Show/Hide options display:

3. Check the boxes above the tabs to display in the *Tabs to display in Progress Note Chart Panel* section:



Note: The CDSS tab is enabled by default, and cannot be disabled.

Note: A minimum of two tabs are required for display, and a maximum of five tabs may be selected.

4. Click *OK*.

   The tabs displayed in the Chart Panel are configured. Log out and log back in to view the changes.

Defaults Tab

To customize eCW, users set preferred default options from the Defaults tab under My Settings.

The table provides a description of the options available from this tab:

Setting	Description
Default Superbill	Select your default Superbill from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Lab Requisition Form	Select your default lab requisition form from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Default Imaging Requisition Form	Select your default diagnostic imaging requisition form from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default UOM in Growth Charts	Select your default unit of measurement for growth charts from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Style in Progress Notes	Select your default style for Progress Notes from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Signature Pad	Select your default signature pad from this drop-down list. For more information, refer to Selecting a Default Signature Pad.
Default Timeout for Server Communication	Enter the number of seconds without communication with the server before a timeout occurs in this field. Entering 0 results in an infinite timeout. For more information, refer to Selecting a Default Timeout for Server Communications.
Default Progress Note Templates	Click a radio button to select whether the system chooses a Generic or Patient Specific templates by default when accessing Progress Notes templates. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Number of Visits for Outgoing Referrals	Enter the default number of visits when you are creating outgoing referrals. For more information, refer to the *Front Office Setup Guide*.
Default Payment Method in Co-pay Screen	Click a radio button to determine the default payment method selected when entering co-payments from patients during Check In/Check Out. For more information, refer to the *Front Office Setup Guide*.
Default New Patients Primary Service Location	Select your default primary service location when adding new patients to the system from this drop-down list. For more information, refer to the *Front Office Setup Guide*.
Default Option for View All Reports	To select your default view, click the *View All Reports* link on the Labs/DI/ Procedures window from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default window for Lab/ DI Review	Select the appropriate radio button to display reviewed reports or all reports, including those that have not been reviewed. Use the drop-down arrow to display the options for sorting the reports in the display.
Default Lookup Options	Select your default lookup, sort by, and output options from these drop-down lists for the following reports: ▪ Cumulative eReport ▪ View All Reports - By Patient For more information, refer to the *Electronic Medical Records Setup Guide*.

Selecting a Default Signature Pad

Users can select the type of signature pad they want to use by default from My Settings.

To select a default signature pad:

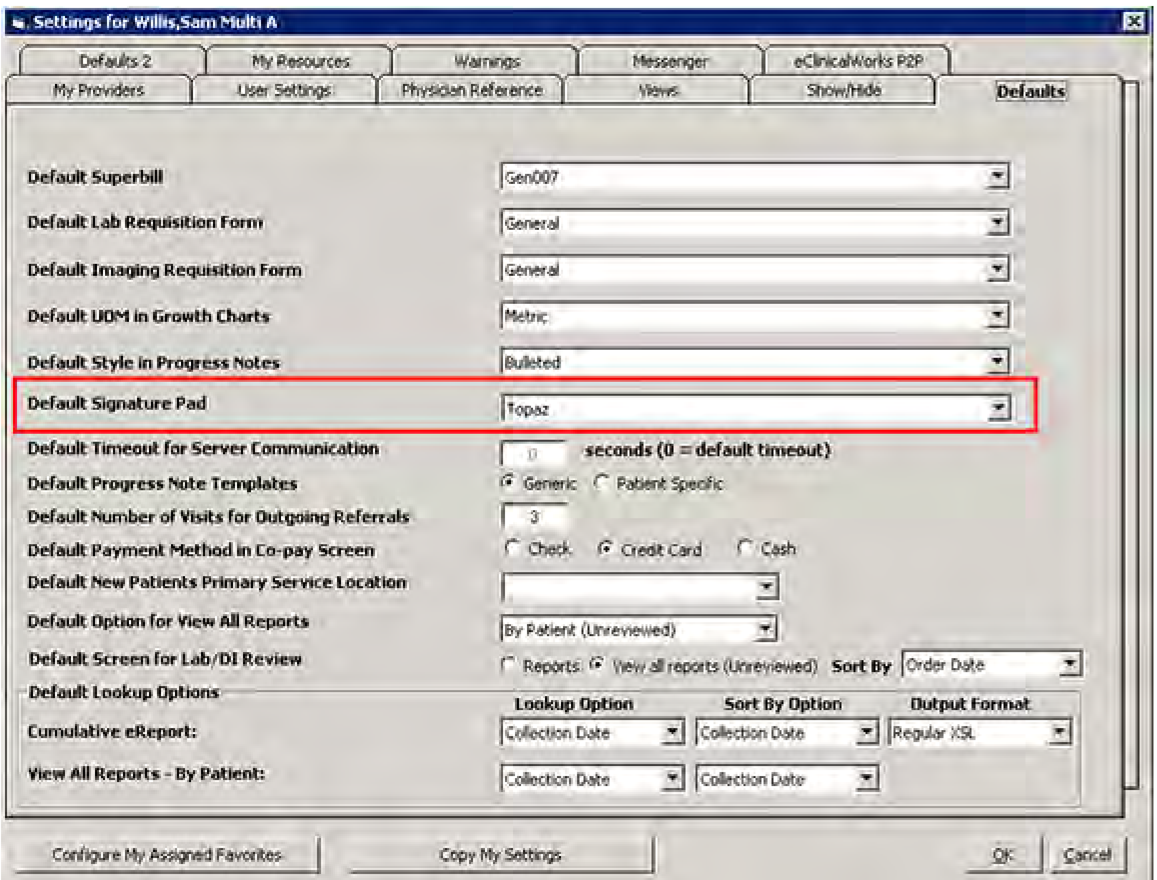
1. From the File menu, point to Settings, and then click *My Settings*.

   The Settings window displays.

2. Click the *Defaults* tab.

   The Defaults options display.

3. Select the type of signature pad to use as you default signature pad from the *Default Signature Pad* drop-down list:



4. Click *OK*.

   The default signature pad for this user is specified. Log out and log back in to view the changes.

Selecting a Default Timeout for Server Communications

Each user can customize the number of seconds before a timeout occurs when eClinicalWorks is communicating with the server.

To configure the default timeout for server communications:

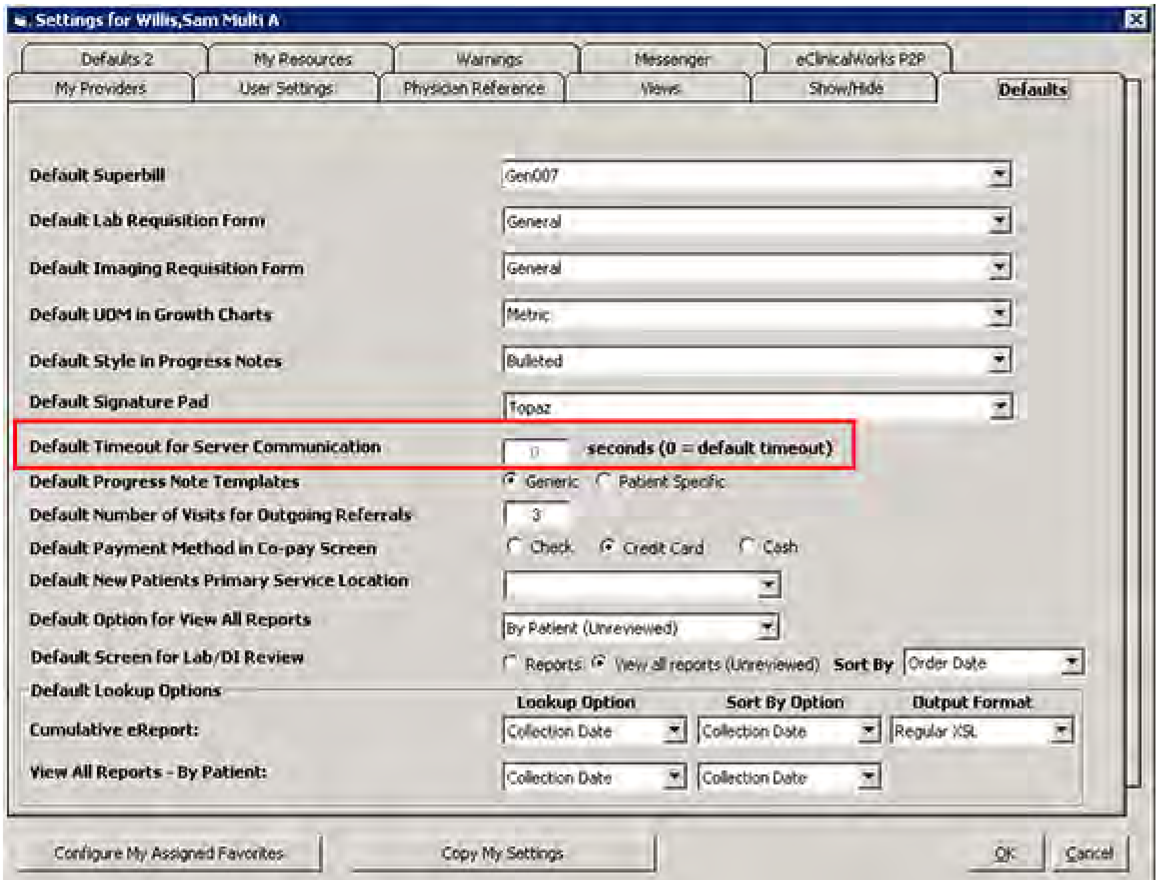
1. From the File menu, point to Settings, and then click *My Settings*.

   The Settings window displays.

2. Click the *Defaults* tab.

   The Defaults options display.

3. Enter the number of seconds before a timeout occurs in the *Default Timeout for Server Communication* field:



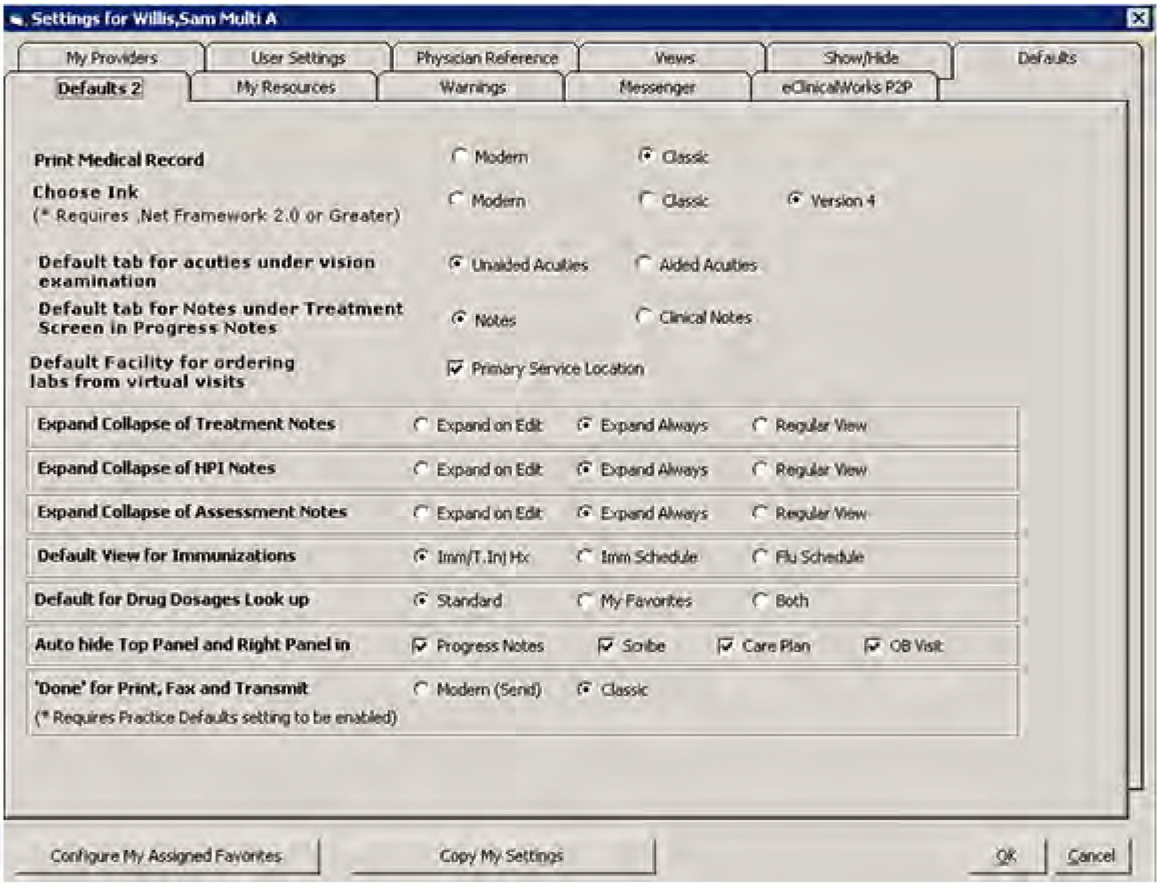
   Entering 0 results in an infinite timeout.

4. Click *OK* to save your changes and close this window.

   The default timeout for server communications is configured for this user. Log out and log back in to view the changes.

Defaults 2 Tab

A number of additional default options are available from the Defaults 2 tab:



This table provides a description of the options available from the Defaults 2 tab:

Setting	Description
Print Medical Record	Click a radio button to default to either the Modern View or the Classic View when you print medical records. For more information, refer to Configuring the View for Printed Medical Records.
Choose Ink	Click a radio button to use the Modern View, the Classic View, or Version 4 when you ink documents. For more information, refer to Selecting an Ink Editing Style.
Default tab for acuities under vision examination	Click a radio button to determine your default tab for acuities on the Vision Examination window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Tab for Notes under Treatment Screen in Progress Notes	Click the appropriate radio button to indicate that the default tab under the Treatment window will display as either Notes or Clinical Notes.
Default Facility for ordering labs from virtual visits	Check this box to use your primary service location as the default facility for Virtual Visits. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Expand/Collapse of Treatment Notes	Select one of the choices to indicate which display of Treatment notes will be the default.
Expand/Collapse of HPI Notes	Select one of the choices to indicate which display of HPI notes will be the default.
Expand/Collapse of Assessment Notes	Select one of the choices to indicate which display of Assessment notes will be the default.
Default View for Immunizations	Select the appropriate radio button to enable the default display for the Immunizations window as the patient's injection history, immunization schedule, or flu schedule.
Default for Drug Dosages lookup	Select the appropriate radio button to set the default display for a lookup of drug dosages.
Auto-hide Top Panel and Right Panel in	Select one or more of the listed choices to automatically hide the top panel and right panel when the respective windows display.
"Done" for Print, Fax, and Transmit	Select either Modern or Classic view as the display when print, fax, and transmit are completed.

Configuring the View for Printed Medical Records

Set printed medical records to display in either the Modern View or the Classic View from the *Defaults 2* tab on the My Settings window. Users may print Medical Records from the Patient Hub in the selected default style.

To configure the view for printed medical records:

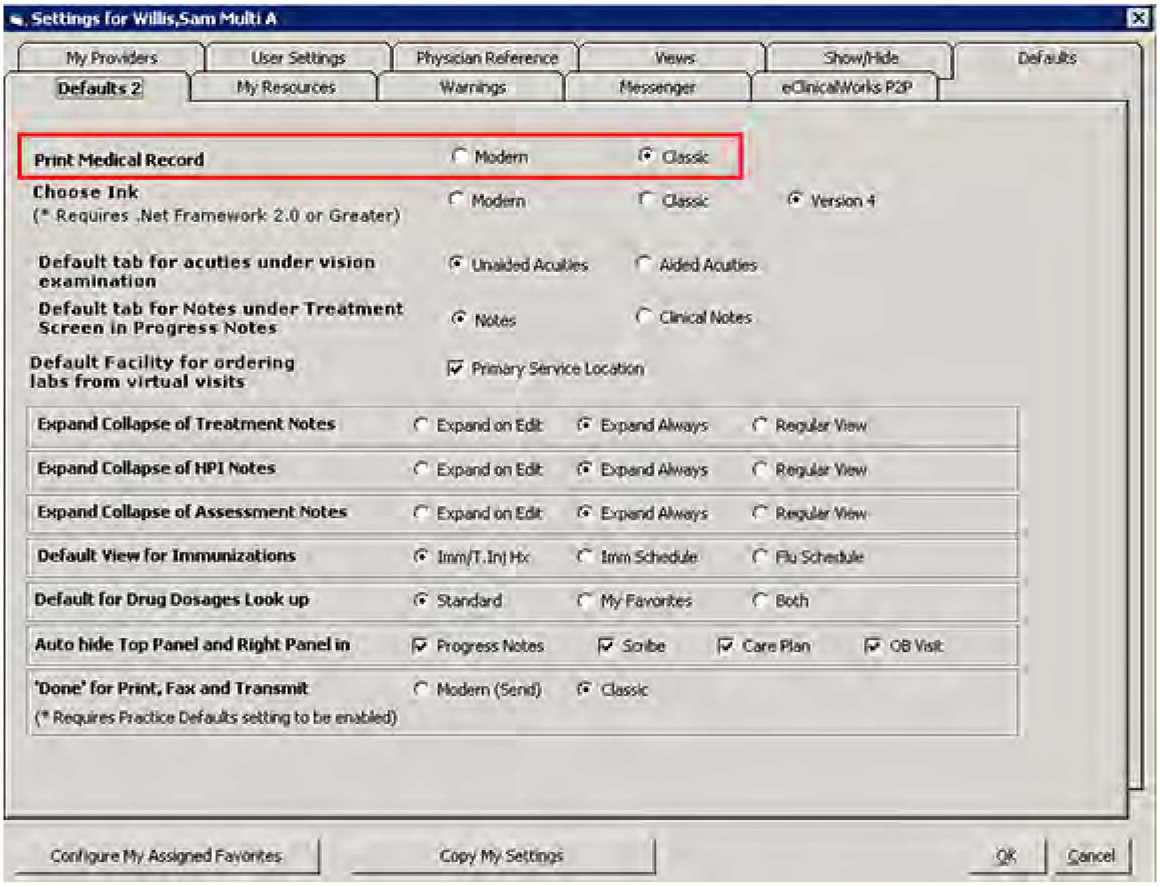
1. From the File menu, point to *Settings*, and then click *My Settings*.

The My Settings window displays.

2. Click the *Defaults 2* tab.

The Defaults 2 options display.

3. Click a radio button in the Print Medical Record row:



4. Click *OK*.

   The view for printed medical records is selected. Log out and log back in to view the changes.

Selecting an Ink Editing Style

Configure the style of ink editing from the *Defaults 2* tab of the My Settings window.

Note: Classic inking is NOT compatible with Windows XP operating system or newer (*e.g.*, Windows Vista®, Windows 2007®, Windows 2008®). The Modern Inking style works with all Windows operating systems.

Note: The Modern method of inking documents requires .NET Framework 2.0. Practices without this software should select the Classic method of inking documents.

If .NET Framework 2.0 is not installed on the system and the Modern method of ink editing is selected, a warning message displays when users attempt to ink a document and prompts them to *install .NET Framework 2.0 and try again*.

To select an ink editing style:

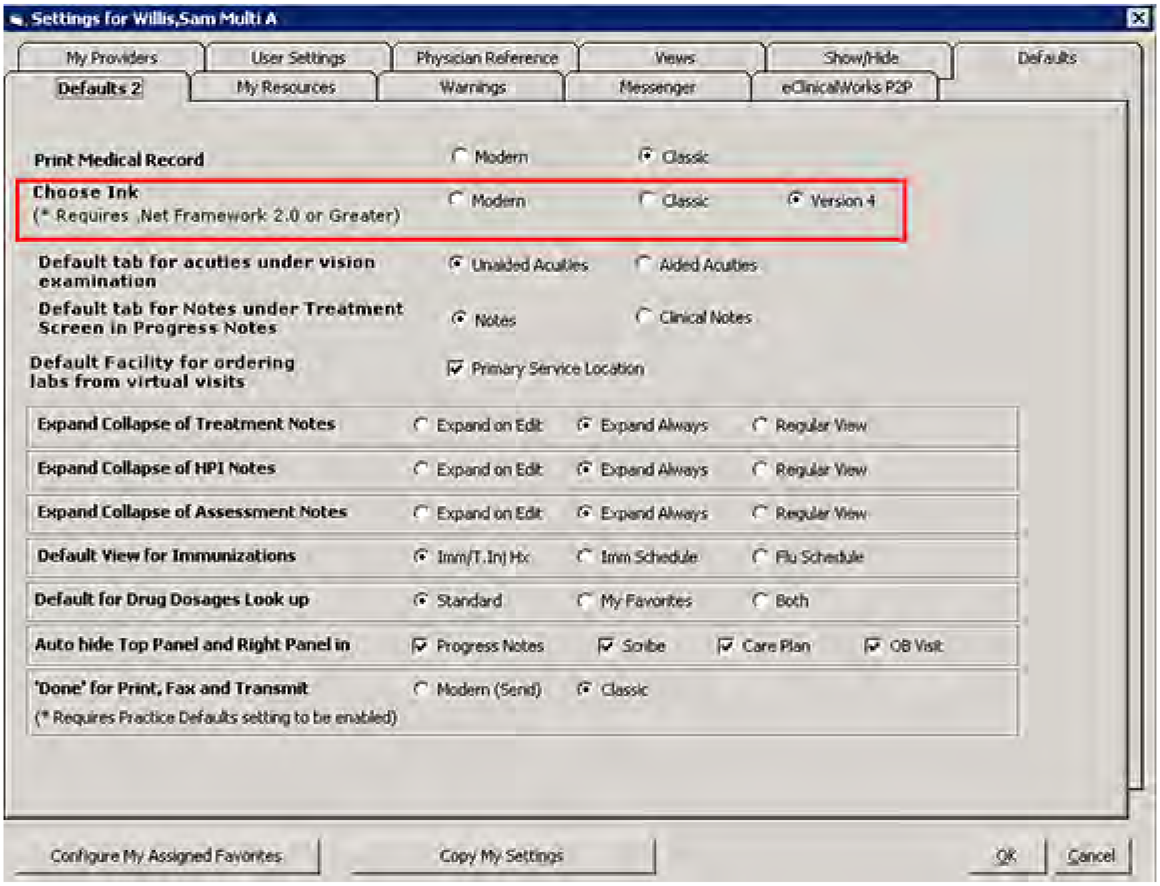
1. From the File menu, point to *Settings*, and then click *My Settings*.

   The My Settings window displays.

2. Click the *Defaults 2* tab.

   The Defaults 2 options display.

3. Click the appropriate radio button in the Choose Ink row:



4. Click *OK*.

   The ink editing style is selected. Log out and log back in to view the changes.

Warnings Tab

Suppress various warning messages individually after they pop-up, or collectively from the My Settings window.

To suppress warning messages:

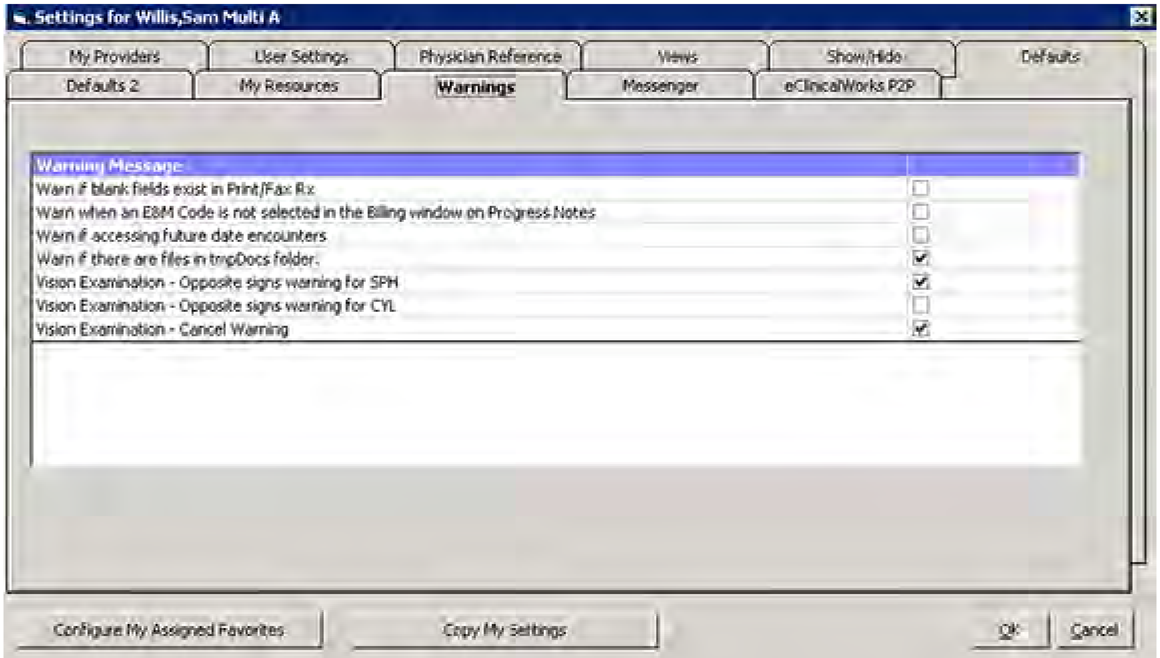
1. From the File menu, point to *Settings*, and then click *My Settings*.

   The My Settings window displays.

2. Click the *Warnings* tab.

   The Warnings options display.

3. Clear the check box(es) next to the warning(s) to suppress:



4. Click *OK*.

   The selected warnings are suppressed.

> **Note:** When a warning pop-up window does display, you can suppress that warning from displaying in the future.
> In the pop-up window, check the box: *Don’t display this warning again*.

My Resources Tab

Users can select the resources to display on the Resource Schedule from a list of the resources available at a selected location.

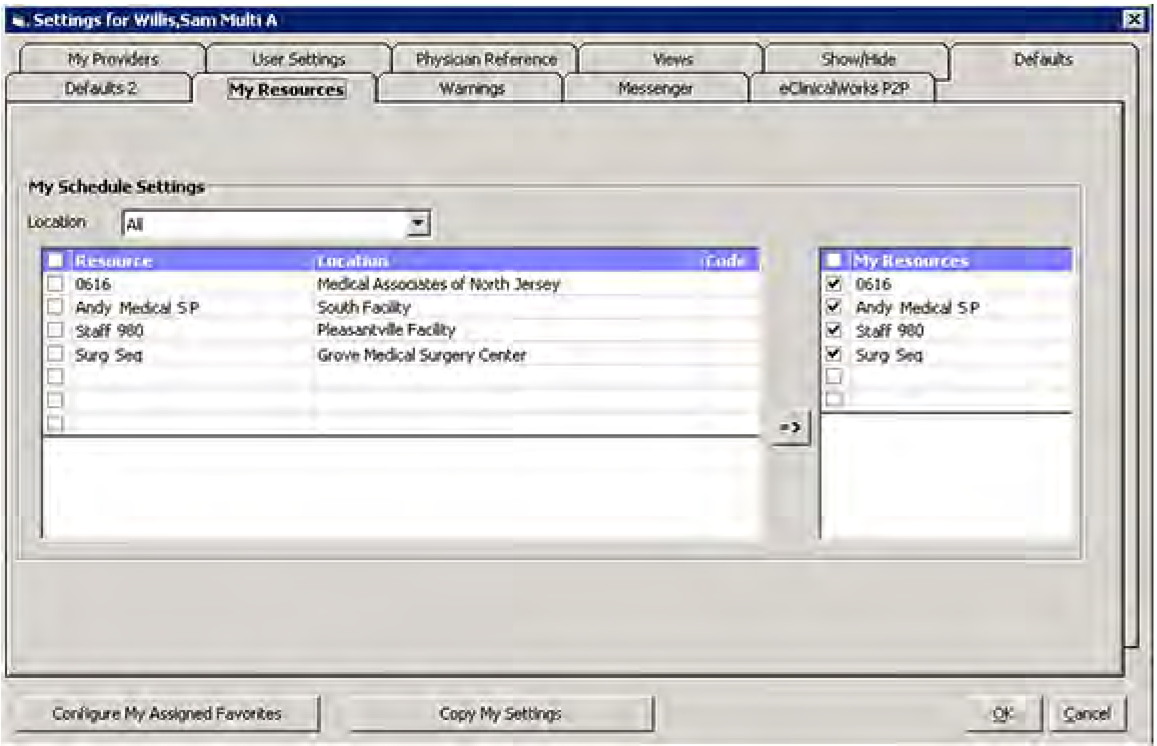
To configure the resources to display on the Resource Schedule:

1. From the File menu, point to *Settings*, and then click *My Settings*.

   The Settings window displays.

2. Click the *My Resources* tab.

   The My Resources options display:



3. From the Location drop-down list, select the facility for which you want to configure providers.

   A list of the resources available at the selected location displays in the left pane.

4. Check the box(es) next to the resource(s) to display for this user on the Resource Schedule.
5. Click =>.

   The selected resources are added to the right pane.

6. Clear the check box(es) for the resources in the right pane to not display for this user.
7. Click *OK*.

   The specified resources display on the Resource Schedule for the selected facility.

   This user must log out and log back in to see the changes.

eClinicalWorks P2P Tab

Configure the eClinicalWorks P2P (Physician to Physician) Portal settings from My Settings. This feature is separate from the main eClinicalWorks application, and must be activated to be used.

For more information, refer to the *eClinicalWorks P2P Users Guide*.

Practice Defaults

Practice Defaults enables administrators to configure options for all users and computers at your practice.

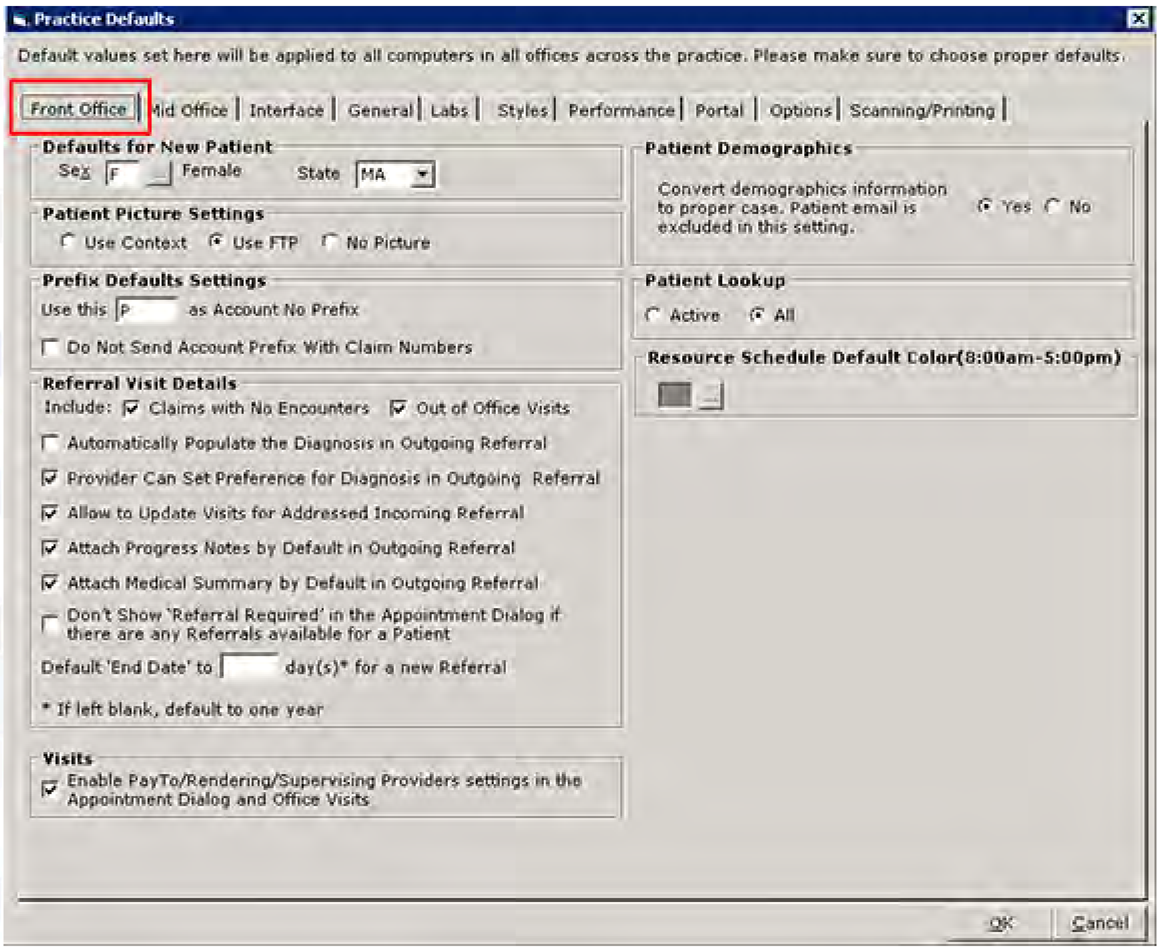
To access Practice Defaults, open the File menu, click *Settings*, then click *Practice Defaults*.

For more information about Practice Defaults, refer to:

- Front Office Tab
- Mid-Office Tab
- Interface Tab
- General Tab
- Labs Tab
- Styles Tab
- Performance Tab
- Portal Tab
- Options Tab
- Scanning/Printing Tab

Front Office Tab

From the Front Office tab, the administrator sets the defaults for the medical front office:



This table provides a description of the options available from this tab:

Setting	Description
Defaults for New Patient	Click *More* (...) next to the Sex field to select a default gender for new patients. Select a default state for new patients from the *State* drop-down list. For more information, refer to the *Front Office Setup Guide*.

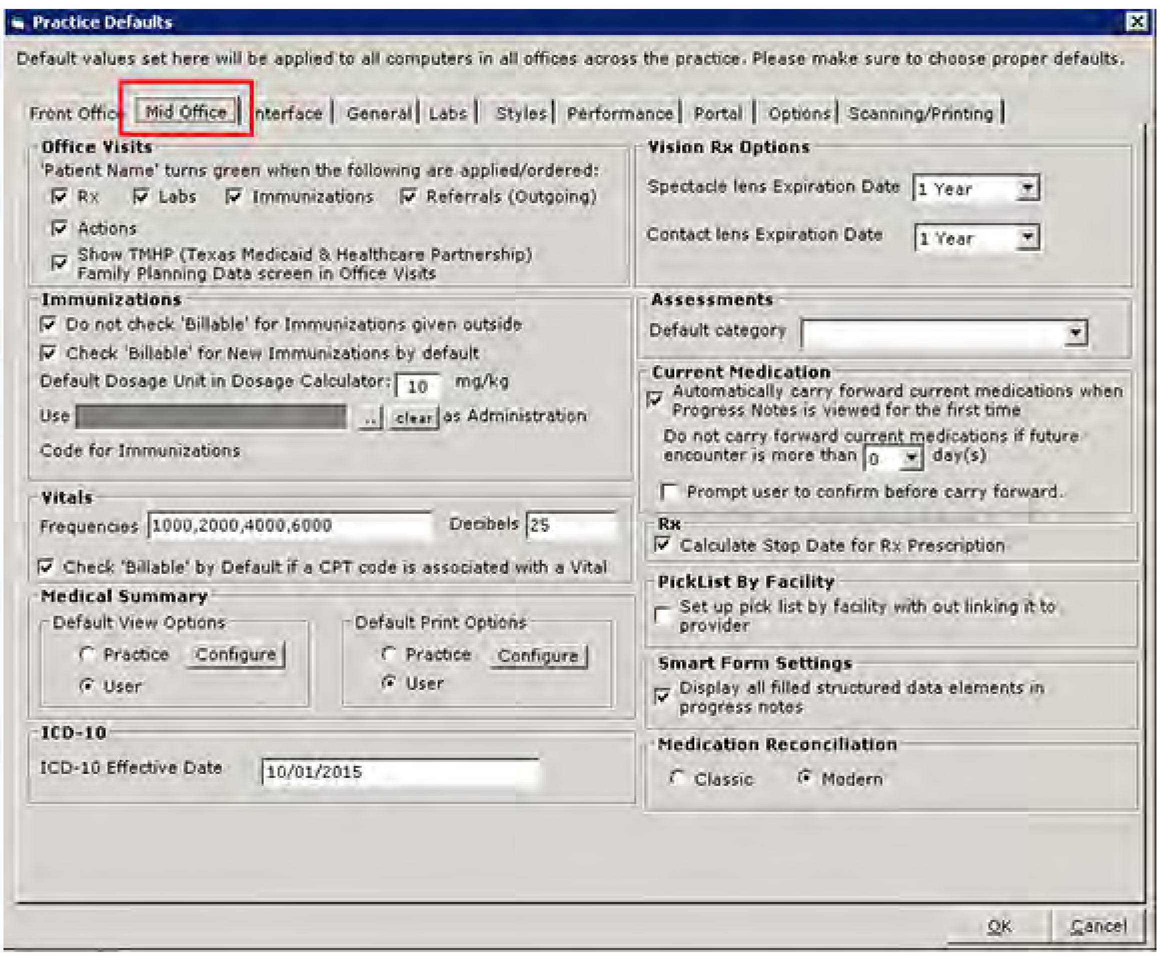
Setting	Description
Patient Picture Settings	Click one of the following radio buttons to determine the source for patient pictures: ▪ **Use Context -** The URL context on the server is used when a picture is loaded. This is the default option; but if you experience problems loading pictures, use the FTP option. ▪ **Use FTP -** A call to the FTP (File Transfer Protocol) database is made each time a picture is loaded. This is slower than the *Context* option, but more reliable. ▪ **No Picture -** Patient pictures are not loaded throughout the application. For more information, refer to the *Front Office Setup Guide*.
Prefix Defaults Settings	Enter the default account prefix into the *Use this* field. Check the *Do Not Send Account Prefix With Claim Numbers* box to prevent this account number prefix from being included with Claim Numbers. For more information, refer to the *Front Office Setup Users Guide*.

Setting	Description
Referral Visit Details	Select the items in this section: ▪ **Include: Claims with No Encounters / Out of Office Visits** Check the boxes in this section to include information on claims with no encounters or claims with out-of-office visits in outgoing referrals automatically. For more information, refer to the *Front Office Setup Guide*. ▪ **Automatically Populate the Diagnosis in Outgoing Referral** Check this box to copy diagnoses from current encounters to the Diagnosis/Reason tab on the Referral (Outgoing) window. For more information, refer to the *Front Office Setup Guide*. ▪ **Provider Can Set Preference for Diagnosis in Outgoing Referral** Check this box to enable a My Setting option where individual users can set their own preferences. For more information about this setting, refer to Enabling the Server Object Setting and the *Front Office Setup Guide*. ▪ **Allow to Update Visits for Addressed Incoming Referral** Check this box to permit updates in addressed referrals. For more information, refer to the *Front Office Setup Guide*. ▪ **Attach Progress Notes by Default in Outgoing Referral** Check this box to attach Progress Notes for the current encounter to outgoing referrals automatically. For more information, refer to the *Front Office Setup Guide*. ▪ **Attach Medical Summary by Default in Outgoing Referral** Check this box to attach patients' Medical Summaries to outgoing referrals automatically. For more information, refer to the *Front Office Setup Guide*. ▪ **Don't Show *Referral Required* in the Appointment Dialog…** Check this box to disable the Referral Required flag that displays on the Appointment window when there are referrals available for a patient. For more information, refer to the *Front Office Setup Guide*. ▪ **Default End date to (...) Days for a New Referral** Enter a number of days to establish an end date for a referral to remain valid and active. The default will be one year if the field is left blank. For more information, refer to the *Front Office Setup Guide*.
Visits	Check this box to enable the configuration of Pay To, Rendering, and Supervising providers for claims when creating appointments. For more information, refer to the *Front Office Setup Users Guide*.

Setting	Description
Patient Demographics	Click the radio button for this item to convert the first character of each word on the Patient Information window to upper case. All remaining letters of each word will be converted to lower case automatically. To override this feature, enter all characters in a field in uppercase (*e.g.,* entering *USA* in the Country field). The *Patient E-mail* field is the only text field not affected by this feature. For more information, refer to the *Front Office Setup Users Guide*.
Patient Lookup	Click one of these radio buttons to determine whether all patients or only active patients display by default on the *Patient Lookup* window. For more information, refer to the *Front Office Setup Guide*.
Resource Schedule Default Color (8:00 AM - 5:00 PM)	Click the *More* (...) button to display the available colors. Click the color that you want to use as the default color for the EMR Resource Schedule. For more information, refer to the *Front Office Setup Guide*.

Mid-Office Tab

The administrator configures the defaults for the middle office from Practice Defaults:



This table provides a description of the options available from this tab:

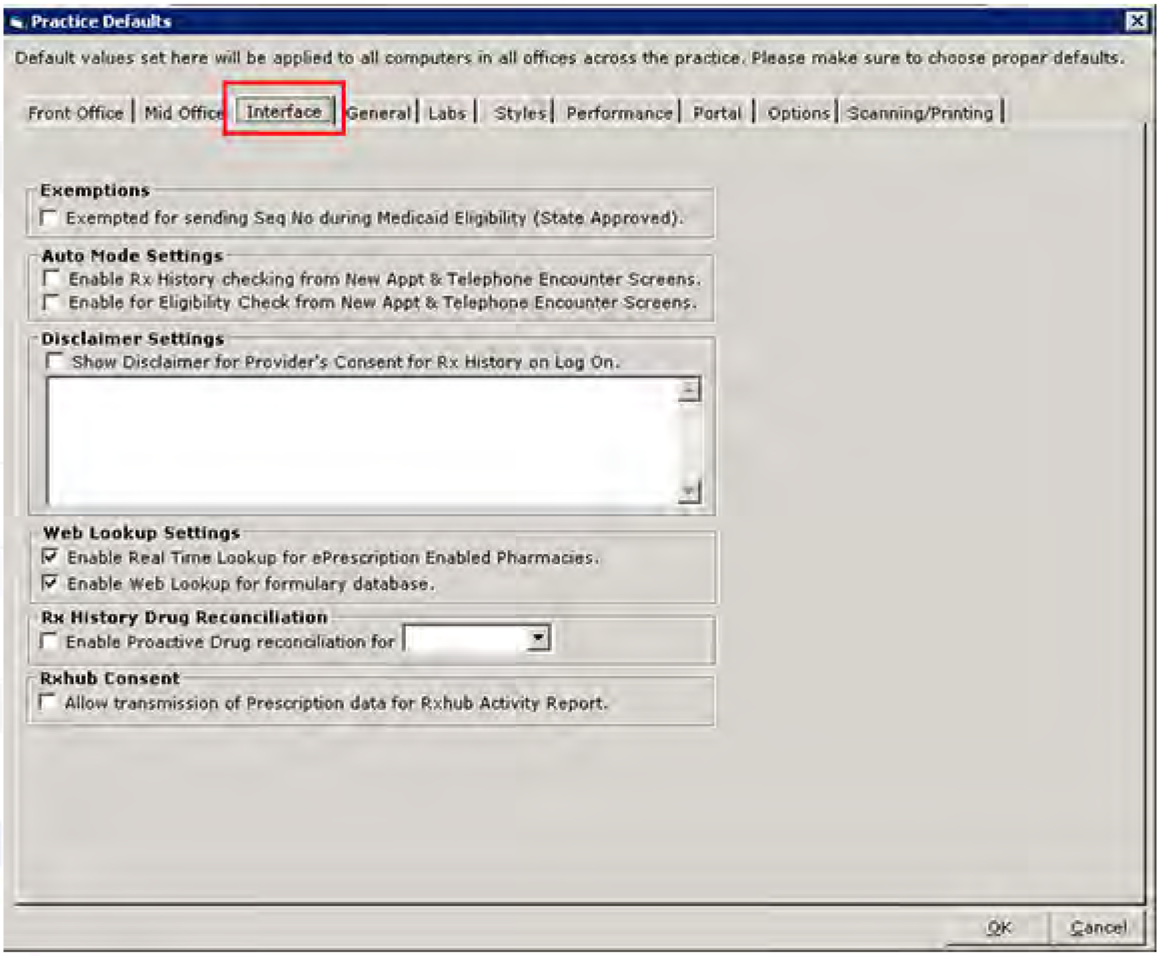
Setting	Description
Office Visits **Rx, Labs, Immunizations, and Referrals (Outgoing)**	Check the boxes next to the criteria to highlight a patient's name in green on the Office Visits window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Show TMHP (Texas Medicaid & Healthcare Partnership) Family Planning Data window in Office Visits	Check this box to include the TMHP (Texas Medicaid and Healthcare Partnership) family planning data window in Office Visits. For practices in Texas that have patients covered by Medicaid, family planning data must be submitted in a specific format. The TMHP (Texas Medicaid and Healthcare Partnership) family planning data window facilitates entering this information. For more information, refer to the *Electronic Medical Records Setup Users Guide*.
Immunizations	Check the appropriate boxes or add/select the appropriate data to enable the practice settings for immunizations: ▪ **Do not check *Billable* for Immunizations given outside** Check this box to mark new immunizations as *Billable* by default. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ▪ **Check *Billable* for New Immunizations by default** Check this box to mark immunizations given outside the practice as *Non-Billable* by default. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ▪ **Default Dosage Unit in Dosage Calculator** Enter the default dosage (in mg/kg format) for the dosage calculator here. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ▪ **Use … an as Administration Code for Immunization** Click *More* (...) to select the default Administration Code for immunizations. For more information, refer to the *Electronic Medical Records Setup Users Guide*.

Setting	Description
Vitals	Enter the appropriate figures for each of the items in the Vitals section: ■ **Frequencies** Enter the frequencies used at this practice for hearing tests here. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ■ **Decibels** Enter the decibels used for hearing tests at this practice here. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ■ **Check *Billable* by Default if a CPT code is associated with a Vital** Check this box if your practice bills for collecting vitals and has associated a CPT* code with collecting them. For more information, refer to the *Electronic Medical Records Setup Users Guide*.
Medical Summary	Click one of the following radio buttons: ■ **Practice** - All users in this practice have the same view and print options for the Medical Summary—configured here. ■ **User** - Enables individual users to configure their own view and print options directly from the Medical Summary. Next click *Configure* in the appropriate section to select the default view and print options for medical summaries. For more information, refer to the *Electronic Medical Records Setup Guide*.
ICD-10	Enter the ICD-10 effective date for your practice in this field.
Vision Rx Options	Select the default expiration dates for spectacles and contacts from these drop-down lists. For more information, refer to the *Electronic Medical Records Setup Guide*.
Assessments	Select the category to display by default whenever the *Assessments* window is opened in Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Current Medication	Check and select the appropriate values to enable settings for current medications: ■ **Automatically carry forward current medications when Progress Notes is viewed for the first time** Check this box to carry medications forward automatically to a patient's *Current Medications* whenever Progress Notes display for the first time. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ■ **Do not carry forward current medications if future encounter is more than… days** To prevent medications from being carried forward after a certain number of days, select the number of days from this drop-down list. For more information, refer to the *Electronic Medical Records Setup Users Guide*. ■ **Prompt user to confirm before carry forward** Check this box to ask users before carrying medications forward to new encounters. For more information, refer to the *Electronic Medical Records Setup Guide*.
Rx	**Calculate Stop Date for Rx Prescription** Check this box to remove medications from a patient's Current Medications automatically after the *Stop Date* for that medication has been reached. For more information, refer to the *Electronic Medical Records Setup Guide*.
PickList By Facility	Check this box to enable users to configure which Progress Notes items display for each category by facility, without linking the configuration to a provider. For more information, refer to the *Electronic Medical Records Setup Guide*.
Smart Form Settings	Check this box to display all the Structured Data elements filled in on the Smart Forms in the Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.
Medication Reconciliation	Select the Classic or Modern View as the default for the medication reconciliation display.

Interface Tab

The administrator configures the defaults for the eClinicalWorks user interface from Practice Defaults:



This table provides a description of the options available from this tab:

Setting	Description
Exemptions	Check this box if your facility has a state exemption from sending the sequence number with Medicaid eligibility requests, so that requests are not rejected because the sequence number is not included. For more information, refer to the *Billing Setup Guide*.

Setting	Description
Auto Mode Settings	Check the appropriate boxes to enable the default settings for this category: ▪ **Enable Rx History checking from New Appt & Telephone Encounter Screens** Check this box to enable automatic prescription history checking with RxHub when a new appointment or telephone encounter is created for a patient. For more information, refer to Configuring Auto Mode Settings. ▪ **Enable for Eligibility Check from New Appt & Telephone Encounter Screens** Check this box to enable automatic prescription checks with RxHub when a new appointment or telephone encounter is created for a patient. For more information, refer to Configuring Auto Mode Settings.
Disclaimer Settings	To create a disclaimer that displays whenever anyone attempts to log into the eClinicalWorks application, check the *Show Disclaimer for Provider's Consent for Rx History on Log On* box and then enter the disclaimer text in the blank filed below the check box. For more information, refer to Creating a Login Disclaimer.
Web Lookup Settings	Check the appropriate boxes to enable the default settings for Web lookups: ▪ **Enable Real Time Lookup for ePrescription Enabled Pharmacies** Check this box to enable a real-time lookup for e-Prescription-enabled pharmacies. For more information, refer to the *Electronic Medical Records Setup Guide*. ▪ **Enable Web Lookup for formulary database** Check this box to enable the Web lookup for the formulary database. For more information, refer to Enabling the Web Lookup for the Formulary Database.
Rx History Drug Reconciliation	To enable proactive drug reconciliation, check the *Enable Proactive Drug Reconciliation for* box and select the number of days from the drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
RxHub Consent	Check this box to specify that eCW can transmit prescription data, which is required before it can be incorporated into the RxHub Activity Report. For more information, refer to the *Electronic Medical Records Setup Guide*.

Configuring Auto Mode Settings

Auto Mode settings govern the automatic checks of a patient's external Rx history and eligibility with RxHub from the New Appointment window and the Telephone Encounters window. Enable the Auto Mode settings from Practice Defaults. The RxHub feature must be enabled for the practice to use the Auto Mode settings.

To configure Auto Mode settings:

1. From the File menu, point to *Settings*, and then click the *Practice Defaults* option.

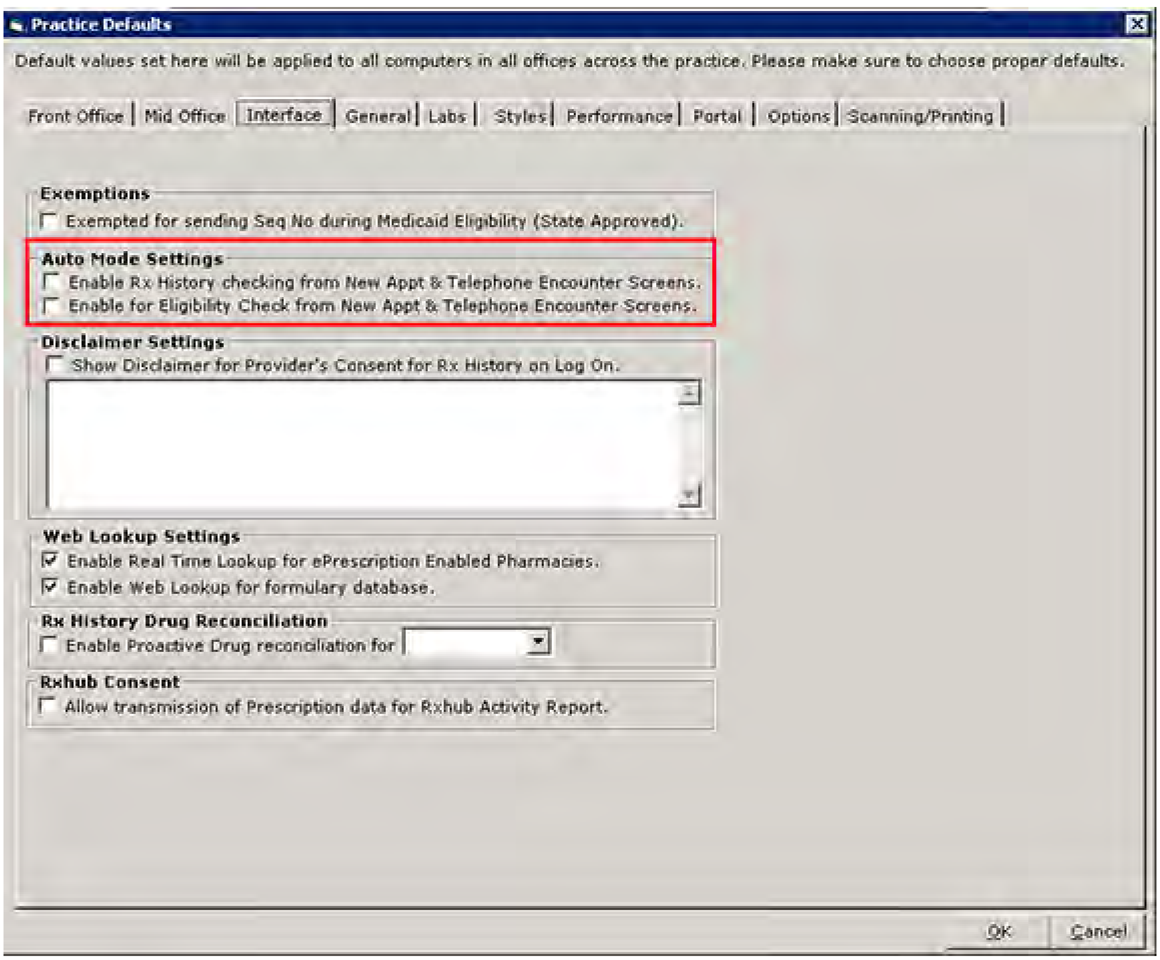
   The Practice Defaults window displays.

2. Click the *Interface* tab.

   The Interface options display.

3. Check the *Enable Rx History check…* box to enable automatic prescription history checking with RxHub when a new appointment or telephone encounter is created for a patient.

4. Check the *Enable Rx Eligibility check…* box to enable automatic prescription checks with RxHub when a new appointment or telephone encounter is created for a patient:



5. Click *OK*.

   Auto mode settings are configured. All users must log out and log back in to view these changes.

Creating a Login Disclaimer

Practices are able to add a disclaimer to the Login window. This disclaimer is designed to obtain providers' consent for prescription history.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 0609_DMG.

To add a disclaimer to the Login window:

1. From the File menu, point to *Settings*, and then click the *Practice Defaults* option.

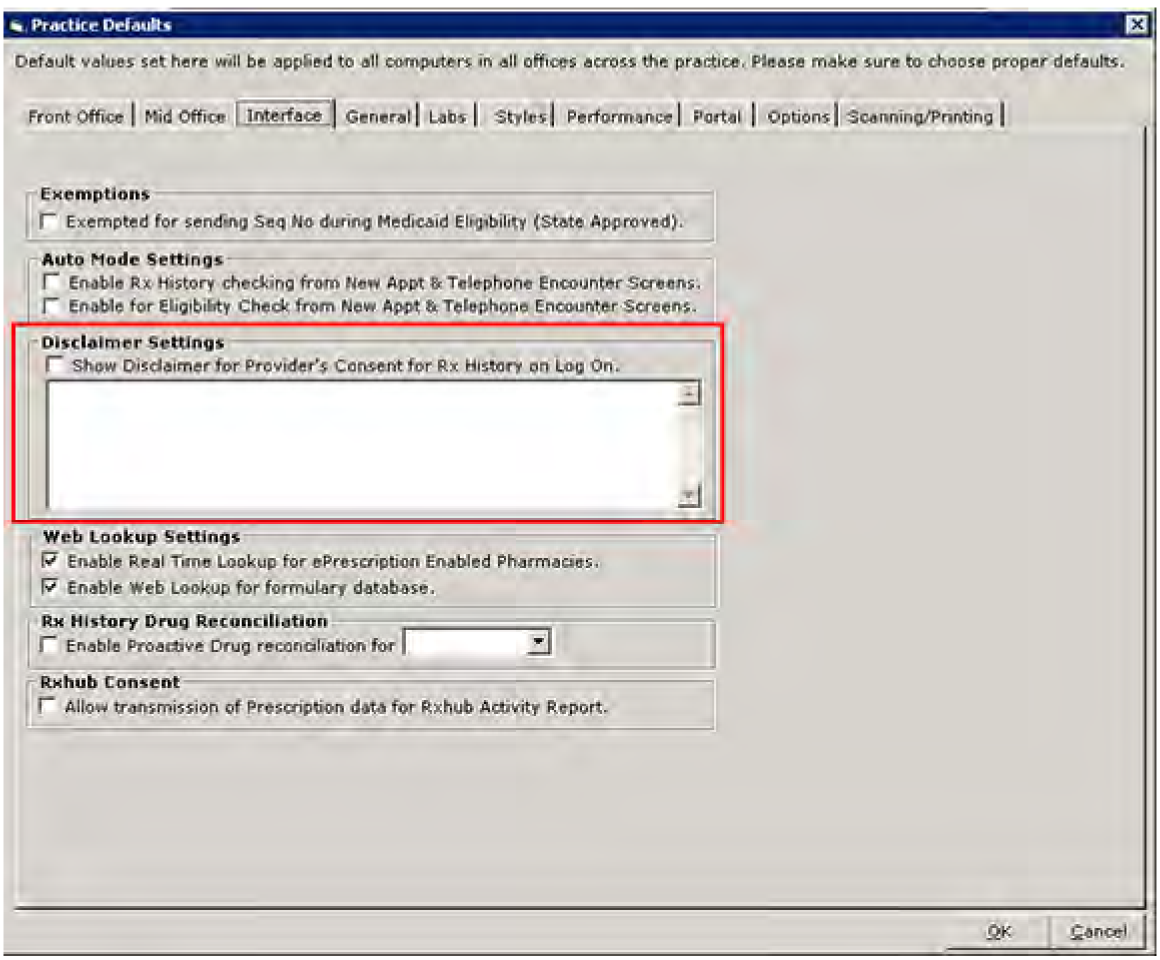
   The Practice Defaults window displays.

2. Click the *Interface* tab.

   The Interface options display.

3. Check the *Show disclaimer for Provider's…* box to enable the disclaimer.

4. Enter the text to display as a disclaimer in the Disclaimer Settings field:



5. Click *OK*.

   The specified text displays as a disclaimer on the initial Login window the next time any users attempt to log in. Users will have to click *I Agree* to complete the login process.

Enabling the Web Lookup for the Formulary Database

When performing formulary checks, use the Surescripts central hub database to check the formulary. Enable the Web Lookup for the formulary database from Practice Defaults.

To enable the Web Lookup for the formulary database:

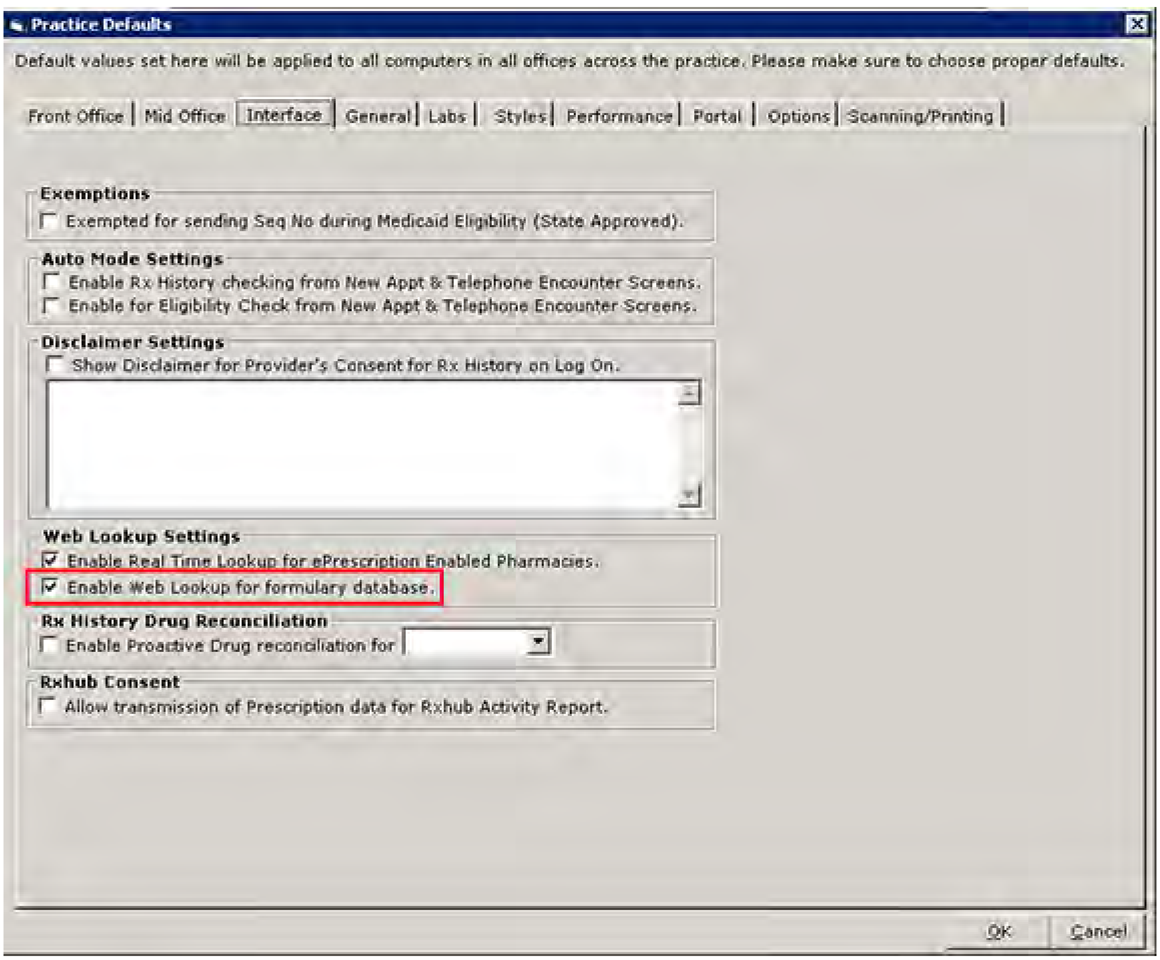
1. From the File menu, point to *Settings*, and then click the *Practice Defaults* option.

The Practice Defaults window displays.

2. Click the *Interface* tab.

The Interface options display.

3. Check the *Enable Web Lookup for formulary database* box:

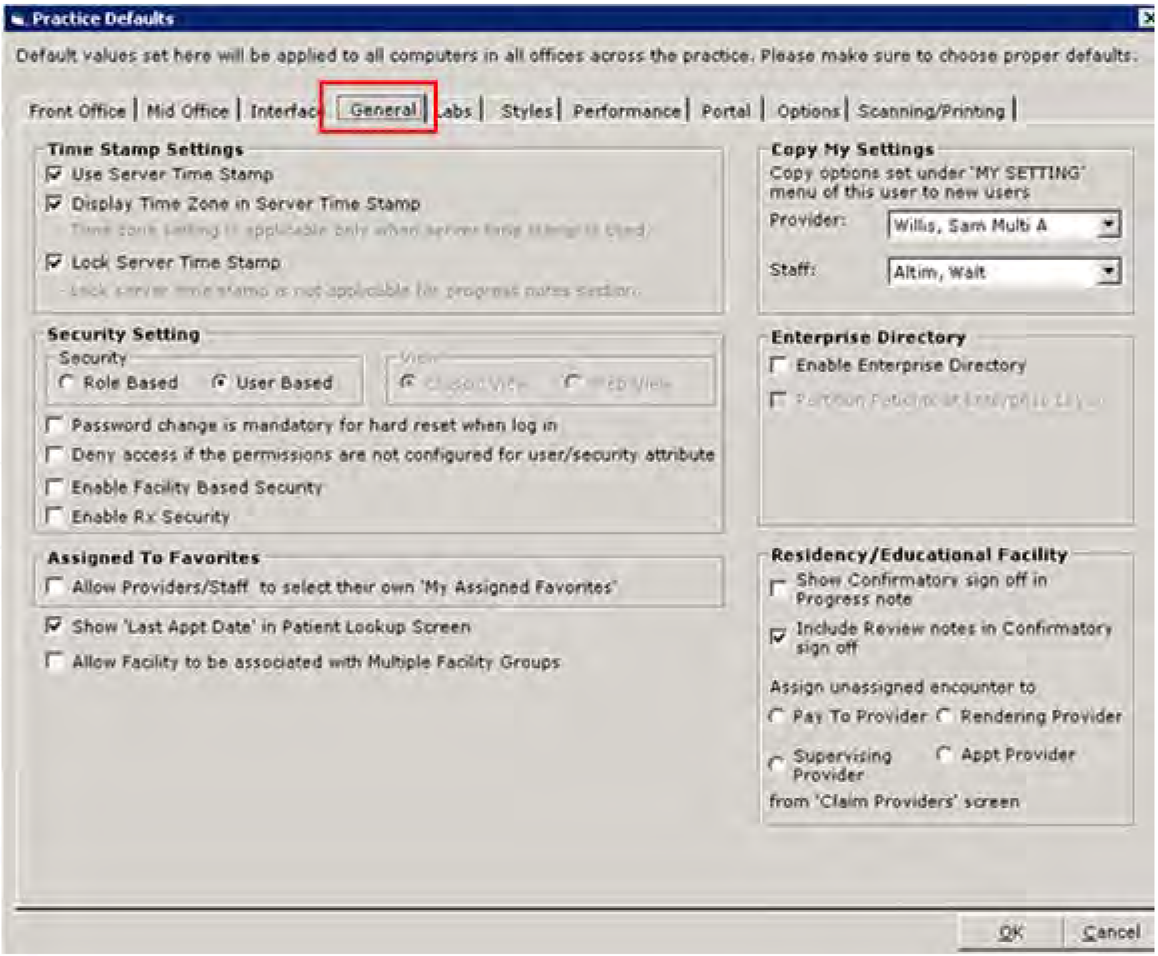


4. Click *OK*.

The Web Lookup for the formulary database is enabled. All users must log out and log back in to view these changes.

General Tab

The system administrator configures general settings for the eCW application from Practice Defaults:



This table describes the options available from this tab:

Setting	Description
Time Stamp Settings	Check the appropriate boxes to enable the default settings for time stamps: ▪ **Use Server Time Stamp** Check this box to utilize the time on the server in all Notes field time stamps. For more information, refer to Configuring Time Stamp Settings. ▪ **Display Time Zone in Server Time Stamp** Check this box to have the server's time zone (EST, PST, *etc.*) added to the time stamp if you have chosen to use the server time in Notes field time stamps. For more information, refer to Configuring Time Stamp Settings. ▪ **Lock Server Time Stamp** Check this box to prevent text from being entered manually in any Notes fields outside of the Progress Notes. Check this box to remove the Time Stamp button from Notes fields. Use the Action Taken button to add notes. Click *Action Taken* to open a pop-up window and make your entry. After this window closes, the system adds the text entered in the Notes field following a time stamp. This text cannot be modified in the future. For more information, refer to Configuring Time Stamp Settings.

Setting	Description
Security Setting	Check the appropriate boxes to enable the defaults for security settings: ■ **Security** Click one of the radio buttons to select either User-Based or Role-Based security settings. For more information, refer to Enable Role-Based Security. ■ **Password change is mandatory for hard reset when log in** Check this box to enable individual users to determine their new password whenever a Hard Reset is performed. For more information, refer to Enabling Mandatory Password Changes. ■ **Deny access if the permissions are not configured for user/security attribute** Check this box to deny access to all security attributes by default until specific security access is granted. For more information, refer to Denying Access to All Security Attributes by Default. ■ **Enable Facility Based Security** Check this box to enable Facility-Based Security. For more information, refer to Enable Facility-Based Security. ■ **Enable Rx Security** Check this box to enable Rx Security. For more information, refer to Enable Rx Security.
Assigned to Favorites	■ **Allow Providers/Staff to select their own *My Assigned Favorites*** Check this box to enable users to populate their own My Favorites list. For more information, refer to Enabling Users to Populate My Favorites Lists.
Show *Last Appt Date* in Patient Lookup Screen	Check this box to display patients' last appointment dates on the Patient Lookup window. For more information, refer to the *Front Office Setup Guide*.
Allow Facility to be associated with Multiple Facility Groups	Check this box to enable a facility to be added to more than one Facility Group. For more information, refer to Enabling the Association of Facilities with Multiple Groups.
Copy My Settings	To copy your My Settings options to another provider, select a provider from the Provider drop-down list. To copy your My Settings options to another staff member, select a staff member from the Staff Member drop-down list. For more information, refer to Copying My Settings Options to Other Users.

Setting	Description
Enterprise Directory	To enable the Enterprise Directory, check the *Enable Enterprise Directory* box. After you check the *Enable Enterprise Directory* box, check the *Partition Patients at Enterprise Level* box to partition patients at different Enterprise levels. For more information, refer to Enabling and Partitioning the Enterprise Directory.
Residency/Educational Facility	■ **Show Confirmatory sign off in Progress note** Check this box to display a confirmatory sign-off on the Progress Notes window for Residency/Educational facilities. For more information, refer to the *Electronic Medical Records Setup Guide*. ■ **Include Review notes in Confirmatory sign off** Check this box to include review comments for Residency/ Educational facilities on Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*. ■ **Assign unassigned encounter to** Click one of the radio buttons in this section to automatically assign unassigned encounters to the selected provider. For more information, refer to the *Electronic Medical Records Setup Guide*.

Configuring Time Stamp Settings

Practices have two options for the time stamp on Notes fields throughout the system—either the local time or the time on the server. If a practice uses the server time and the server is in a different time zone from some of the local systems, all time stamps in Notes will use the server time.

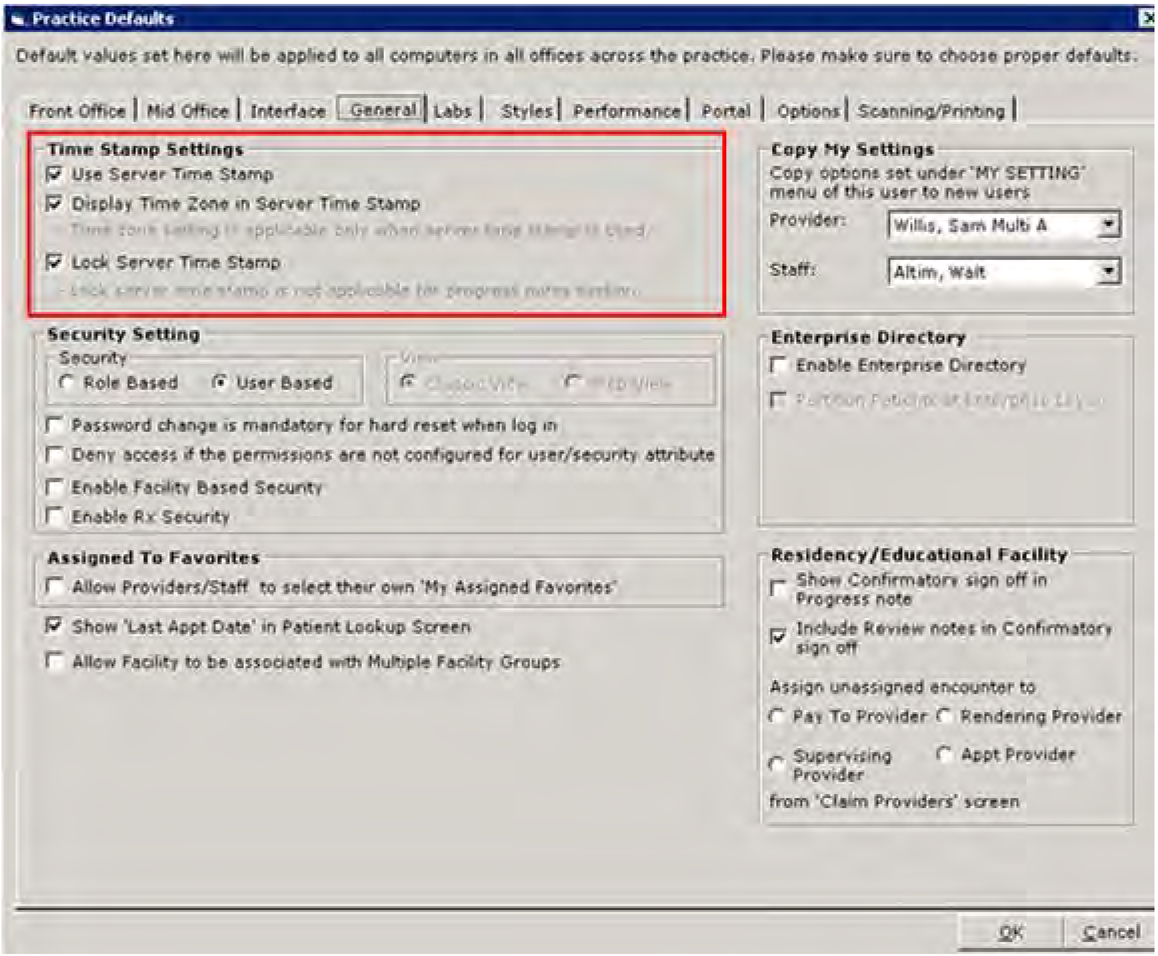
To set the Time Stamp settings:

1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display:



3. Check one or more of the following boxes:

Option	Function
Use server time stamp	Check this box to utilize the time on the server in all Notes field time stamps.
Display time zone in server time stamp	If you have chosen to use the server time in Notes field time stamps, check this box to have the server's time zone (EST, PST, *etc.*) added to the time stamp.
Lock server time stamp	To prevent text from being entered manually in any Notes fields outside of the Progress Notes, select this option. Select this option to remove the *Time Stamp* button from Notes fields. The *Action Taken* button must be used to add notes. Click the *Action Taken* button to open a pop-up window where the user can enter text. After this window closes, the entered text is added to the Notes field following a time stamp. This text cannot be modified in the future.

4. Click *OK*.

Time stamp settings are configured. All users must log out and log back in to view these changes.

Enable Role-Based Security

Before the administrator can configure any roles or assign security permissions, the role-based security feature must be enabled from Practice Defaults.

To enable role-based security:

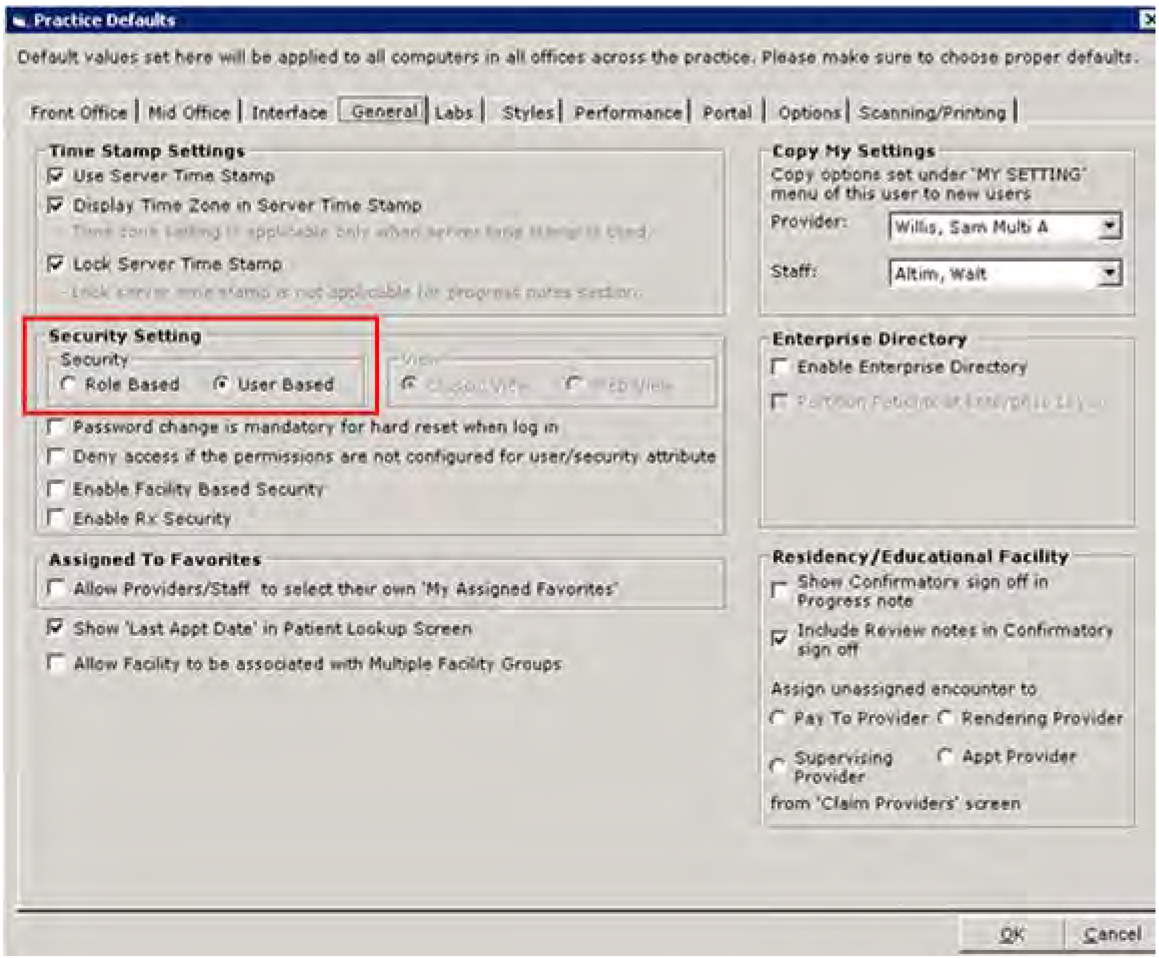
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display.

3. In the Security Setting section, click *Role Based*:



   You can select user-based or role-based security setting.

4. Click *OK*.

   Role-based security is enabled. All users must log out and log back in to view these changes.

   For more information about using role-based security, refer to Role-Based Security.

Enabling Mandatory Password Changes

Administrators can enable individual users to determine their new password whenever a Hard Reset is performed.

To enable the mandatory changing of passwords:

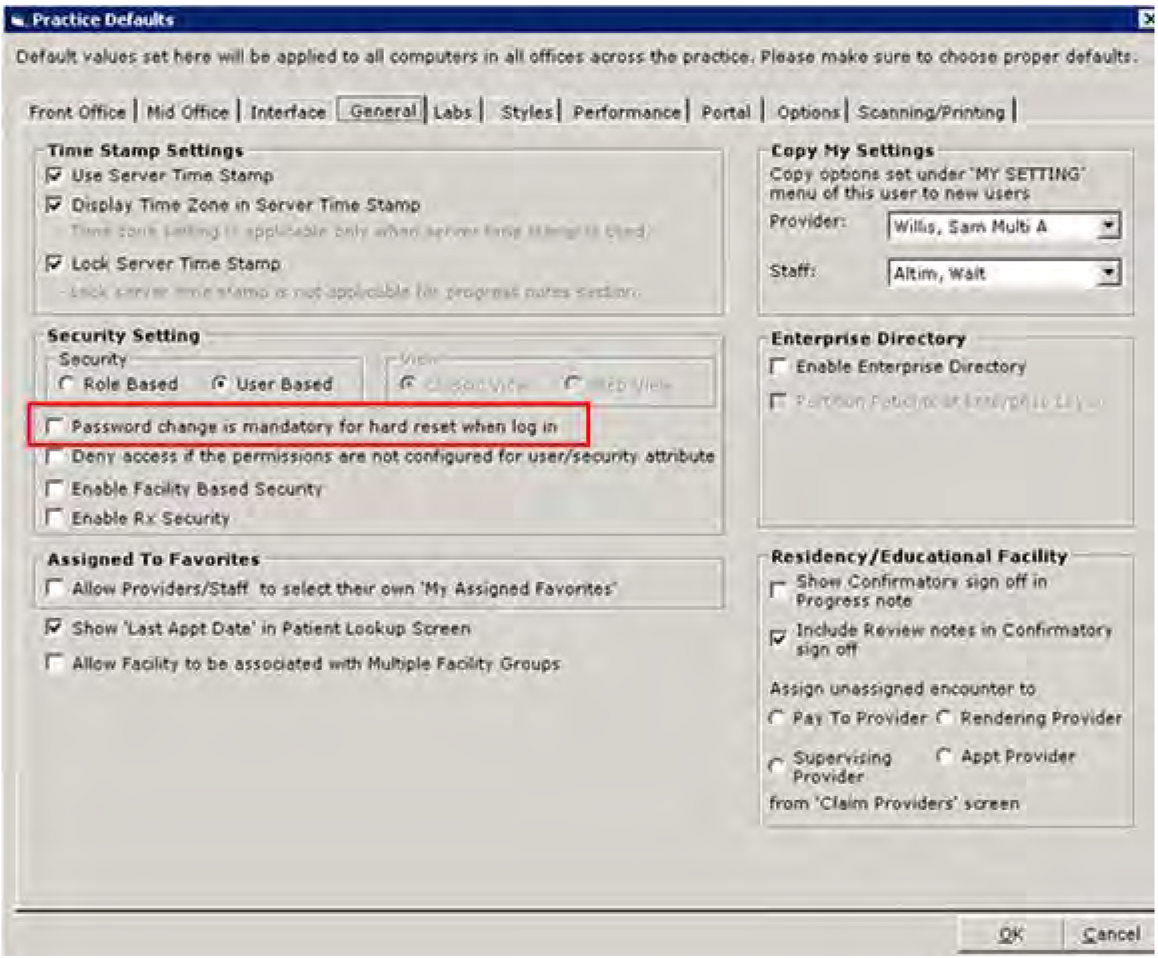
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display.

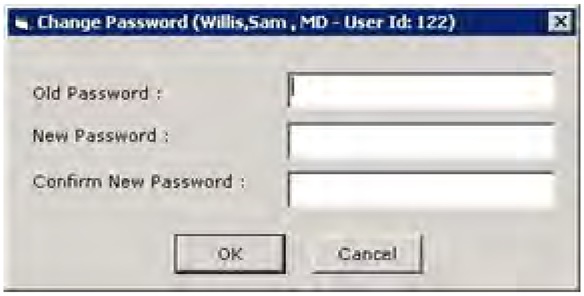
3. Check the *Password change is mandatory…* box:



4. Click *OK*.

   A password change is mandatory when a Hard Reset is performed.

   After this setting is enabled and a Hard Reset is performed for a user, the next time they log in they will be prompted to change their password:



Hard Reset of Password by Other User(s) Option on eClinicalWorks Administrator

Enhanced Feature

Configure the Other User(s) option to enable the users added to this list to hard reset passwords.

To configure the Other User(s) list:

1. From File menu, point to Settings and click *eClinicalWorks Administrator*.

   The eClinicalWorks Administrator window displays.

2. Click *Add*:

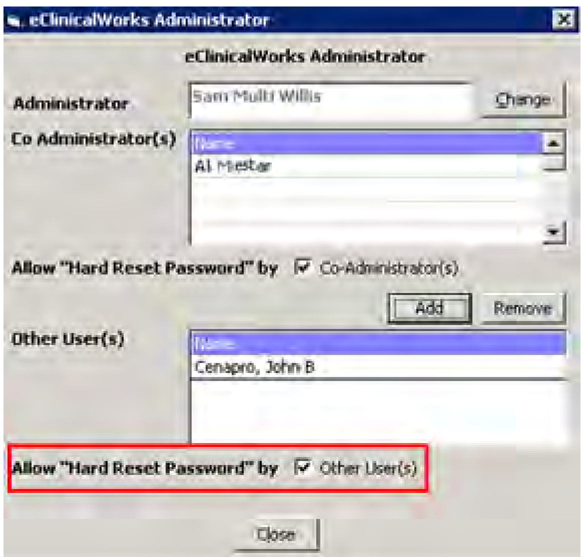
   The Users List window displays.

3. Select the user to be added to the Other User(s) list:

4. Click *OK*.

   The eClinicalWorks Administrator window displays.

5. Check the box next to *Allow "Hard Reset Password" by Other User(s)*:

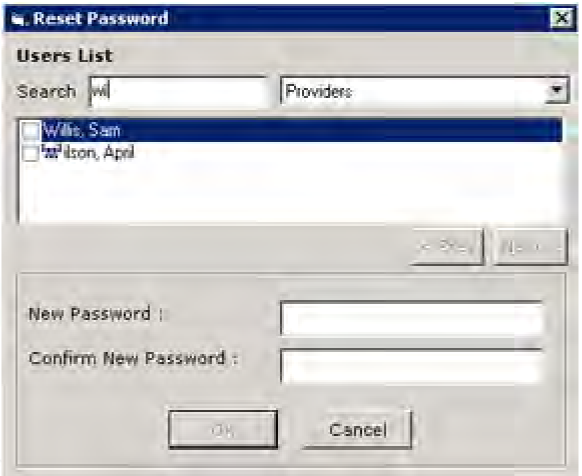


6. Click *Close*.

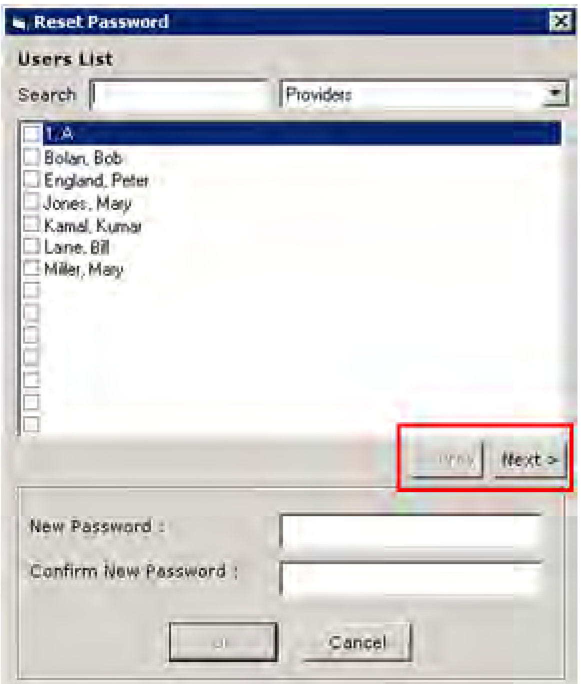
   The users in the Other User(s) list can hard reset passwords.

Search Capability and Pagination on Hard Reset Password Window

Search Capability has been added to the Hard Reset Password window (accessed from File menu > Settings option) enabling users to perform real-time searches for the staff and providers:



The Prev and Next pagination buttons enable users to navigate through the list:



Denying Access to All Security Attributes by Default

Some of the new security attributes in the eClinicalWorks system deny access to certain features to which other attributes permit access. To ensure that the default for your practice denies access to features unless the practice specifically grants access, a Practice Default option provides this security measure.

To deny access to all features by default:

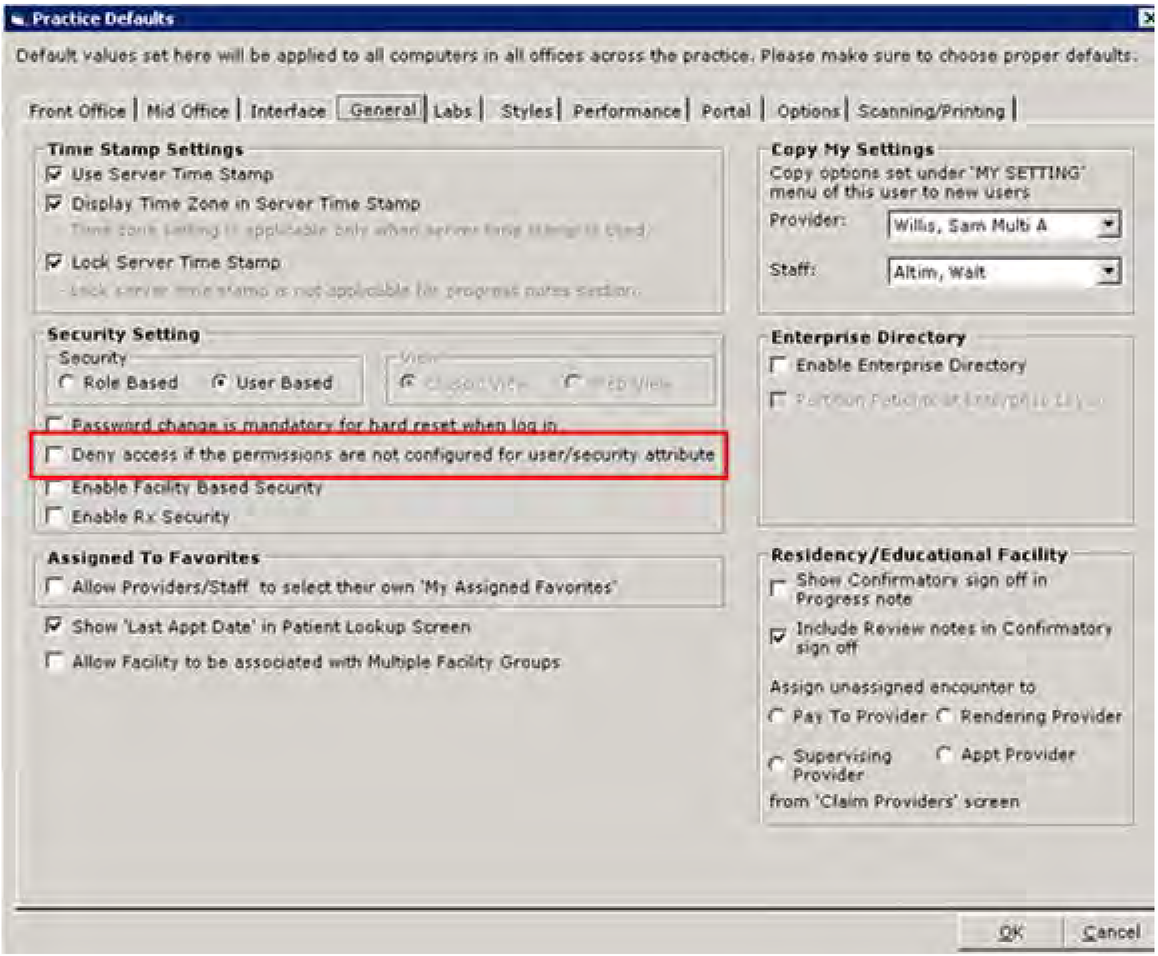
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

The Practice Defaults window displays.

2. Click the *General* tab.

The General options display.

3. In the Security Setting section, check the *Deny access...* box:



4. Click *OK*.

   Users are denied access to all security attributes by default. All users must log out and log back in to view these changes.

Enable Facility-Based Security

Enable the facility-based security settings from Practice Defaults.

To enable facility-based security settings:

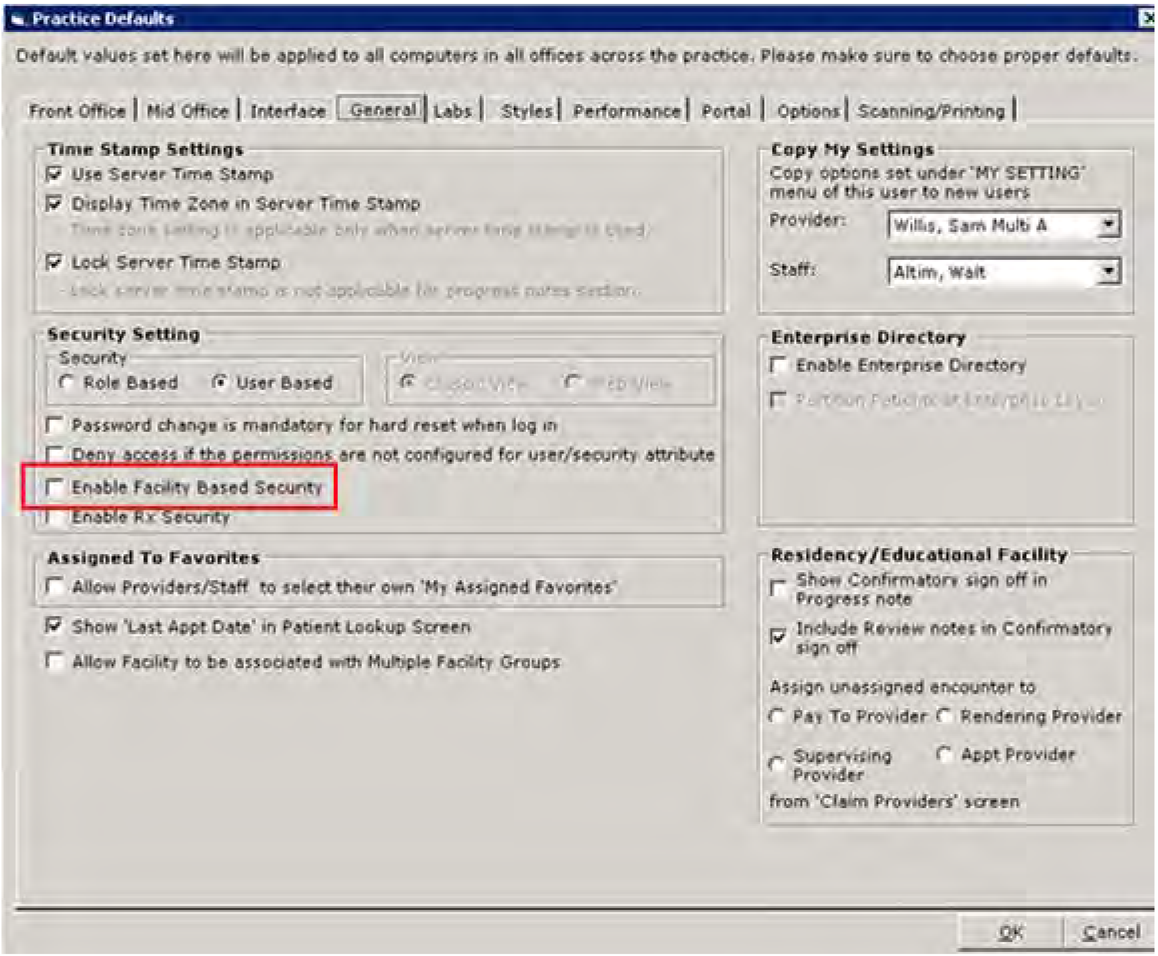
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display.

3. Check the *Enable Facility Based Security* box:



Note: To use Facility-Based Security, select the *User Based* option.

Please note that Facility-Based Security is incompatible with Role-Based Security.

4. Click *OK*.

Facility-based security is enabled, adding a By Facility tab to the Security Settings window. All users must log out and log back in to view these changes.

For more information about using this feature, refer to Facility-Based Security.

Enable Rx Security

The Rx Security feature enables staff members to print and fax prescriptions for providers. This feature must be enabled from Practice Defaults.

To enable Rx Security:

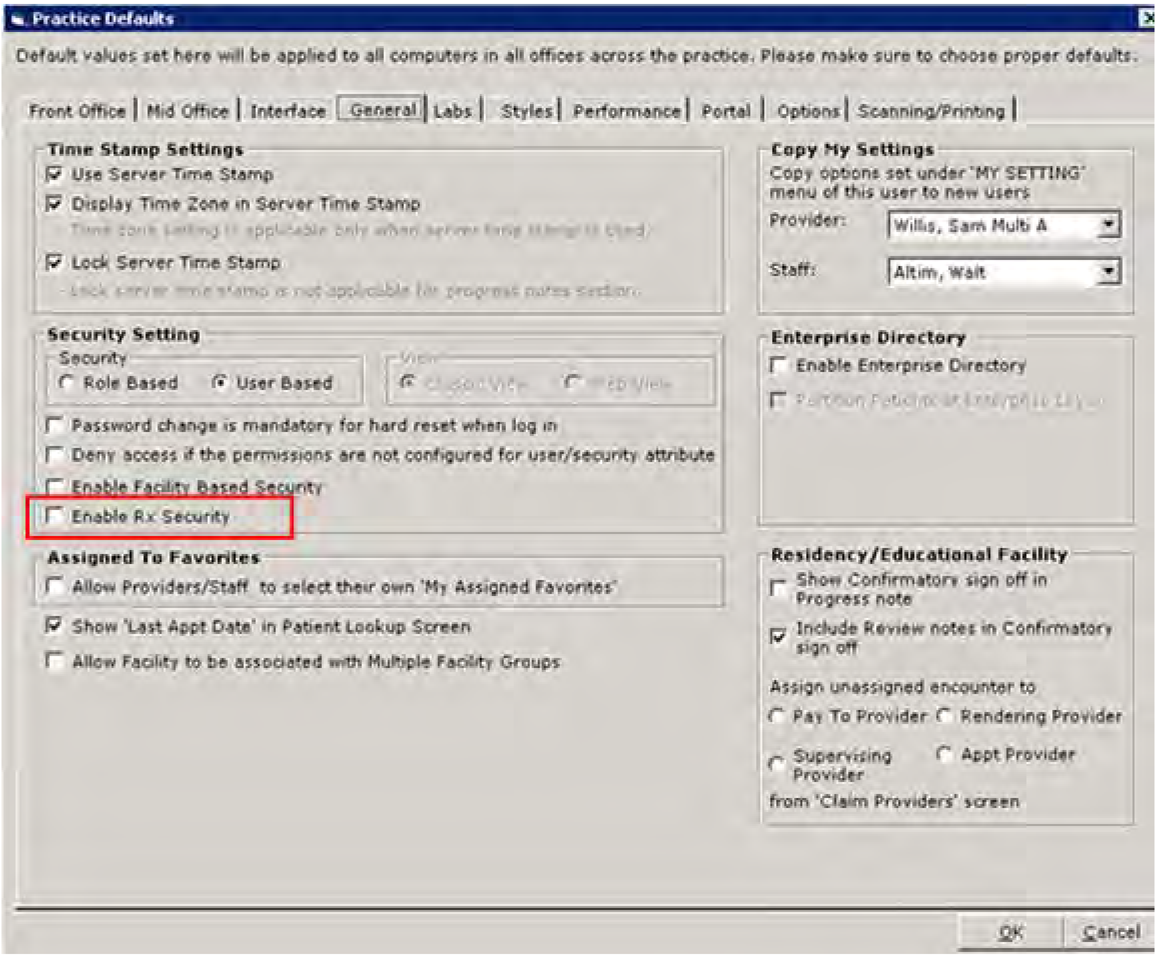
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

The Practice Defaults window displays.

2. Click the *General* tab.

The General options display.

3. Check the *Enable Rx Security* box:



4. Click *OK*.

   Rx Security is enabled, adding an Rx Security button to the Security Settings window. All users must log out and log back in to view these changes.

   For more information about using this feature, refer to Rx Security.

Enabling Users to Populate My Favorites Lists

The system can prevent users from populating their own My Favorites lists.

To grant permission to users to configure their Assign To favorites:

1. From the File menu, click the *Security Settings* option.

   The Security Settings window displays.

2. Check the *Admin My Assign Favorites* box for the providers, staff, or roles that to be able to configure their Assign To favorites.

3. Click *OK*.

   The Security Settings window closes.

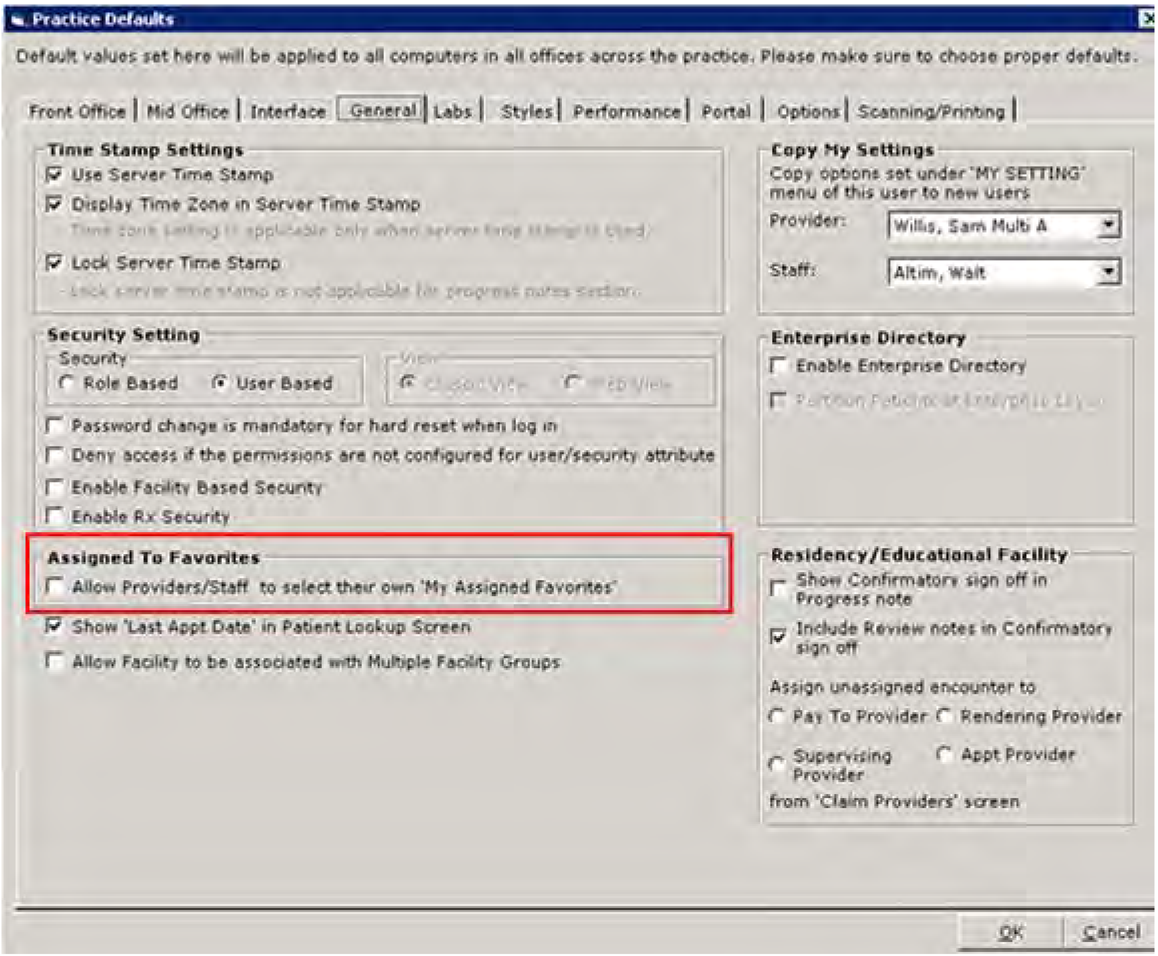
4. From the File menu, point to *Settings*, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

5. Click the *General* tab.

   The General options display.

6. Check the *Assigned To Favorites* box:



7. Click *OK*.

   If users have permission to configure Assigned favorites, they can add or remove favorites while making assignments. All users must log out and log back in to view these changes.

   For more information about using this feature, refer to Configuring My Favorites from My Settings.

Enabling the Association of Facilities with Multiple Groups

Users may associate facilities with multiple Facility Groups. To use this feature, enable it from Practice Defaults.

To enable the association of facilities with multiple groups:

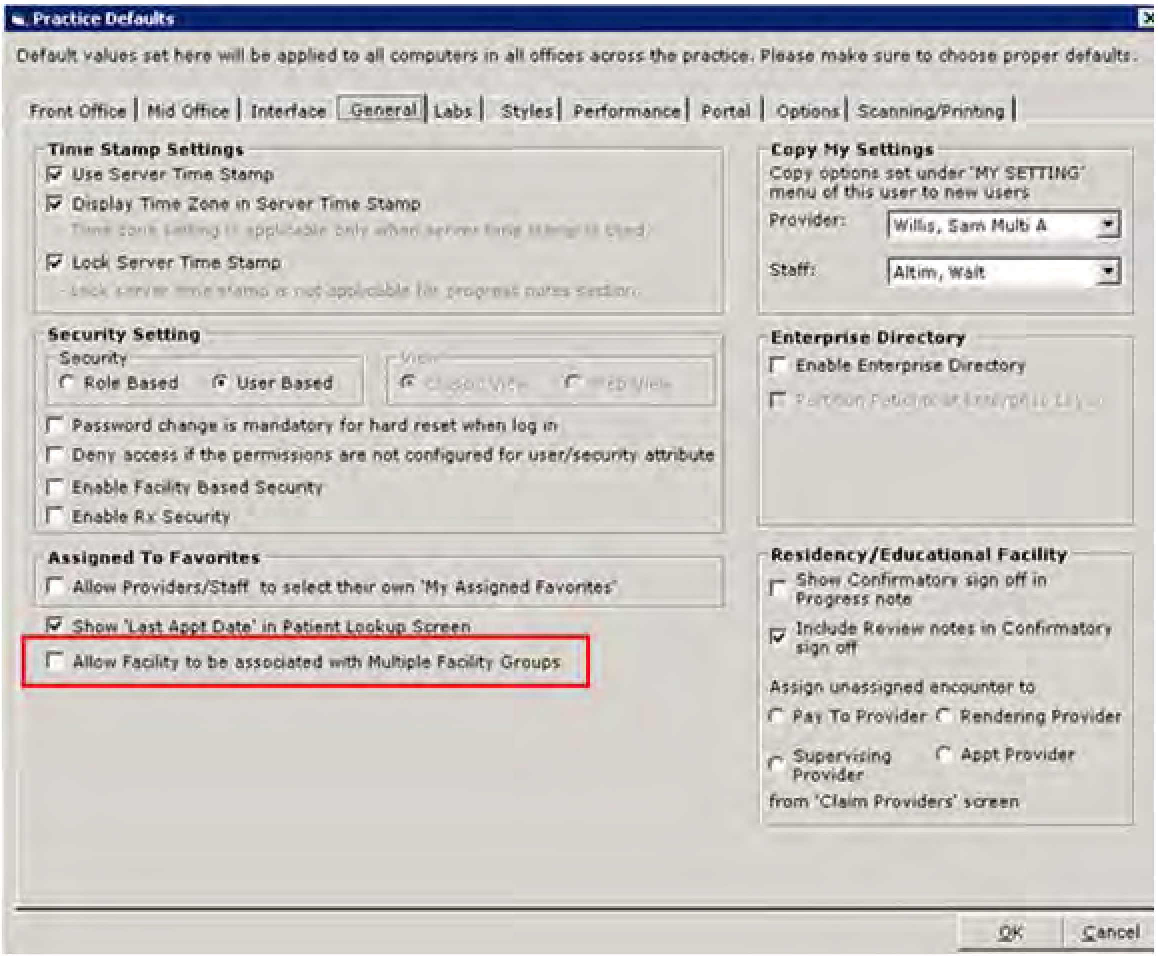
1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

   The Practice Defaults window displays.

2. Click the *General* tab.

   The General options display.

3. Check the *Allow Facility to be associated…* box:



4. Click *OK*.

   The facilities are associated with multiple Facility Groups. All users must log out and log back in to view these changes.

Copying My Settings Options to Other Users

Users can copy their own My Settings options to other users in their practice.

To copy My Settings options to other users:

1. From the File menu, point to Settings, and then click the *Practice Defaults* option.

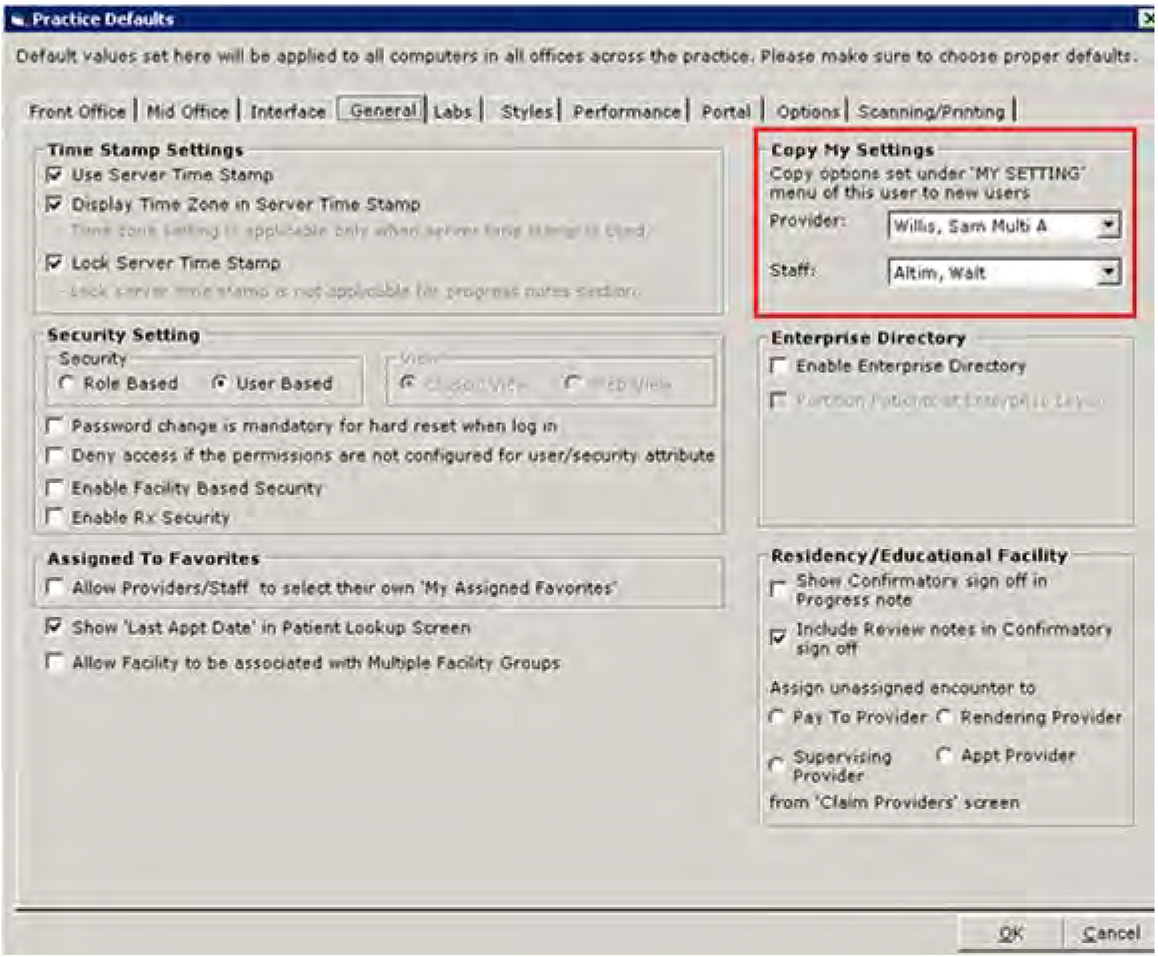
   The Practice Defaults window displays.

2. Click the *General* tab.

The General options display.

3. To copy your *Settings* options to another provider, select the provider's name from the *Provider* drop-down list.

4. To copy your *Settings* options to another staff member, select the staff member's name from the *Staff Member* drop-down list:



5. Click *OK*.

The My Settings options for the current logged-in user are transferred to the selected provider and/or staff member. All users must log out and log back in to view these changes.

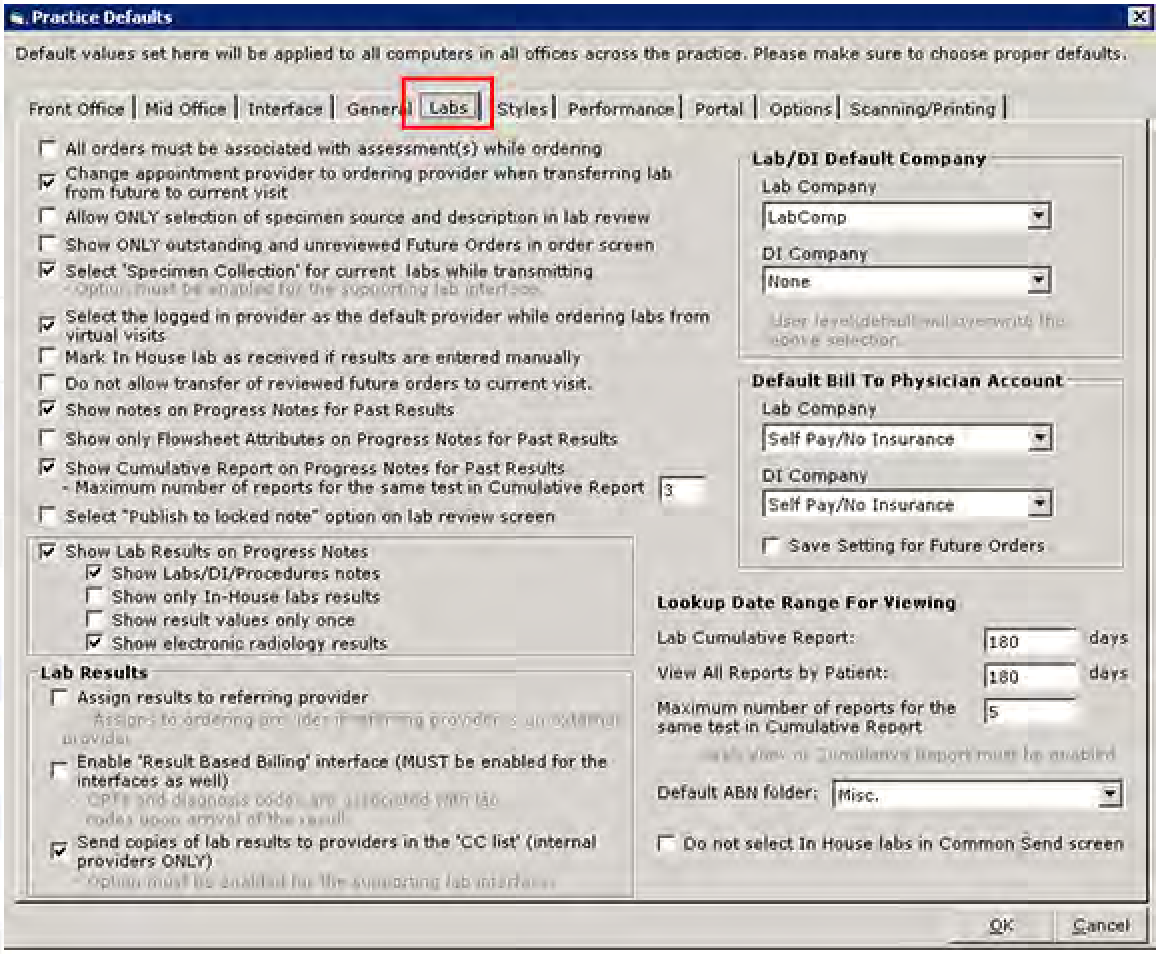
Enabling and Partitioning the Enterprise Directory

Enable and partition the Enterprise Directory from the General tab of the Practice Defaults window.

For more information, refer to the *Enterprise Directory Users Guide*.

Labs Tab

The administrator sets the preferred method for managing and displaying lab request and lab results for the office from Practice Defaults:



The table provides a description of the options available from this tab:

Setting	Description
All orders must be associated with assessment(s) while ordering	Check this box to require that users associate at least one assessment with a lab to order it. For more information, refer to the *Electronic Medical Records Users Guide*.
Change appointment provider to ordering provider when transferring lab from future to current visit	Check this box to mark the appointment provider for an encounter automatically as the ordering provider on any labs that are transferred from a future to a current visit. For more information, refer to the *Electronic Medical Records Users Guide*.

Setting	Description
Allow ONLY selection of specimen source and description in lab review	Check this box to enable altering of only the Specimen Source and Description fields when reviewing labs. For more information, refer to the *Electronic Medical Records Users Guide*.
Show ONLY outstanding and unreviewed Future Orders in order window	Check this box to display only outstanding and unreviewed future orders on the View Orders window (accessible from the Appointment and Office Visits windows). For more information, refer to the *Electronic Medical Records Users Guide*.
Select *Specimen Collection* for current labs while transmitting	Check this box to have the *Specimen Collection* box checked by default on labs. For more information, refer to the *Electronic Medical Records Users Guide*.
Select the logged in provider as the default provider while ordering labs from virtual visits	Check this box to assign the logged-in provider as the default provider for labs ordered during Virtual Visits. If the logged-in user is not a provider, then the provider selected as the PCP on the Patient Information window is the default provider. For more information, refer to the *Electronic Medical Records Users Guide*.
Mark In House lab as received if results are entered manually	Check this box to mark labs performed *in house* as Received automatically whenever results are entered manually on the Lab Results window. For more information, refer to the *Electronic Medical Records Users Guide*.
Do not allow transfer of reviewed future orders to current visit	Check this box to disable transferring of the reviewed future orders to current visits. For more information, refer to the *Electronic Medical Records Users Guide*.
Show notes on Progress notes for Past Results	Check this box to display notes from past lab results on Progress Notes whenever the same lab is ordered. For more information, refer to the *Electronic Medical Records Users Guide*.
Show Lab Results on Progress Notes	Check the *Show Lab Results on Progress Notes* box to display lab results directly on the Progress Notes window. After checking this box, users may check the following boxes: ▪ **Show Labs/DI/Procedure notes** - Display notes for lab, diagnostic imaging, and procedures on the Progress Notes window (in the Treatment section, under the associated lab). ▪ **Show only In-House labs results** - Displays ONLY results for In-House labs. Results for labs that are sent out to a lab company do not display. ▪ For more information, refer to the *Electronic Medical Records Users Guide*.

Setting	Description
Assign results to referring provider	Check this box to automatically assign lab results to the Referring Provider for encounters. For more information, refer to the *Electronic Medical Records Users Guide*.
Enable *Result Based Billing* interface	Check this box to enable Result-Based Billing. When lab results are received, CPT* and ICD codes associated with the lab are attached to the results. For more information, refer to the *Billing Setup Guide*.
Send copies of lab results to providers in the *CC list*	Check this box to automatically forward lab results to internal providers in the CC list. For more information, refer to the *Electronic Medical Records Users Guide*.
Lab/DI Default Company	Select the default lab and diagnostic imaging companies for tests from the Lab Company and DI Company drop-down lists in this section. For more information, refer to the *Electronic Medical Records Users Guide*.
Default Bill To Physician Account	Select one of the following options from the Lab Company and DI Company drop-down lists in this section: ■ **Never** - The *Bill to Physician* box is clear by default. ■ **Always** - The *Bill to Physician* box is checked by default. ■ **Self-Pay/No Insurance** - The *Bill to Physician* box is checked when the patient is marked as Self-Pay or has no insurance. To use these settings on future labs as well, check the *Save Setting for Future Orders* box. For more information, refer to the *Billing Setup Guide*.
Lookup Date Range For Viewing	Enter the number of days in the *Lab Cumulative Report* and *View All Reports by Patient* fields to configure the number of days contained in each report. For more information, refer to the *Electronic Medical Records Setup Guide*.
Maximum number of reports for the same test in Cumulative Report	Enter the maximum number of reports for the same test to include in a single cumulative report in this field. For more information, refer to the *Electronic Medical Records Setup Guide*.

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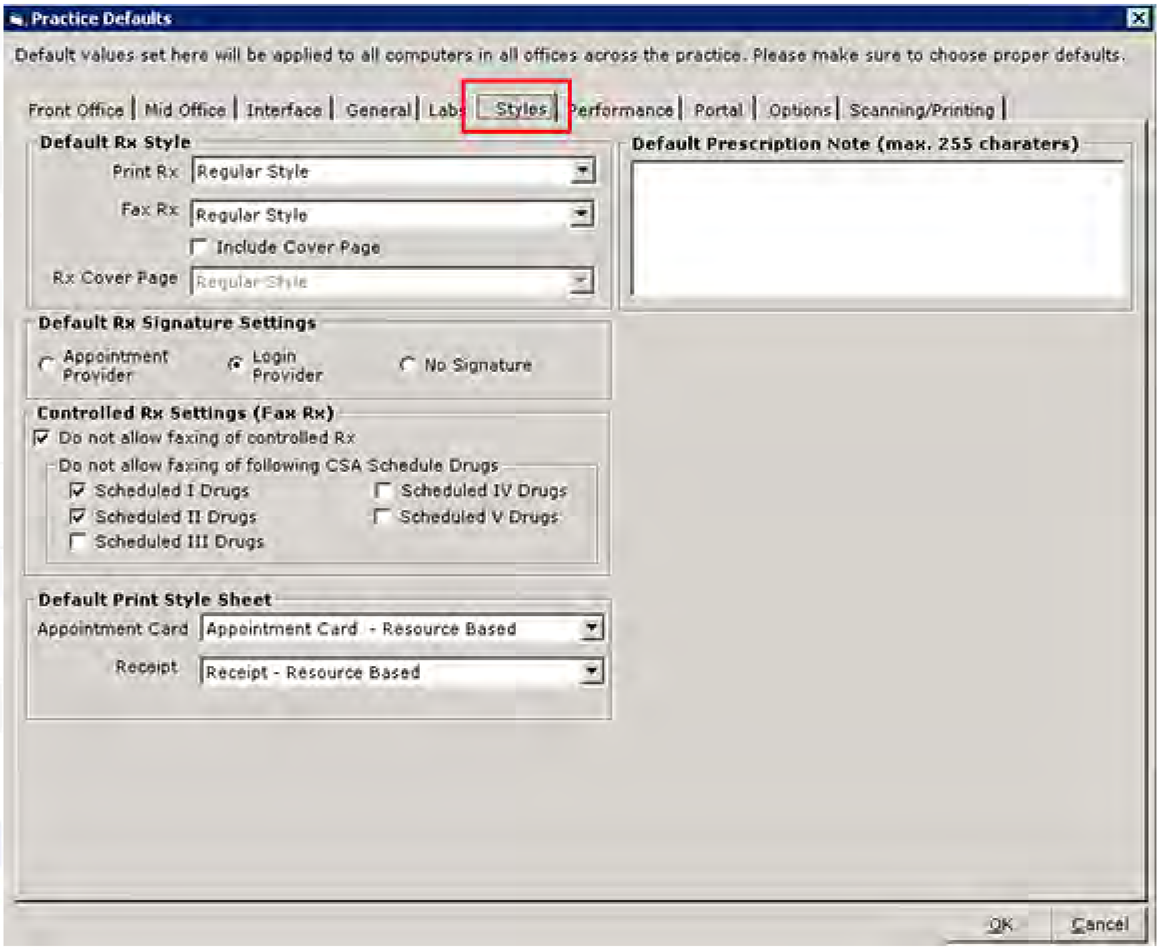
Styles Tab

Select style choices from the Practice Defaults window:



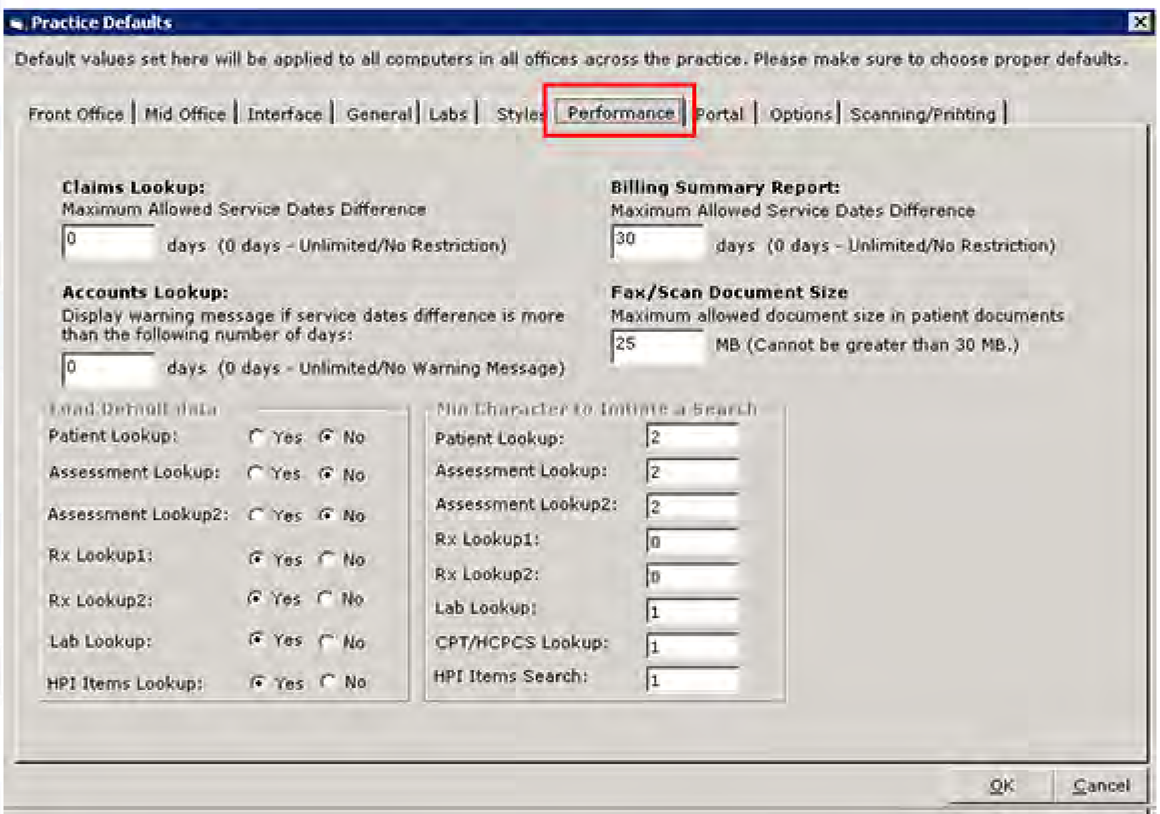
The table provides a description of the options available from this tab:

Setting	Description
Default Rx Style	Select the default styles for printing and faxing prescriptions from the Print Rx and Fax Rx drop-down lists. To include a cover page on prescriptions, check the *Include Cover Page* box and select a default cover page from the Rx Cover Page drop-down list. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Rx Signature Settings	Click a radio button to determine which provider's signature is included on locked Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Controlled Rx Settings (Fax Rx)	Check the *Do not allow faxing of controlled Rx* box to prevent the faxing of all controlled medications. To prevent the faxing of certain schedules of controlled medications, check the appropriate box(es) in the *Do not allow faxing of following CSA Schedule Drugs* section. For more information, refer to the *Electronic Medical Records Setup Guide*.
Default Print Style Sheet	Select the default appointment card and receipt styles from the Appointment Card and Receipt drop-down lists. For more information, refer to the *Front Office Setup Guide*.
Default Prescription Note	Enter the text that you want to display by default in the Notes field for prescriptions. For more information, refer to the *Electronic Medical Records Setup Guide*.

Performance Tab

The options on this tab are designed to help large practices that experience performance slowdowns when users search for large amounts of data in their Lookup windows:



The table provides a description of the options available from this tab:

Setting	Description
Claims Lookup	■ Enter the maximum number of days the service dates difference is allowed between the Start Date and End Date fields on the Claims Lookup window. ■ If your database is large in terms of patient records and claims, a smaller maximum difference between Start and End dates will create more specific and faster searches of your claims and accounts. ■ Enter 0 to remove restrictions on search date ranges. For more information, refer to Configuring Performance Settings.
Billing Summary Report	■ Enter the maximum number of days the service date difference is allowed between the Start Date and End Date fields on the Billing Summary Lookup window. ■ If your database is large in terms of patient records and claims, a smaller maximum difference between Start and End dates will create more specific and faster searches of your claims and accounts. ■ Enter 0 to remove restrictions on search date ranges. For more information, refer to Configuring Performance Settings.
Accounts Lookup	■ Enter the maximum number of days difference allowed between the Start Date and End Date fields on the Accounts Lookup window. ■ If your database is large in terms of patient records and claims, a smaller maximum difference between Start and End dates will create more specific and faster searches of your claims and accounts. ■ Enter 0 to put no restrictions on search date ranges. For more information, refer to Configuring Performance Settings.
Fax/Scan Document Size	Enter the maximum file size (in megabytes) for faxed and scanned documents in Patient Documents. For more information, refer to Configuring Performance Settings.
Load Default Data	Click one of the following radio buttons for each row: ■ **Yes** - All data is loaded before you search. ■ **No** - Data is only loaded after you enter search criteria. For more information, refer to Configuring Performance Settings.
Min Character to Initiate a Search	Enter the minimum number of characters that must be entered into a Search field before the system begins loading data search results. The larger this number is, the more specific and faster your searches will be. For more information, refer to Configuring Performance Settings.

Configuring Performance Settings

Performance enhancement options include maximum allowed service dates differences, maximum file size limits, default data loading options, and minimum character limits to initiate real time searches.

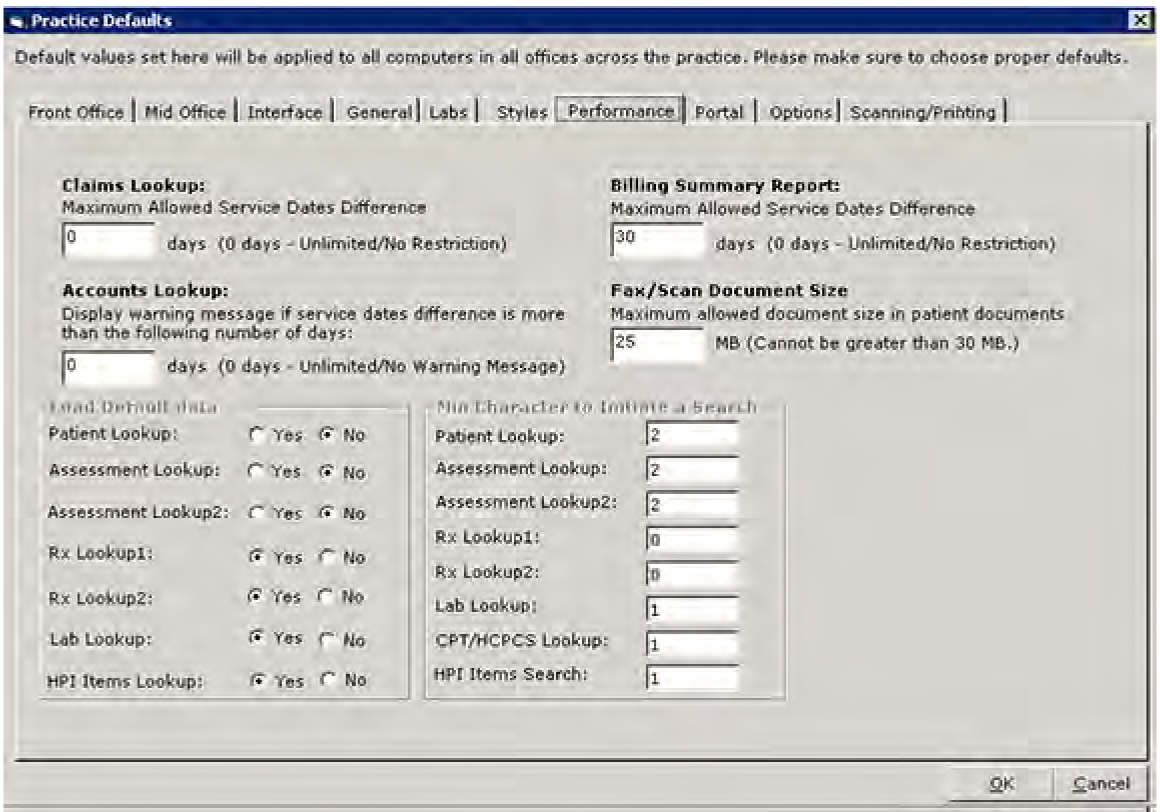
To enter performance-enhancing settings:

1. From the File menu, point to *Settings*, and then click *Practice Defaults*.

The Practice Defaults window displays.

2. Click the *Performance* tab.

The Performance options display:



3. To define a maximum difference between the Start Date and End Date fields on the Claims Lookup, Accounts Lookup, and Billing Summary Report windows, enter the appropriate number of days in the Claims Lookup, Billing Summary Report, and/or Accounts Lookup fields.

If your database is large in terms of patient records and claims, a smaller maximum difference between Start and End dates will create more specific and faster searches of your claims and accounts.

Leave 0 as the default to put no restrictions on searches.

4. To define a maximum file size (in megabytes) for faxed and scanned documents in Patient Documents, enter the number of megabytes (MB) in the *Fax/Scan Document Size* section.

5. You can also enable the way the system loads data for your searches in other Lookup windows using the *Load Default data* settings:

- Click *Yes* to have the system load all data before you search.

- Click *No* to enter search data before the system loads data.

  Depending on the size of your database, clicking *Yes* can slow your searches for an unacceptable amount of time. If your database is large or searches seem slow, click *No*.

6. In the *Min character to initiate a search* group box, enter the minimum number of characters that must be entered into a Search field before the system begins loading search results. The larger this number is, the more specific and faster your searches will be.
7. Click *OK*.

   Performance settings are configured. All users must log out and log back in to view these changes.

Portal Tab

The Portal tab contains settings related to the Patient Portal. This feature is separate from the main eClinicalWorks application and must be purchased from eClinicalWorks.

For more information, refer to the *Patient Portal Users Guide*.

Options Tab

You can enable many optional features from the Options tab on the Practice Defaults window.

The table provides a description of the options available from this tab:

Setting	Description
Enable CHDP (PM-160 Form)	Enables the CHDP (Child Health and Disability Prevention) (PM-160) form. For more information, refer to the *Billing Setup Guide*.
Display MRN (External System) on Patient Demographic Screen Title Bar	Displays any MRN information (entered on the Patient Information - Additional Info window) in the title bar of the Patient Information window. For more information, refer to the *Front Office Setup Guide*.
Enable Departments	Enables users to select a department on the Appointment, Out of Office Visits, and Claims windows. For more information, refer to Enabling Departments.
Department is mandatory on appointment/out of office visits/claim windows	The Department field is marked as mandatory on the Appointment, Out of Office Visits, and Claims windows. For more information, refer to Making Departments Mandatory on Appointments, Out of Office Visits, and Claims.
Lock patient payment after printing the receipt	Whenever a receipt is printed for a payment, the associated payment is locked and cannot be edited. For more information about printing receipts, refer to the *Front Office Setup Guide.*

Setting	Description
Enable PCP/Referring Providers selection from a Browse List instead of Drop Down combo	Disables the ability to select PCPs/Referring Providers from a drop-down list on the Patient Information window. Users must click *More* (...) and then select a provider from the window that displays. For more information, refer to the *Front Office Setup Guide*.
Validate patient's *Additional Info* in Demographic section itself	Enables a validation check on the Patient Information - Additional Info window upon attempting to exit. For more information, refer to the *Front Office Users Guide*.
Disable Encounter Count on Provider's Calendar	Disables the encounter count on providers' calendars. For more information, refer to the *Electronic Medical Records Setup Guide*.
Enable appointment creation for Inactive/ Deceased patients	Enables the creation of appointments for patients that are marked as Inactive or Deceased. For more information, refer to the *Front Office Setup Guide*.
Enable Quick Registration Feature	Enables the Quick-Registration feature. For more information, refer to the *Front Office Setup Guide*.
Enable using Asynchronous method for sending ePrescriptions	e-Prescriptions are stored on the eClinicalWorks server and then sent to pharmacies. Without this option enabled, e-prescriptions are sent to the pharmacy directly from the eClinicalWorks application. For more information, refer to the *Electronic Medical Records Setup Guide*.
Set default to *Both* in the search option of Guarantors window	The *in* drop-down list defaults to the *Both* option on the Guarantors window, instead of Guarantors. For more information, refer to the *Front Office Setup Guide*.
Enable copying the guarantor address to all the associated members	Whenever a change is made to a guarantor's address, the option is given to copy this address to all patients associated with this guarantor. For more information, refer to the *Front Office Setup Guide*.
Allow Login Provider to send ePrescriptions (New Rx only) with their details	The system will enable logged-in providers to send e-Prescriptions with their details for other providers' patients. This only applies to new prescriptions. For more information, refer to the *Electronic Medical Records Setup Guide*.
Allow PN Assigned To Provider to send ePrescriptions (New Rx only) with their details	The system enables Progress Notes *Assigned To* providers that are logged in to send e-Prescriptions with their details for other providers' patients. This only applies to new prescriptions. For more information, refer to the *Electronic Medical Records Setup Guide*.
Enable ePayment transactions (Credit Card, Debit Card, ACH [Check])	Enables the Intuit® interface to process payments. For more information, refer to the *Billing Setup Guide*.

Setting	Description
Include Provider Signature in the Outgoing Referral Print/Fax	Automatically includes provider signatures on printed and faxed outgoing referrals. For more information, refer to the *Front Office Setup Guide*.
Show Medication Reviewed in progress notes for verified current medications	Displays that a medication is reviewed on the Progress Notes window if the Medication Verified box is checked on the Current Medications window. For more information, refer to the *Electronic Medical Records Setup Guide*.
Due to pre-printed prescription paper set Comments max limit to 200 Chars.	Limits the Comments field on the Print Rx window to 200 characters. This is to ensure that prescription comments do not exceed the pre-defined boundaries of paper forms. For more information, refer to the *Electronic Medical Records Setup Guide*.
Enable InScope Option on Quick Registration Screen	Enables the selection of the In Scope radio button during Quick Registration. For more information, refer to the *Front Office Setup Guide*.
Enable Fax inbox by departments	Enables the creation of fax inboxes for specific departments, instead of just facilities. For more information, refer to Enabling Fax Inboxes by Department.
Show ePrescription Register Old Screen	Displays the Classic View for the Register ePrescriber window. For more information, refer to the *Electronic Medical Records Setup Users Guide*.
Show FTPS Progress Dialog	Display the progress dialog during FTPS transfers. For more information, refer to Displaying FTPS Transfer Status.
Show HelpHub in external browser window	Enables the HelpHub to open in an external Internet browser window. For more information, refer to Enabling the HelpHub.
Show electronic signature on print/fax lab order form	Automatically includes provider signatures on printed and faxed lab orders. For more information, refer to the *Electronic Medical Records Setup Users Guide*.
Enable generated letters to automatically save in patient's chart (patient documents)	Automatically saves letters in the Patient Documents for the patient for whom it is generated. For more information, refer to the *Front Office Setup Users Guide*.
Enable Ohio Pharmacy Board related functionality	Enables features required for the Ohio Pharmacy Board. For more information, refer to the *Electronic Medical Records Setup Guide*.

Setting	Description
Enable Modern Screen for Devices	Enables the Modern View of the window for devices. This feature requires additional setup on each individual machine. ▪ For more information about completing the setup: ◆ refer to Enabling the Modern View for Devices ◆ refer to the *eClinicalWorks On-Demand Product Activation Guide* ◆ contact your system administrator ▪ For more information about using the Modern View, refer to the *Devices List*.
Enable Jelly Bean Access Filter (Tomcat restart required)	Enables the administrator to specify users who have access to other users' *Assigned To* queues in each jelly bean. For more information, refer to Enabling Jelly Bean User Access.

Enabling Departments

Enable departments from the Options tab on the Practice Defaults window.

To enable departments:

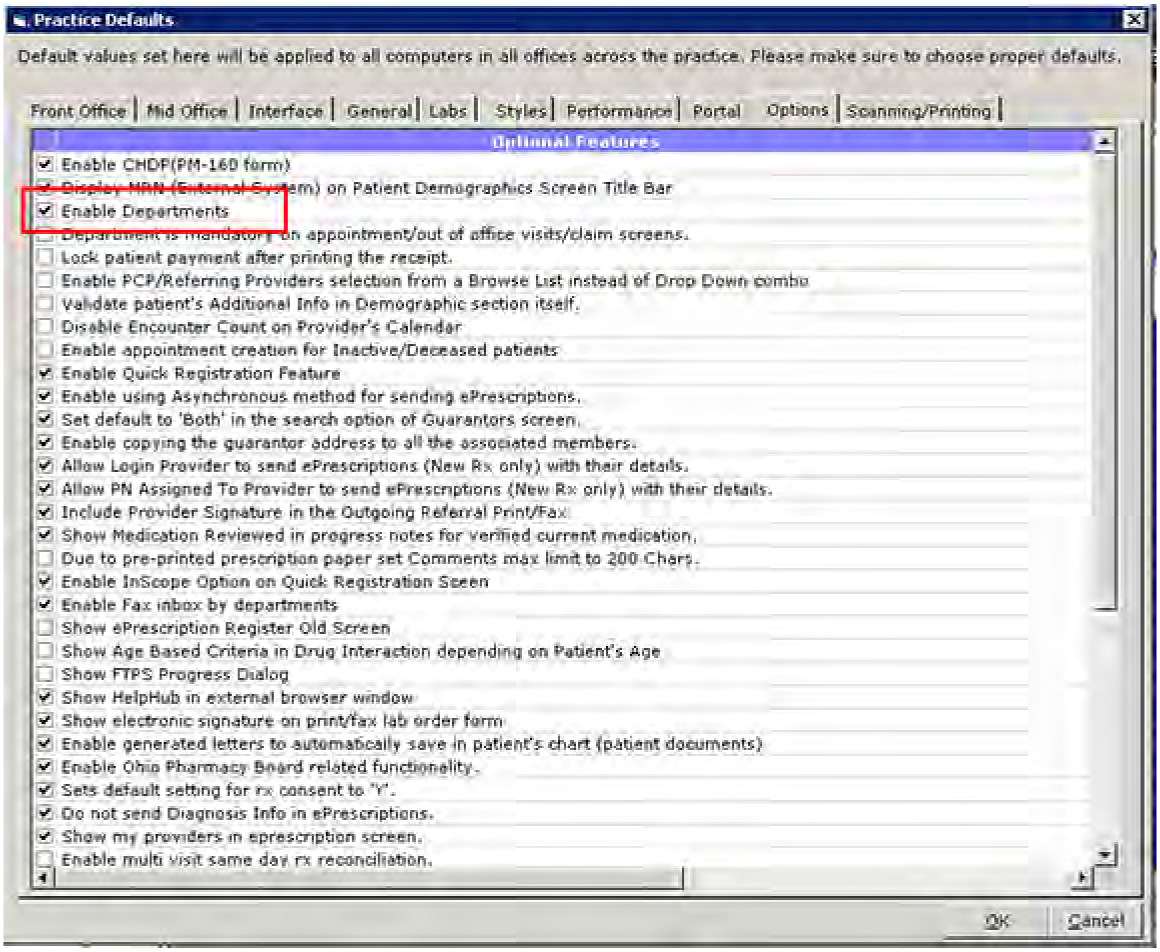
1. From the File menu, point to Settings, and then click *Practice Defaults*.

The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

The Options settings display.

3. Check the *Enable Departments* box:



4. Click *OK*.

   Departments are enabled.

Making Departments Mandatory on Appointments, Out of Office Visits, and Claims

Enable departments from the Options tab on the Practice Defaults window.

To make departments mandatory on appointments, out of office visits, and claims:

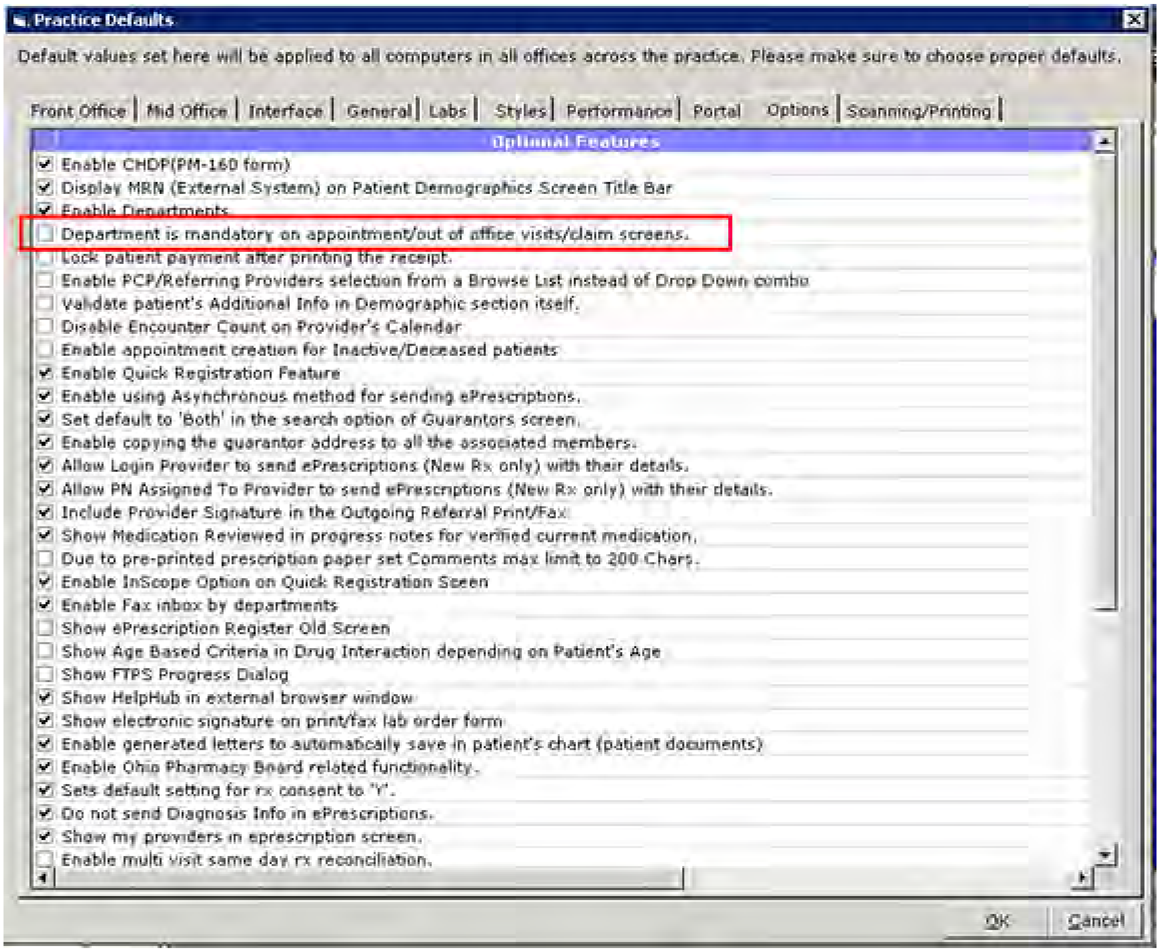
1. From the File menu, point to Settings, and then click *Practice Defaults*.

   The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

   The Options settings display.

3. Check the *Department is mandatory on appointment/out of office visits/claim screens* box:



4. Click *OK*.

   A department must be entered whenever creating an appointment, out-of-office encounter, or claim.

Enabling Fax Inboxes by Department

Enable different fax inboxes for each department from the Options tab on the Practice Defaults window.

For more information about configuring fax inboxes by department, refer to Configuring Fax Inboxes by Department.

To enable fax inboxes by department:

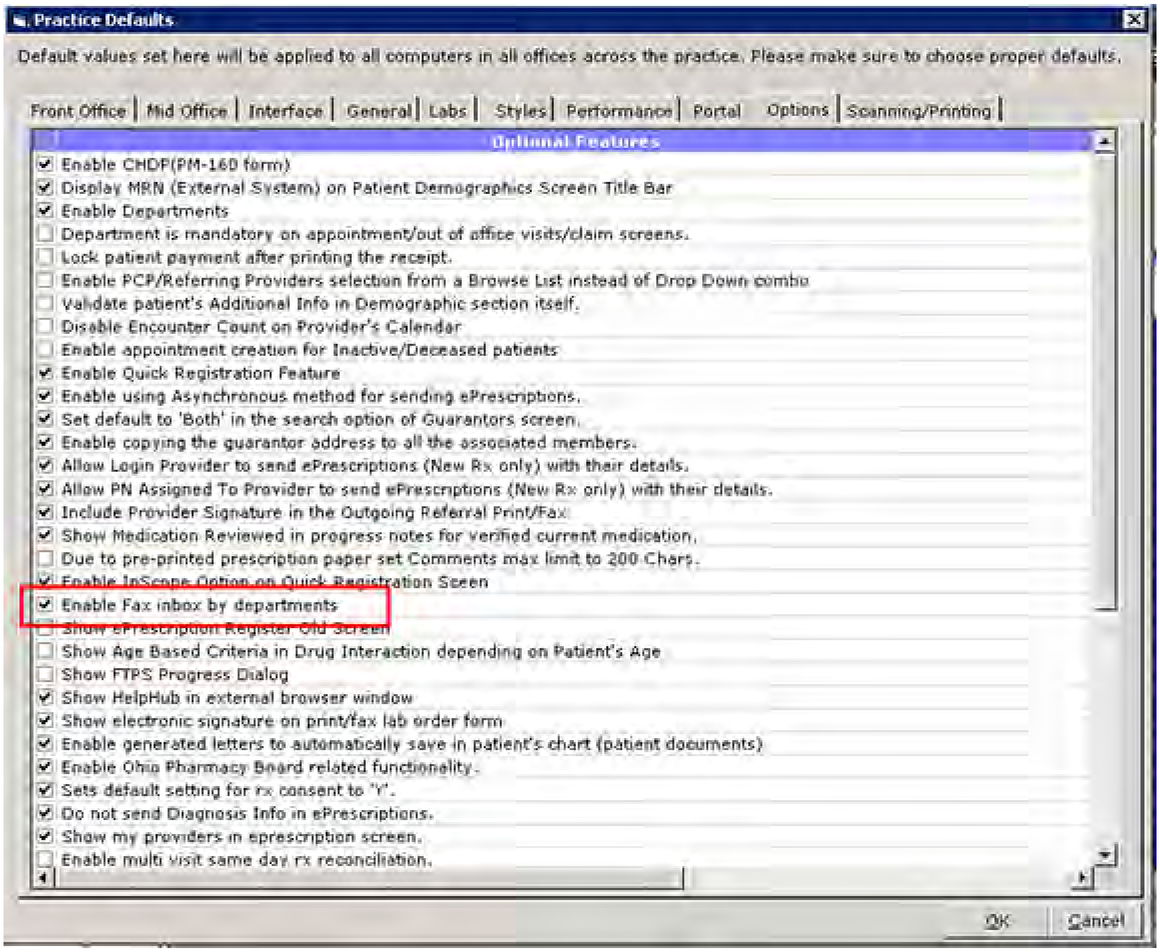
1. From the File menu, point to Settings, and then click *Practice Defaults*.

   The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

   The Options settings display.

3. Check the *Enable Fax inbox by departments* box:



4. Click *OK*.

Different fax inboxes may be configured for each department.

Displaying FTPS Transfer Status

Enable the display of the progress status of FTPS transfers from the Options tab on the Practice Defaults window.

To display FTPS transfer status:

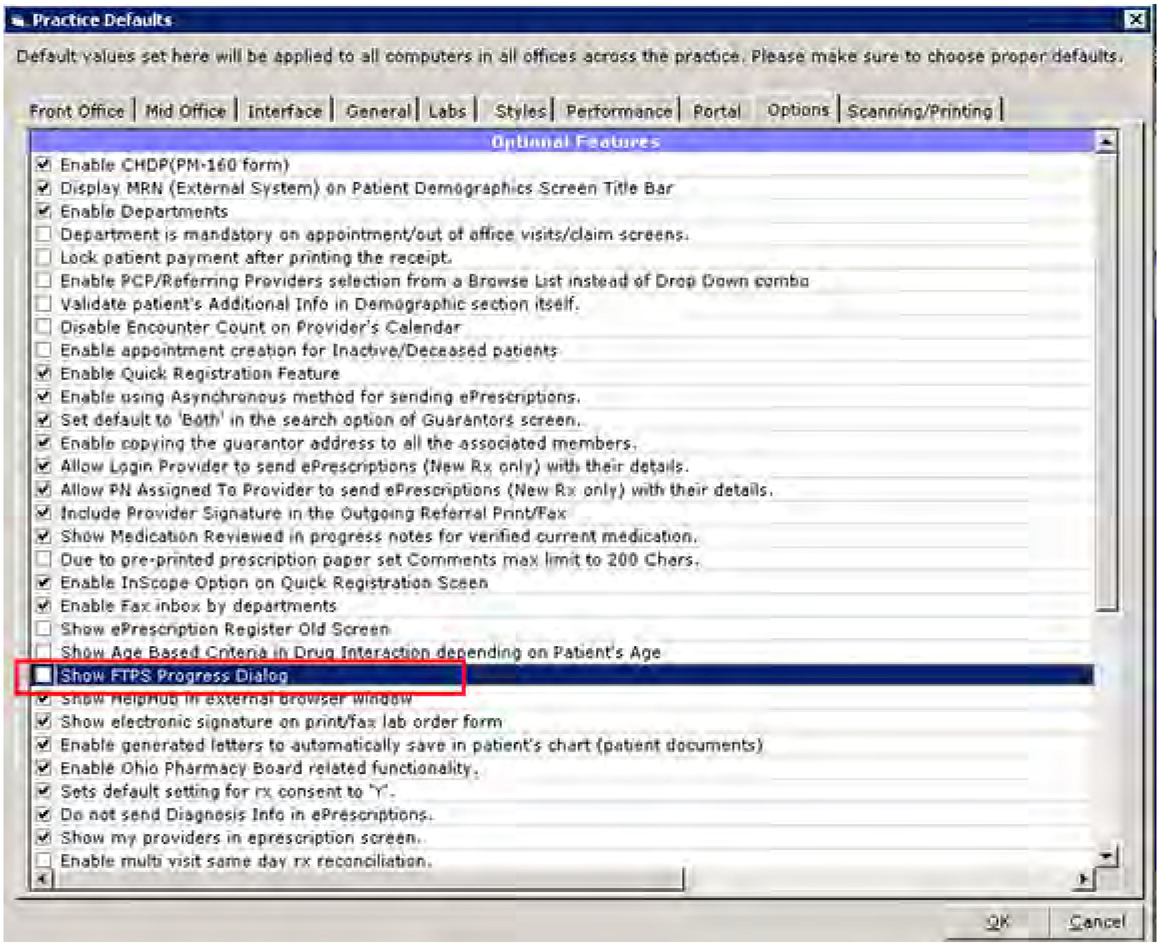
1. From the File menu, point to Settings, and then click *Practice Defaults*.

The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

The Options settings display.

3. Check the *Show FTPS Progress Dialog* box:



4. Click *OK*.

The progress status of FTPS transfers displays.

Enabling the HelpHub

The HelpHub is an online help system within the eClinicalWorks application. To display the HelpHub in an internal view when launched from the Help menu, clear the selection for the option *Show Help Hub in External Browser window* in Practice Defaults. If this option is checked, the HelpHub is launched in an external browser.

> **Note**: The HelpHub is a proprietary eClinicalWorks help system that includes an authentication process. If a user attempts to paste an unauthenticated browser window into the Web address, the HelpHub will not open.

To enable the HelpHub to display in the external browser:

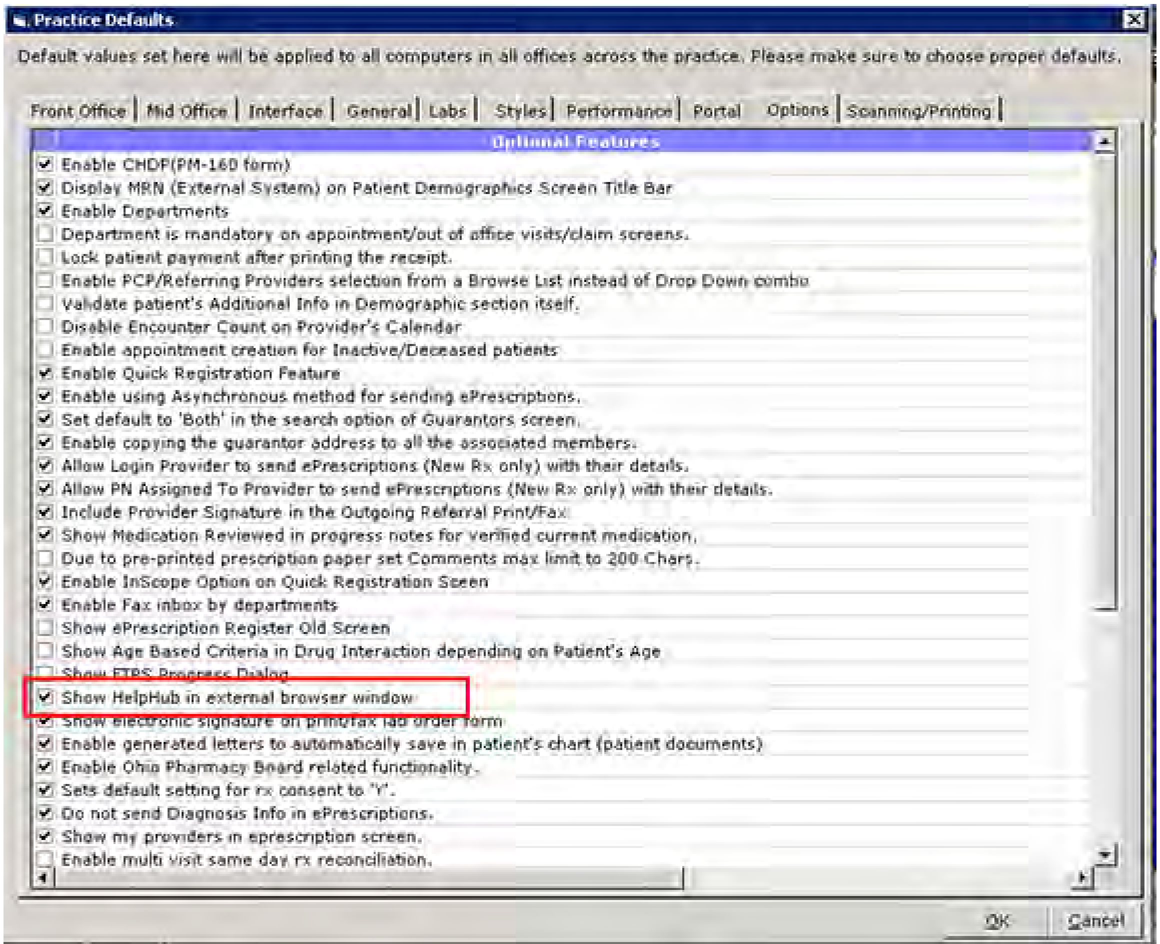
1. From the File menu, point to Settings, and then click *Practice Defaults*.

The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

The Options settings display.

3. Check the box for *Show HelpHub in external browser window* box:



4. Click *OK*.

The HelpHub is enabled for launching from the Help menu in an external browser.

For more information, refer to Launching the HelpHub.

Launching the HelpHub

After enabling the HelpHub as described in the section above, launch it from the Help menu in an external browser.

The HelpHub is best viewed using Mozilla® Firefox® and Google™ Chrome™.

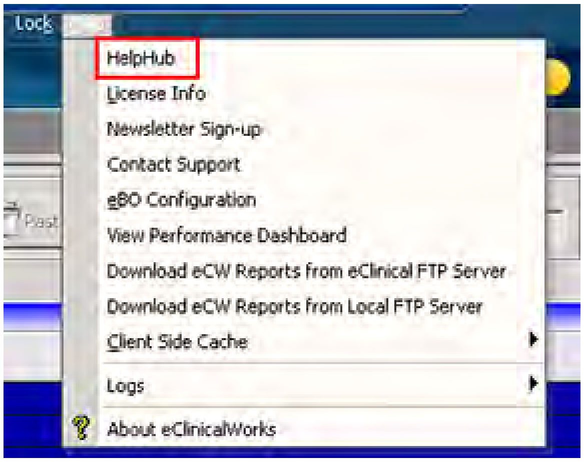
To view HelpHub in Internet Explorer®, add the following site to Internet Explorer® Trusted Sites: https://ecwhelphub.eclinicalweb.com/webhelp

Note: Link above is for configuration purposes only and will not launch HelpHub directly.

To launch the HelpHub:

1. Click the *Help* menu to display a drop-down list.

2. From the drop-down list, click the *HelpHub* option:



The HelpHub displays:

Enabling the Modern View for Devices

New Feature

Click *Enable modern screen for devices* from the Options tab on the Practice Defaults window. This feature requires additional setup on each individual machine.

Using the Product Hub: Product Activation tool, the administrator activates the devices supported by the eClinicalWorks application. Not all devices are available on demand.

For more information about the list of supported devices, refer to the *Devices Users Guide* from the my.eclinicalworks.com Customer Portal https://my.eclinicalworks.com.

If the practice administrator enables the Modern View at the practice level, an individual user can set eClinicalWorks to use just the Modern View of the device window or to use an intermediary Modern View through the Classic View device window (using the Classic View window to display the Modern View window). If the provider selects the Modern View option for the Device DI window, eClinicalWorks does not display the intermediary window; it displays the Modern View of the window for the device.

For more information about enabling the Device DI window, refer to Enabling the Device DI Window.

With the Modern View of the device window enabled, the user can use structured data, trend analysis, reports, and log comparison, *etc*.

- For more information about all the devices supported by eCW, refer to the *Devices List,* available from the my.eclinicalworks.com Customer Portal: https://my.eclinicalworks.com.
- For more information about using the Modern View for devices, refer to the *Devices Users Guide*.

To enable the Modern View for devices:

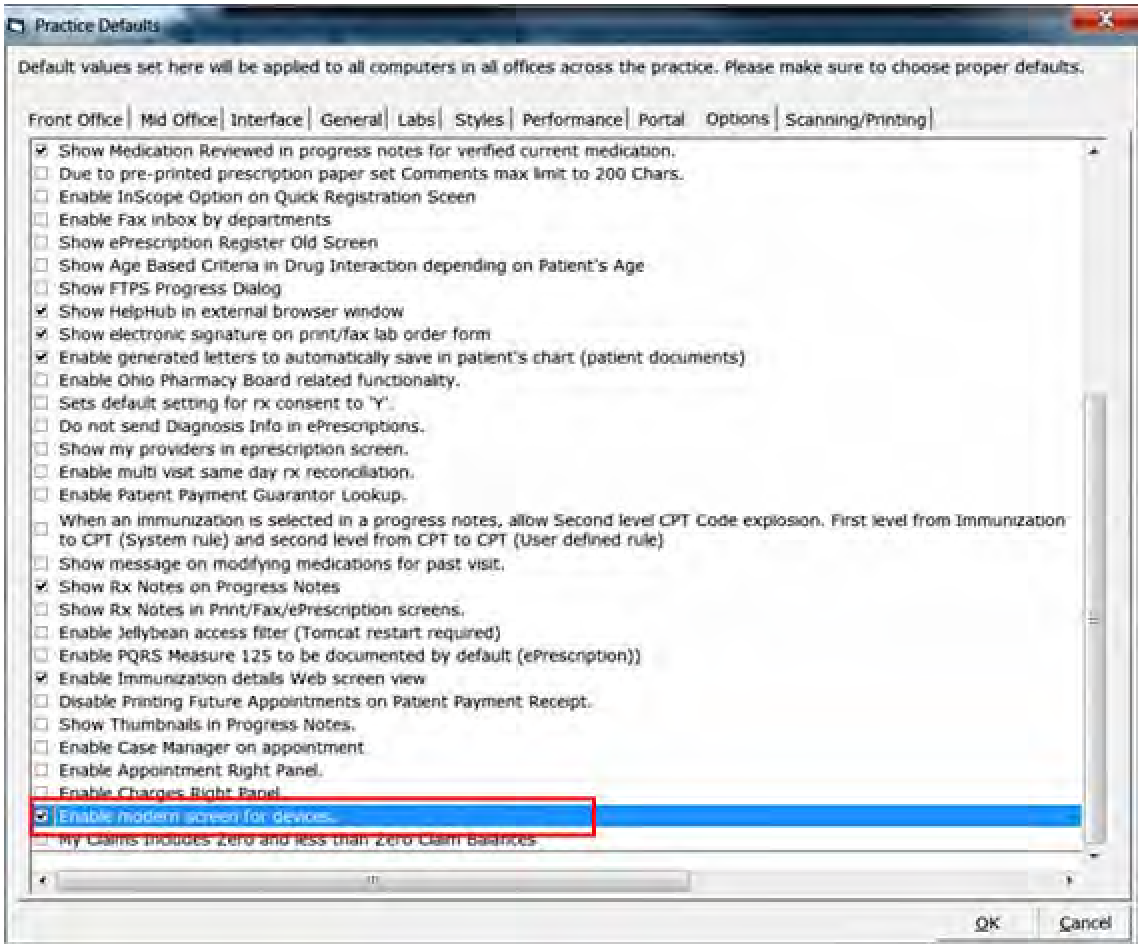
1. From the File menu, point to Settings, and then click *Practice Defaults*.

The Practice Defaults window opens with the Front Office tab displayed.

2. Click the *Options* tab.

The Options settings display.

3. Check the *Enable modern screen for devices* box:



4. Click *OK*.
5. Log out and log back in to view the changes.

   The Modern View of the devices window is enabled.

   Note: This feature requires additional setup on each individual machine.

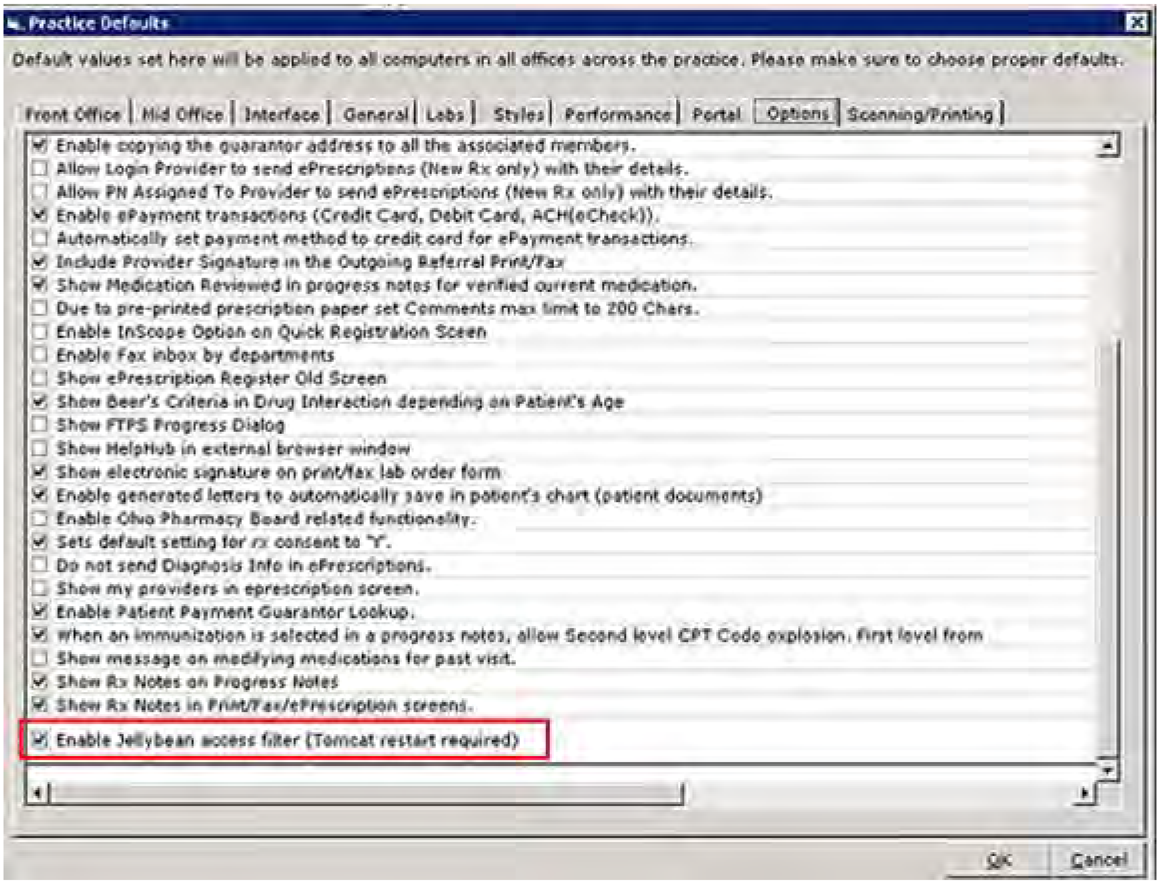
   For more information, refer to the section Enabling the Outlook Tree View.

Enabling Jelly Bean User Access

To enable jelly beans user access:

1. From the File menu, point to *Settings*, and then click *Practice Defaults*.

   The Practice Defaults window opens.
2. Click the *Options* tab.
3. Check the box next to *Enable jelly bean access filter (Tomcat restart required)*.
4. Click *OK*:



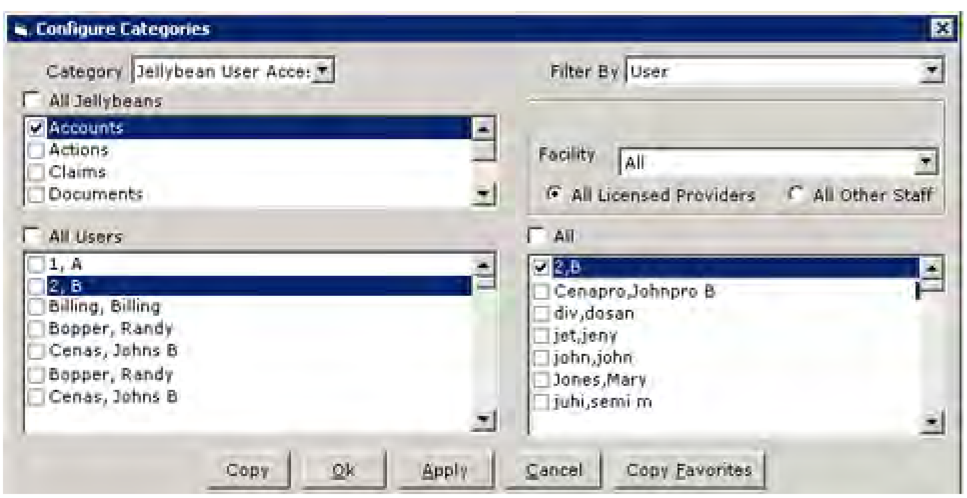
The jelly bean access filter is enabled.

Configuring Jelly Bean User Access

To configure jelly beans user access:

1. From the EMR menu, point to *Miscellaneous Configuration Options*, and then click *Configure Categories*.

   The Configure Categories window opens:

2. Select *jelly bean User Access* from the Category drop-down list.

Set the fields as described in the following table:

Field	Information
Filter By	The drop-down list options are: ▪ **User:** ◆ Select the *All Licensed Providers* radio button: • Click the *All* radio button to select all Providers • Select individual providers by checking the box next to the provider name ◆ Select the *All Other Staff* radio button: • Click the *All* radio button to select all Staff • Select individual staff members by checking the box next to the staff member's name ▪ **Role:** ◆ Check the box next to *All* to select all roles ◆ Select individual roles by checking the box next to the role
All jelly beans	The options are: ▪ Check the box next to *All jelly beans* to select all jelly beans ▪ Check the box next to a jelly bean to select a jelly bean or select multiple jelly beans to set access
Facility	The options are: ▪ Check the box next to *All* to select all facilities ▪ Select the *Facility* from the Facility drop-down list

3. Click *Apply*.
4. Click *OK*.

   User access to the jelly beans is configured.

Scanning/Printing Tab

The Practice Defaults window contains the options used to scan documents and print various sections of the Progress Notes.

The table provides a description of the options available from this tab:

Setting	Description
Enable scanning documents into temp sub folder based on system user profile	Check this box to enable the saving of scanned documents to temporary subfolders on your machine. This is useful to prevent the merging or deleting of documents if multiple users are scanning documents into the system at the same time. For more information, refer to Enabling the Scanning of Documents into Temporary Subfolders.
Show print dialog after done button is clicked on the Billing window	Check this box to display the print dialog automatically after the users clicks *Done* from the Billing window of the Progress Notes. For more information, refer to the *Electronic Medical Records Setup Guide*.
Select defaults for print all window	Check the boxes in this section to select the information to transmit by default when a users prints, faxes, or transmits a prescription. The Transmit section refers to the time a user clicks *Send Rx.* This button must first be enabled for each user from My Settings. For more information about enabling this feature, refer to Show-Hide Tab. For more information, refer to the *Electronic Medical Records Setup Guide*.

Enabling the Scanning of Documents into Temporary Subfolders

To save scanned documents in temporary subfolders on your machine, enable the *Enable scanning documents…* option in Practice Defaults. This is useful to prevent the merging or deleting of documents when multiple users are scanning documents into the system at the same time.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 0667_DMH.

To enable the scanning of documents into temporary subfolders:

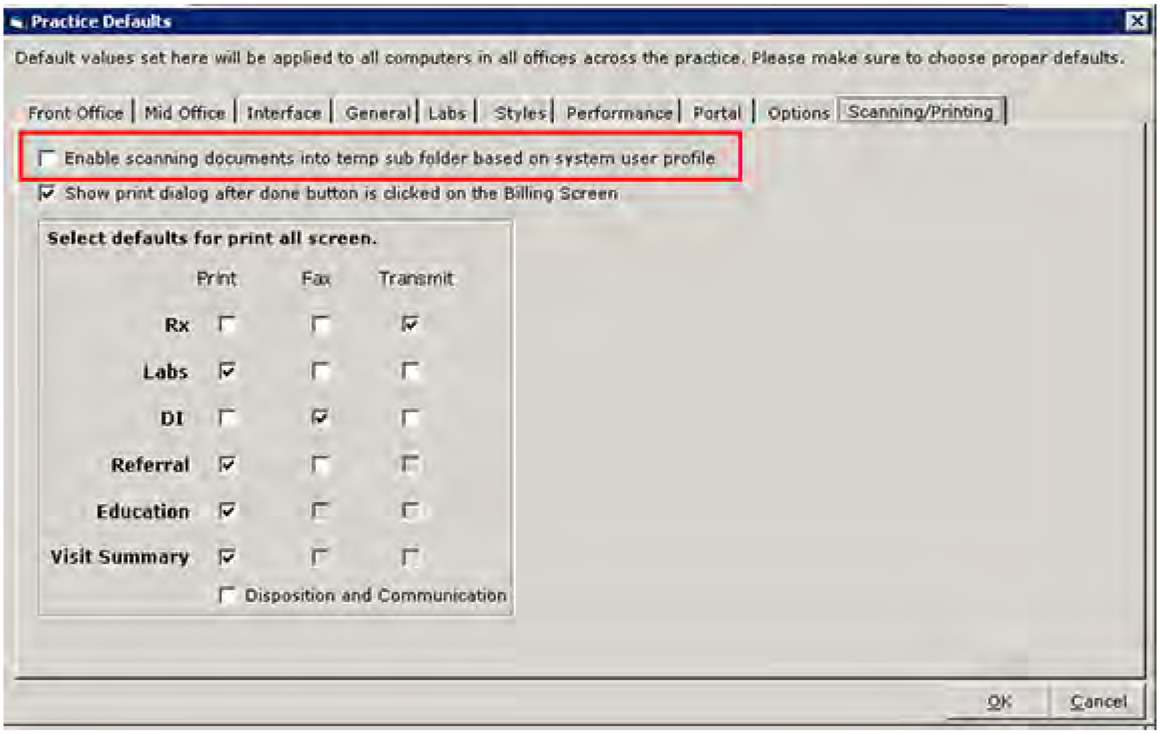
1. From the File menu, point to Settings, and then click *Practice Defaults*.

   The Practice Defaults window displays.

2. Click the Scanning/Printing tab.

   The Scanning/Printing options display.

3. Check the *Enable scanning documents…* box:



4. Click *OK*.

   The scanning of documents into temporary subfolders is enabled. All users must log out and log back in to view these changes.

eClinicalWorks Administrator

The current administrator can change or assign an eClinicalWorks administrator a co-administrator from the File menu.

For more information about the eClinicalWorks Administrator, refer to:

- Changing the eClinicalWorks Administrator
- Enabling Co-Administrators and Others to Hard Reset Passwords

Changing the eClinicalWorks Administrator

The current eClinicalWorks administrator can set a new administrator.

To change the eClinicalWorks administrator:

1. From the File menu, point to Settings, and then click *eClinicalWorks Administrator*.

   The eClinicalWorks Administrator window displays.

2. Click *Change*:

3. Select the name of the person who will become the new administrator, then click *Close*.

Note: Only the current administrator can change the name in this field.

The selected user is now the administrator.

Note: To create co-administrators, grant the user permission to the Administration security attribute. For more information, refer to Specifying Co-Administrators.

Enabling Co-Administrators and Others to Hard Reset Passwords

Co-administrators and other users can perform a hard reset on passwords only if granted permission from the eClinicalWorks Administrator window.

To give co-administrators and others permission to hard reset passwords:

1. From the File menu, point to Settings, and then click *eClinicalWorks Administrator*.

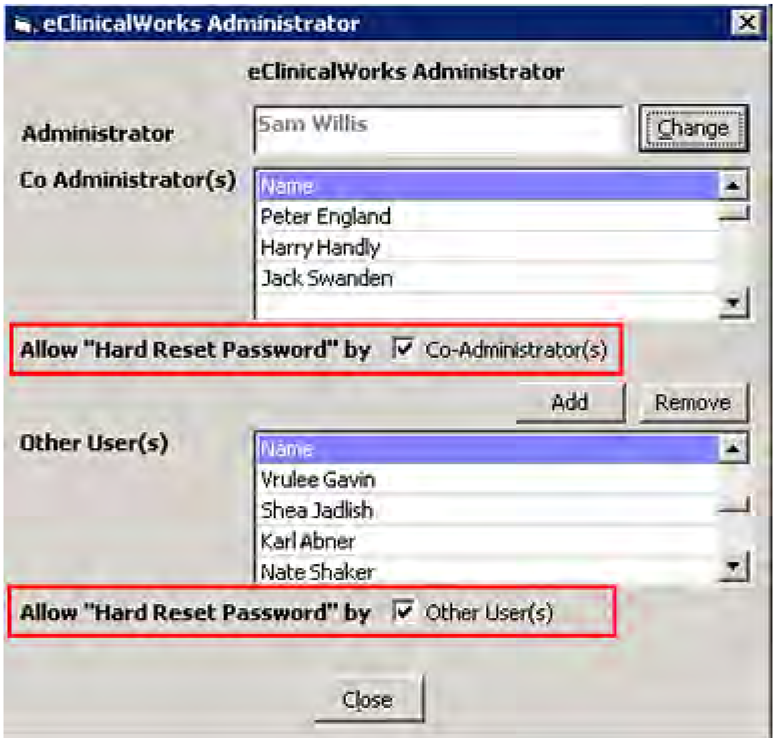
The eClinicalWorks Administrator window displays.

2. Click the name(s) of the co-administrators or other users who will be allowed to hard reset passwords.

3. Check the *Allow Hard Reset Password* by Co-Administrators box

And / Or

Check the *Allow Hard Reset Password* by Other User(s) box:



4. Click *Close*.

   The hard resetting of passwords by co-administrators is enabled.

Hard Reset Password

The system administrator can use the Hard Reset Password feature to reset a user's password. Only the administrator has access to this function.

Grant co-administrators permission to use this feature from the eClinicalWorks Administrator window.

For more information, refer to Enabling Co-Administrators and Others to Hard Reset Passwords.

To reset a password:

1. From the File menu, point to *Settings*, and then click *Hard Reset Password*.

   The Reset Password window displays:

2. Select *All*, *Providers*, or *Staff* from the Users List drop-down to filter the displayed users.
3. Check the box next to the user(s) for whom the password will be reset.
4. Enter and confirm the new password.
5. Click *OK*.

   The selected user's password is reset.

> **Note:** If the steps in Enabling Mandatory Password Changes were performed, the password entered is irrelevant; users that are Hard Reset will be prompted to enter their own new password the next time they log in.

Authentication Settings

Authentication settings provide the administrator with a way to determine how the eCW system enables a user to log in and work on the eClinicalWorks application.

For more information about authentication settings, refer to:

- Configuring the Session Inactivity Timeout
- Locking Accounts After a Number of Failed Login Attempts
- Setting the Minimum Password Length
- Requiring Alphanumeric Passwords
- Enforcing Password History
- Requiring Password Changes

Configuring the Session Inactivity Timeout

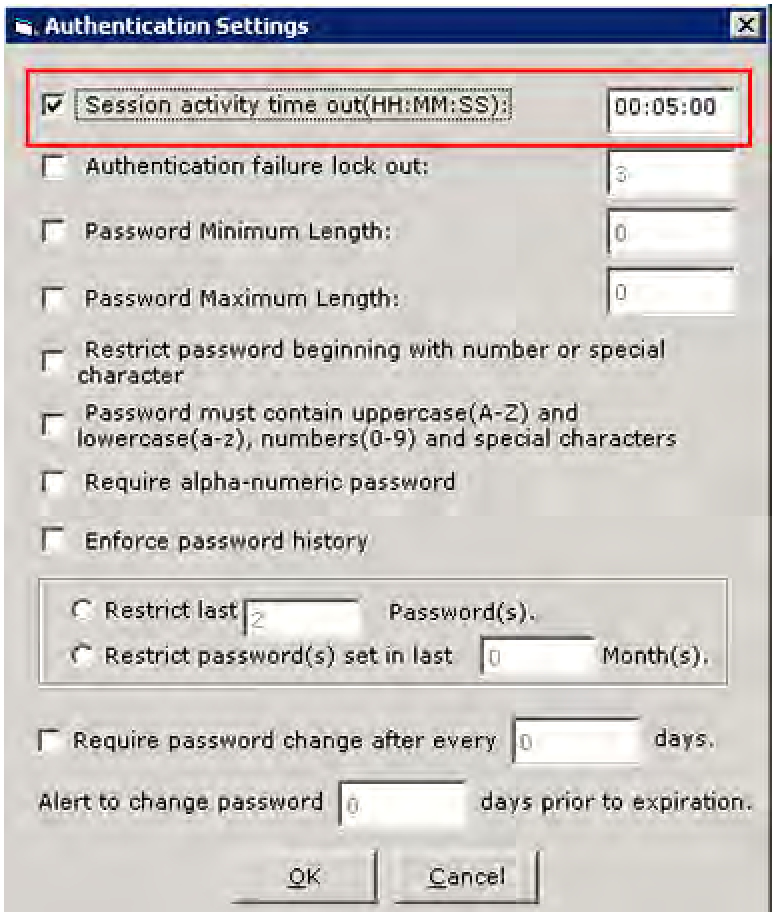
Configure the system to time out after a certain period of inactivity from the Authentication Settings window.

To set the session inactivity time out:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

The Authentication Settings window displays.

2. Check the *Session activity time out* box:



3. Enter the time, in HH:MM:SS format, in the field here.

4. Click *OK*.

The system will time out and lock the program after the specified period of inactivity.

Locking Accounts After a Number of Failed Login Attempts

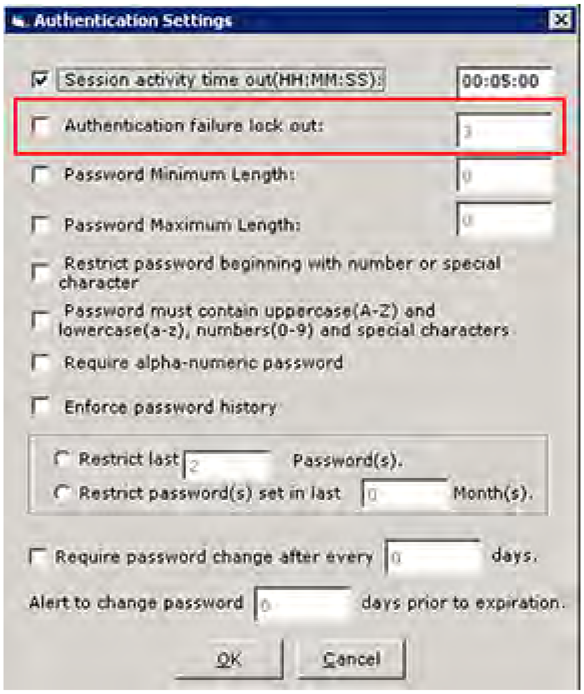
Administrators may configure the system to lock out users who fail their login attempt a certain number of times from the Authentication Settings window.

To lock accounts after failed login attempts:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the *Authentication failure lock out* box:



3. Enter the number of failed attempts before the system locks the user out.

4. Click *OK*.

   The system locks a user out of eCW if the user exceeds the set amount of failed attempted logins.

   Note: The system administrator account does not lock as the administrator is the only user who can unlock an account.

   For more information, on unlocking an account, refer to Locked Users.

Setting the Minimum Password Length

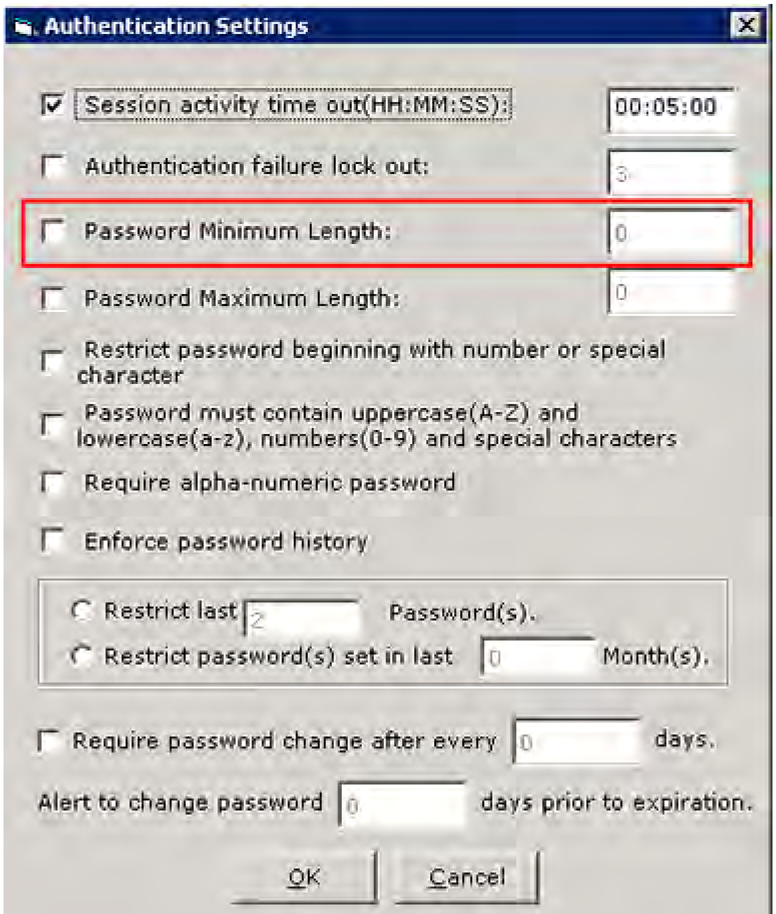
Set the minimum length that passwords are required to be in your system from the Authentication Settings window.

To set the minimum password length:

1. From the File menu, point to *Settings*, and then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the *Password Minimum Length* box:



3. Enter the number of characters for the minimum length.
4. Click *OK*.

   The minimum password length is set.

Note: If a user currently has a login with a password that is less than the minimum length set by the administrator, then they will receive a prompt on their next login, asking them to change their password to meet the minimum requirement.

Updating a Password to the Maximum Length

You can establish a maximum length for any login password.

To set the maximum password length:

1. From the File menu, point to *Settings*, and then click *Authentication Settings*.

   The Authentication Settings window displays.
2. Check the *Password Maximum Length* box.
3. Enter the number of characters you want to establish as the maximum length of a user password.
4. Click *OK*.

The maximum password length is set.

Updating a Password to the Minimum Length at Login

When users attempt to log in with a password that does not meet a minimum length requirement, they will be prompted to change their password to one that meets the minimum length.

To update a password at login if it does not meet the minimum characters requirement:

1. The user clicks *Yes* to change the password. If users click *No*, they will not be logged in to eClinicalWorks.

2. Enter the current password in the Old Password field.
3. Enter the new password in the New Password field, ensuring that the minimum characters requirement has been met.
4. Re-enter the new password in the Confirm New Password field.
5. Click *OK*.

   The new password is saved and the user is logged in to the system.

> **Note:** If the administrator's password is less than the minimum length, it does not have to be changed at the next login.

Restrict Passwords Beginning with a Number or Special Character

You can restrict passwords to ensure that they do not begin with a number or special character.

To restrict passwords in this manner:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

   The Authentication Settings window displays.
2. Check the *Restrict Password Beginning with Number or Special Character* box.
3. Click *OK*.

   Passwords beginning with numbers or special characters will not be allowed.

Password Contents

You can establish a setting to require that passwords contain upper and lower case alpha characters, both alpha and numeric characters, and special characters.

To restrict passwords in this manner:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the box named *Password must contain upper case (A-Z) and lower case (a-z), numbers (0-9), and special characters*.

3. Click *OK*.

   All user passwords must now contain a combination of the specified characters.

Requiring Alphanumeric Passwords

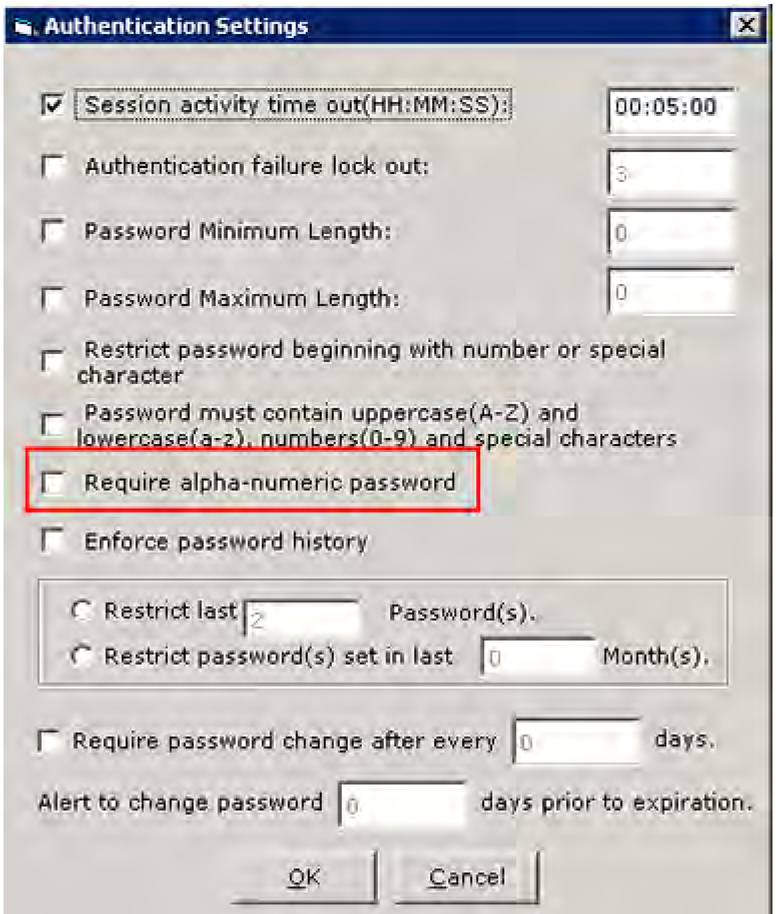
To require user passwords that contain both letters and numbers, enable the Require Alphanumeric Password option on the Authentication Settings window.

To require alphanumeric passwords:

1. From the File menu, point to Settings, then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the *Require Alphanumeric Password* box:



3. Click *OK*.

   Users are required to have passwords that contain at least one letter and at least one number.

Enforcing Password History

Password history prevents users from using previous passwords as their new password during mandatory restriction period. You can restrict the use of the same password by frequency or by time elapsed.

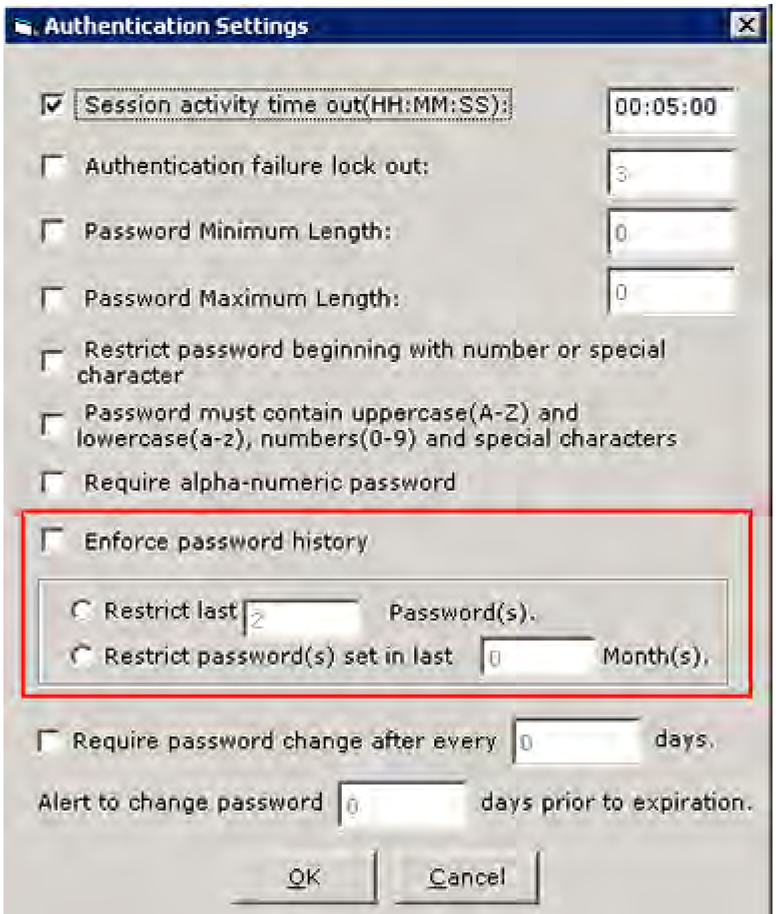
Set the enforce password history feature from the Authentication Settings window.

To enforce password history:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the *Enforce password history* box:



3. To enforce password history based on the number of past passwords:
   a. Click the *Restrict last… Password(s)* radio button.
   b. Enter the number of previous passwords that cannot be used (*e.g.,* if you entered 3 here, then a user cannot reuse any of their last three passwords).
4. To enforce password history based on length of time:
   a. Click the *Restrict password(s) set in last… Month(s)* radio button.
   b. Enter the number of months to prevent users from using passwords from (*e.g.,* if you entered 3 here, then a user cannot use any of the passwords they have used in the past three months).
5. Click *OK*.

   The system now prevents users from reusing the last X number of the passwords they have used in the past.

Requiring Password Changes

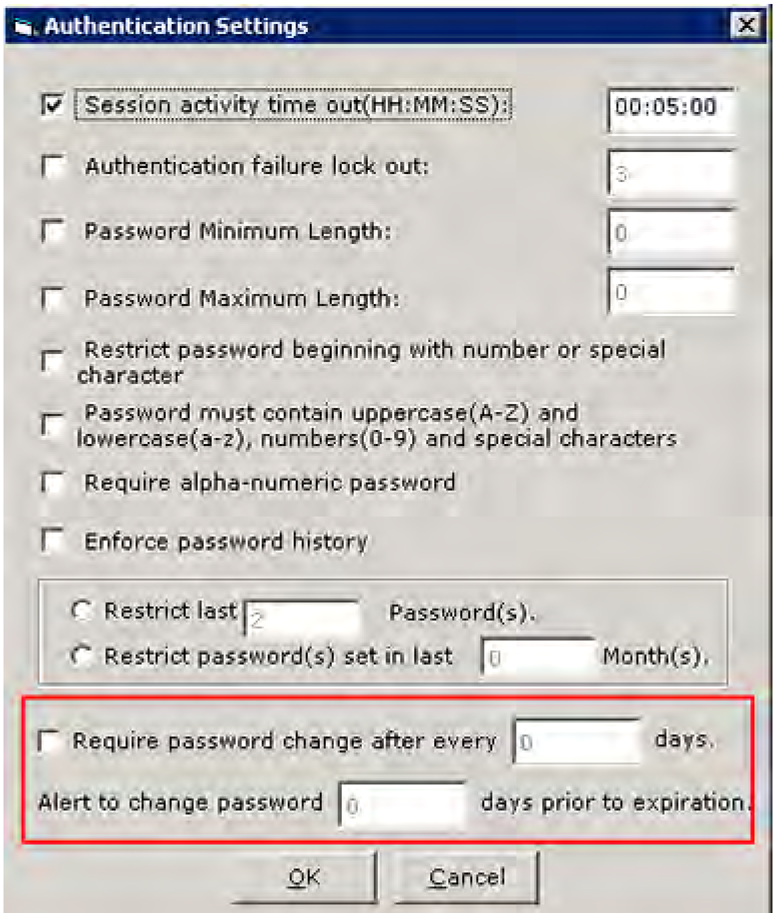
Set up the system to require users to change their passwords on a set schedule. Set up this schedule from the Authentication Settings window.

To require password changes:

1. From the File menu, point to Settings, and then click *Authentication Settings*.

   The Authentication Settings window displays.

2. Check the *Require password change…* box:



3. Enter the number of days between mandatory password changes for users in the *after every… days* field.
4. Enter the number of days before the mandatory password change that the system will notify a user of the impending change in the *Alert to change password…* field.
5. Click *OK*.

   Users are required to change their password on a set schedule, determined by the numbers entered.

Print/Fax/Lock Settings

The application includes user-specific preference settings for the Progress Notes printing, faxing, and locking capabilities.

To use the default print/fax/lock style set up when printing/faxing/locking Progress Notes, click the *Print/Fax/Lock* button in Progress Notes.

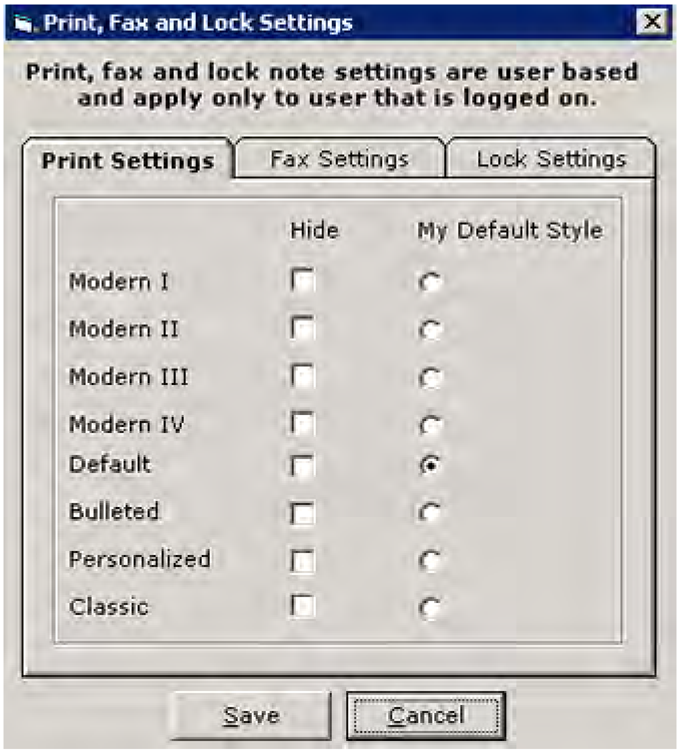
Use the default print style set up when printing Progress Notes from the Print Medical Record window. To print medical record items, click *Medical Record* on the Patient Hub.

The available Print, Fax, and Lock settings are specific to the current logged-in user.

To set the Print/Fax/Lock settings:

1. From the File menu, point to Settings, and then click *Print/Fax/Lock Settings*.

The Print, Fax, and Lock Settings window displays:



2. Click one of the following tabs:

- **Print Settings** - Configure styles available when printing Progress Notes.
- **Fax Settings** - Configure styles available when faxing Progress Notes.
- **Lock Settings** - Configure styles available when locking Progress Notes.

3. Check the box(es) in the Hide column for any styles you do not want to be available.

The hidden style(s) will not display in the Print/Fax/Lock style options in Progress Notes.

4. Click the radio button in the My Default Style column to select the style to be used as the default.

The Progress Notes will print/fax/lock in the selected default style when the user clicks the *Print/ Fax/Lock* button in Progress Notes. The Medical Record will print in the selected default style when the user clicks *Print* in the Medical Record window for a selected encounter.

5. Click *Save*.

Users must log out and then log in again for the changes to take effect.

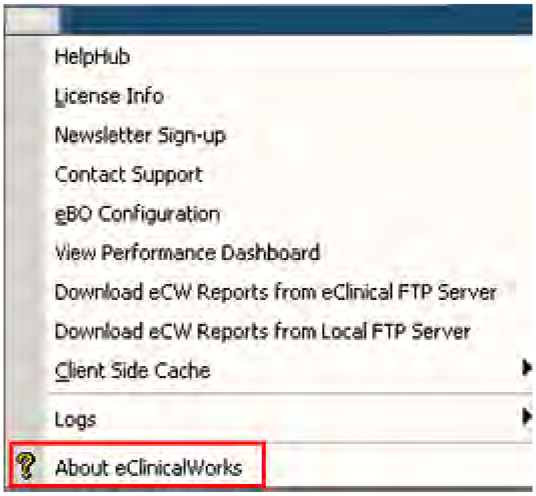
Note: After Progress Notes are locked, the print/fax setting remains in the same format as the locked note regardless of the settings specified for printing or faxing.

eClinicalWorks APU ID Location

Following installation, the system issues an Auto-Practice Upgrade (APU) ID to all practices using eClinicalWorks. eCW uses this assigned number to identify the practice for installation, upgrade, and support purposes. This number is located within the installed eCW application.

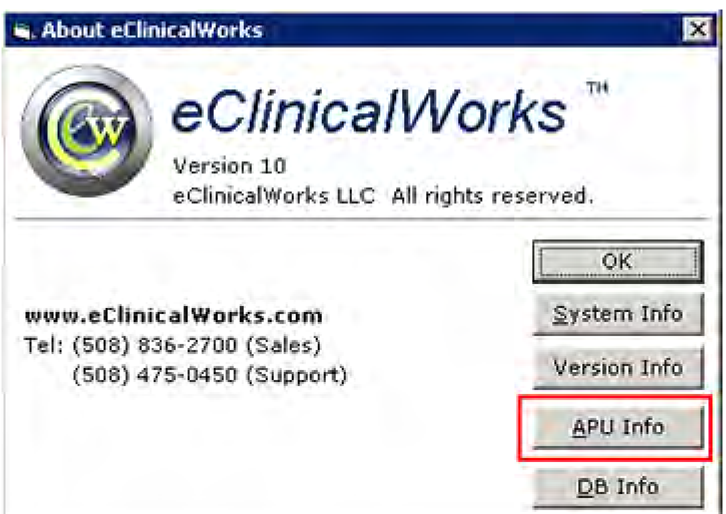
To display the APU ID for the practice:

1. From the eClinicalWorks Help menu, click *About eClinicalWorks*:

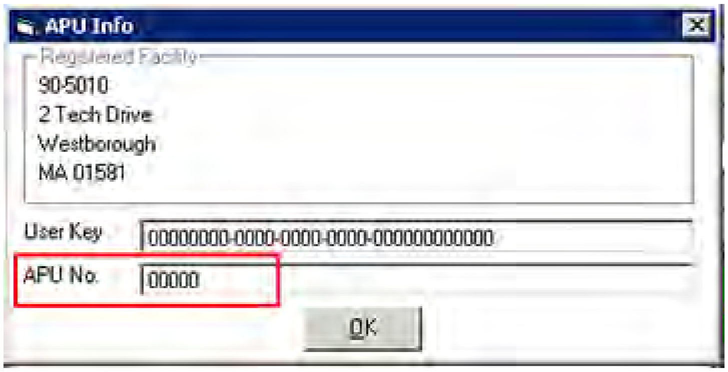


The *About eClinicalWorks* window displays:

2. Click *APU* Info:



The practice APU ID number displays:



Enable Tree View for Social History

Enable a tree view for the folders on the Social History window of the Progress Notes from the File menu.

Note: This feature is also enabled by item key. Contact eCW Support and refer to the Item Key Code 1357_DMJ.

Note: Users must have access to the *Enable Tree View for Social History* security attribute to access this setting.

IMPORTANT! This is a one-time setting. After the admin enables the feature, it cannot be disabled, and this option is removed from the File menu.

For more information, refer to the *Electronic Medical Records Setup Guide*.

Format Progress Notes

Providers have user-specific options available to format the font style, font color, and indent style of their Progress Notes. These formats apply only to the Progress Notes Print and Fax options.

The formatting options available are specific to the currently logged-in user. An additional option enables the administrator to apply a selected format to all providers in the practice.

For more information, refer to the *Electronic Medical Records Setup Guide*.

Upload Images

The administrator can upload scanned images of physician signatures and practice logos used for printing letters or faxing and printing prescriptions and Progress Notes.

For more information about uploading images, refer to:

- Uploading an Electronic Signature
- Uploading a Logo
- Uploading a Facility

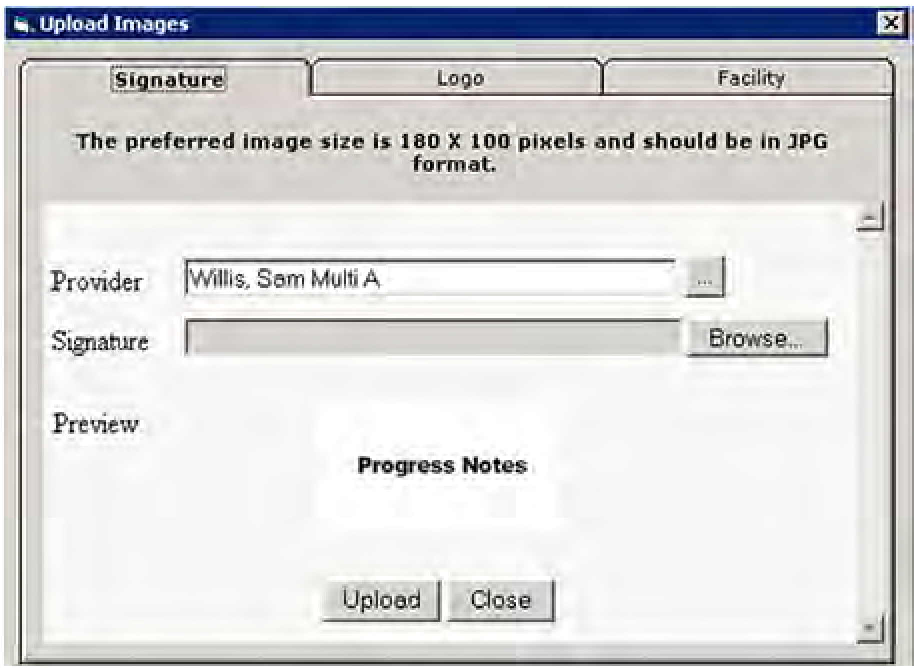
Uploading an Electronic Signature

After all providers capture their signature, the administrator can upload images of those signatures. The providers can use these images when printing letters or when faxing and printing prescriptions.

To upload an electronic signature:

1. From the File menu, point to Settings, then click *Upload Images*.

   The Upload Images window displays.
2. Click the *Signature* tab:



3. Click the *More* (...) button next to the Provider field and select a provider from the list.

   The selected provider’s name appears in the Provider field.
4. Click *Browse* (…) next to the Signature field to search for that provider’s signature image file.

   The selected image file displays in the Preview window.
5. Click *Upload*.

   The selected image file is uploaded as the electronic signature for that provider.

For more information, refer to the *Electronic Medical Records Setup Guide*.

Uploading a Logo

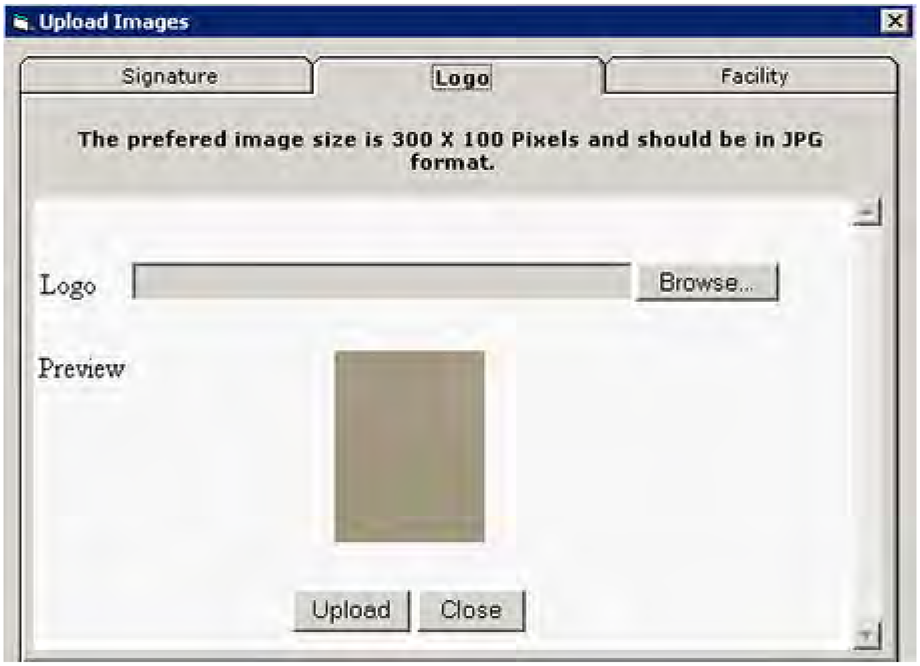
Upload a logo into the system, for the practice to include when printing letters and when printing or faxing Progress Notes.

To upload a logo:

1. From the File menu, point to Settings, and then click *Upload Images*.

The Upload Images window displays.

2. Click the *Logo* tab:



The Logo options display.

3. Click *Browse* (…) next to the Logo field to browse for your practice's logo image file.

The selected image file displays in the Preview window.

4. Click *Upload*.

The selected image file is uploaded as the logo for your practice, which is used in the Progress Notes.

Uploading a Facility

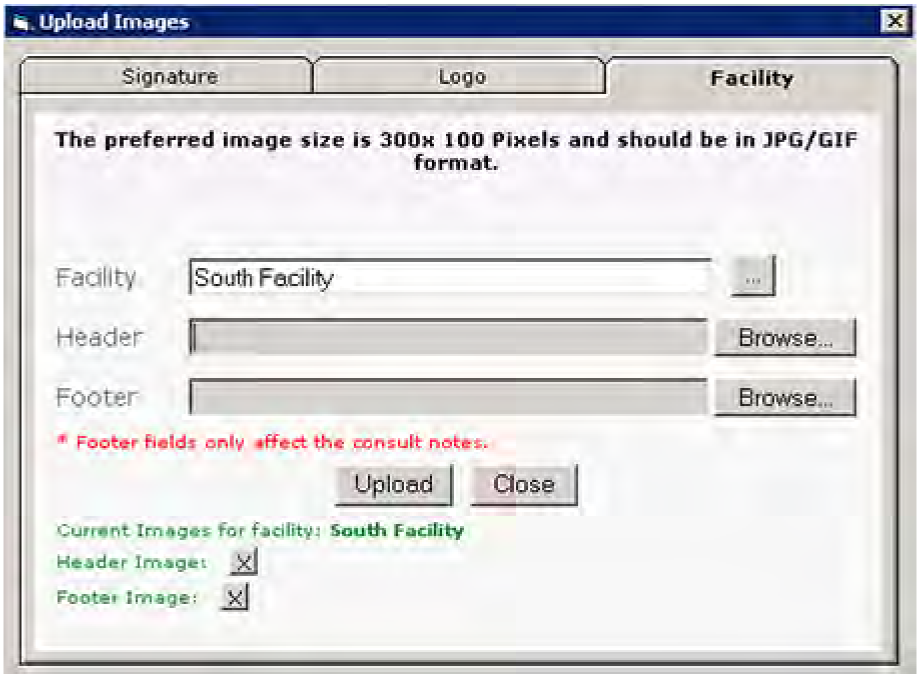
Upload a logo into the system, for the practice to include when printing letters and when printing or faxing Progress Notes.

To upload a facility:

1. From the File menu, point to Settings, and then click *Upload Images*.

The Upload Images window displays.

2. Click the Facility tab:



3. Click the *More* (...) button to display a list of the facilities in your practice.
4. Select the facility for which you want to upload images.
5. Click the *Browse* button next to the Header field to search for the image you want to use for the header.
6. Click the *Browse* button next to the Footer field to search for the image you want to use for the footer.
7. Click *Upload.*

   The selected, facility-specific images will display as the header and, if applicable, the footer in letters, printouts and fax transmissions of progress notes from the selected facility.

UpToDate Setup

eClinicalWorks is integrated with UpToDate®, an evidenced-based clinical reference website:

www.uptodate.com

Note: To use the UpToDate interface, a subscription is required. After you obtain subscription services to UpToDate, contact eClinicalWorks Support to activate the feature.

Configure login information for UpToDate for any provider from the File menu.

This feature must first be enabled. For more information about enabling this feature, refer to User Settings Tab.

Configuring UpToDate

For more information about using UpToDate, refer to the *Electronic Medical Records Setup Guide*.

PROVIDER AND STAFF SETUP

This section describes how to enable settings for the providers and staff in your practice. The settings enable you to add and maintain providers, referring physicians, staff and resources.

For more information about provider and staff setup, refer to:

- Setting Up Providers
- Setting Up Referring Physicians
- Setting Up License Information
- Setting Up Provider Numbers
- Setting Up Staff
- Setting Up Resources

Setting Up Providers

Providers must be added to your system, with their information entered into the Providers file. eClinicalWorks uses this information for billing and record keeping.

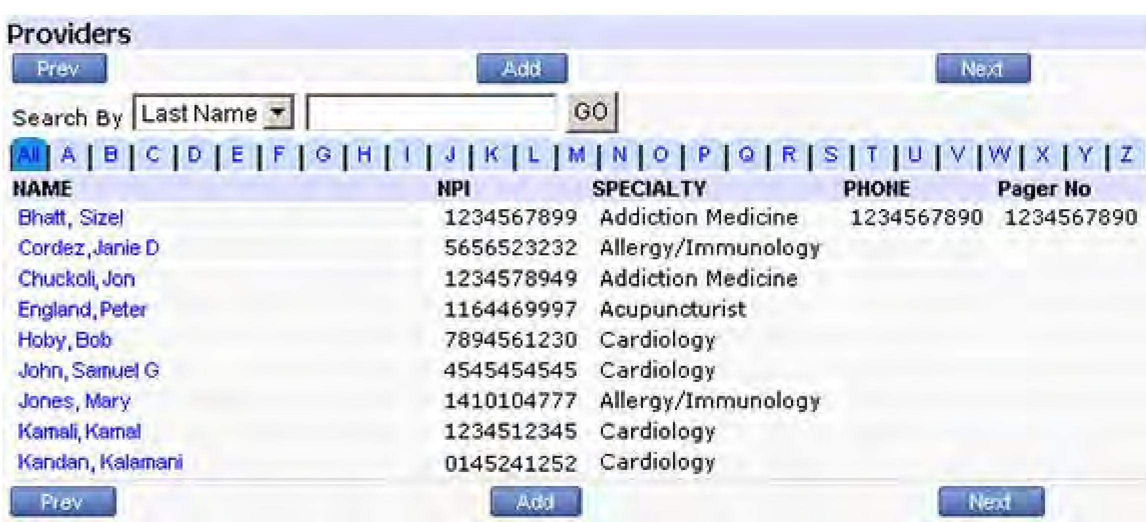
Adding a Provider to the System

To establish providers in your system, enter their information into the Providers file.

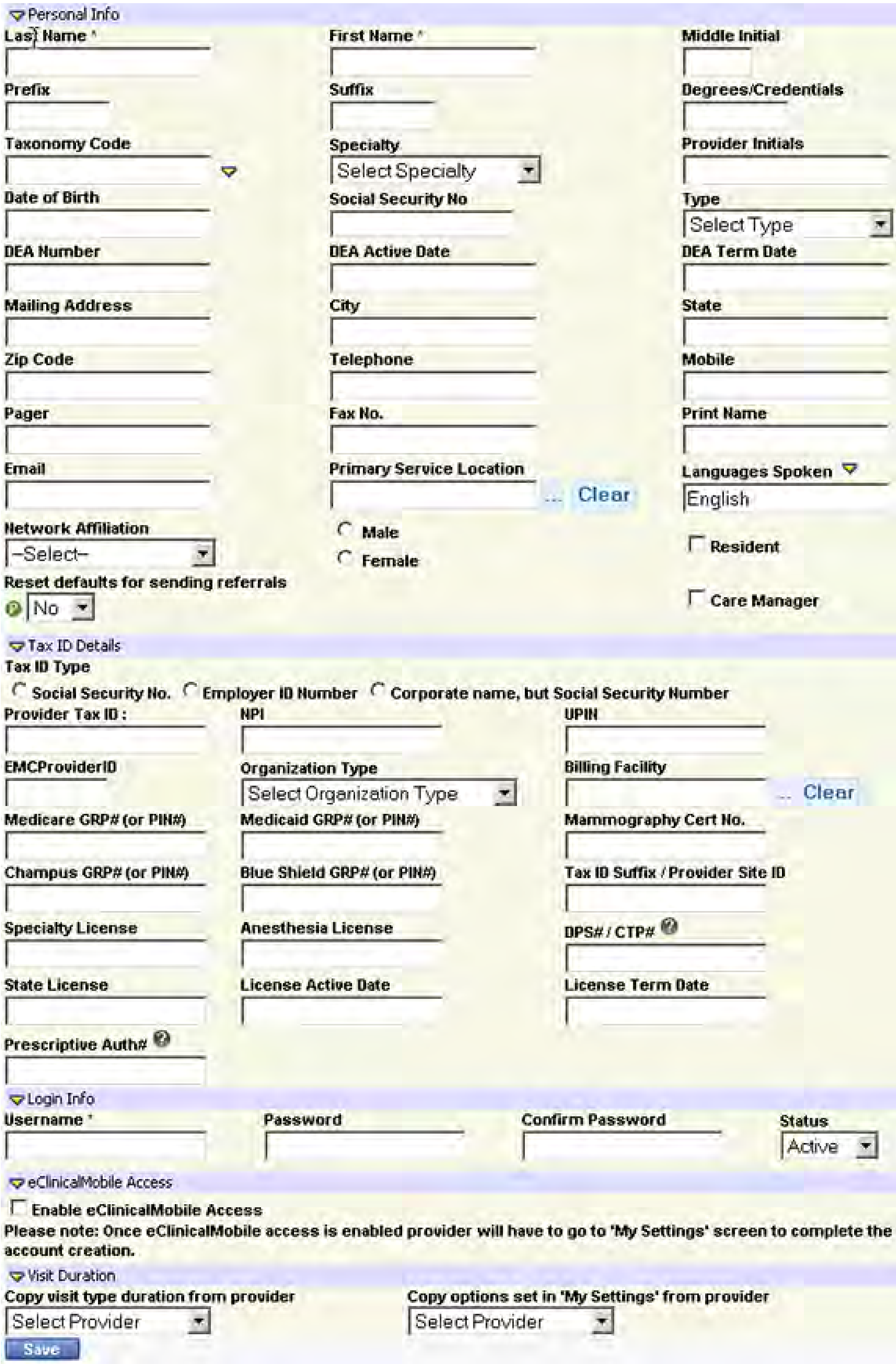
To add a new provider:

1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers window displays:



2. Click *Add* to display the Personal Info window:


Personal Info
Last Name *
First Name *
Middle Initial
Prefix
Suffix
Degrees/Credentials
Taxonomy Code
Specialty
Select Specialty
Provider Initials
Date of Birth
Social Security No
Type
Select Type
DEA Number
DEA Active Date
DEA Term Date
Mailing Address
City
State
Zip Code
Telephone
Mobile
Pager
Fax No.
Print Name
Email
Primary Service Location
... Clear
Languages Spoken
English
Network Affiliation
--Select--
Male
Female
Resident
Reset defaults for sending referrals
No
Care Manager
Tax ID Details
Tax ID Type
Social Security No.
Employer ID Number
Corporate name, but Social Security Number
Provider Tax ID :
NPI
UPIN
EMCProviderID
Organization Type
Select Organization Type
Billing Facility
... Clear
Medicare GRP# (or PIN#)
Medicaid GRP# (or PIN#)
Mammography Cert No.
Champus GRP# (or PIN#)
Blue Shield GRP# (or PIN#)
Tax ID Suffix / Provider Site ID
Specialty License
Anesthesia License
DPS# / CTP#
State License
License Active Date
License Term Date
Prescriptive Auth#
Login Info
Username *
Password
Confirm Password
Status
Active
eClinicalMobile Access
Enable eClinicalMobile Access
Please note: Once eClinicalMobile access is enabled provider will have to go to 'My Settings' screen to complete the account creation.
Visit Duration
Copy visit type duration from provider
Select Provider
Copy options set in 'My Settings' from provider
Select Provider
Save

3. Enter information in the required fields:

- Last Name
- First Name
- Primary Service Location
- Username
- Password
- Confirm Password

4. Enter any other information that your practice could use.

   Import the following fields for treatment, billing, and claims:

- Degrees/Credentials
- Taxonomy Code (click the caret icon to the right of this field)
- Specialty
- Provider Initials
- Social Security Number
- DEA number
- Provider Tax ID (Enter with no dashes)
- NPI (for Individual NPI numbers)
- UPIN
- EMC Provider ID (used for certain clearinghouses)
- E-mail
- Prescriptive Auth #
- Security
- Medicare Group # or PIN # (obsolete if using ANSI format)
- Medicaid Group # or PIN # (obsolete if using ANSI format)
- Mammography Certification Number (obsolete if using ANSI format)
- Champus Group # or PIN # (obsolete if using ANSI format)
- Blue Shield Group # or PIN # (obsolete if using ANSI format)
- Tax ID Suffix or Provider Site ID (obsolete if using ANSI format)
- Specialty License
- State License
- Anesthesia License
- Taxonomy Code
- Provider Initials
- Network Affiliation

   To look up the Taxonomy Code for your specialty category, go to www.wpc-edi.com/codes/taxonomy

5. Select the new provider's gender, using the Male or Female radio buttons.

   Note: The gender selection determines the icon that displays with the provider's name on the Practice band.

6. To copy the visit type durations from an existing provider, select the provider whose durations you want to use from the *Copy visit type duration from provider* drop-down list.

7. Click *Save*.

   The new provider is added to the database.

   For more information, refer to Updating Provider Information and Deleting a Provider from the System.

Add Multiple DEA Numbers for a Provider

Enhanced Feature

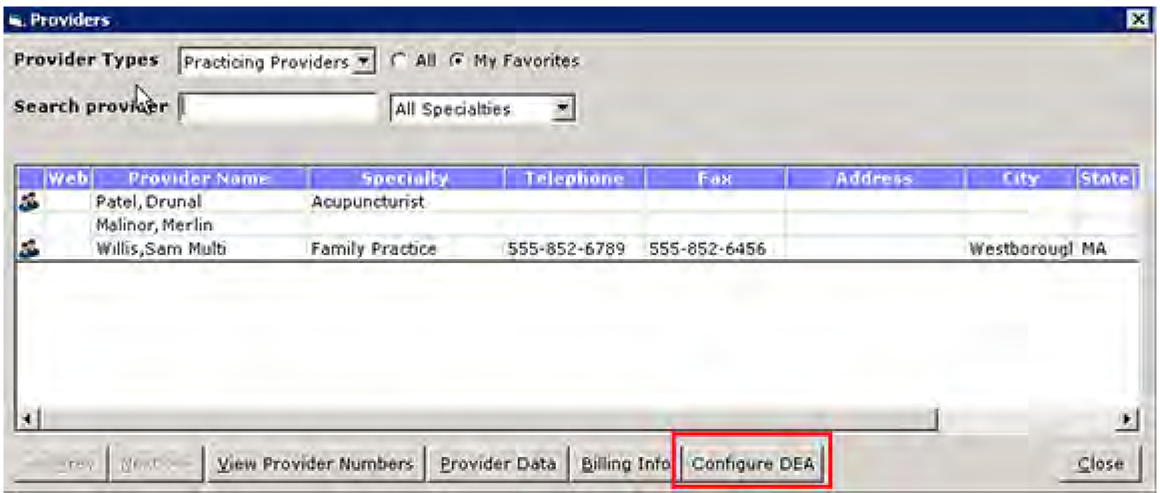
The practice may add multiple DEA numbers for a provider by first enabling the Security Attribute *Allow user to edit multiple DEA*. For more information, contact eClinicalWorks Support.

To add multiple DEA numbers:

1. With the security attribute enabled, from the File menu, click *Provider Numbers*.

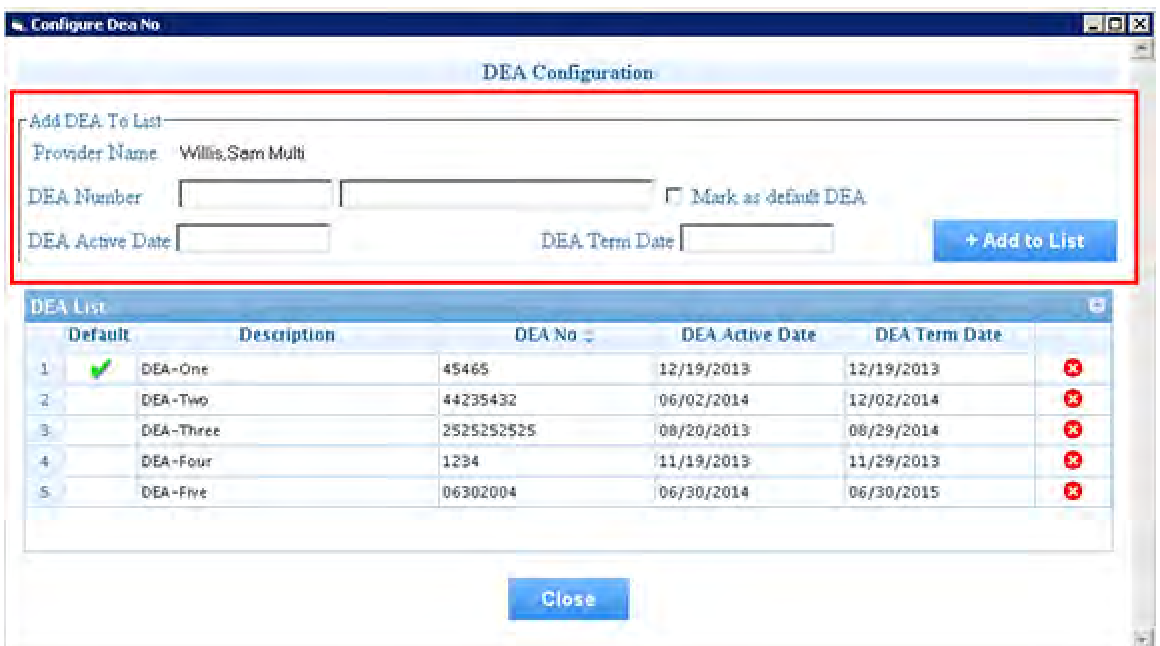
The Providers window displays.

2. Click *Configure DEA*:

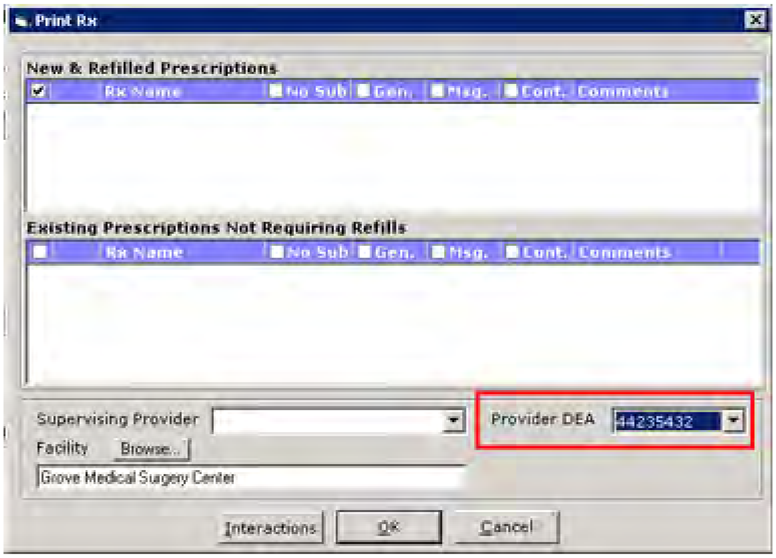


The *Configure DEA No* window displays.

3. Enter the DEA Number, DEA Active Date, and DEA Term Date, then click *Add to List*:



4. *(Optional)* Check the box next to *Mark as default DEA* to assign the new DEA number as the default for the provider.
5. Going forward, when working with a provider who has multiple DEA numbers, you will select that Provider's appropriate DEA number when printing, faxing, or e-Prescribing a prescription:



Editing the Provider DEA Number

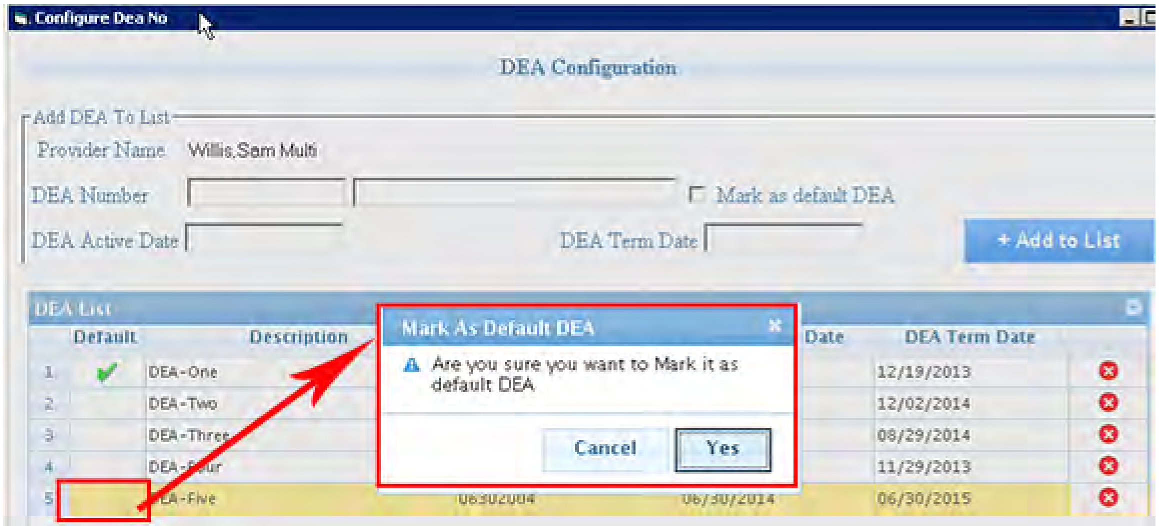
You can edit the information you entered for a provider's DEA number(s). You can change a provider's default DEA number, and you can change the data that is included in the record for a provider's DEA number.

Change a Provider Default DEA Number

To change a provider's default DEA number from the DEA Configuration window:

1. From a provider's DEA Configuration window, click the Default column on the line item that you wish to make the default.

   The Mark as Default DEA dialog box displays.
2. Click *Yes* to make the selected DEA number the default for that provider:



Going forward, the selected DEA number will display as the default for the provider.

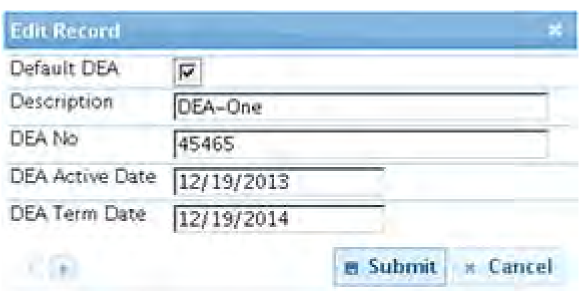
Edit Data for a Provider's DEA Number

To edit the details of a provider's DEA number from the DEA Configuration window:

1. From a provider's DEA Configuration window, double-click the line item that you wish to edit.

   The Edit Record dialog box displays.

2. Check the box to make the selected DEA number the default for that provider.
3. Click any of the other fields to change the description, DEA Number, active date, or term date.
4. Click *Submit* to enable the changes:



Updating Provider Information

Update existing providers' information from the Providers window. When updating, configure a list of *favorite* provider and staff names to display in the *Assigned To* drop-down lists throughout the eClinicalWorks® system.

For more information about provider and staff favorites, refer to Setting Up Favorite Staff Members.

To update an existing provider's information:

1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers window displays.

2. Click the name of the provider to update.

> **Note:** There are two methods of filtering the providers:
> - Click one of the blue letter tabs at the top of the window to filter the list by all providers whose last name begins with that letter.
> - Use the Search By drop-down list and field to search for a specific last name, NPI number, or specialty.

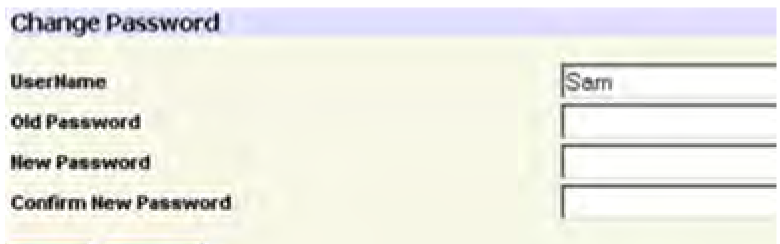
The Personal Info window displays.

3. Modify the information in any of the fields as necessary.

4. To change this provider's username and/or password:

a. Click *Change Password* at the bottom of the window.

The Change Password window displays:



b. To modify the username, enter the text in the UserName field.

c. Enter this provider's old password in the Old Password field.

d. Enter the new password in the New Password field.

e. Re-enter the new password in the Confirm New Password field.

f. Click *Save*.

The username and/or password is modified.

5. Click *Save*.

The modifications to this provider's information are saved.

Deleting a Provider from the System

Providers that were entered erroneously and those that have duplicate accounts can be deleted from the system.

> **Note:** The system does not allow the deletion of providers if they have any assigned encounters, Telephone Encounters, labs, diagnostic imaging tests, documents, claims, or actions.

To delete a provider:

1. From the Admin band on the left navigation pane, click *Providers*.

The Providers window displays.

2. Click the name of the provider (the blue link) to be deleted.

The Personal Info window displays.

3. Click *Delete*.

   A confirmation window displays.

4. Click *OK*.

   The selected provider is deleted.

Marking Providers as Residents

Mark providers as residents as part of the Residency/Educational Facilities feature.

To enable this feature, refer to the *Electronic Medical Records Setup Guide*.

To mark a provider as a resident:

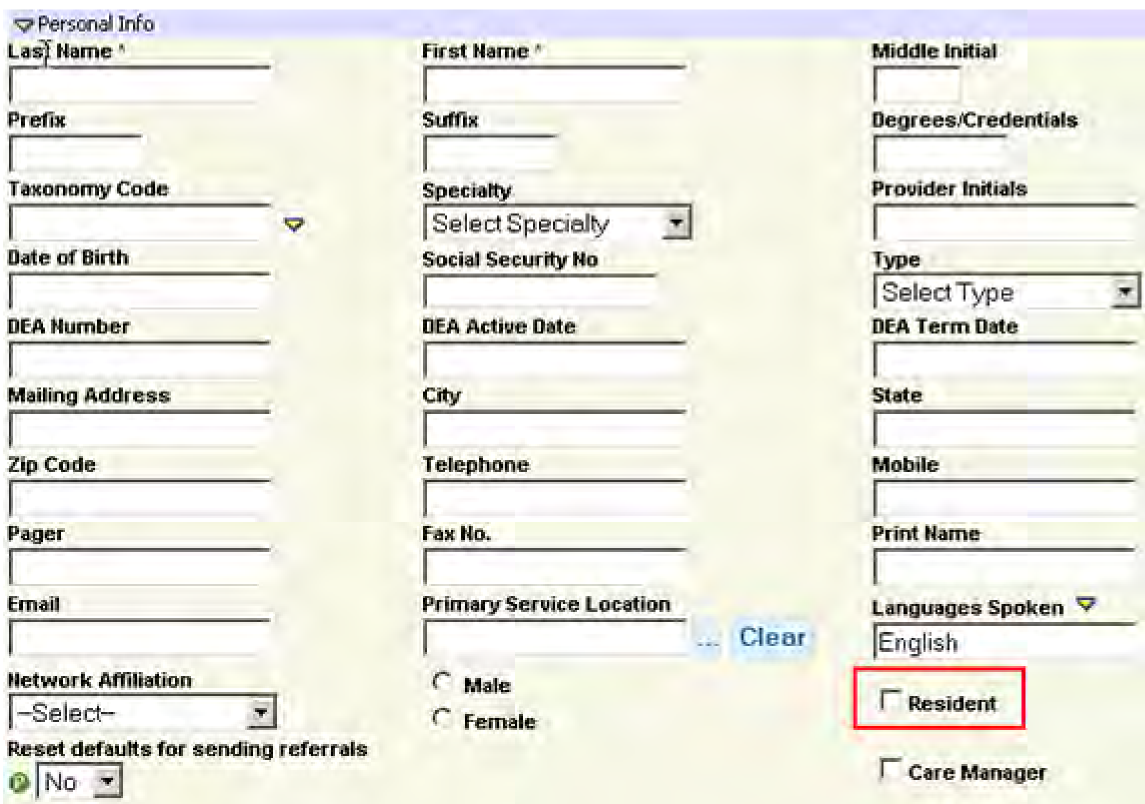
1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers window displays.

2. Click the name of the provider to mark as a resident.

   The Provider information window displays.

3. Check the *Resident* box:



4. Click *Save*.

   The selected provider is marked as a resident.

Marking Providers as Care Managers

You can indicate that providers are Care Managers.

To mark a provider as a care manager:

1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers window displays.

2. Click the name of the provider to mark as a care manager.

   The Provider information window displays.

3. Check the *Care Manager* box:

4. Click *Save*.

   The selected provider is marked as a care manager.

Configuring Assigned Favorites for Providers

Providers use assigned favorites to create a list of the staff members they most commonly work with, in order to speed up data entry and assignments.

Users cannot configure the favorites list when creating new providers in the system; the feature is available only when updating existing providers.

To configure assigned favorites:

1. From the Admin band on the left navigation pane, click *Providers*.

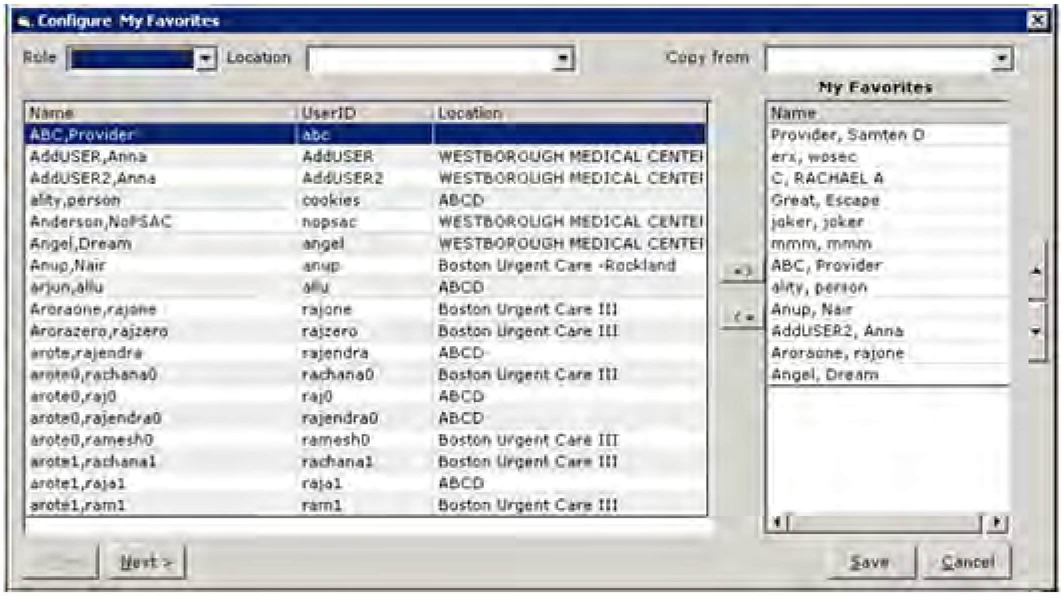
   The Providers window displays:

2. Click the name (the blue link) of the provider for whom you will configure assigned favorites.

   The Personal Info window displays.

3. Click *Configure My Assigned Favorites*:

The Configure My Favorites window displays:



Note: *Configure My Assigned Favorites* does not display when adding new providers; it is available only when updating existing providers. The new provider information must be entered and saved prior to configuring favorites.

4. Select the options described in the table, as required:

Function	Option
To filter the list by the role of users	Select the role from the Role drop-down list
	Note: Roles are applicable only if they are set up by the practice. For more information about setting up roles, refer to Role-Based Security.
To filter the list by the primary facility of users	Select the facility from the Location drop-down list.
To copy favorites from another user	Select the name of that user in the *Copy from* drop-down list. The system copies the names of the selected user's favorites to the My Favorites list.
To add users to the My Favorites list	**1.** Highlight the user in the left pane. **2.** Click =>. The selected user is added to the My Favorites list. Repeat steps until all users have been added.
To remove names from the My Favorites list	To remove names from the My Favorites list: **1.** Highlight a user in the My Favorites list. **2.** Click <=. The selected user is removed from the My Favorites list.
To change the order of favorite staff members:	**1.** Highlight a user in the My Favorites list. **2.** Click the up or down arrow button to move the selected staff.

5. Click *Save*.

The My Favorites list for this provider is saved as specified.

Viewing Patient Demographics Logs for Providers and Staff

View patient demographics logs for providers and staff members from the Provider or Staff information windows.

To view provider and staff patient demographics logs:

1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers or Staff window displays.

2. Click the blue name link for the provider or staff member.

   The Provider or Staff information window displays.

3. Click *View Provider Log* or *View Staff Log*:

The Patient Demographics Log for the selected provider or staff member displays. For more information, refer to the *Security Attributes and Logs Guide*.

Deactivating a Provider in the System

Administrators can deactivate providers that are no longer with the practice, while preserving all the information associated with them and preventing users from selecting the providers.

Note: New claims cannot be created for deactivated providers. **Do not** deactivate providers until all their claims have been created and billing has been completed for their services.

To deactivate a provider that has left the practice:

1. From the Admin band on the left navigation pane, click *Providers*.

   The Providers window displays.

2. Click the name (the blue link) of the provider to be deactivated.

   The Personal Info window displays.

3. Click *Inactive* from the Status drop-down list at the bottom of the window.
4. Click *Save*.

   The selected provider is marked as inactive.

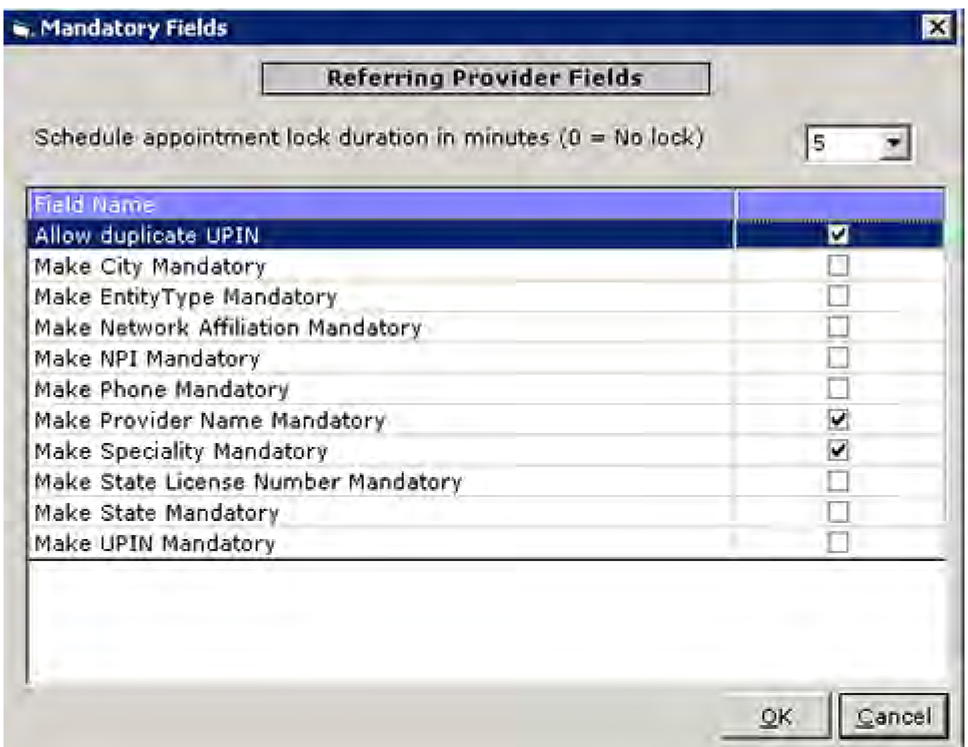
Configuring Mandatory Fields for Providers

Users may designate certain fields as mandatory when adding providers to the system.

To configure mandatory fields for providers:

1. From the File menu, point to the *Mandatory Fields* option, and then click *Configure Provider Mandatory Fields*.

   The Mandatory Fields window displays:



2. To enable the same UPIN for use with more than one provider, check the *Allow duplicate UPIN* box.
3. To designate any fields as mandatory, check the appropriate box(es).

4. Click *OK*.

   The referring physician mandatory fields are configured.

Setting Up Referring Physicians

To establish referring physicians in your system, you must set up their personal information, provider numbers, and insurance information.

For more information about referring physicians, refer to:

- Adding a Referring Physician to the System
- Configuring Mandatory Fields for Referring Physicians
- Associating Referring Physicians with Insurance Carriers

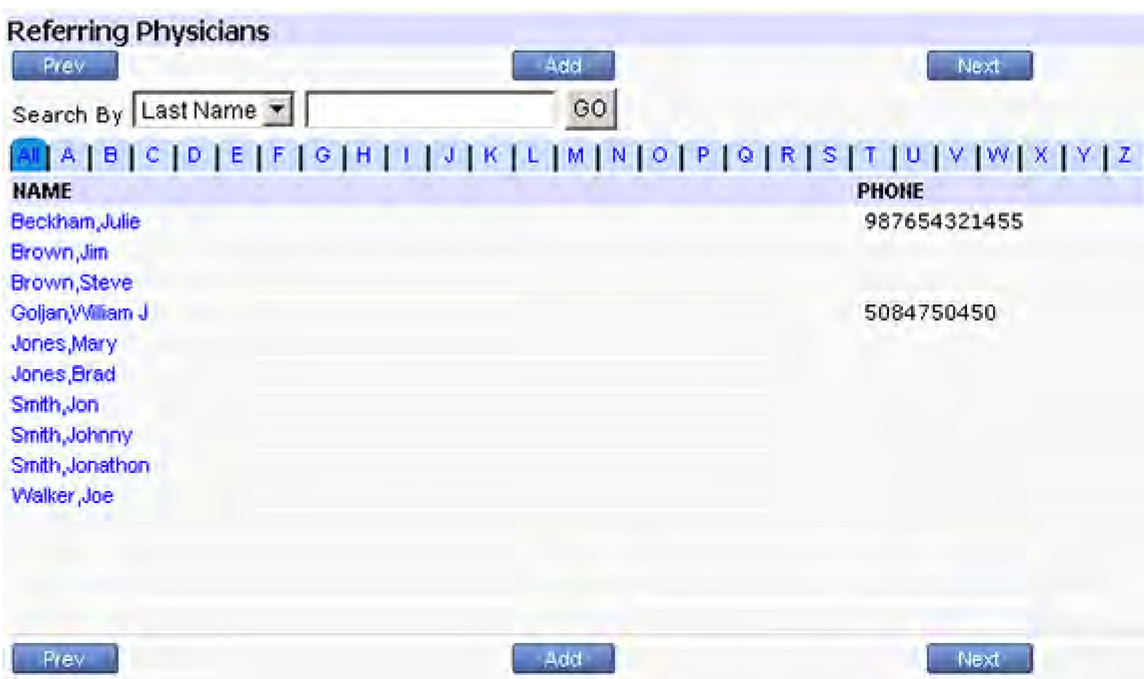
Adding a Referring Physician to the System

Add referring physicians to the system so users can select them for referrals.

To add a referring physician:

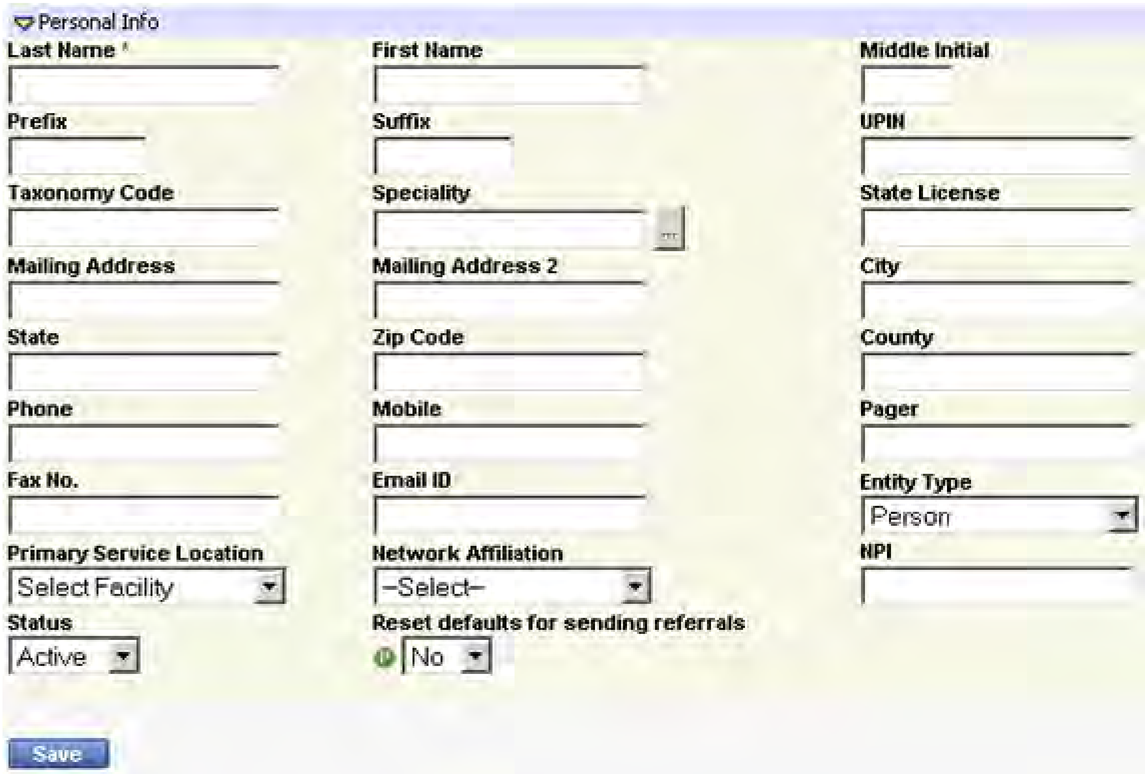
1. From the Admin band in the left navigation pane, click *Referring Physicians*.

   The Referring Physicians window displays:



2. Click *Add*.

   The Personal Info window displays:



3. Enter information in the required fields:
   - Last Name
   - First Name
   - Primary Service Location
   - Referring physician's NPI number
4. Enter any other information that your practice may use.
5. Select one of the following entity types from the Entity Type drop-down list:
   - **Person** - This referring physician is an individual person.
   - **Non-Person Entity** - This referring physician is not an individual person (*e.g.,* an organization)
6. If this provider is associated with a network, select the appropriate network from the Network Affiliation drop-down list.
7. Click *Save*.

   The referring physician is added to the system.

   For more information about updating and deleting referring physician information, refer to:
   - Updating Referring Physician Information
   - Deleting a Referring Physician from the System

Updating Referring Physician Information

Update referring physicians in the system from the Referring Physicians window.

To update personal information for referring physicians:

1. From the Admin band in the left navigation pane, click *Referring Physicians.*

   The Referring Physicians window displays.

2. Click the name (the blue link) of the referring physician whose information to update.

   > **Note:** There are two methods of filtering the providers:
   > - Click one of the blue letter tabs at the top of the window to filter the list by all providers whose last name begins with that letter.
   > - Use the Search By drop-down list and field to search for a specific last name, NPI number, or specialty.

   The Personal Info window displays.

3. Modify the information in any of the fields as necessary.
4. Click *Save*.

   The selected referring physician's information is updated as specified.

Deleting a Referring Physician from the System

Delete referring physicians that are no longer needed from the system.

> **Note:** Referring physicians cannot be deleted if they are used in a referral or a claim.

To delete referring physicians from the system:

1. From the Admin band in the left navigation pane, click *Referring Physicians*.

   The Referring Physicians window displays.

2. Click the name (the blue link) of the referring physician whose information to delete.

   The Personal Info window displays.

3. Click *Delete*.

   A confirmation window displays.

4. Click *OK*.

   The selected referring physician's information is deleted.

Configuring Mandatory Fields for Referring Physicians

Set certain fields as mandatory when adding referring physicians to the system.

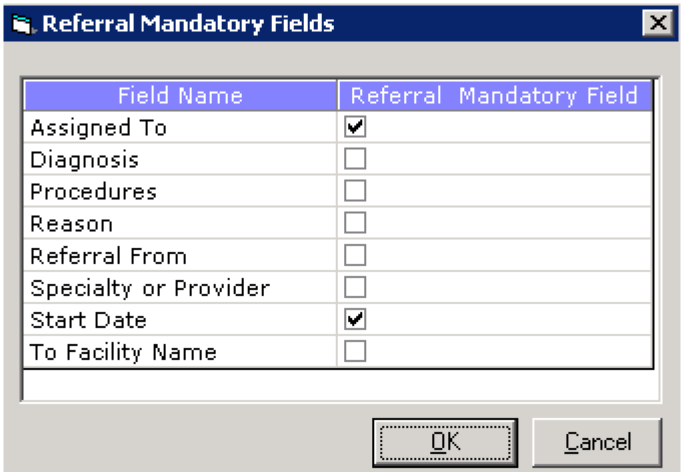
To configure mandatory fields for referring physicians:

1. From the File menu, point to *Mandatory Fields* to open a drop-down list, then click *Configure Referral Mandatory Fields*.

   The Referral Mandatory Fields window displays.

2. To designate any fields as mandatory, check the appropriate box(es).

3. Click *OK*:



The referring physician mandatory fields are configured.

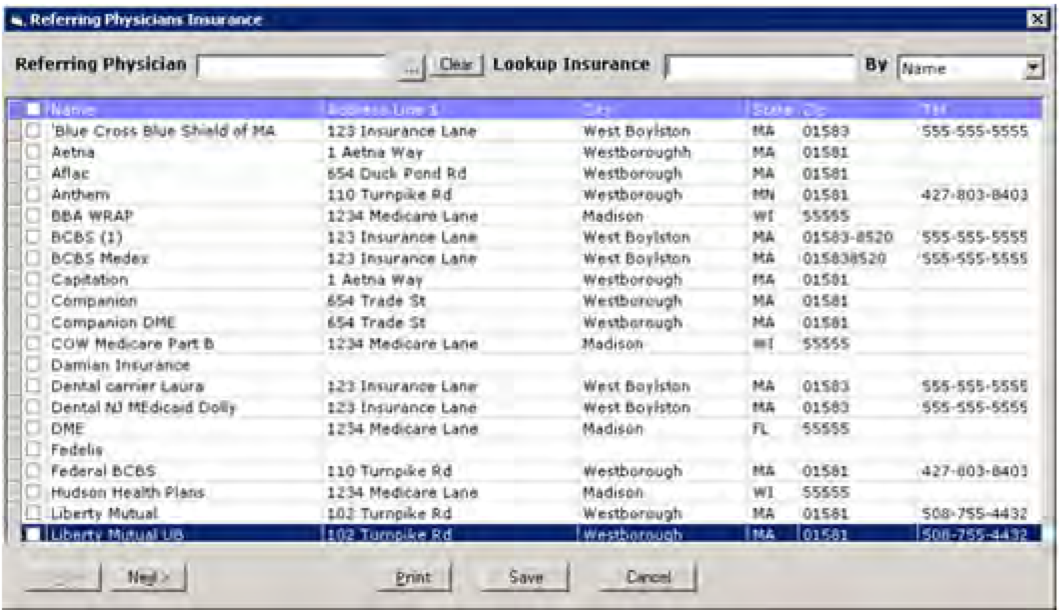
Associating Referring Physicians with Insurance Carriers

You can associate referring physicians with the insurances they accept so that when a provider creates a referral, the provider can select the referring physician based on the insurance that the patient uses.

To associate referring physicians with insurance carriers:

1. From the File menu, click *Referring Physicians/Insurances*.

   The Referring Physicians Insurance window displays:



2. To select a referring Physician to link with insurance carriers:

   a. Click *More* (...) next to the Referring Physician field.

      The Providers window displays with Referring Providers selected by default from the Provider Type drop-down list.

      For more information about all the options available from this window, refer to Setting Up Provider Numbers.

   b. Highlight a referring physician and click *OK*.

      The Providers window closes and the selected physician's name populates in the Referring Physician field.

3. To search for a specific insurance company:

   a. Select the criteria to use for this search from the *By* drop-down list.

   b. Enter the text to use for your search in the Lookup Insurance field.

      The list is filtered by your search criteria.

4. Check the boxes next to all the insurance carriers that the selected referring physician accepts.

5. Click *Save*.

   The accepted insurance carriers for this referring physician are saved.

6. Repeat steps 2 - 5 until all referring physicians have been configured.

Note: Click *Print* to create a printout of the associated insurances for the selected referring physician.

Setting Up License Information

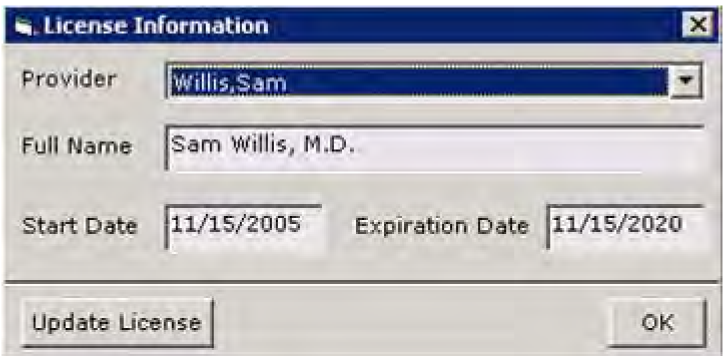
Each provider in your practice is licensed to use the eClinicalWorks software. Authorization to use eClinicalWorks is granted with a license key that is unique to each provider. Licenses are updated automatically by the eClinicalWorks Support team.

View provider license information from the Help menu.

To view license information:

1. From the Help menu, click *License Info*.

The License Information window displays:



2. Select the provider whose license information to view from the Provider drop-down list.

The provider's full name and license start and expiration dates display in the corresponding fields.

Message Change for Locked and Inactive eCW Users

Enhanced Feature

The license alert pop-up is restricted to Administrators and Co-Administrators only.

The EMR & Integrated Practice Management System pop-up displays when a login is attempted by a locked or inactive user:

Setting Up Provider Numbers

Enter provider numbers and the billing information for each provider who will submit insurance claims.

For more information about provider numbers, refer to:

- Practicing Providers
- Setting Up Referring Providers
- Configuring Provider Numbers by Facility

Practicing Providers

Configure provider numbers, data, and billing information for providers at your practice.

For more information about practicing providers, refer to:

- Entering Provider Numbers
- Entering Provider Data
- Entering Billing Information

Entering Provider Numbers

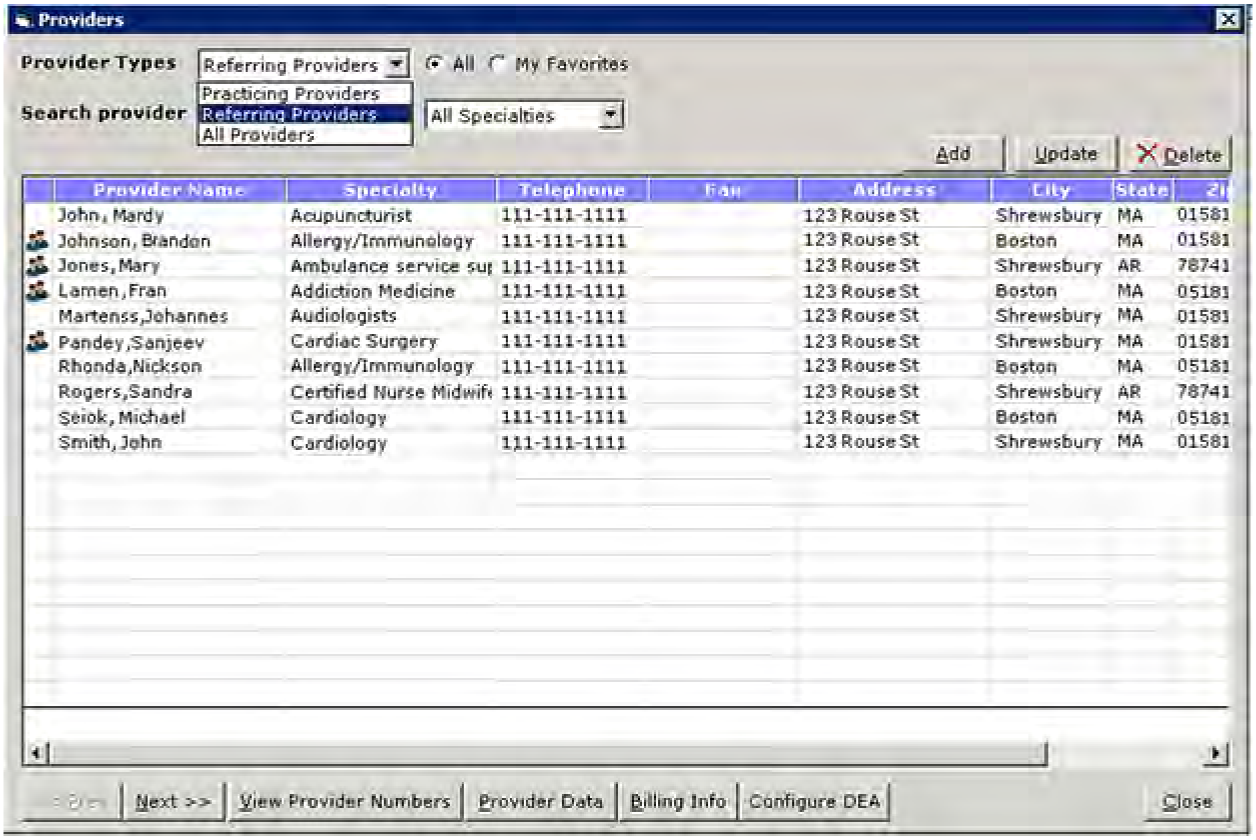
Provider and group insurance numbers must be entered into the system for all providers (practicing and referring) that are used in billing.

Note: This information can also be entered when setting up insurance companies. For more information about entering provider numbers from this location, refer to the *Billing Setup Guide*.

To enter provider numbers:

1. From the File menu, click *Provider Numbers*.

   The Providers window displays:



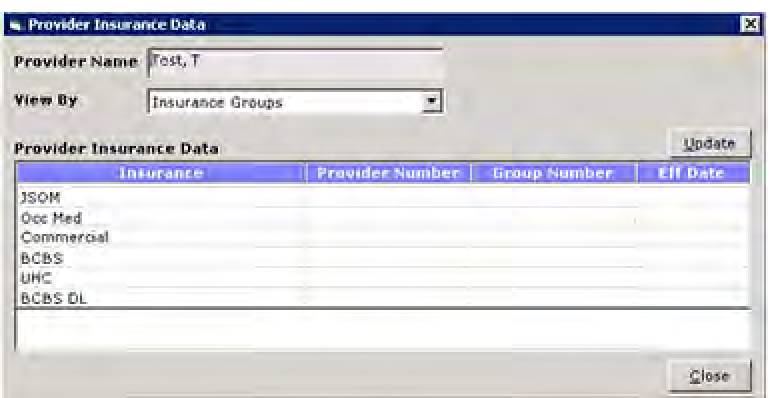
- To filter the list by provider type, select the type from the Provider Types drop-down list.

  For more information about referring providers on this window, refer to Setting Up Referring Providers.
- To search for a specific provider, enter that provider's name in the Search Provider field in the *Last name, First name* format.

2. Highlight the provider.

3. Click *View Provider Numbers*.

The Provider Insurance Data window displays:



4. Select the options that are specified in the table, as required:

Option	Function
To sort this list either by insurance groups or by individual insurance carriers	Select the option from the *View By* drop-down list.
To add a new insurance carrier to the list	**1.** With Individual Insurances selected from the View By drop-down list, click *Add*. The Insurances window displays. **2.** Double-click the insurance carrier. The selected insurance carrier is added to the bottom of the Provider Insurance Data section.
To delete an insurance carrier from the list	**1.** With Individual Insurances selected from the View By drop-down list, highlight the insurance carrier to delete. **2.** Click *Delete*. A confirmation window displays. **3.** Click *Yes*. The selected insurance carrier is deleted from the list.

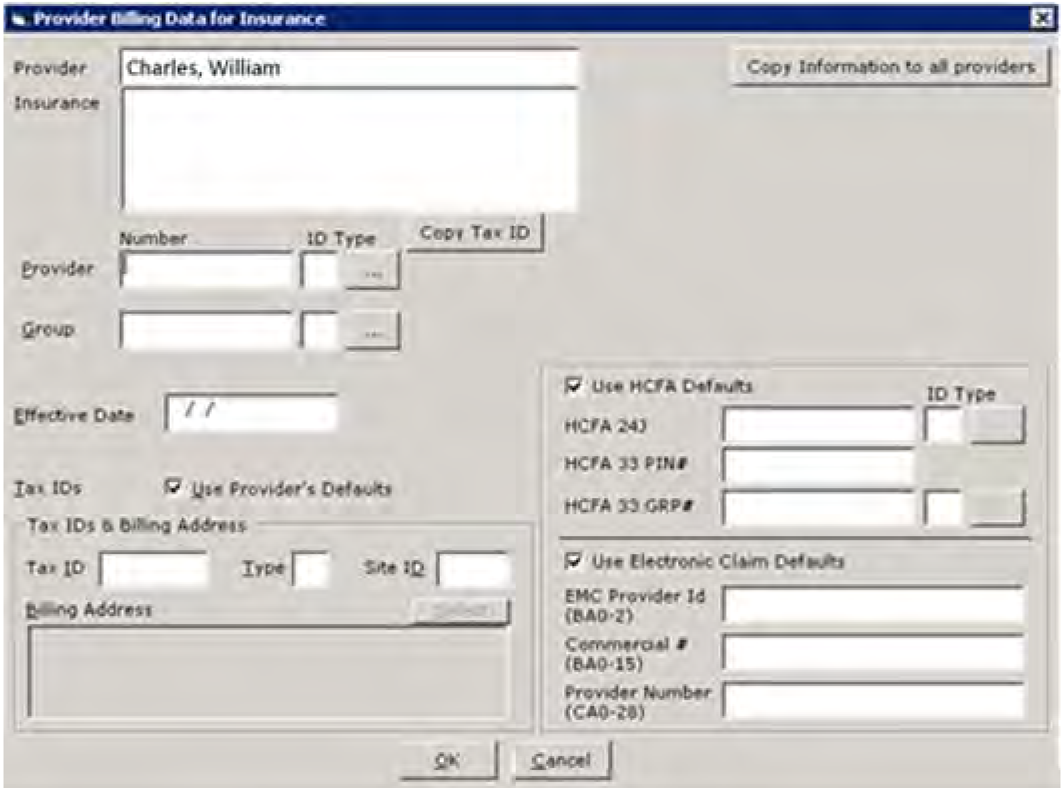
5. Enter provider numbers for an insurance carrier or group:

- Highlight the insurance carrier or group for which you will enter numbers and click *Update*.

  OR

- Double-click the insurance carrier or group for which to enter numbers.

The Provider Billing Data for Insurance window displays:



6. Enter information in the following fields as appropriate:

Field	Information
Provider	Displays the name of the selected provider.
Insurance	Displays information about the selected insurance that has been entered in the system.
Copy Tax ID	Populates the Group and Provider Number fields with the provider's 9-digit Tax ID number entered in their Personal Information.
Provider Number and ID	Enter the physician's number with the insurance company and the ANSI code for the insurance type here. These are mandatory fields.
Group Number and ID	Enter the physician's number with the insurance group and the ANSI code for the type here. These are mandatory fields.
Effective Date	Enter the date on which the Provider and Group numbers became effective in the mm/dd/yyyy format.
Tax IDs - Use Provider’s Defaults	Check this box to use the Tax ID information entered in this provider’s Personal Information for the fields here.
Tax ID, Type, and Site ID	Enter the Tax ID, Tax ID Type, and Site ID for this provider in these fields.
Billing Address	Click *Select* to assign a billing address for this provider from the Facility Lists window.

Field	Information
Copy Information to All Providers	Click this button to copy the information on this window to all providers for this insurance company or group.
Use HCFA Defaults	Check this box to populate the fields in this group box with the numbers in the Provider Number and Group Number fields.
HCFA 24J & ID Type, HCFA 33 PIN#, and HCF 33 GRP# & ID Type	If you do not choose to use the defaults, clear the *Use HCFA Defaults* box and enter the appropriate numbers in these fields.
Use Electronic Claim Defaults	Check this box to populate the fields in this group box with the numbers in the Provider Number and Group Number fields.
EMC Provider ID (BA0-2), Commercial # (BA0-15), and Provider Number (CA0-28)	If you do not select to use the defaults, clear the Use Electronic Claim Defaults box and enter the appropriate numbers in these field.

7. Click *OK*.

The provider numbers for this insurance carrier or group are saved.

8. Repeat steps 5 and 6 until all the provider numbers have been entered for all applicable insurance carriers and groups.

Entering Provider Data

Enter additional miscellaneous data for providers from the Provider Numbers window.

To enter provider data:

1. From the File menu, click *Provider Numbers*.

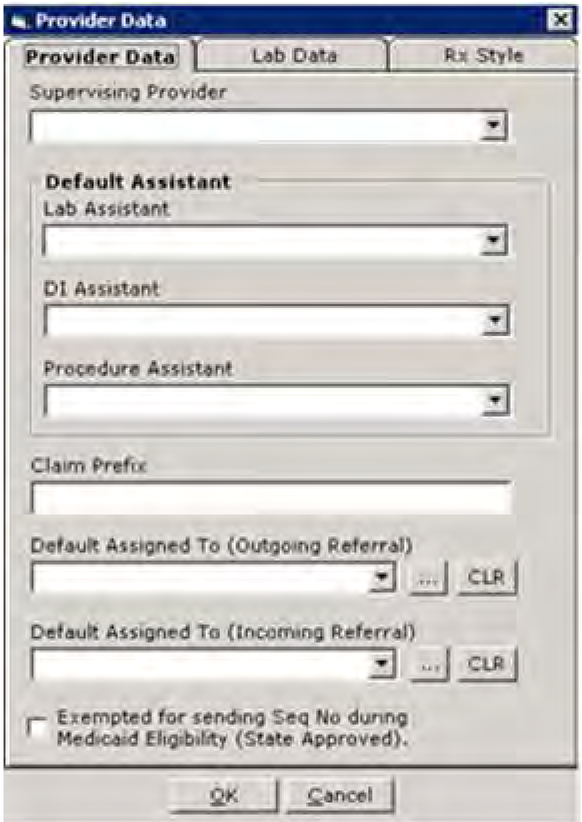
The Providers window displays.

- To filter the list by provider type, select the type from the Provider Types drop-down list.
- To search for a specific provider, enter that provider's name in the Search Provider field in the Last Name, First Name format.

2. Highlight the provider for whom to enter additional data.

3. Click *Provider Data*.

The Provider Data window displays:



4. Enter information in the following fields as necessary:

Option	Function
Supervising Provider	Select the default supervisor for this provider from this drop-down list.
Default Assistant	Select the default assistants for this provider from the drop-down lists in this section.
Claim Prefix	Enter a claim prefix for this provider in this field.
Default Assigned To (Outgoing Referral)	■ Select the staff member to which outgoing referrals created by this provider will be assigned from this drop-down list. **OR** ■ Click *More* (...) to the right of this drop-down list to select a staff member from the Staff Lookup window.
Default Assigned To (Incoming Referral)	■ Select the staff member to whom incoming referrals created by this provider will be assigned from this drop-down list. **OR** ■ Click *More* (...) to the right of this drop-down list to select a staff member from the Staff Lookup window.
Exempted for sending Seq No during Medicaid Eligibility (State Approved)	If this provider is not required to send a Seq No during Medicaid eligibility, check this box.

5. Click *OK*.

   The additional data for this provider is saved.

Entering Lab Data for Providers

Enter lab data for providers from the Provider Additional Data window.

For more information, refer to the *Electronic Medical Records Setup Guide*.

Selecting Rx Styles by Provider

Select the Rx styles for providers from the Provider Additional Data window.

For more information, refer to the *Electronic Medical Records Setup Guide*.

Entering Billing Information

Billing information must be entered for every provider for whom to make insurance claims.

To enter billing information for a provider:

1. From the File menu, click *Provider Numbers*.

   The Providers window displays.

   - To filter the list by provider type, select the type from the Provider Types drop-down list.
   - To search for a specific provider, enter that provider's name in the Search Provider field in the *Last name, First name* format.

2. Highlight the provider whose billing information to enter.
3. Click *Billing Information*.

   The Provider Insurance Data window displays:

Any information currently in this provider's Personal Information is automatically populates here (this typically includes the UPIN Number, Provider NPI, Provider Group NPI, and/or Taxonomy Code).

4. Enter the following information:

- **a.** Enter the UPIN in the UPIN Number field, if necessary.
- **b.** Enter the state-based healthcare numbers for Kentucky, Carolina, and/or New York as necessary.
- **c.** Enter this provider's NPI in the Provider NPI field, if necessary.
- **d.** Enter this provider's Group NPI in the Provider Group NPI field, if necessary.

5. If necessary, enter this provider's Florida Medicaid type:

- ◆ Enter the type in the Medicaid, FL Provider Type field.

  OR

- ◆ Click *More* (...) next to the Medicaid, FL Provider Type field and select the code from the Provider Type window.

6. Enter this provider's taxonomy code:

- ◆ Type the code In the Taxonomy Code field.

  OR

- Click *More* (...) next to the Taxonomy Code field and select the code from the Taxonomy Codes window.

7. Select whether this provider is a person or a non-person entity from the Entity Type drop-down list.

8. Click *OK*.

The provider's billing information is saved.

Setting Up Referring Providers

Enter information about referring providers by selecting Referring Providers from the Provider Type drop-down list on the Providers window.

For more information about referring providers, refer to Entering Information for Referring Providers.

Entering Information for Referring Providers

Add provider numbers and other basic demographic information to the system for referring providers.

To enter information for a referring provider:

1. From the File menu, click *Provider Numbers*.

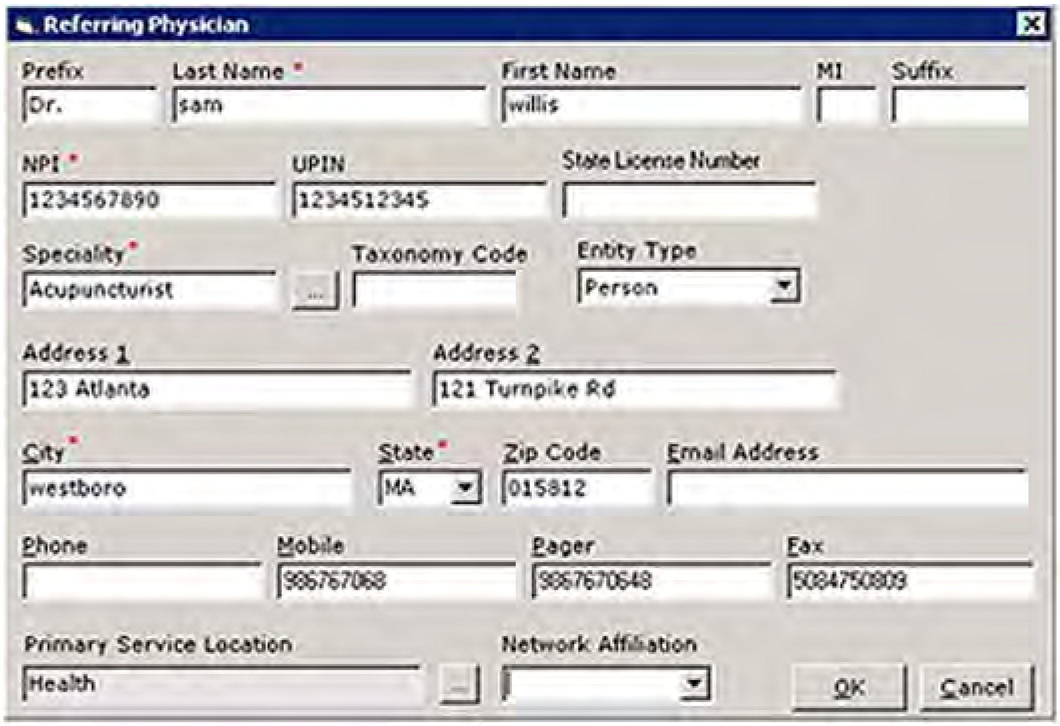
The Providers window displays.

2. Select *Referring Providers* from the Provider Type drop-down list.

All referring providers currently in the system display.

3. Click *Add*.

The Referring Physician window displays:



4. Enter information in the fields as necessary.

   Fields with a red asterisk next to their name are mandatory. For more information about marking fields as mandatory, refer to Configuring Mandatory Fields for Referring Physicians.

   For more information about the information entered in these fields, refer to Adding a Referring Physician to the System.

5. Click *OK*.

   The information entered for this referring physician is recorded.

Updating Information for Existing Referring Providers

Update information for referring providers from the Providers window.

To update information for existing referring providers:

1. From the File menu, click the *Provider Numbers* option.

   The Providers window displays.

2. Select *Referring Providers* from the Provider Type drop-down list.

   All referring providers currently in the system display.

3. Highlight a provider and click *Update*.

   The Referring Physician window displays.

4. Update the information in the fields as necessary.

   For more information about the information entered in these fields, refer to Adding a Referring Physician to the System.

5. Click *OK*.

The information entered for this referring physician is updated.

Deleting Information for Existing Referring Providers

Delete existing referring providers from the Providers window.

To delete existing referring providers:

1. From the File menu, click the *Provider Numbers* option.

   The Providers window displays.
2. Select *Referring Providers* from the Provider Type drop-down list.

   All referring providers currently in the system display.
3. Highlight a provider and click *Delete*.

   A confirmation window displays.
4. Click *Yes*.

   The selected referring provider is removed from the system.

Configuring Provider Numbers by Facility

Specify insurance provider numbers by facility.

For more information about provider numbers by facility, refer to:

- Configuring Insurance Provider Numbers by Facility
- Configuring a Group NPI by Service Date and Facility

Configuring Insurance Provider Numbers by Facility

The Provider Numbers configured by Facility/ Payer ID override the values entered in the individual or group insurance windows during the claim creation and submission process.

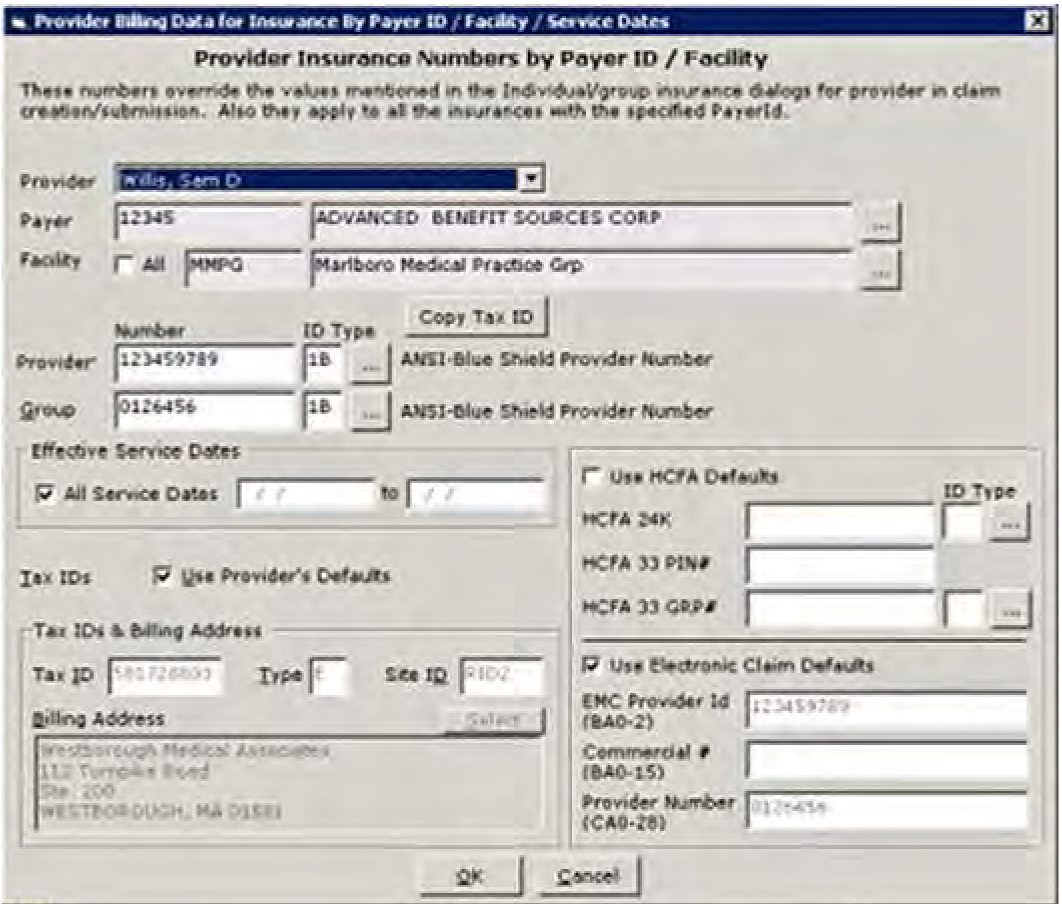
To specify insurance provider numbers by facility:

1. From the File menu, point to *Data by Facility*, and then click *Provider Numbers by Facility*.

   The Provider Numbers by Payer ID/Facility window displays.
2. Open the Provider Billing Data for Insurance By Payer ID & Facility window
   - Click *Add*.

     OR
   - Highlight the payer ID to specify service dates for and click *Update*.

   The Provider Billing Data for Insurance By Payer ID & Facility window displays.
3. Select a provider from the Provider drop-down list.
4. Click *More* (...) next to the Payer field to select the payer:



Note: The configured Provider Numbers are applied to all the insurances with the specified Payer ID.

5. If this number is for a specific facility, clear the *All* check box next to the Facility field and click *More* (…) to select a facility.
6. To configure these provider numbers for a specific service date range, clear the *All Service Dates* box in the Effective Service Dates section and specify a date range for this number in the fields in the mm/dd/yyyy format.
7. Click *OK* when complete to save your changes.

Configuring a Group NPI by Service Date and Facility

A practice can have a group NPI. This group NPI takes precedence over the individual NPI numbers of the providers in the practice for claim submission. Configure the Group NPI numbers by Service Date and Facility. This is useful for practices that have merged or split and must use certain NPI numbers for certain date ranges and facilities.

To configure a group NPI by service date and facility:

1. From the File menu, point to *Data by Facility*, and then click *Group NPI Rules*.

   The Group NPI Rules window displays:

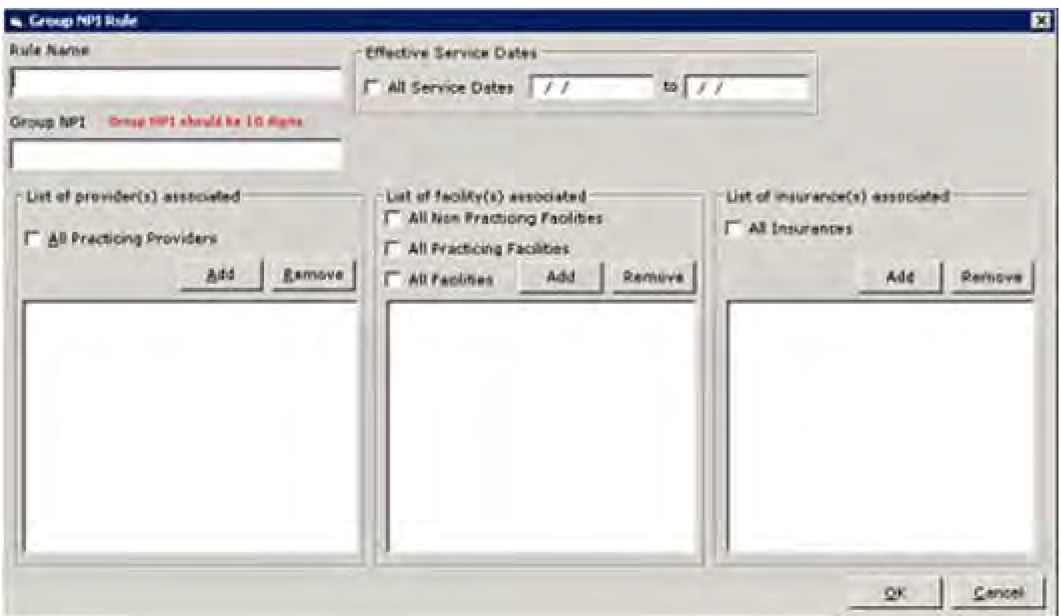
2. Create an NPI group:

   - Click *New* to create a group NPI.

     OR

   - Highlight an existing rule and click *Update* to modify a group NPI.

   The Create Group NPI window displays:



   a. Enter or edit the group name in the Rule Name field.

   b. Enter or edit the 10-digit group NPI in the Group NPI field.

3. If this Group NPI is effective only for a certain Service Date range, clear the *All Service Dates* box and enter a date range in the mm/dd/yyyy format in the Effective Service Dates fields.

4. To select and add providers to the group from the Providers List window:

   - Click *Add* in the List of provider(s) associated section.

     OR

   - Check the *All Practicing Providers* box to select all providers.

   - To delete a provider name, highlight the provider in this pane and click *Remove*.

5. To select and add facilities to the group from the Facilities List window:

- Click *Add* in the List of facility(s) associated section.

  OR

- Check one of the following boxes as necessary:
  - **All Non Practicing Facilities** - Select all facilities where medical services are not performed.
  - **All Practicing Facilities** - Select all facilities where medical services are performed.
  - **All Facilities** - Select all facilities in the database.
- To delete a facility, highlight the facility in this pane and click *Remove*.

6. To select and add facilities to the group from the Facilities List window:

- Click *Add* in the List of insurance(s) associated section.

  OR

- Check the *All Insurances* box to select all insurance providers.
- To delete an insurance company, highlight a company in this pane and click *Remove*.

7. Click *OK* to save your changes and close this window.

Repeat steps 2 - 7 to add or update additional NPI groups.

Setting Up Staff

Add and delete Staff from the Staff window.

For more information about staff members, refer to:

Adding Staff Members to the System

Adding Staff Members to the System

Enhanced Feature Meaningful Use

To set up your staff members, enter their information in the Staff file.

To add new staff members:

1. From the Admin band on the left navigation pane, click *Staff*.

The Staff window displays:

2. Click *Add*.

The Personal Info window displays:

3. Enter the required fields:

- Last Name
- First Name
- Primary Service Location
- Username
- Password
- Confirm Password

4. To specify this staff member as a resource, check the *Is a resource* box.

   For more information about resources, refer to Setting Up Resources.

5. Check the *Licensed Healthcare Professional or Credentialed Medical Assistant* box:

Note: If the box is checked for a staff member, and the staff member has completed a Meaningful Use Objective, then that patient falls into the denominator and numerator of the appointment provider. If the box is not checked for that staff member, and they complete the objective, then the patient is not included in the numerator.

6. Enter other information that your practice may use.
7. Click *Save*.

   The staff member is saved.

   For more information about updating and deleting staff members, refer to the following sections:

   - Updating Staff Member Information
   - Deleting a Staff Member from the System

Updating Staff Member Information

Update existing staff members’ information from the Staff window. When updating, configure a list of *favorite* provider and staff names to display in the Assigned To drop-down lists throughout the eClinicalWorks system.

For more information about provider and staff favorites, refer to Setting Up Favorite Staff Members.

To update an existing staff member’s information:

1. From the Admin band on the left navigation pane, click *Staff*.

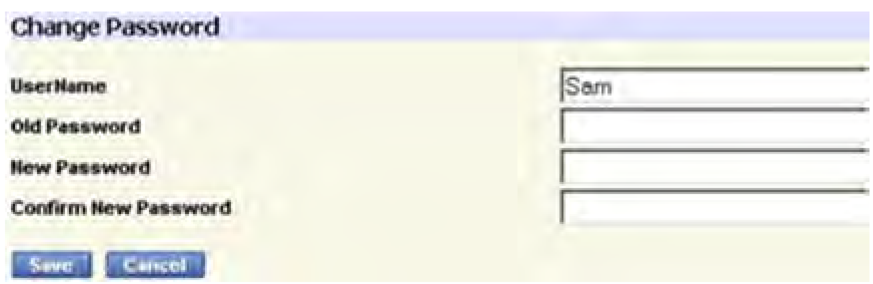
   The Staff window displays:

2. Click the name (the blue link) of the staff member whose information to update.

   The Personal Info window displays.

3. Modify the information in the fields as necessary.
4. To change this staff member's username and/or password:
   a. Click *Change Password* at the bottom of the window.

      The Change Password window displays:



   b. Enter the information as described in the following table:

Field	Description
UserName	To modify the username, enter the text in the UserName field.
Old Password	Enter this staff member's old password in the this field.
New Password	Enter the new password in the New Password field.
Confirm New Password	Re-enter the new password in the Confirm New Password field.

   c. Click *Save*.

      The username and/or password is modified.

5. Click *Save*.

   The modifications to this staff member's information are saved.

Deleting a Staff Member from the System

Delete staff members that were entered erroneously or that have duplicate accounts from the system.

IMPORTANT! Deleting staff members is not recommended, unless the staff member has never been assigned to a task. Deactivation is a safer alternative for staff members who have handled assignments. For more information, refer to Deactivating a Staff Member in the System.

To delete an existing staff member:

1. From the Admin band on the left navigation pane, click *Staff*.

   The Staff window displays.
2. Click the name (the blue link) of the staff member whose information to update.

   The Personal Info window displays.
3. Click *Delete*.

   A confirmation window displays.
4. Click *OK*.

   The selected staff member is deleted.

Deactivating a Staff Member in the System

Set the staff members that are no longer with the practice as inactive, to preserve all the information associated with them, but prevent them from being selected by users.

To deactivate a staff member that has left the practice:

1. From the Admin band on the left navigation pane, click *Staff*.

   The Staff window displays.
2. Click the name (the blue link) of the staff member whose information to update.

   The Personal Info window displays.
3. Select *Inactive* from the Status drop-down list at the bottom-right of the window.
4. Click *Save*.

   The selected staff member is marked as inactive.

Setting Up Favorite Staff Members

Assigned favorites enable staff members to create a list of other staff members they most commonly work with to speed up data entry and assignments.

For more information about favorite staff members, refer to:

- Configuring Favorite Staff Members from Admin
- Configuring Favorite Staff Members from the Staff Lookup Window

- Viewing Favorite Staff Members

Configuring Favorite Staff Members from Admin

Assigned favorites may be configured for a staff member only when updating their information, not when initially entering them into the system.

To configure assigned favorites:

1. From the Admin band on the left navigation pane, click *Staff*.

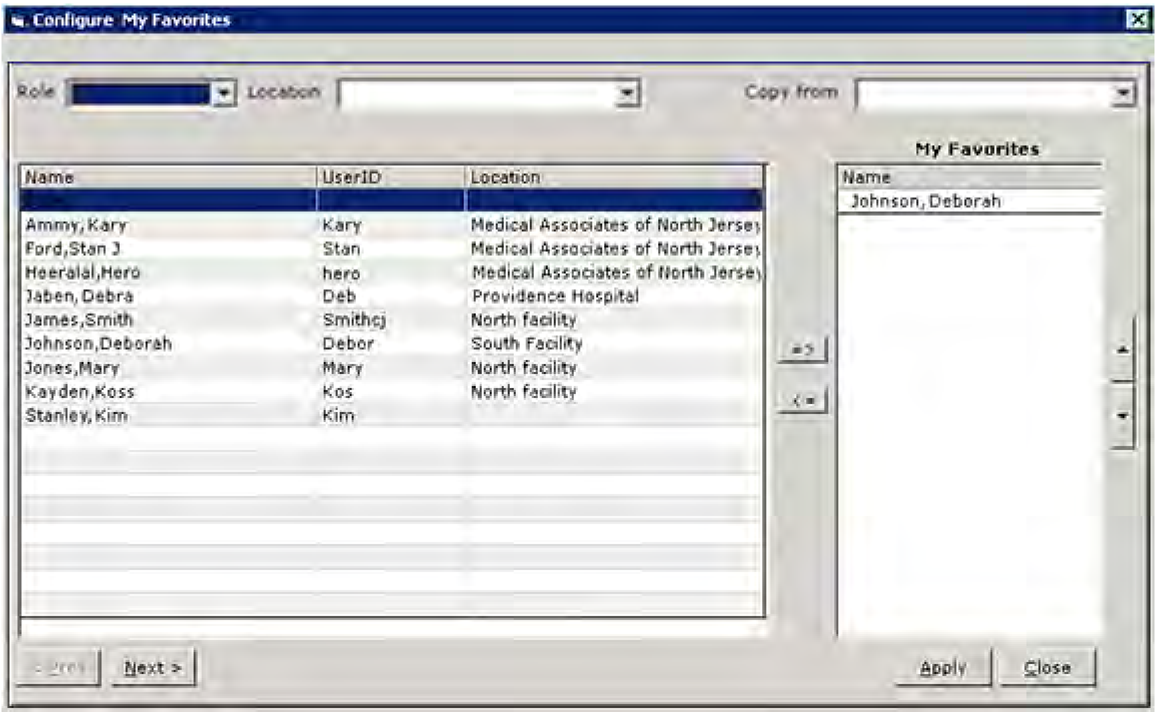
   The Staff window displays:

2. Click the name (the blue link) of the staff member for whom to configure assigned favorites.

   The Personal Info window displays.

3. Click *Configure My Assigned Favorites*.

   The Configure My Favorites window displays:



Note: *Configure My Assigned Favorites* does not display when adding new staff members; it is available only when updating existing staff members. The new staff members’ information must be entered and saved prior to configuring favorites.

4. Select the options described in the table, as appropriate:

Function	Option
To filter the list by the role of the users	Select the role from the Role drop-down list.

Function	Option
To filter the list by the primary facility of users	Select the facility from the Location drop-down list.
To copy favorites from another user	Select the name of that user in the *Copy from* drop-down list. The names of the selected user's favorites are copied to the My Favorites list.
To add users to the My Favorites list	**1.** Highlight the user in the left pane. **2.** Click =>. The selected user is added to the My Favorites list. Repeat steps a - b until all users XXX added.
To remove names from the My Favorites list	**1.** Highlight a user in the My Favorites list. **2.** Click <=. The selected user is removed from the My Favorites list.

5. Click *Save*.

   The My Favorites list for this staff member is saved as specified.

Configuring Favorite Staff Members from the Staff Lookup Window

Users can specify their favorite staff members directly from the Staff Lookup window.

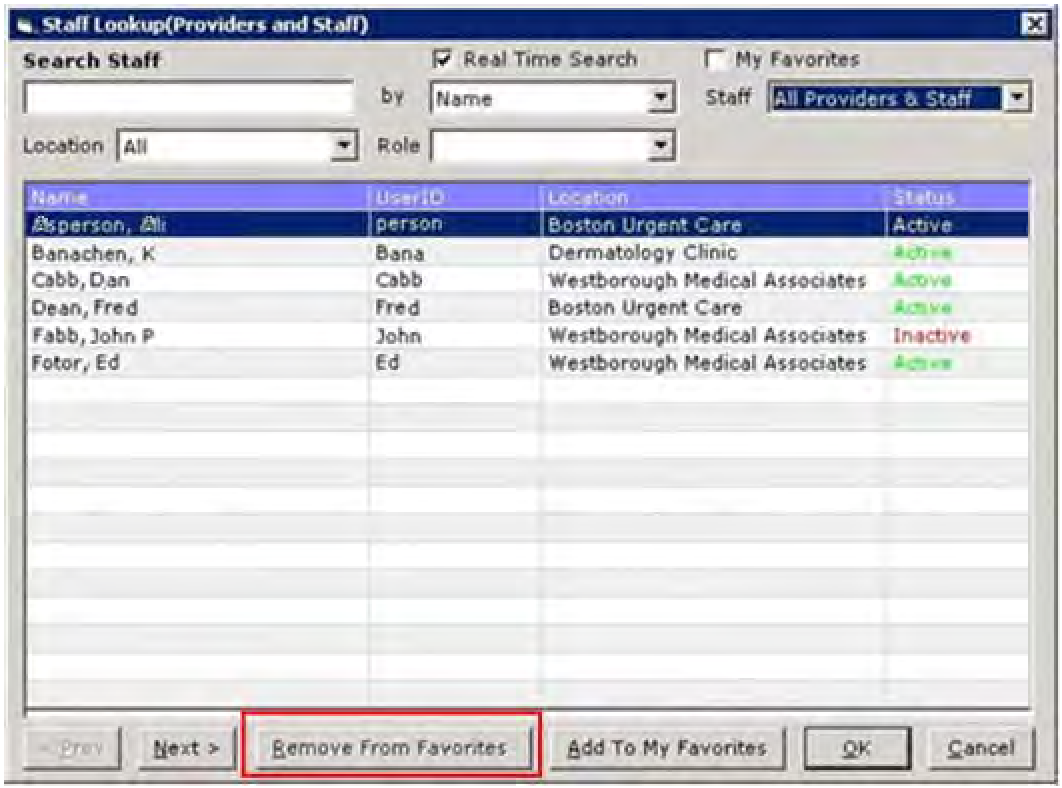
To configure favorite staff members:

1. From the Staff Lookup window, search for and highlight the provider or staff member to add to or remove from your favorites.

   Note: To access the Staff Lookup window, click *More* (...) next to any Staff field throughout the system.

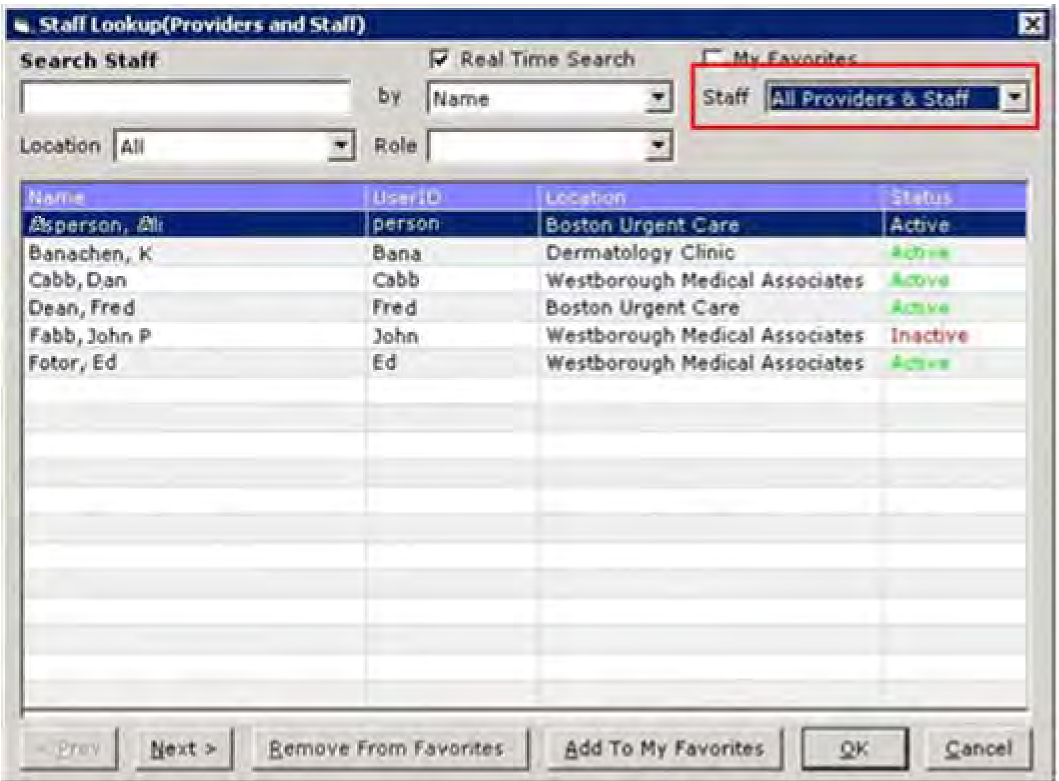
2. Add this provider or staff member to your favorites:
   - Click *Add To My Favorites*.

     OR
   - Click *Remove From Favorites* to remove the selected provider or staff member from your favorites:


Staff Lookup(Providers and Staff)
Search Staff
Real Time Search
My Favorites
by
Name
Staff
All Providers & Staff
Location
All
Role
Name
UserID
Location
Status
person
Boston Urgent Care
Active
Banachen, K
Bana
Dermatology Clinic
Active
Cabb, Dan
Cabb
Westborough Medical Associates
Active
Dean, Fred
Fred
Boston Urgent Care
Active
Fabb, John P
John
Westborough Medical Associates
Inactive
Fotor, Ed
Ed
Westborough Medical Associates
Active
< Prev
Next >
Remove From Favorites
Add To My Favorites
OK
Cancel

Viewing Favorite Staff Members

On the Staff Lookup window, check the *My Favorites* box to remove all providers and staff members not in your favorites from the list:



Setting Up Resources

A resource is anyone on your staff except a physician, who can be scheduled for patient visits. Examples of resources are lab technicians and nurses. These staff members are set up with their own schedules and are available during an appointment search.

Patient encounters may be created for resources, although any claims created for these encounters should be made for an actual provider.

For more information about resources, refer to:

- Specifying a Staff Member as a Resource
- Adding a Resource Not Associated with Staff Members

Specifying a Staff Member as a Resource

Specify staff members as resources if they need their own schedule for seeing patients. The following procedure describes how to set up resources for a generic role/room/process in your practice.

To specify a staff member as a resource:

1. From the Admin band on the left navigation pane, click *Staff*.

   The Staff window displays:

2. Click the name (the blue link) of the staff member whose information to update.

   The Personal Info window displays:

3. Check the *Is a resource* box.
4. Click *Save*.

   This staff member is specified as a resource, indicated on the Staff window by a Yes in the Resource column.

Adding a Resource Not Associated with Staff Members

A resource can also be set up without being attached to a staff member. This action enables the scheduling of patients for appointments with this resource, but does not set up a user in the system under the resource name.

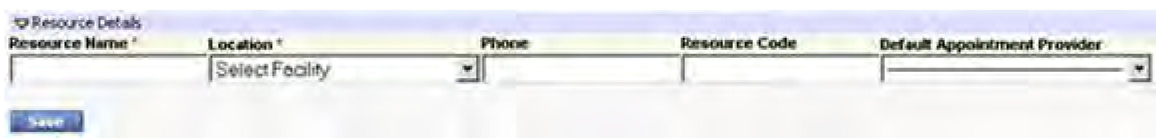
To add a new resource not associated with a staff member:

1. From the Admin band on the left navigation pane, click *Resources*.

   The Resources window displays:

2. Click *Add*.

   The Resource Details window displays:



3. Enter the information as described in the following table:

Feature	Description
Resource Name	Enter a name for this resource.
Location	Select a primary facility for this resource from the Location drop-down list.
Phone	Enter the telephone number for this resource.
Resource Code	Enter a resource code for this resource.
Default Appointment Provider	If this resource always bills under the same provider, select the default appointment provider for this resource from the drop-down list.

4. Click *Save*.

   This resource is added.

Updating Resource Information

Update the resource's information from the Admin band.

To update an existing staff member's information:

1. From the Admin band on the left navigation pane, click *Resources*.

   The Resources window displays:

2. Click the name (the blue link) of the resource whose information to update.

   The Resource Info window displays.

3. Click *Save*.

   The modifications to this resource's information are saved.

Deleting a Resource from the System

Delete resources that are no longer needed from the system.

IMPORTANT! eClinicalWorks does not recommend deleting resources, unless the resource has never been assigned to a task. Instead, deactivate the resource; it is a safer alternative for resources who handled assignments.

To delete an existing resource:

1. From the Admin band, click *Resources*.

   The Resources window displays.

2. Click the name (the blue link) of the resource whose information to update.

   The Resource Info window displays.

3. Click *Delete*.

   A confirmation window displays.

4. Click *OK*.

   The selected resource is deleted.

DATABASE SETUP

There are several databases within the eClinicalWorks® application that contain specific types of information. The administrator must populate these databases with all the information used in the operation of your practice.

For more information, refer to the following sections:

- Insurances
- Pharmacies
- Setting Up Attorneys
- Employers
- Setting Up Case Managers
- Setting Up Guarantors
- Facilities
- Adding ZIP Codes
- Management
- Exporting to Microsoft Outlook

Note:

- Users may add Pharmacies, Case Managers, and Attorneys from the Additional Info section in the Patient Information window.
- Add Employers and Guarantors to the database from the Patient information window.

Insurances

From the File menu, the administrator can add, update, copy and export insurance information for the practice.

For more information, refer to the *Billing Setup Guide.*

Pharmacies

The pharmacy database contains information related to the pharmacies used by your practice's patients. For more information, refer to Add Pharmacies.

Note: It is common practice to import or link e-Prescription-enabled pharmacies to the pharmacies in practice's database using the *Linking Pharmacy* option from the Tools menu, selecting *ePrescription*.

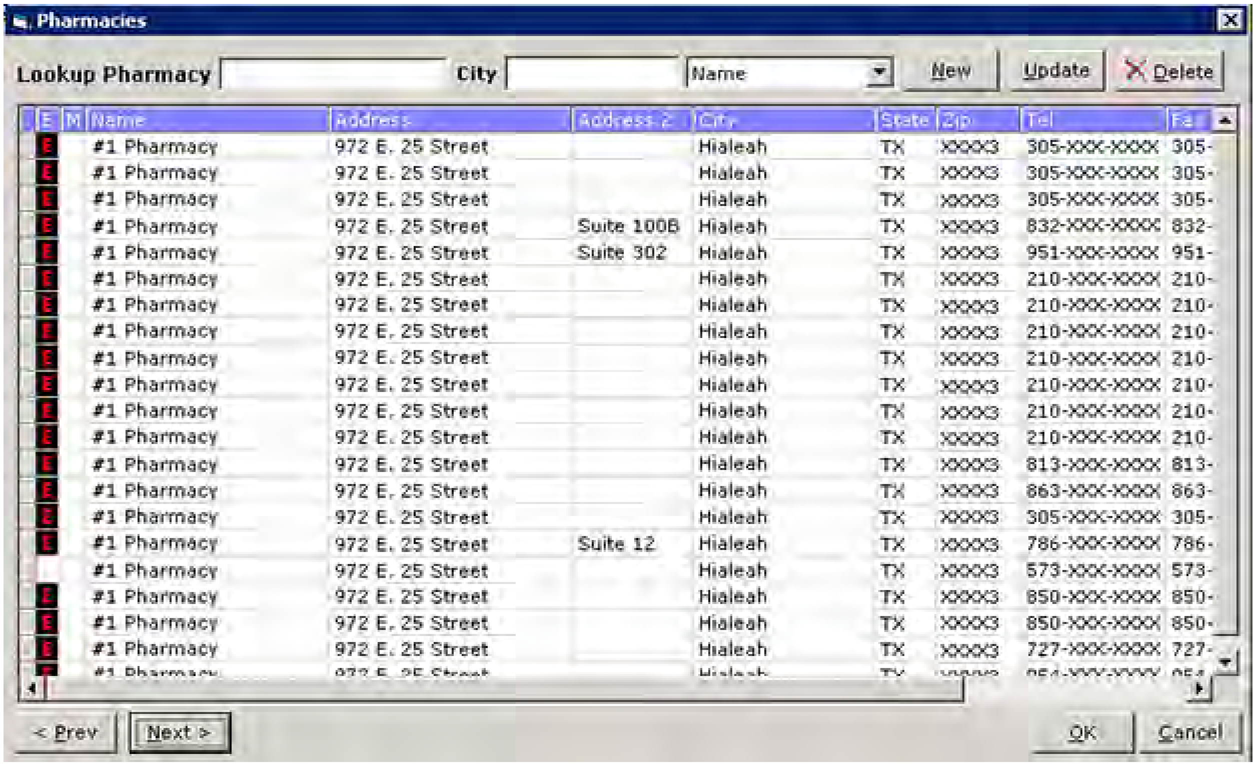
Add Pharmacies

Add pharmacies to the database so users can select them for their patients.

To add pharmacies to the database:

1. From the File menu, click *Pharmacies*.

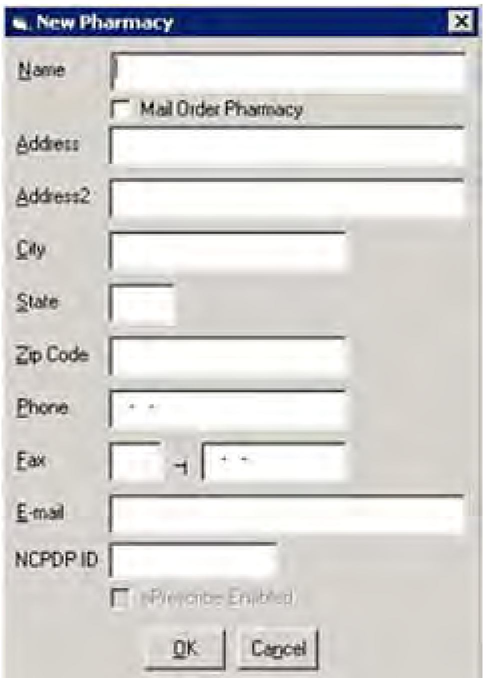
   The Pharmacies window displays:



Note: A black and red E icon displays in the E column for pharmacies that are e-Prescription-enabled. A check mark displays in the M column for mail-order pharmacies.

2. Click *New*.

   The New Pharmacy window displays:



3. Enter the information or enable the option as described in the following table:

Field	Description
Name	Enter the name of this pharmacy.
Mail Order Pharmacy	Check this box if this is a mail-order pharmacy.
Address, Address2, City, State, and ZIP Code	Enter the address of this pharmacy.
Phone	Enter the telephone number for this pharmacy.
Fax	Enter the fax number for this pharmacy in the Fax field.
	Note: Use the first Fax number field for the dial-out access number, if your practice uses one, and use 1 if the number is in a different area code.
E-mail	Enter the e-mail address for this pharmacy.
NCPDP ID	Enter the National Council for Prescription Drug Programs ID for the facility.
ePrescribe Enabled	Check this box if this pharmacy is enabled for e-Prescription.

4. Click *OK*.

   The pharmacy is added to the database.

   For more information about updating and deleting pharmacies, refer to the sections Updating Pharmacies and Deleting Pharmacies.

Updating Pharmacies

Update pharmacies in the database from the Pharmacy window.

To update a pharmacy in the database:

1. From the File menu, click *Pharmacies*.

   The Pharmacies window displays.

2. To look up a specific pharmacy:

   a. Select the criteria to use to search from the drop-down list at the top of the window.

   b. Enter the search text in the Lookup Pharmacy field.

   AND/OR

   c. Enter the city of the pharmacy for which you are searching in the City field.

   The list of pharmacies displays the results filtered by your search criteria.

3. Highlight the pharmacy to update and click *Update*.

   The Update Pharmacy window displays.

4. Modify the information as necessary.

5. Click *OK*.

   The selected pharmacy is updated.

Deleting Pharmacies

Administrators may delete pharmacies from the database.

To delete a pharmacy from the database:

1. From the File menu, click *Pharmacies*.

   The Pharmacies window displays.

2. To look up a specific pharmacy:

   a. Select the criteria to use to search from the drop-down list at the top of the window.

   b. Enter the search text in the Lookup Pharmacy field.

   AND/OR

   c. Enter the city of the pharmacy you are searching for in the City field.

   The list of pharmacies displays the results filtered by your search criteria.

3. Highlight the pharmacy to delete and click *Delete*.

   A confirmation window displays.

4. Click *Yes*.

   The selected pharmacy is deleted.

Setting Up Attorneys

From the File menu, the administrator can add, edit, and delete attorneys.

For more information about how to manage attorneys in eClinicalWorks, refer to Configure Attorneys.

Configure Attorneys

Add attorneys to the database from the File menu.

For more information about updating and deleting attorneys, refer to the following sections:

- Adding Attorneys
- Updating Attorneys
- Deleting Attorneys

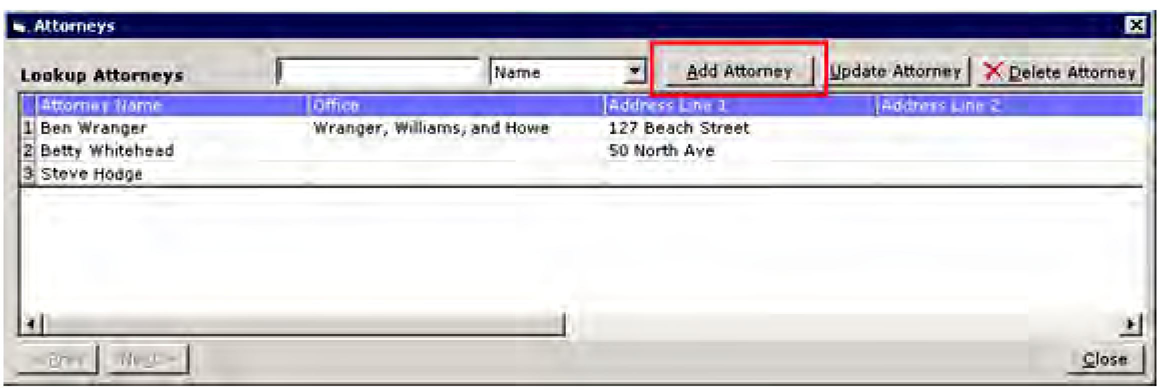
Adding Attorneys

To add an attorney:

1. From the File menu, click *Attorneys*.

   The Attorneys window displays.

2. Click *Add Attorney*:



The Add Attorney window displays:

3. Enter the information as described in the following table:

Field	Description
First Name, Last Name	Enter the name of this attorney in the First Name and Last Name fields.
Office	Enter the name of this attorney's office.
Address Line 1, Address Line 2, City, State, and ZIP	Enter the address of this attorney's office.
Tel, Fax, Contact Details, and Contact Information	Enter the contact information for this attorney.
Notes	Enter any miscellaneous notes about this attorney.

4. Click *OK*.

   This attorney is added to the system.

Updating Attorneys

Update attorney information in the database from the File menu.

To add an attorney:

1. From the File menu, click *Attorneys*.

   The Attorneys window displays.
2. Highlight the attorney whose information to update and click *Update Attorney*.

   The Update Attorney window displays.
3. Modify any information as necessary.
4. Click *OK*.

   The selected attorney's information is updated as specified.

Deleting Attorneys

Delete attorneys from the database from the File menu.

To delete an attorney:

1. From the File menu, click *Attorneys*.

   The Attorneys window displays.
2. Highlight the attorney to delete and click *Delete Attorney*.

   A confirmation window displays.
3. Click *Yes*.

   The selected attorney is deleted.

Employers

The Employer dictionary permits faster and more consistent data entry of employer information if your practice has multiple patients from the same employer.

The following section describes the employer setup, Configuring Employers.

Configuring Employers

For information about configuring employers, refer to the following sections:

- Adding Employers
- Attaching a Document to an Employer

- Viewing Documents Attached to Employers

Adding Employers

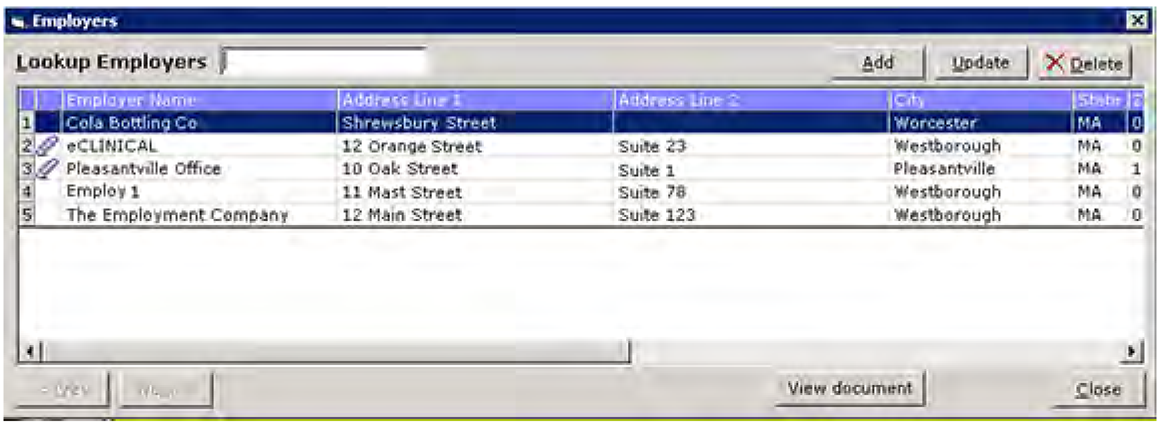
Add employers to the system from the File menu.

Note: In addition to the steps shown here, to add employers, updated, and deleted employers from the Patient Information window, click the *More* (...) next to the Employer Name field.

To add employer information:

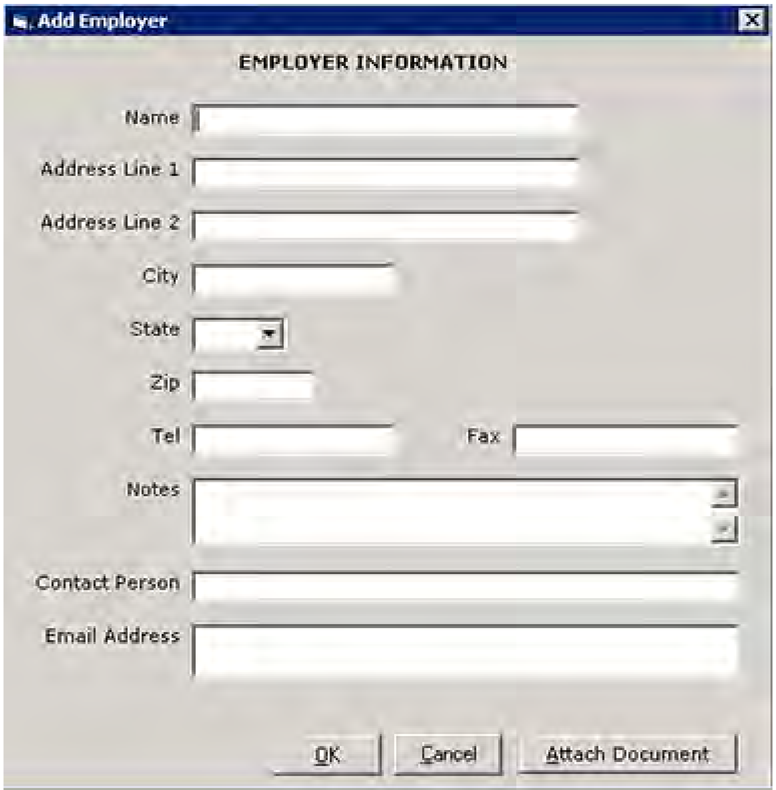
1. From the File menu, click *Employers*.

   The Employers window displays:



2. Click *Add*.

   The Add Employer window displays:



3. Enter the information as described in the following table:

Field	Description
Name	Enter the name of this employer.
Address Line 1, Address Line 2	Enter the street address for this employer.
City	Enter the city where this employer is located.
State	Select the state that this employer is located in from the State drop-down list.
ZIP	Enter the ZIP Code for this employer's location.
Tel	Enter a telephone number for this employer.
Fax	Enter a fax number for this employer.
Notes	Enter any miscellaneous notes concerning this employer.
Contact Person	Enter a designated contact person for this employer.
E-mail Address	Enter the e-mail address of the contact person for this employer.

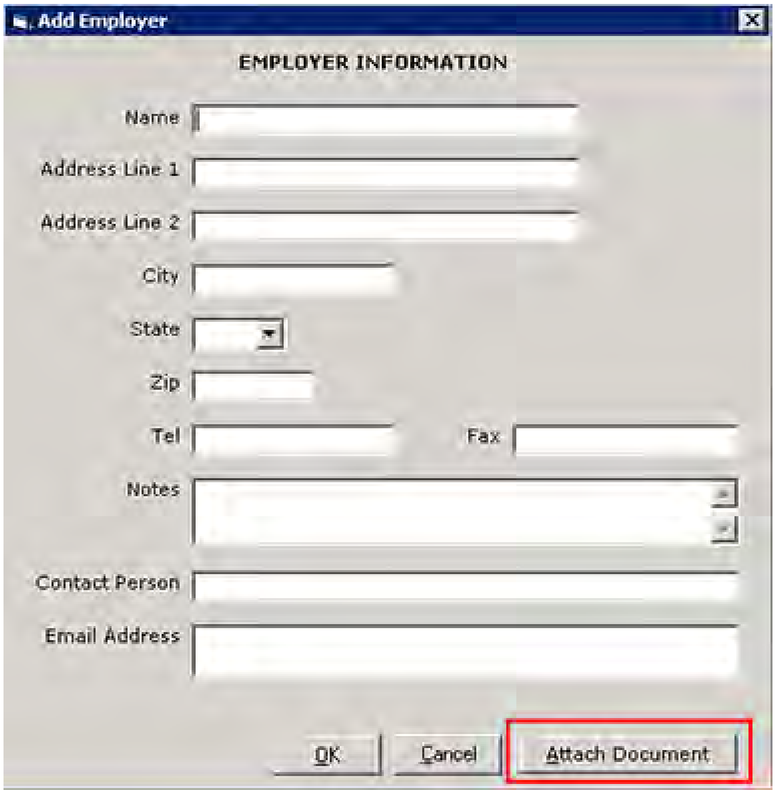
For more information about employers, refer to Attaching a Document to an Employer.

Attaching a Document to an Employer

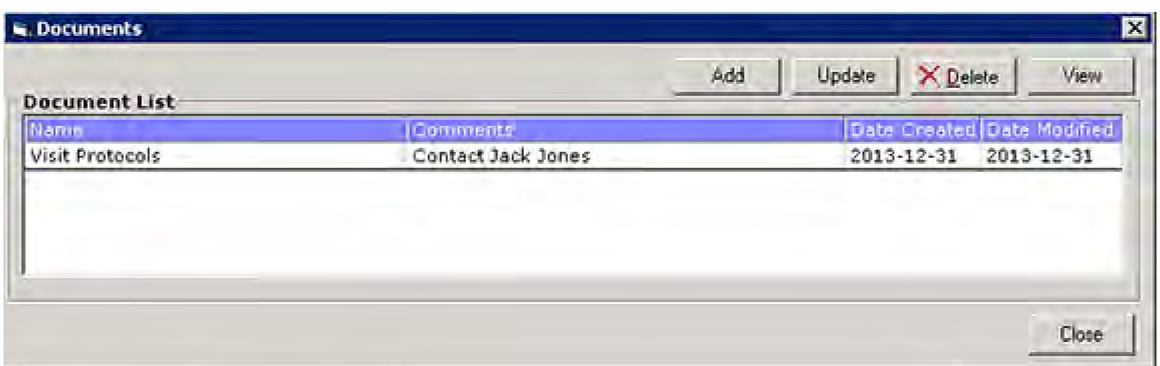
Attach documents to employers from the Document Attributes window.

To attach a document to this employer:

1. From the Add Employer window, click *Attach Document*:

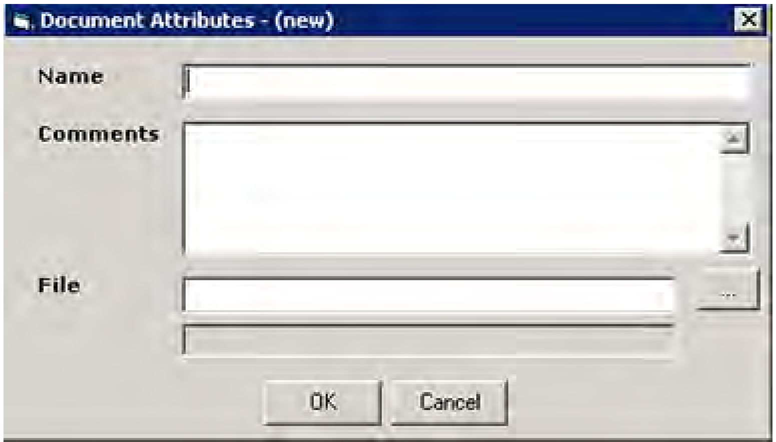


The Documents window displays:



2. Click *Add*.

The Document Attributes window displays:



a. Enter a name for this document in the Name field.

b. Enter any comments concerning this document in the Comments field.

c. Click *More* (...) next to the File field to browse for and select the appropriate document file.

The full path to the selected file displays in the gray field beneath the File field.

3. Click *OK*.

The selected file is added to the Document List.

Note: On the Employers window, a paper clip icon to the left of the employer's name indicates attached documents.

4. Click *OK*.

The employer is added to the system.

Updating Employers

Update employers in the database from the Employers window.

To update an employer's information:

1. From the File menu, click *Employers*.

The Employers window displays.

Note: A paper clip icon in the left column indicates that an employer has at least document attached to their information.

2. To search for a specific employer, enter their name in the Lookup Employers field.

3. To add, update, delete, or view documents attached to an employer from here:

Highlight the employer whose document(s) to view.

a. Click *View Document*.

The Documents window displays.

b. Add, Update, Delete, or View the documents using the buttons in the upper-right of the window.

4. Highlight the employer to update and click *Update*.

The Update Employer window displays.

5. Modify the information as necessary.
6. Click *OK*.

   The selected employer is updated.

Deleting Employers

Administrators can delete employers from the system. However, eClinicalWorks does not allow the deletion of employers that are currently associated with patients.

To delete an employer from the system:

1. From the File menu, click *Employers*.

   The Employers window displays.

2. Highlight the employer to be deleted and click *Delete*.

   A confirmation window displays.

   Note: If this employer is currently associated with a patient, a pop-up window displays to notify that you cannot delete this employer.

3. Click *Yes*.

   The selected employer is deleted.

Viewing Documents Attached to Employers

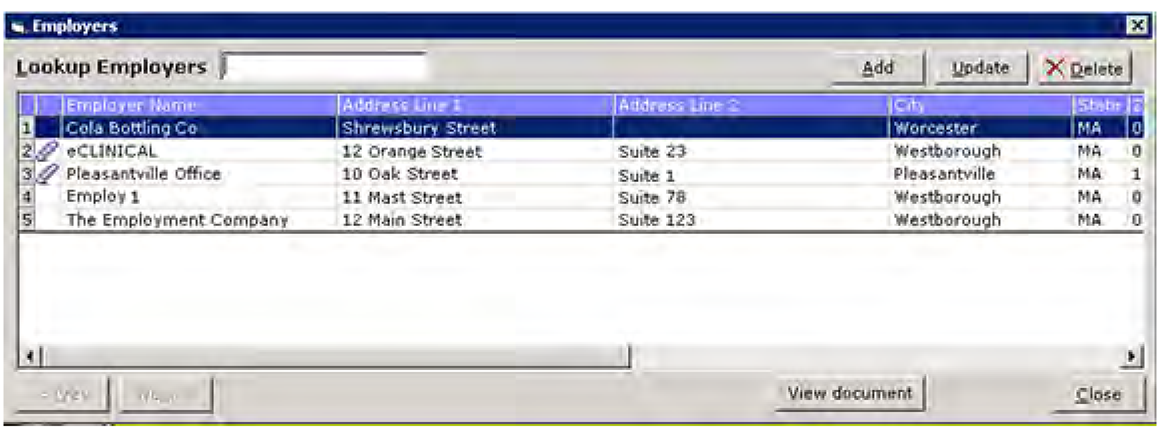
On the Employers window, a paper clip icon next to an employer's name indicates that documents are attached to that employer's record. Users can view these documents directly from the Employers window.

To view documents attached to employers:

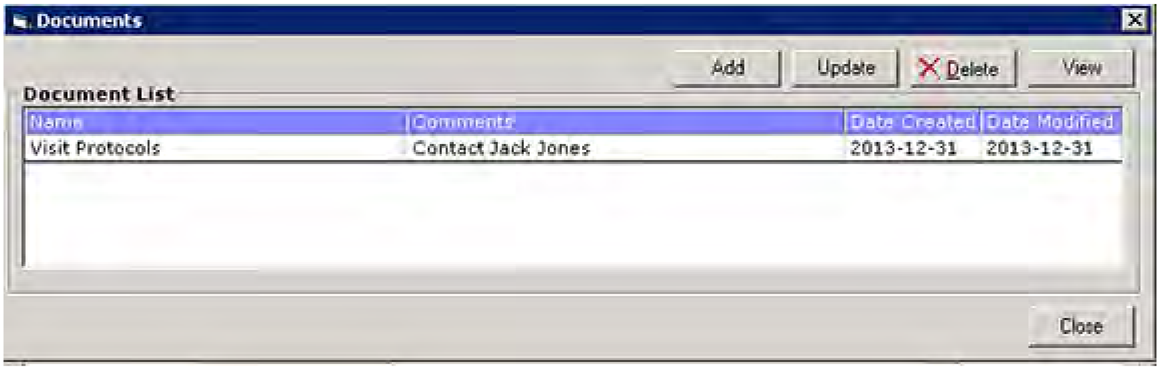
1. From the File menu, click *Employers*.

   The Employers window displays.

2. Click to highlight an employer with a document attached and click *View Document*:



The Documents window displays:



3. Highlight the document to view and click *View*.

The selected document displays.

Setting Up Case Managers

From the File menu, the administrator can add, edit, and delete case managers.

To set up case managers, refer to Configuring Case Managers.

Configuring Case Managers

To create cases for patients, users must select a case manager. Case managers are set up and maintained from the File menu in eClinicalWorks.

For more information, refer to the sections:

- Adding Case Mangers
- Updating Case Managers
- Deleting Case Managers

For more information about Case Management, refer to the *Front Office Users Guide*.

Adding Case Mangers

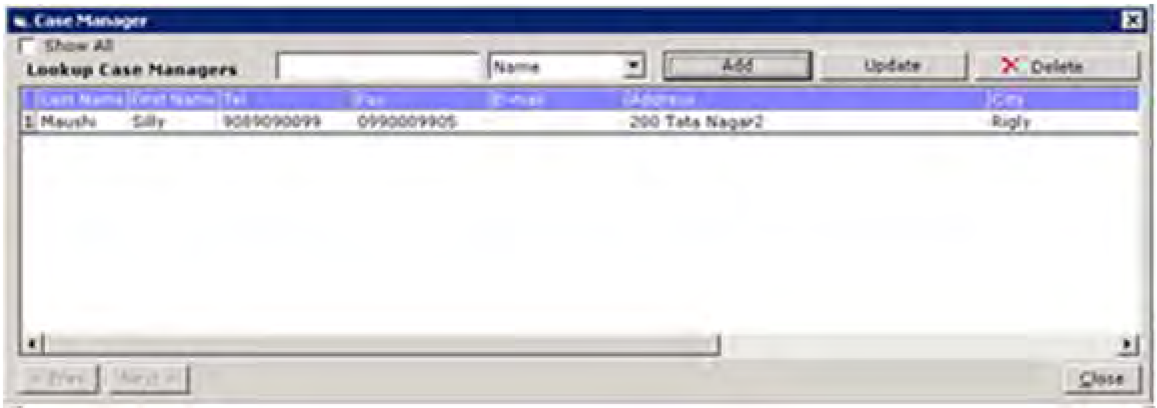
Add case managers to the database from the File menu.

To add a case manager:

1. From the File menu, click *Case Managers*.

The Case Manager window displays.

2. Click *Add*:



Note: To display all cases here, check the *Show All* box.

The Case Manager window displays:

3. Enter the information as described in the following table:

Feature	Description
First Name	Enter the first name of this case manager.
Last Name	Enter the last name of this case manager.
DOB field	Enter the date of birth of this case manager in mm/dd/yyyy format.
Address Line 1	Enter the first line of the case manager’s address.
Address Line 2	Enter the second line of the case manager’s address (office number, PO Box).
City	Enter the city.

Feature	Description
State	■ Click the drop-down list to select the state. **OR** ■ Select the *Same as Patient* option.
ZIP	Enter the ZIP code.
Tel	Enter the case manager's telephone number, with area code.
Fax	Enter a fax number for the case manager.
E-mail	Enter an e-mail address for the case manager.
Contact Preference	To select this case manager's preferred method of contact, click one of the radio buttons in this section e-mail, fax, or phone.
Notes	Enter any miscellaneous notes about this case manager in the Notes field.

4. Click *OK*.

This case manager is added to the system.

Updating Case Managers

Update database information about existing case managers from the File menu.

To update a case manager:

1. From the File menu, click *Case Managers*.

The Case Manager window displays.

2. Highlight the case manager whose information will be updated and click *Update*.

The Case Manager window displays.

3. Modify any information as necessary.

4. Click *OK*.

The selected case manager's information is updated as specified.

Deleting Case Managers

Delete case managers from the database from the File menu.

To delete a case manager:

1. From the File menu, click *Case Managers*.

The Case Manager window displays.

2. Highlight the case manager to delete and click *Delete*.

A confirmation window displays.

3. Click *Yes*.

   The selected case manager is deleted from the database.

Setting Up Guarantors

From the File menu, the system administrator can look up, add, edit, and delete guarantors.

For more information about guarantors, refer to:

- Looking Up Guarantors
- Adding Guarantors
- Viewing Guarantor Accounts
- Copying Guarantor Address Changes to Associated Patients

Looking Up Guarantors

Look up Guarantors and patients from the File menu.

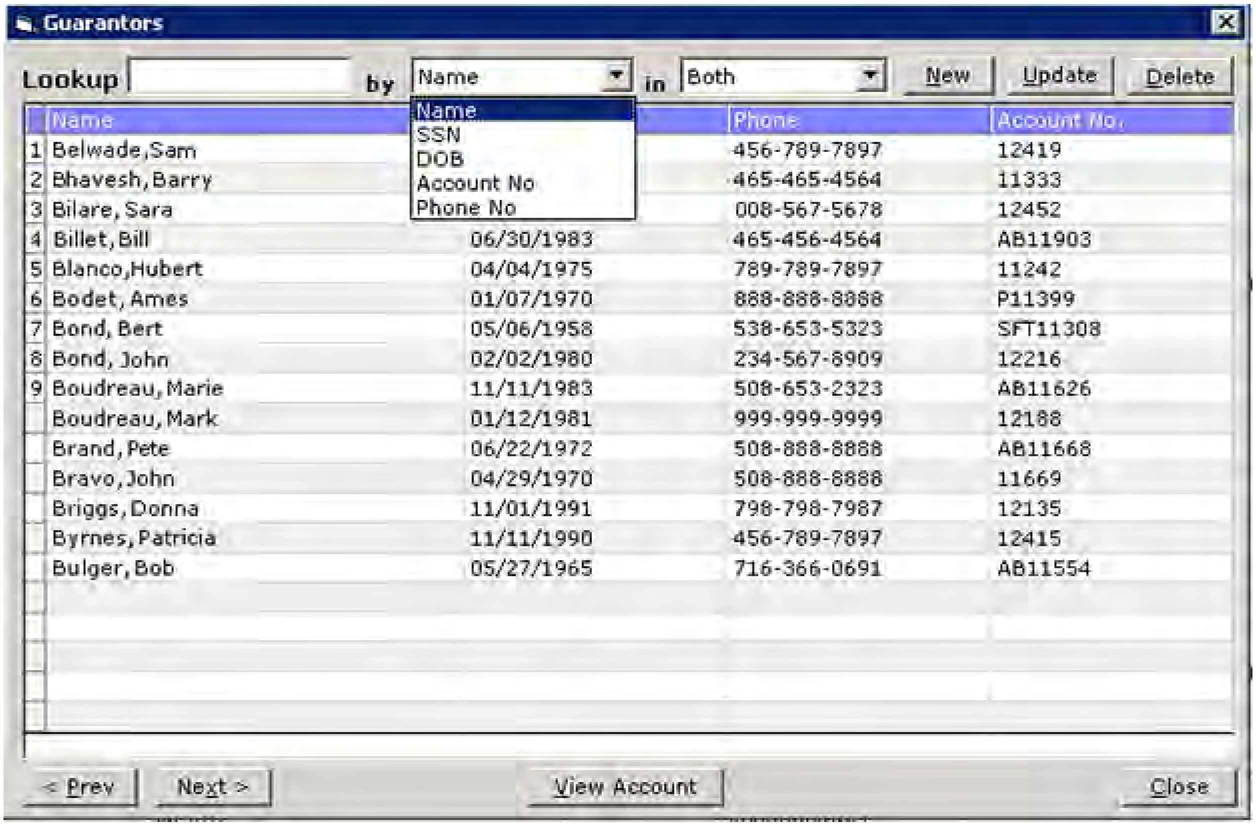
To look up a guarantor:

1. From the File menu, click *Guarantors*.

   The Guarantors window displays.

2. Select one of the following criteria from the *by* drop-down list:

   - **Name** - Search by the name of a guarantor/patient.
   - **SSN** - Search by the Social Security Number of a guarantor/patient.
   - **DOB** - Search by the date of birth of a guarantor/patient.
   - **Account No** - Search by the account number of a guarantor/patient.
   - **Phone No** - Search by the phone number of a guarantor/patient.



3. Select the database(s) to search from the *in* drop-down list:
   - **Guarantors** - Search in the guarantor database.
   - **Patients** - Search in the patient database.
   - **Both** - Search in both the guarantor and patient databases.
4. Enter the text to search for in the Lookup field.

   Accounts that match your criteria display in real time as you type.

Adding Guarantors

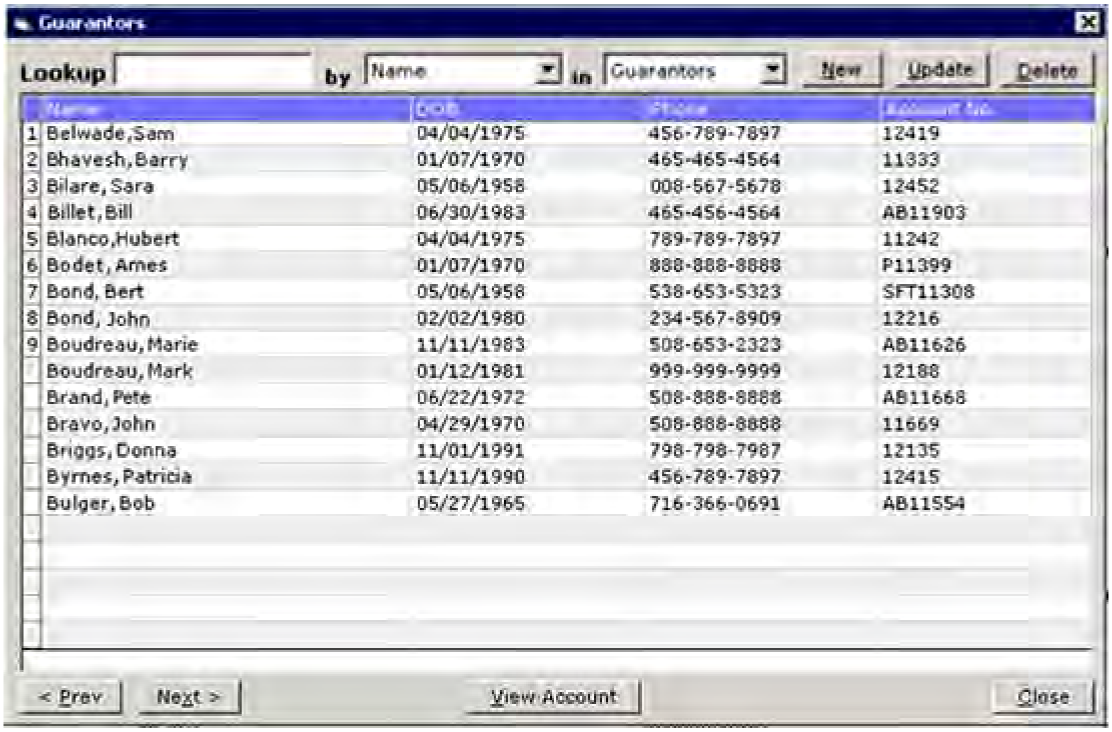
To list a guarantor in the Guarantors Lookup window, add the guarantor information to eClinicalWorks.

Note: Administrators may also add Guarantors from the Patient Demographics window.

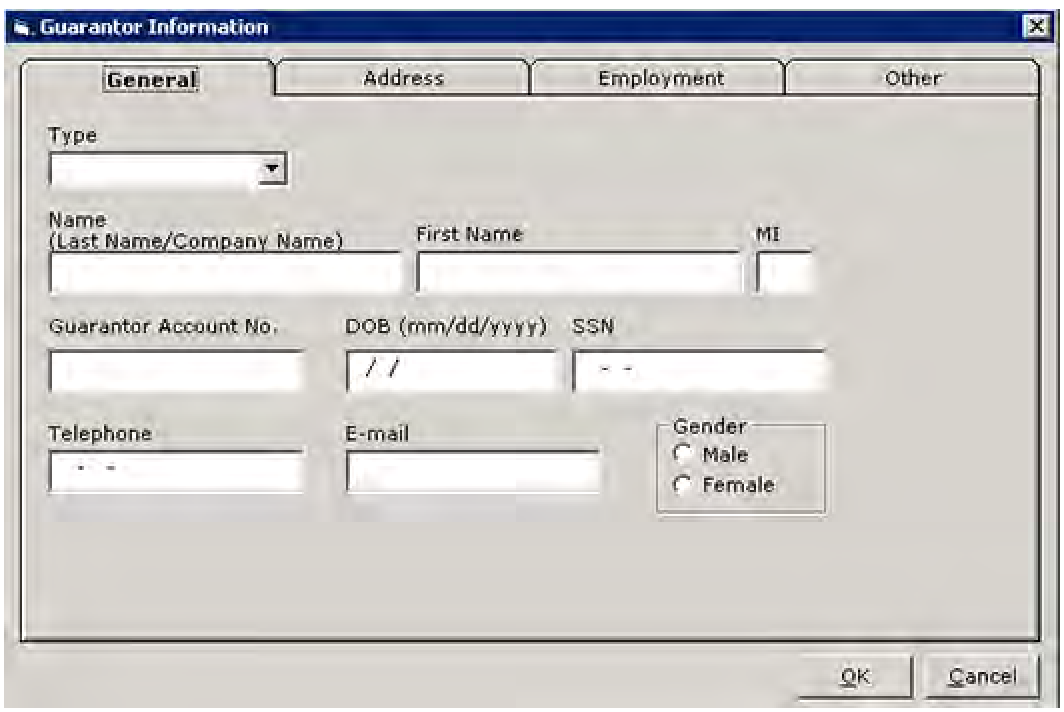
To add a guarantor:

1. From the File menu, click *Guarantors*.

   The Guarantors window displays.
2. Click *New*:



The Guarantor Information window displays:

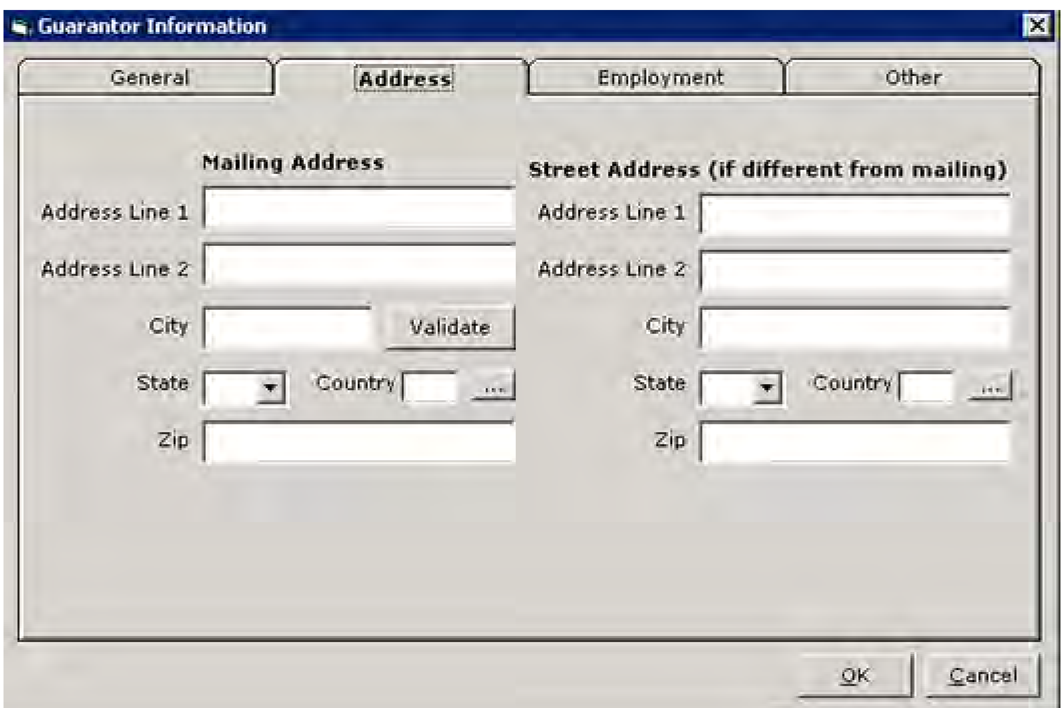


3. On the General tab, select the type of guarantor you are adding from the *Type* drop-down list.
4. Enter the following information:

Guarantor Information Field	Information
Name (Last Name/Company Name)	Enter the last name of an individual or a company name in the *Name* field.
First Name	Enter an individual's first name.
MI	Enter an individual's middle initial.
Guarantor Account No.	The system assigns this number automatically when adding a new guarantor. If the guarantor is a patient in your practice, that person's account number automatically displays in the Control No. field.
DOB	If the guarantor is an individual, enter that person's date of birth in mm/dd/yyyy format.
SSN	If the guarantor is an individual, enter that person's Social Security Number.
Telephone	Enter the guarantor's telephone number.
E-Mail	Enter the guarantor's e-mail address.
Gender	If the guarantor is an individual, select *Male* or *Female* to indicate that person's gender.

5. Click the *Address Tab*.

The Address options display:



6. Enter the following information:

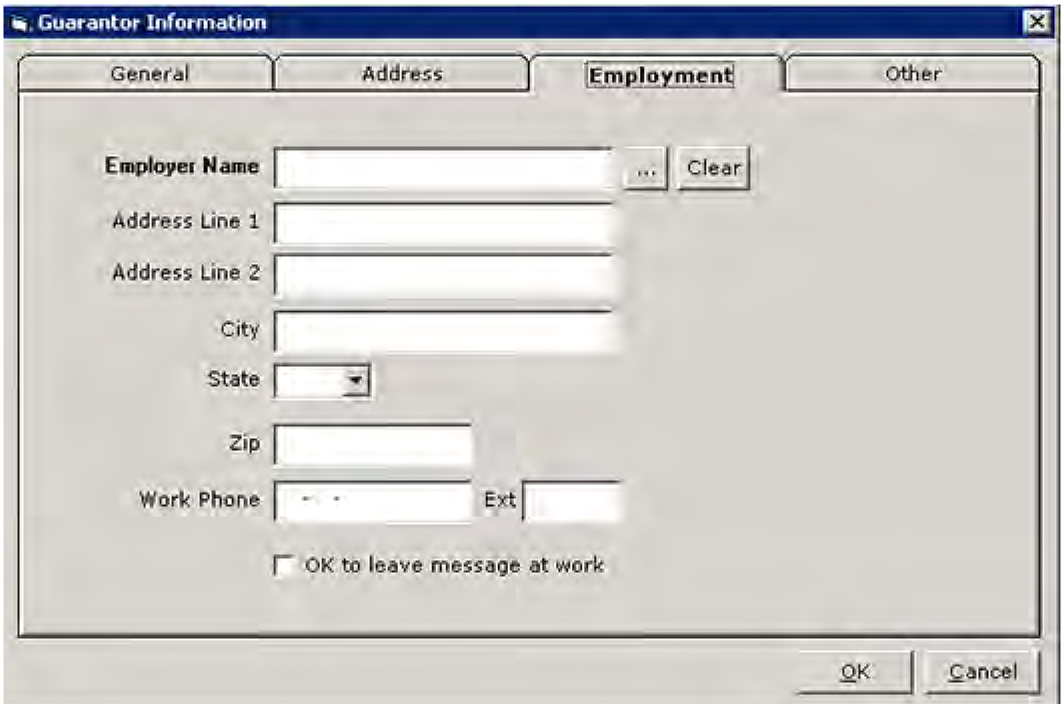
IMPORTANT! If you do not have the complete address information for this guarantor, do not enter anything into these fields. If this information is incomplete, errors occur on claims that include this guarantor.

a. Enter the guarantor's street address and mailing street address (if the mailing address differs from the street address) in the Address Line 1, Address Line 2, City, State, and ZIP fields.

b. To add a country code, click *More* (...) next to the Country field and select the code.

7. Click the *Employment* tab.

The Employment options display:



8. Enter the following information:

a. Click *More* (…) next to the Employer Name field to select an employer from the list.

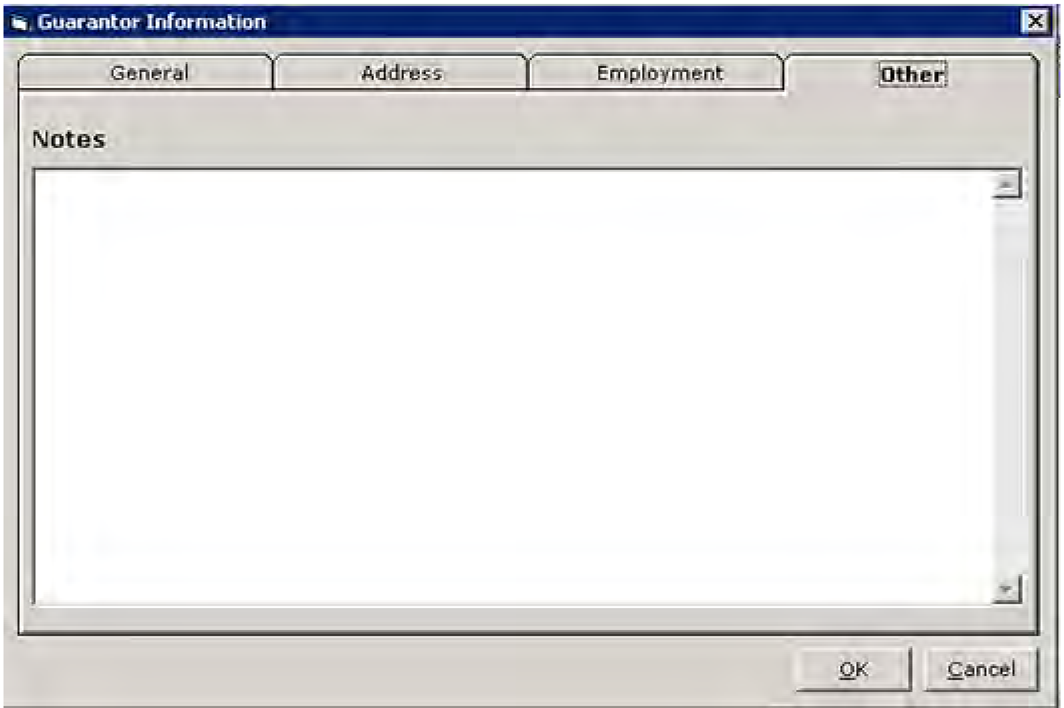
b. Enter the guarantor’s employer address in the Address Line 1, Address Line 2, City, State, and ZIP fields.

c. Enter the guarantor’s work phone number in the Work Phone and Ext fields.

d. Check the *OK to leave message at work* box if the guarantor allows calls at work.

9. Click the *Other* tab.

The *Other* window displays:



a. Enter any miscellaneous notes concerning this guarantor here.

b. Click *OK*.

This guarantor's information is saved.

Note: Set Guarantor Information fields as mandatory from the Patient menu > Configure Demographics Mandatory fields. An asterisk (*) indicates a mandatory field; the user cannot finish adding the guarantor without completing the mandatory fields.

Viewing Guarantor Accounts

View the accounts that a guarantor is responsible for directly from the Guarantors window.

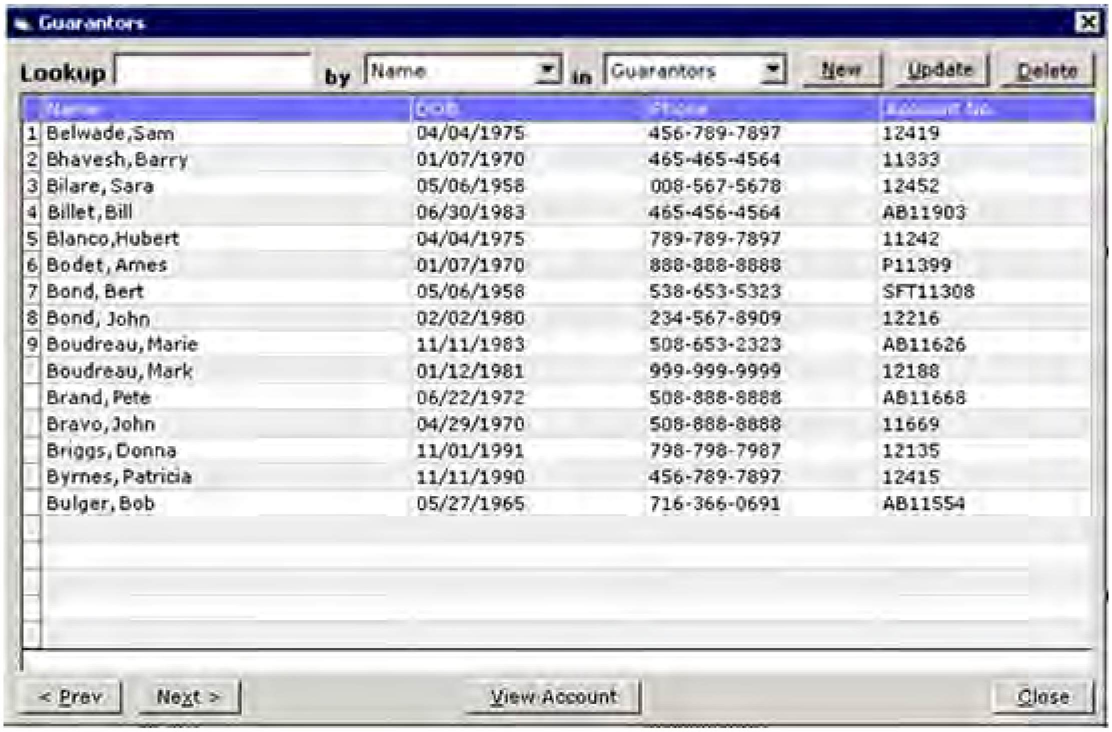
For more information about updating and deleting guarantors, refer to the following sections:

- Updating Guarantors
- Deleting Guarantors

To view a guarantor's account:

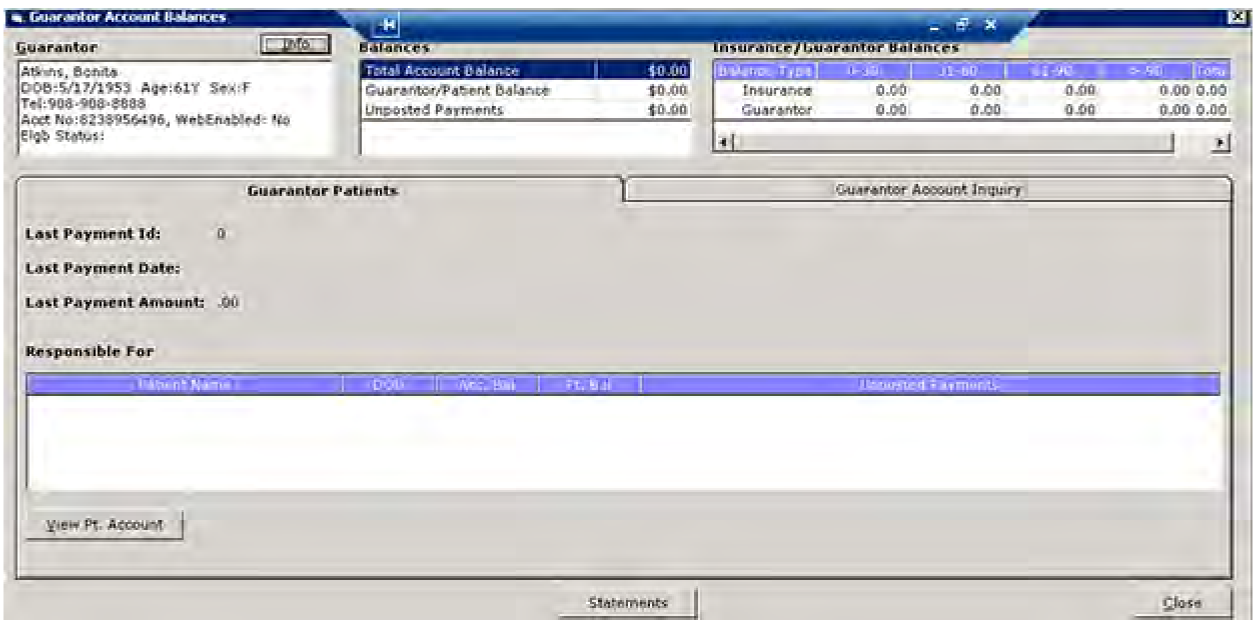
1. From the File menu, click *Guarantors*.

The Guarantors window displays:



2. Highlight the guarantor whose accounts to view and click *View Account*.

   The Guarantor Account Balances window displays:

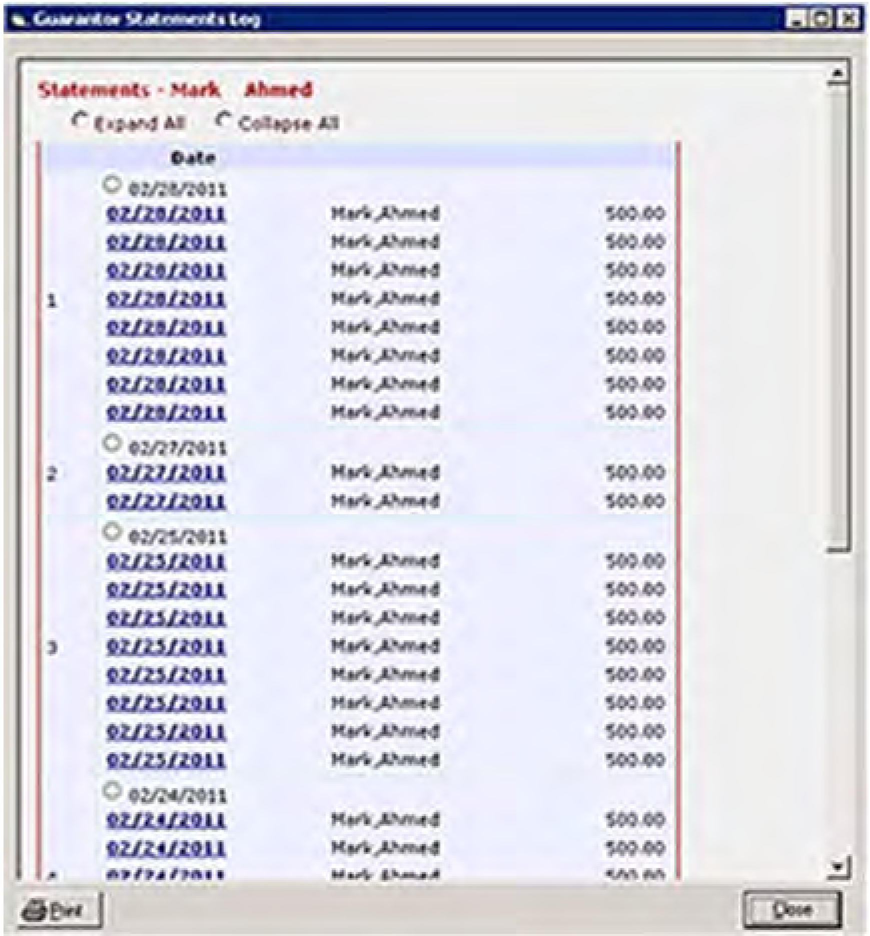


3. To view the account of a patient for whom this individual is a guarantor, highlight the patient and click *View Pt Account*.

   The Patient Inquiry Detail window displays.

   For more information, refer to the *Billing Users Guide*.

4. To view the Guarantor Statements Log, click *Statements*:



Note: To expand or collapse the entries for a specific date, click the gray arrow (<>) icon to the left of the date heading. To expand or collapse all the entries simultaneously, click the *Expand All* or *Collapse All* radio button.

Note: To view the details for a specific transaction, click the blue date link to the left of that transaction.

5. To view account details for this guarantor:

a. Click the *Guarantor Account Inquiry* tab.

b. Set the filters at the top of the tab and click *Lookup* to search for specific claims.

c. *(Optional)* To copy the information to a text or Excel file, click *Copy*.

d. *(Optional)* To view the claim for a specific encounter, highlight the encounter and click *View Details*.

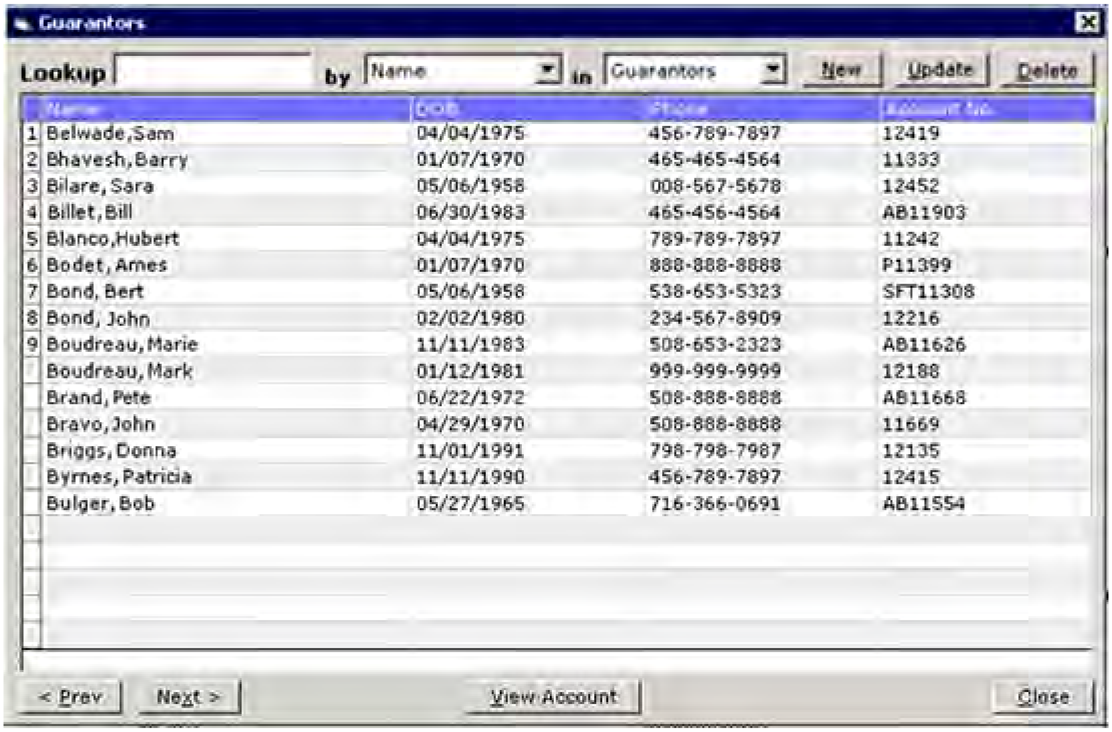
Updating Guarantors

Update guarantor information from the Guarantors window.

To update a guarantor:

1. From the File menu, click *Guarantors*.

   The Guarantors window displays:



2. Highlight the guarantor whose information to update and click *Update*.

   The Guarantor Information window displays.

3. Update this guarantor's information as necessary.

4. Click *OK*.

   The selected guarantor's information is updated as specified.

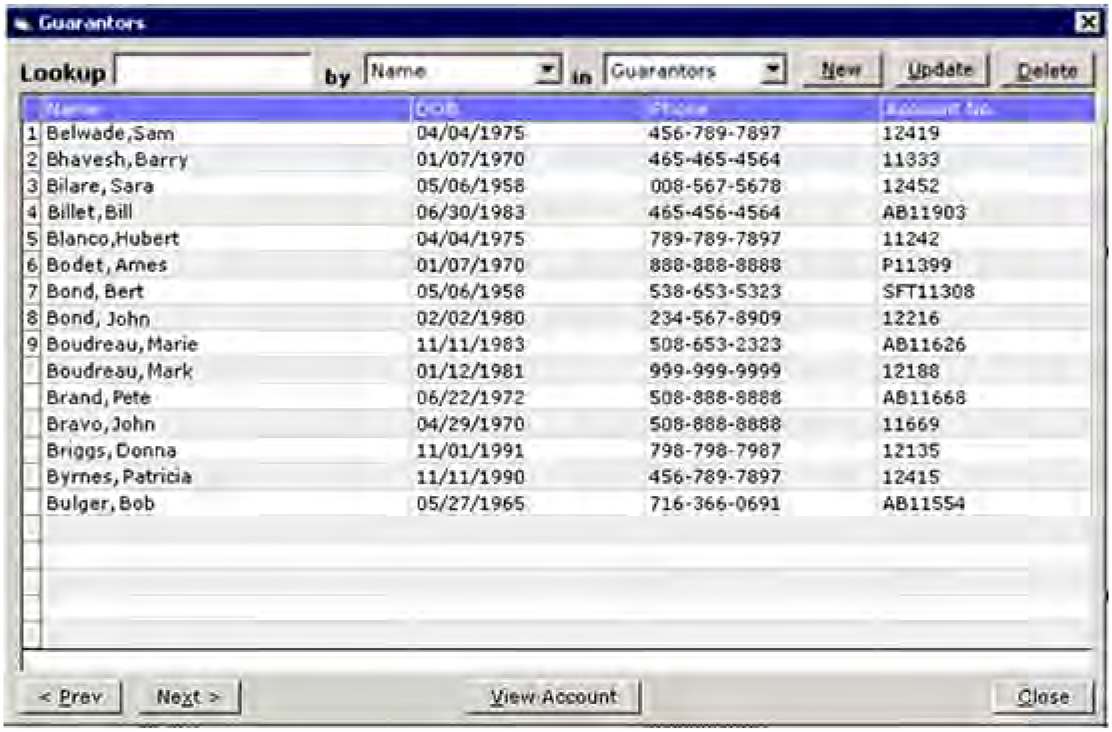
Deleting Guarantors

Delete existing guarantors from the Guarantors window.

To delete a guarantor:

1. From the File menu, click *Guarantors*.

   The Guarantors window displays:



2. Highlight the Guarantor to delete and click *Delete*.

   A confirmation window displays.

3. Click *Yes*.

   The selected guarantor is deleted.

Copying Guarantor Address Changes to Associated Patients

When changing a guarantor's address, copy the new address to all patients that have the guarantor.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 0171_UK.

For more information about enabling this feature, refer to the Options Tab.

To copy guarantor address changes to associated patients:

1. From the File menu, click *Guarantors*.

   The Guarantors window displays.

2. Highlight a guarantor and click *Update*.

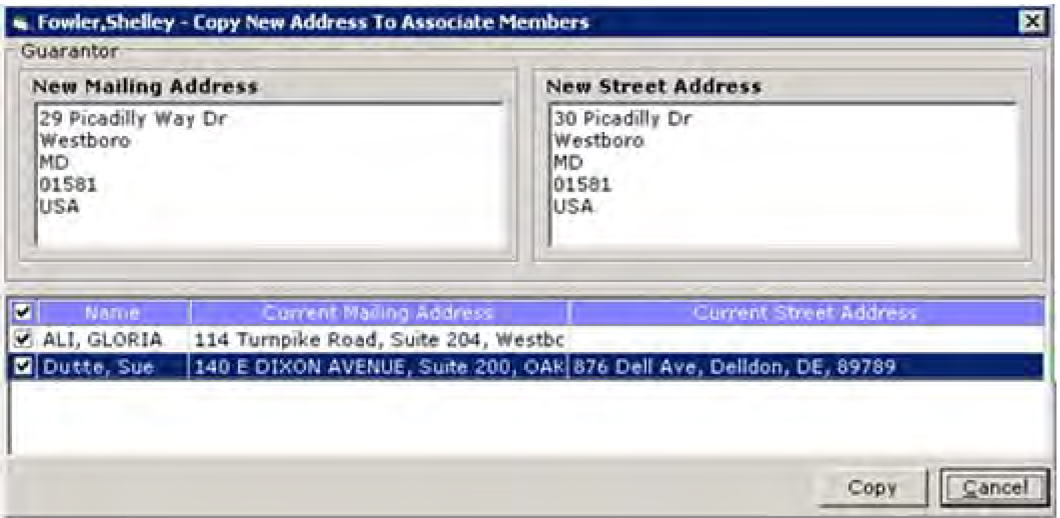
   The Guarantor Information window displays.

3. Click the *Address* tab.

   The Address options display.

4. Alter the information and click *OK*.

The *Copy New Address To Associated Members* window displays:



5. Check the box(es) next to that patient(s) to which you want to copy this new address.

6. Click *Copy*.

This new address is copied to all selected patients.

Facilities

The system administrator can add facilities, enter the corresponding start date, exclude charges at specific facilities from statements, and set up facilities for Ahlers Family Planning, all from the File menu.

The following sections describe how to administer facilities:

- Adding Facilities
- Facility Groups

Adding Facilities

Add a facility's information to the system as described in this section.

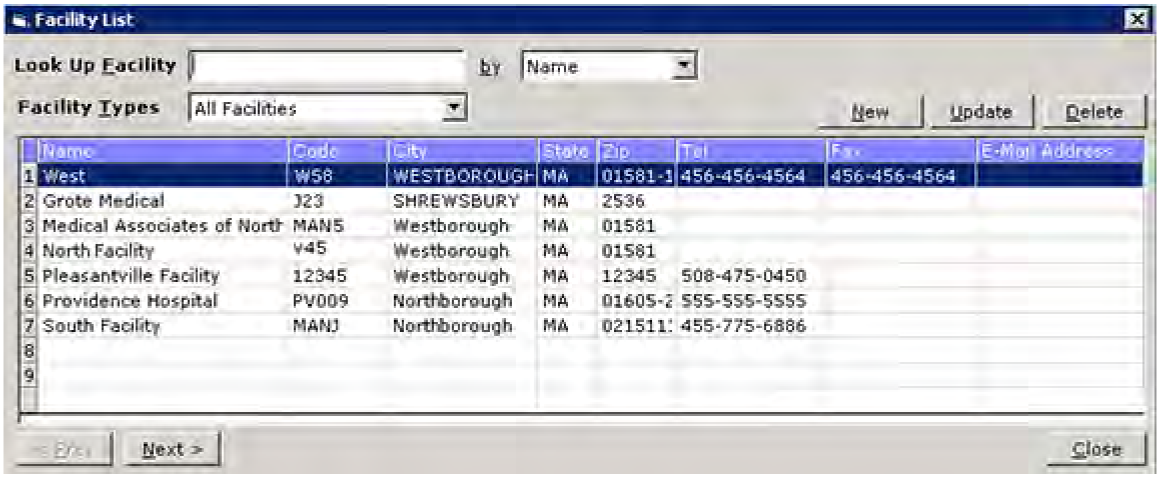
For more information about Facilities, refer to the following sections:

- Adding Facility-Lab ID Numbers
- Overriding the Default Sales Tax Percentage
- Entering the State Immunization ID
- Entering Facility Start Date
- Excluding Charges at Specific Facilities from Statements
- Setting Up Facilities for Ahlers Family Planning Reporting
- Updating Facilities
- Deleting Facilities

To add a facility:

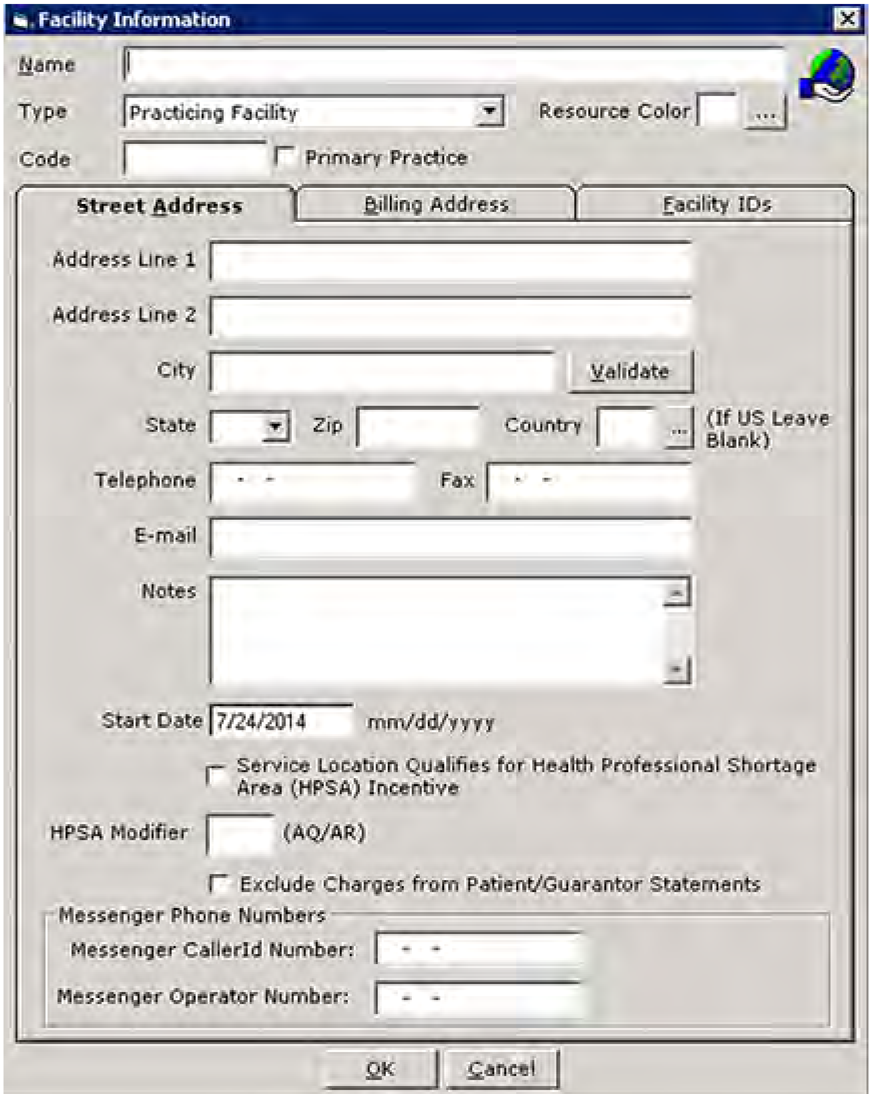
1. From the File menu, click *Facilities*.

   The Facility List window displays:



2. Click *New*.

   The Facility Information window displays:



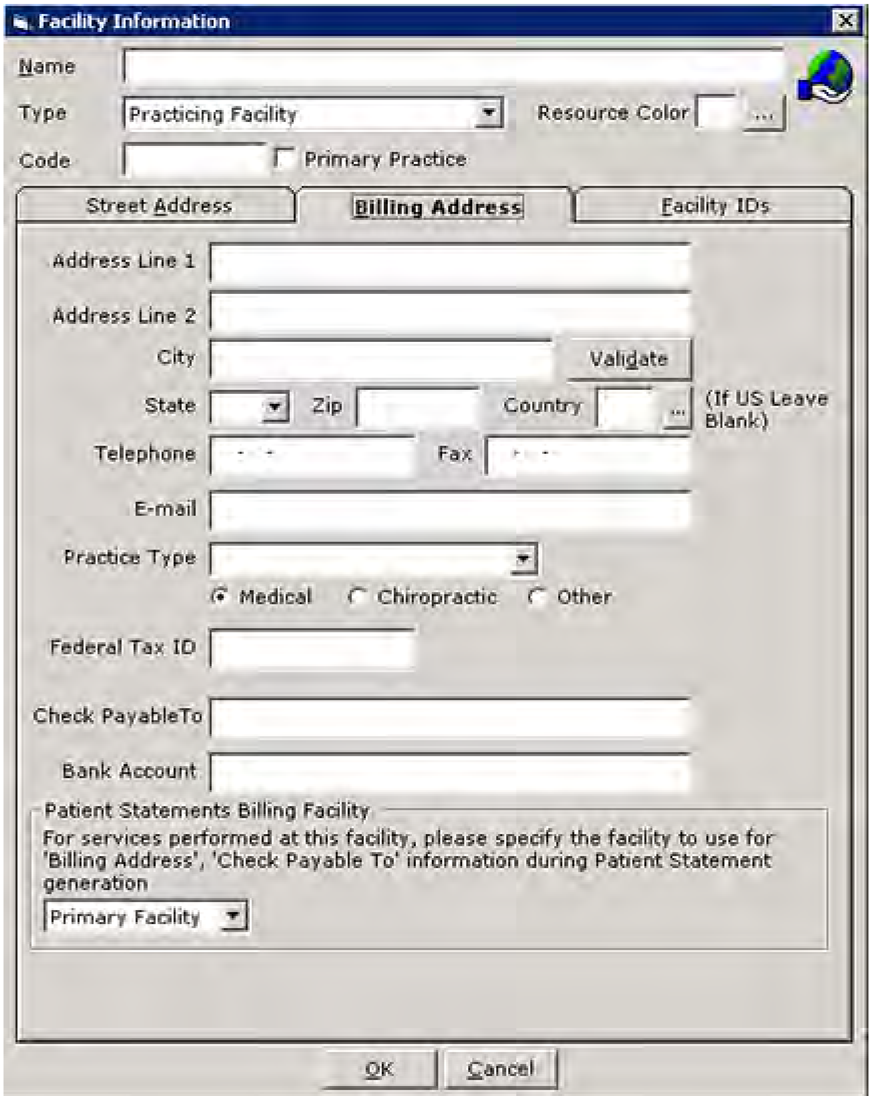
3. Enter facility information and enable options as described in the following table:

Field	Description
Name	Enter the facility's name.
Type	Select one of the following types of facilities from the Type drop-down list: ■ Practicing Facility ■ Consulting Facility ■ Hospital Group
Resource Color	To select the background color that displays for this facility on the Resource Scheduling window click *More* (...) next to the Resource Color option.
Code	Enter an abbreviation of the name in the Code field. The system uses this code to identify the facility in many windows throughout the system.

Field	Description
Primary Practice	Check the *Primary Practice* box if this is the primary facility for your practice.
Address Line 1, Address Line 2	Enter the street address for this facility.
City	Enter the city where this facility is located.
State	Select the state where this facility is located from the State drop-down list.
Zip	Enter the ZIP Code for this facility location.
Tel	Enter a telephone number for this facility in the ###-###-#### format
Fax	Enter a fax number for this facility in the ###-###-#### format.
E-mail	Enter the e-mail address for this facility.
Notes	Enter any miscellaneous notes concerning this employer.
Start Date	Enter the date that you began using this facility with eClinicalWorks in the Start Date field in the mm/dd/yyyy format.
Service Location Qualifies	Check this option if this facility qualifies for a Health Professional Shortage Area (HPSA) incentive and enter this facility's HPSA modifier in the HPSA Modifier field.
HPSA Modifier	Enter this facility's HPSA modifier (only available if the Service Location Qualifies box is checked).
Exclude Charges from Patient/Guarantor Statements	Check this option to exclude charges at this facility from being included on statements. For more information about this feature, refer to Excluding Charges at Specific Facilities from Statements.
Messenger CallerID Number	Enter an eClinicalMessenger Caller ID number.
Messenger Operator Number	Enter an eClinicalMessenger Operator Number here.

4. Click the *Billing Address* tab.

The Billing Address options display:



Note: Billing Address information is important for insurance claims, payments, and patient statements.

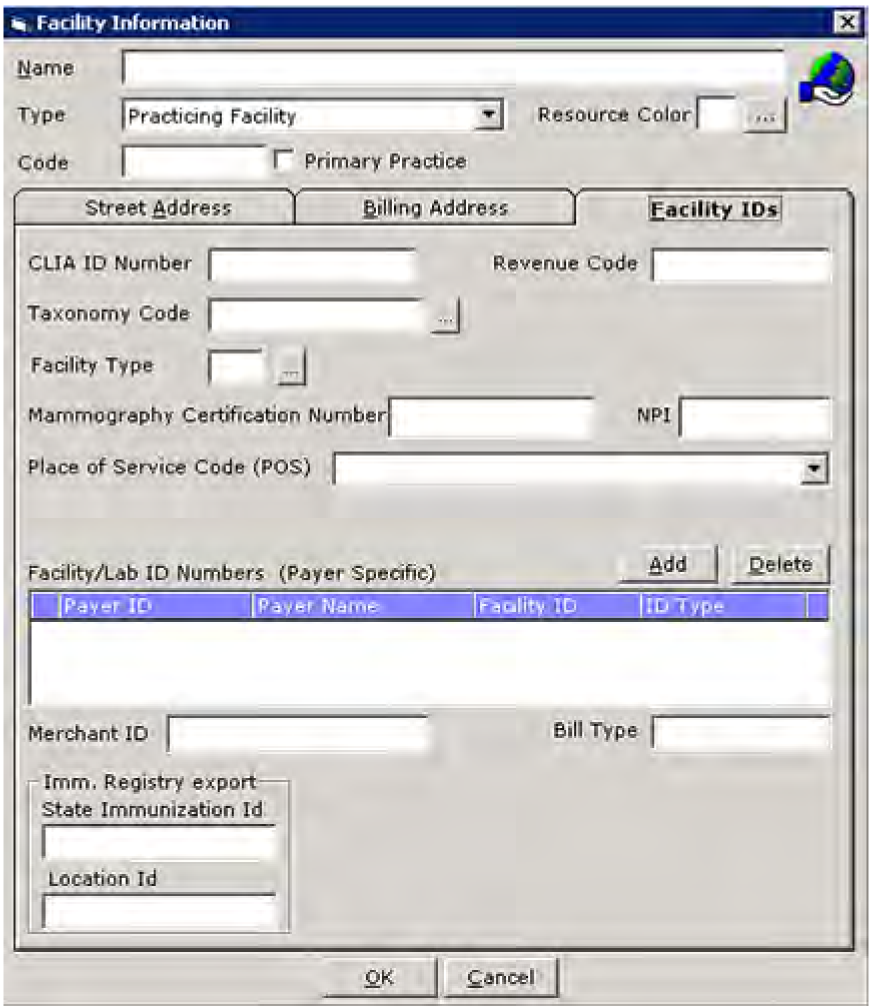
5. Enter facility billing information and enable options as described in the following table:

Field	Description
Address Line 1, Address Line 2, City, State, and Zip	Enter the facility's billing address.
Tel	Enter a billing-related telephone number (if applicable) for this facility in the ###-###-#### format.
Fax	Enter a billing-related fax number (if applicable) for this facility in the ###-###-#### format.
E-mail	Enter the e-mail address related to billing, if applicable) for this facility.

Field	Description
Practice Type	**1.** From the drop-down list, select the type of practice operating from this facility. **2.** Click one of the radio buttons below the Practice Type drop-down list to specify whether this practice is medical in nature, chiropractic, or other.
Federal Tax ID	Enter the federal tax ID for this facility.
Check Payable To	Enter how checks to this facility should be made payable.

6. Click the *Facility IDs* tab.

The Facility IDs options display:



7. Enter Facility ID option information and enable options as described in the following table:

Field	Description
CLIA ID Number	If this facility performs in-house labs, enter the CLIA ID.
	Note: The CLIA number is the Facility Lab ID # from the Department of Public Health. The CLIA numbers are waived for practices that do not do their lab work in-house.
Revenue Code	Enter a revenue code for this facility here, if applicable.
Taxonomy Code	To select a taxonomy code for this facility, click *More* (...) next to the Taxonomy Code field and select a code from the Taxonomy Codes window.
Facility Type	To select a type for this facility, click *More* (...) next to the Facility Type field and select a type from the Facility Type ID Codes window.
Mammography Certification Number	Enter the certification number if this facility performs mammograms.
NPI	Enter the NPI number for this facility here.
Place of Service Code (POS)	Select the *Place of Service* code from the drop-down list.
	Note: A POS code is required for all insurance claims.
Facility/Lab ID Numbers	Add Lab ID numbers for this facility. For more information, refer to Adding Facility-Lab ID Numbers.
Merchant ID	Enter the merchant ID.
Bill Type	Enter the bill type for this facility here, if applicable. This information is used on UB claims.
Imm. Registry export State Immunization Id	Enter a state immunization registry ID number here. The system uses this information exporting immunization information to the state registry.
Location Id	Enter a location ID in this field. Location IDs are required for facilities exporting immunizations to the Florida state immunization registry.
Sales Tax	The sales tax percentage for this facility displays.
Override Sales Tax for this facility	Override the sales tax for this facility. For more information, refer to Overriding the Default Sales Tax Percentage.

Adding Facility-Lab ID Numbers

Add Lab ID numbers for this facility from the Facility IDs tab on the Facility Information window.

To add Facility/Lab ID Numbers:

1. From the Facilities Information window, Facility IDs tab, click *Add*.

   The system adds a blank row to the Facility/Lab ID Numbers (Payer Specific) section.

2. Enter the information as described in the following table:

Field	Description
Payer ID column	Enter the ID for this payer.
Payer Name column	Enter the name for this payer.
Facility ID column.	Enter the ID for this facility.

3. Click in the small column to the right of the ID Type column.

   The Provider ID Type Codes window displays.

4. Highlight the *ID Type Code* and click *OK*.

   The selected ID Type Code is added to the ID Type field.

   Note: The ID Type is always LU except for MA Medicare and BCBS submitted through the Emdeon and McKesson Clearinghouses. The MA Medicare ID Type is 1J and BCBS is 1B.

5. Repeat steps 1 - 4 until all Facility/Lab ID Numbers are added.

   Note: Medicare and Blue Shield normally issues the Facility/Lab ID Numbers at the bottom of the window to facilities such as hospitals, nursing homes, and surgical day centers.

Overriding the Default Sales Tax Percentage

Specify the sales tax percentages for each facility in the Facility Information window.

To override the default sales tax percentage:

1. From the Facilities Information window, Facility IDs tab, check the *Override Sales Tax for this Facility* box.

   A blank % (percent) field displays to the right of this check box.

2. Enter the Sales Tax percentage for this facility in the % field.
3. All claims for this facility that include a Sales Tax Current Procedural Terminology (CPT®)* will be based on the percentage entered here.

Entering the State Immunization ID

Specify the state immunization ID for the facility from the Facility Information window.

1. From the Facilities Information window, Facility IDs tab, enter the state immunization ID for this facility in the State Immunization ID field.
2. Click *OK*.

   The state immunization ID is added to the system.

Entering Facility Start Date

Enter a Start Date for each facility. The system uses this information for reporting purposes.

To enter a facility start date:

1. From the File menu, click *Facilities*.

   The Facility List window displays.

2. Click *New* to create a new facility, or highlight an existing facility and click *Update*.

   The Facility Information window displays.

3. Enter the date the practice began to use this facility with eClinicalWorks (in mm/dd/yyyy format) in the Start Date field.

4. Click *OK*.

   The Start Date is recorded for this facility.

Excluding Charges at Specific Facilities from Statements

The option is available to exclude charges at specific facilities from Patient and Guarantor Statements. This is useful for practices that collect all charges up front, and whose patients do not want statements to be sent to them with charges indicating treatment (*e.g.,* minors at a family planning clinic).

Practices using this feature should create a Facility Group that does not include any facilities that exclude charges — use this Facility Group to create statements.

To exclude charges at a facility from statements:

1. Enable the exclusion of charges for the facility:

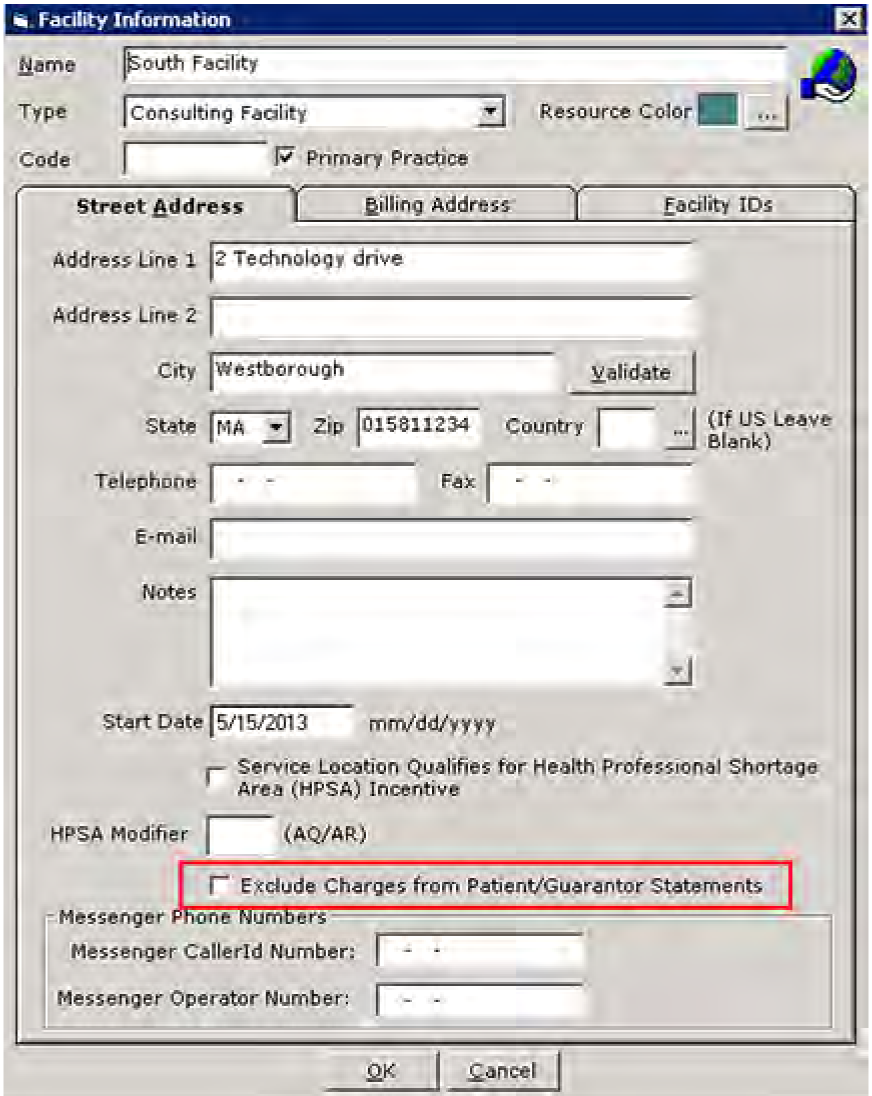
   a. From the File menu, click *Facilities*.

      The Facilities List window displays.

   b. Highlight the facility for which you want to exclude charges and click *Update*.

      The Facility Information window displays.

   c. Check the *Exclude Charges from Patient/Guarantor Statements* box:



d. Click *OK* to save your changes and close this window.

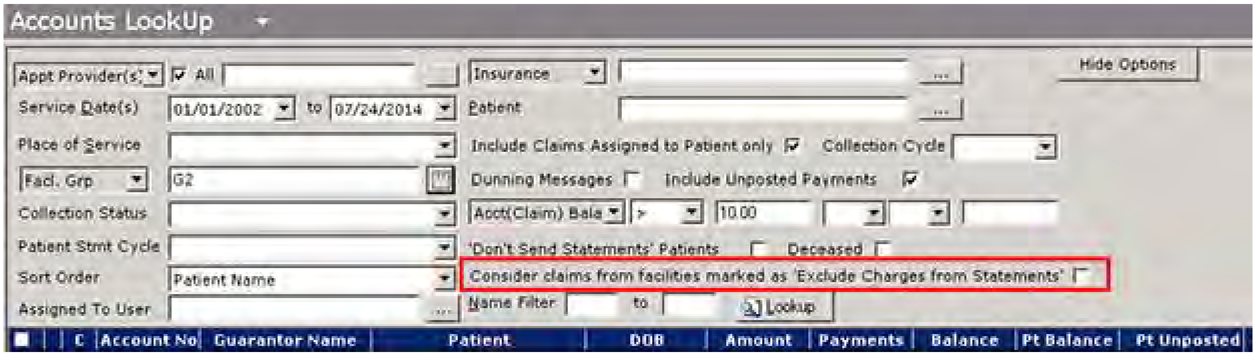
2. Create a *Statement Facility Group* with all facilities except the one(s) for which to exclude charges.
3. Perform the following steps when creating Patient/Guarantor Statements:
   a. Access the Billing band and select *Accounts Lookup*.

      The Accounts Lookup window displays.

   b. Select *Facility Group* from the Facility drop-down list.
   c. Click *More* (…) next to the Facl. Grp field.

      The Facility Groups window displays.

   d. Highlight the *Statement Facility Group* set up in step 2, and click *OK* to close the Facility Groups window.
   e. Check the *Consider claims from facilities…* box to display the total of all charges for the patient(s) in the Pt Balance column, including any charges at the excluded facility:



f. Enable any of the other filters as appropriate, and click *Lookup*.

The accounts that fit the specified criteria display in the bottom pane. If the user does not select the correct Facility Group, the system displays a pop-up warning to correct this in order to print statements.

IMPORTANT! Checking this box determines only how the total is viewed on this window. It does not affect the balances included on the actual statements themselves (*e.g.,* the system includes all charges in the total displayed on the Accounts Lookup window, but excludes the charges from printed and transmitted statements).

Setting Up Facilities for Ahlers Family Planning Reporting

Enter the corresponding clinic numbers for all facilities at which Ahler's Family Planning is used.

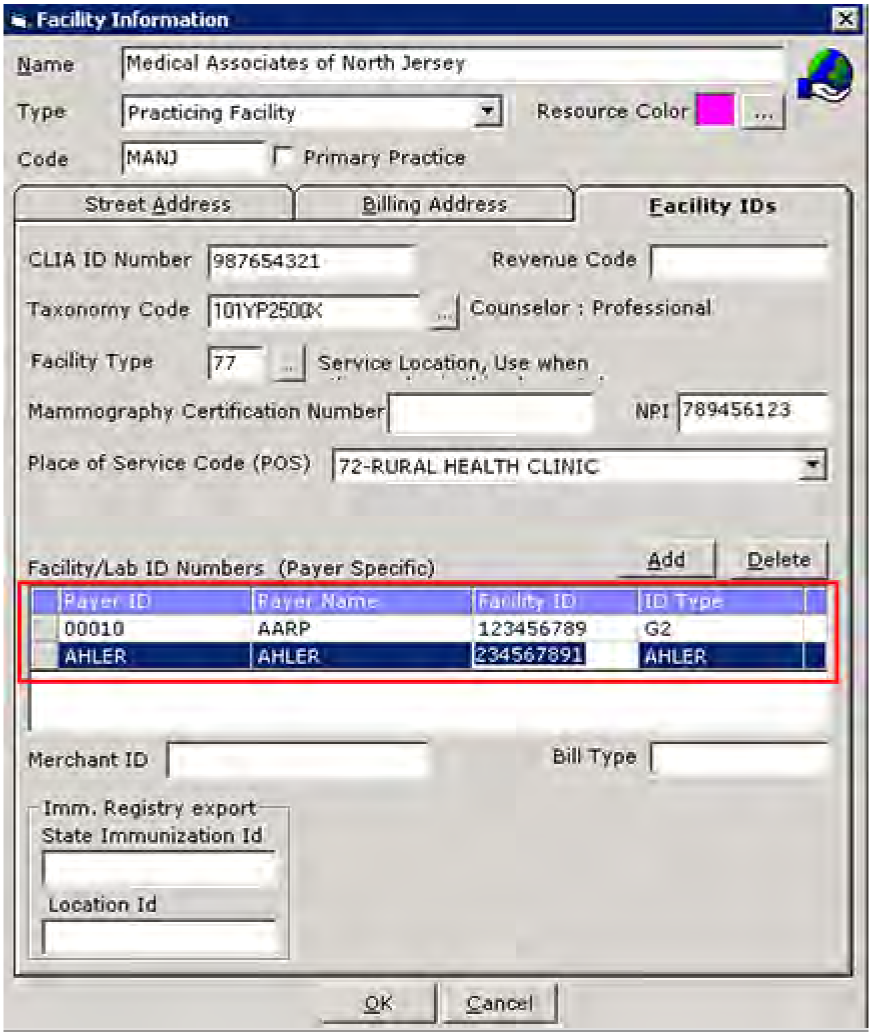
Note: The Ahlers Family Planning report feature is enabled by an item key. Contact eCW Support and refer to the Item Key Code 0018_UK.

To set up a facility for Ahlers Family Planning reporting:

1. From the File menu, click *Facilities*.
2. Highlight the facility for which you want to set the clinic number and click *Update*.

   The Facility Information window displays.
3. Click the *Facility IDs* tab.
4. Click *Add* in the Facility/Lab ID Number section of the window.

   A blank row displays:



5. Enter AHLER in the Payer ID, Payer Name, and ID Type field.
6. Enter the clinic number (the client provides the Clinic number) in the Facility ID column.

   The facility is set up for Ahler's Family Planning Reporting.

Updating Facilities

Update facility information in the system from the Facility List window.

To update a facility:

1. From the File menu, click *Facilities*.

   The Facility List window displays.
2. To look up a specific facility:
   a. To select the search criteria, click the *by* drop-down list.
   b. Enter your search text in the Look Up Facility field.

      The list of facilities is filtered by your search criteria.

3. To filter this list by facility type, select the type from the Facility Type drop-down list.
4. Highlight the facility to be updated and click *Update*.

   The Facility Information window displays.
5. Modify the information as necessary.
6. Click *OK*.

   The selected facility is updated as specified.

Deleting Facilities

Delete unnecessary facilities from the system. Users cannot delete the primary facility or facilities that have encounters, refunds, or payments associated with them.

To delete a facility:

1. From the File menu, click *Facilities*.

   The Facility List window displays.
2. To look up a specific facility:
   a. To select the search criteria, click the *by* drop-down list.
   b. Enter the text to use to search in the Look Up Facility field.

      The list of facilities is filtered by your search criteria.
3. To filter this list by facility type, select the type from the Facility Type drop-down list.
4. Highlight the facility to delete and click *Delete*.

   A confirmation window displays.

   Note: If any encounters, refunds, or payments are associated with this facility, a pop-up window states that this facility cannot be deleted. The number of encounters, refunds, and/or payments associated with this facility displays in this window.
5. Click *Yes*.

   The selected facility is deleted.

Facility Groups

You can set up facility groups, enabling groupings based on practice preferences for reporting purposes. You can run Claims IPE for facility-filtered claims. Several windows provide the *Search by Facility* option or the *Facility Group* option throughout the application.

For more information about facility groups, refer to:

- Adding Facility Groups
- Viewing Facilities with Multiple Associations

Adding Facility Groups

Create facility groups from the File menu.

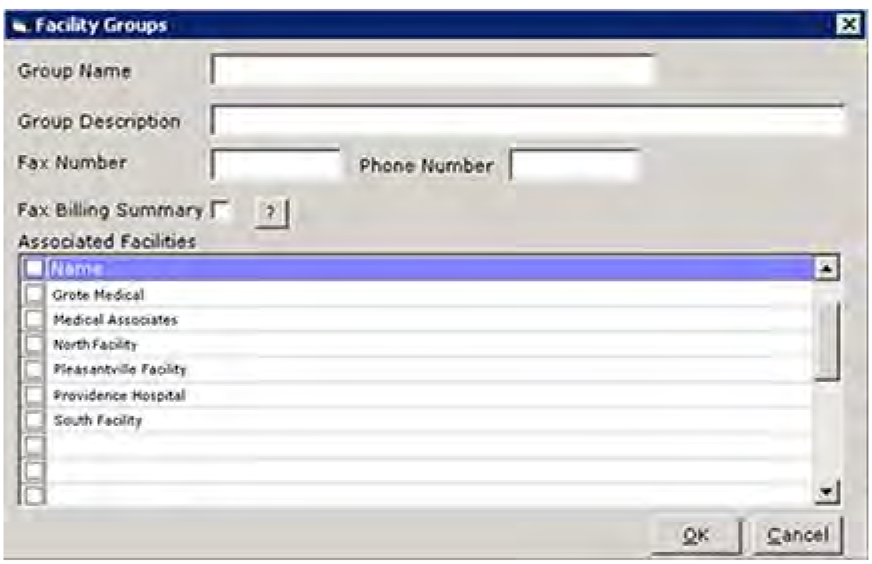
To add a facility group:

1. From the File menu, click *Facility Groups*.

   The Facility Groups list window displays:

2. Click *Add*.

   The Facility Groups information window displays:



3. Enter information in the fields specified in the table:

Field	Information
Group Name	Enter a short name for this group (up to 15 characters).
Group Description	Enter a description of this group.
Fax Number	Enter a fax number for this group.
Phone Number	Enter a phone number for this group.

Field	Information
***Fax Billing Summary* box**	Check the box to fax the daily billing summary automatically to the number specified in the Fax Number field. This fax is sent at 11:00 PM every night.
	Note: The FaxServer version must be 4.7.12 or later to support this feature.

4. Click *OK*.

The facility group is added.

Updating Facility Groups

Update the Facility groups from the Facility Groups list window

To update a facility group:

1. From the File menu, click *Facility Groups*.

The Facility Groups list window displays.

2. Highlight the facility group to update and click *Update*.

The Facility Groups information window displays.

3. Modify the information as necessary.

4. Click *OK*.

The selected facility group is updated as specified.

Deleting Facility Groups

Delete facility groups from the Facility Groups window.

To delete a facility group:

1. From the File menu, click *Facility Groups*.

The Facility Groups window displays.

2. Highlight the facility group to be deleted and click *Delete*.

A confirmation window displays.

3. Click *OK*.

The selected facility is deleted.

Viewing Facilities with Multiple Associations

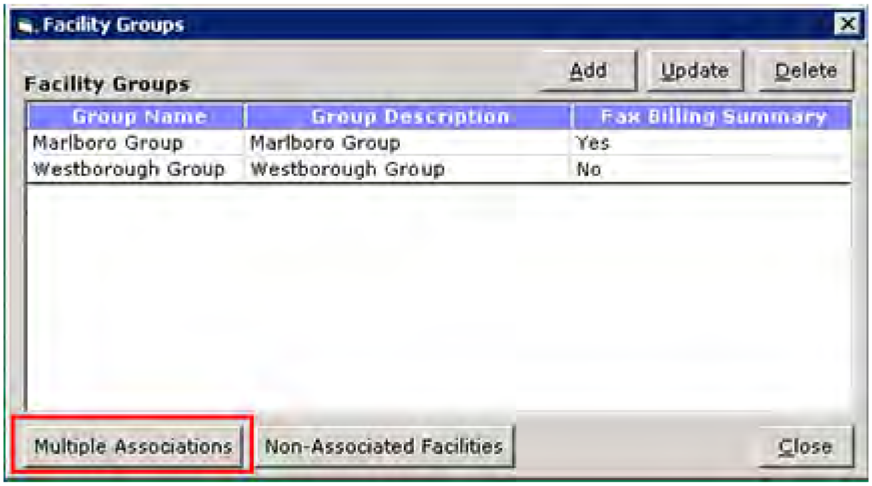
You can view the facilities that have multiple associations with any facility group from the Facility Groups window.

To view facilities with multiple associations:

1. From the File menu, click *Facility Groups*.

   The Facility Groups window displays.

2. Click *Multiple Associations*:



   The eClinicalWorks Viewer displays with a read-only list of Facilities having multiple associations with the displayed Facility Group.

Viewing Facilities Not Associated with a Group

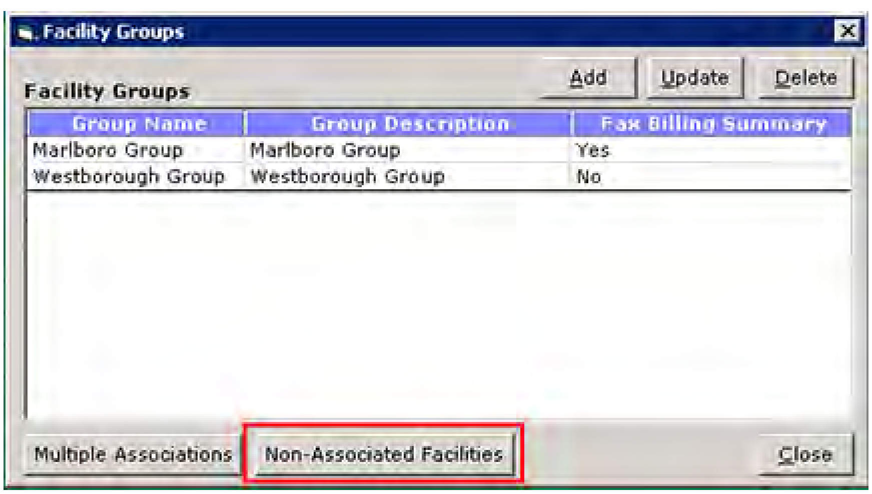
View the facilities that are not associated with any facility group from the Facility Groups window.

To view facilities not associated with a facility group:

1. From the File menu, click *Facility Groups*.

   The Facility Groups window displays.

2. Click *Non-Associated Facilities*:



   The eClinicalWorks Viewer displays with a read-only list of Facilities not associated with the displayed Facility Group.

Adding ZIP Codes

Specify cities and states with associated ZIP codes in the system. After you enter a ZIP code into the system, entering that ZIP code in a patient's demographics automatically populates the city and state.

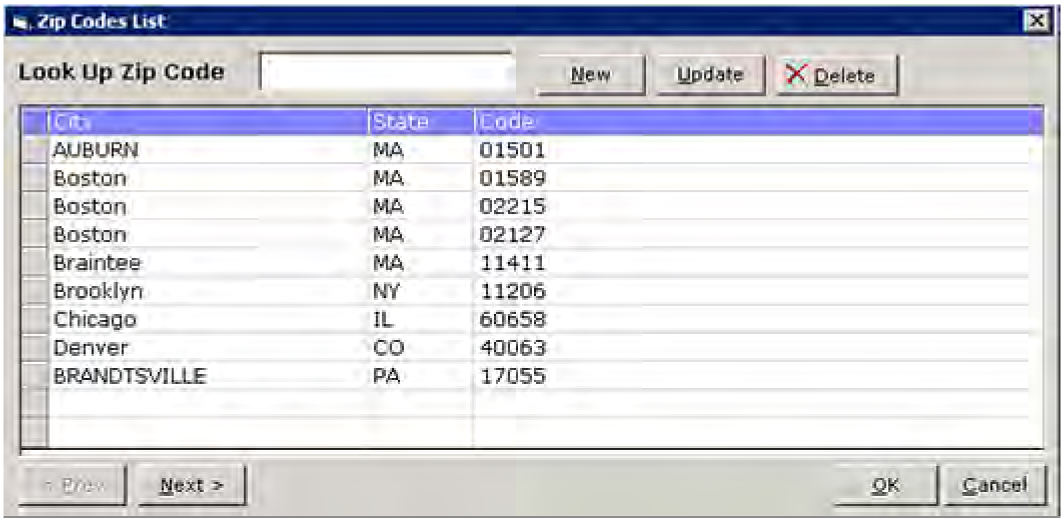
For more information about adding and updating ZIP codes, refer to the following sections:

- Updating ZIP Codes
- Deleting ZIP Codes

To add ZIP codes to the database:

1. From the File menu, click *ZIP Codes*.

   The ZIP Codes List window displays:



2. Click *New*.

   The ZIP Code window displays:

3. Enter the city for this ZIP code in the City field.
4. Select the state for this ZIP code in the State field.
5. Enter the appropriate ZIP code in the ZIP Code field.
6. If applicable, enter the TMHP county code for this ZIP code in the TMHP County Code field.
7. Click *OK*.

The ZIP code is added to the database.

Updating ZIP Codes

Update the ZIP codes in the database from the ZIP Codes List window.

To update ZIP codes to the database:

1. From the File menu, click *ZIP Codes*.

   The Zip Codes List window displays.
2. To look up a specific ZIP Code, enter that code in the Look Up ZIP Code field.
3. Highlight the ZIP Code to be updated and click *Update*.

   The Update Zip Code Information window displays.
4. Modify any information as necessary.
5. Click *OK*.

   The selected ZIP code is updated as specified.

Deleting ZIP Codes

Delete duplicate ZIP codes, or codes that are no longer needed, from the system.

To delete ZIP codes from the database:

1. From the File menu, click the *ZIP Codes* option.

   The ZIP Codes List window displays.
2. To look up a specific ZIP code, enter that code in the *Look Up ZIP Code* field.
3. Highlight the ZIP code to delete and click *Delete*.

   A confirmation window displays.
4. Click *OK*.

   The selected ZIP code is deleted.

Management

From the File menu, the administrator can manage prescriptions, ICD codes, documents, supervising providers, questionnaires, schedule and referring physician information in Microsoft® Outlook®; add custom prescription databases; and export patients.

For more information about management, refer to:

Rx Management

The Administrator can search through the database of prescriptions in the system and, if necessary, delete any using the Rx Management feature.

For more information, refer to the *Electronic Medical Records Setup Guide*.

ICD Management

You can manage ICD codes (add, update, or delete them) using the ICD Management feature. This feature is identical to the ICD codes feature, accessed from the Billing menu.

To manage ICD codes:

1. From the File menu, point to *Management*, and then click *ICD Management*.

   The ICD-9 Codes window displays.

2. Add, update, or delete ICD codes in the same manner as the ICD codes feature.

   For more information about the ICD codes feature, refer to the *Electronic Medical Records Setup Guide*.

Document Management

Create and link custom document folders to document categories from the File menu.

To add custom document folders and link them with document categories:

1. From the File menu, point to *Management*, and then click *Document Management*.

   The Document Management window displays.

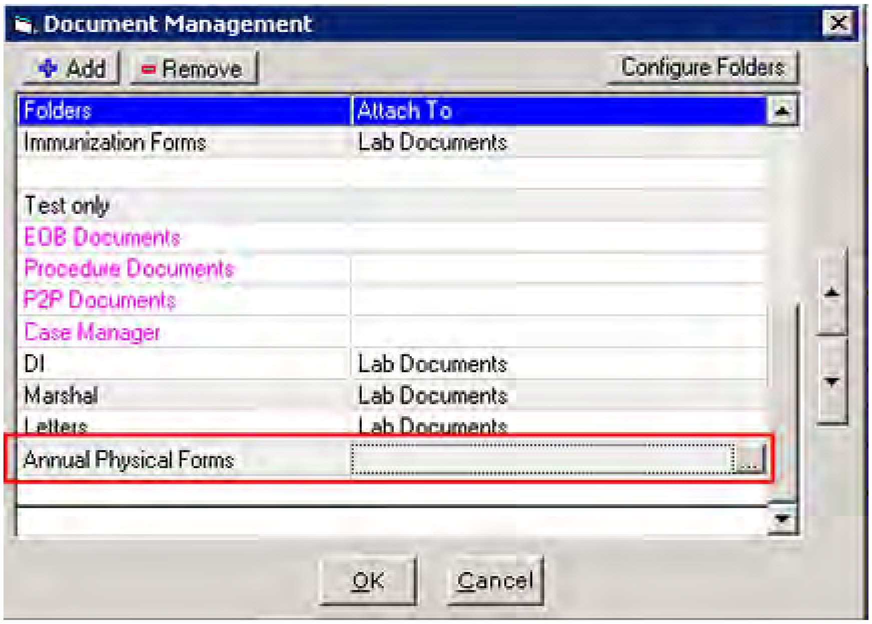
2. Click *Add*.

   The system adds a blank row to the bottom of the list of folders.

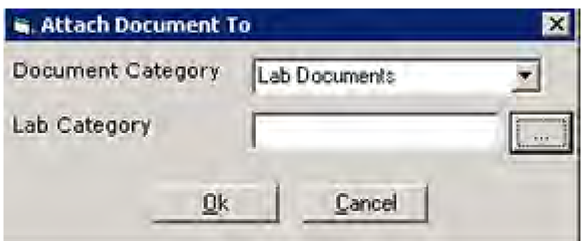
3. Type the name of this folder in the Folders column for this new row.
4. Click in the *Attach To* column to display a *More* (...) button.

   > **Note:** Custom folders display in black, while non-custom folders display in pink. Users cannot link non-custom folders with categories.

5. Click *More* (...):

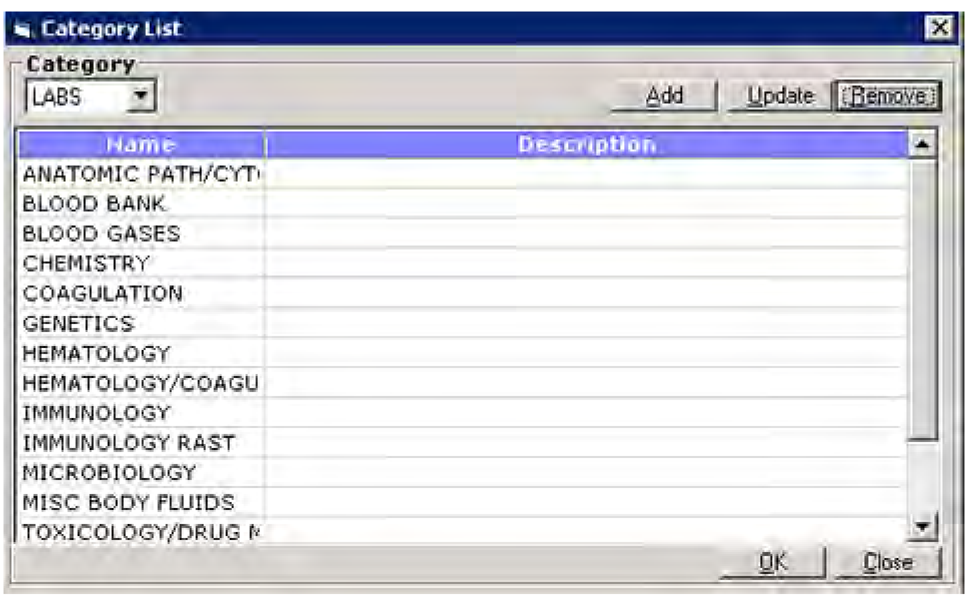


The *Attach Document To* window displays:



6. Select the document category to which you want to link this folder from the Document Category drop-down list.
7. To link this folder with a lab category:
   a. Click *More* (...) next to the Lab Category field.

      The Category List window displays:



b. Select *Labs* or *DI* from the Category drop-down list, depending on the type of lab category to link with this folder.

c. Highlight the lab category to link with this folder.

d. Click *OK*.

The selected lab category is added to the *Attach Document To* window.

Note: The Lab Category option is not available when selecting the *Chart Documents* option from the Document Category drop-down list.

8. Click *OK*.

The selected folder is linked with the specified categories.

Note: Users must log out and log back in for these changes to take effect.

Reconcile Interface Results

Reconcile transcription information and lab results from the Interface Reconciliation window.

- Reconcile lab results automatically or manually through the Interface Reconciliation window.
- To verify that the system added the transcription results to the correct patients, reconcile the results with the patient's demographic data, and encounter ID.

Reconciling Transcription Information

eCW receives transcription information from outside vendors and attaches it to the patient's Progress Notes.

Before posting the information from the interface to the Progress Notes, the eCW application checks for matching patient last names, first names, dates of birth, provider information, and encounter IDs. When the system finds matching information, it then posts the transcription information into the patient's Progress Notes for that encounter.

If the system does not find any matching information, a *Failed* message displays. Users can then reconcile the information and view the reason the task failed.

This reconciliation is available in Web/Manual reconciliation.

Note: The Web reconciliation feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 1524_UK.

To reconcile transcription results (transcription inbound messages) through Web reconciliation:

1. From the File menu, click *Reconcile Interface Results*.

The Interface Reconciliation window displays.

Note: Users must have access to the *Interface Reconciliation View* security attribute to access this feature.
Users who have access to the *Interface Reconciliation Electronic* security attribute will have access to the Reconcile button.

2. Click one of the following tabs:
   - **To be Reconciled** - Displays only transcription results that have not been reconciled.
   - **Reconciled** - Displays only transcription results that have already been reconciled.
   - **Action Taken** - Displays transcription results that have had actions taken on them.
   - **All** - Displays all results:

3. To select the date range:
   a. Click the *More* (…) button next to the *Received Between* field.
      A pop-up calendar displays.
   b. Click the start date for this date range.
   c. Click the *More* (…) button next to the *And* field.
      A pop-up calendar displays.
   d. Click the ending date for this date range.

Viewing Transcription Results for a Specific Patient

To view results for a specific patient:

1. Click the *More* (…) button next to the Patient field.
   The Patient Lookup window displays.
2. Double-click the name of the patient.
   The Patient Lookup window closes, and the selected patient name populates in the Patient field.

Viewing Transcription Results for a Specific Provider

To view results for a specific provider:

1. Open the Providers window.
   - Select the provider from the Provider drop-down list.

   OR
   - Click the *More* (…) button next to the Provider field.

The Providers window displays.

2. Double-click the name of the provider.

   The Providers window closes and the selected provider name populates in the Provider field.

Viewing Transcription Results for a Specific Facility

To view results for a specific facility:

1. Open the Facility List window:
   - Select the facility from the Facility drop-down list.

     OR

   - Click the *More* (…) button next to the Facility field.

   The Facility List window displays.

2. Double-click the name of the facility.

   The Facility List window closes and the selected facility name displays in the Facility field.

Reconciling Transcription Results Automatically

To reconcile transcription results automatically:

1. From the Interface Reconciliation window, check either of the following boxes:
   - **Transcription Documents** - displays successfully imported transcription information
   - **Dictation** - displays failed transcription results

   After setting all options, the results that match the selected criteria display. Error logs display in the last column.

2. To reconcile all current transcription results automatically in batches, click the *Reconcile* button under the *To be Reconciled* tab.

Note: On the *To be Reconciled* tab, High Priority messages, which are marked with a red exclamation mark, indicate that the provider has not reconciled the results and must open the message and complete reconciliation. (This moves the message to the *Reconciled* tab). This feature is enabled by an item key. Contact eCW Support and refer to the Item Key Code 0372_DMJ.

Reconciling Transcription Results Individually

To reconcile the transcription results individually:

1. From the Interface Reconciliation window, click a transcription result row.

   The Failed Result window displays. The problem is noted in red text.

2. Manually attempt to reconcile:

- *Patient Match Not Found* - the patient name for the transcription information does not match any patient names in the eCW application. Select the correct patient from your database to resolve this problem.
- *Provider Match Not Found* - the provider name for the transcription information does not match any provider names in the eCW application. Select the correct provider from your database to resolve this problem.

3. After the problem is resolved, click the *Reconcile* button.

> **Note:** When attempting to reconcile the results manually, click the *Timestamp* button and enter notes. Click *Browse* to select pre-built notes.

The reconciled transcription information is moved from the *To be Reconciled* tab to the *Reconciled* tab.

To print this window, click the *Print* button.

Working with a Transcription Inbound Interface

In a Progress Notes transcription inbound interface, when a vendor sends transcribed HL7 messages to the practice, the eCW application places all information in the Notes section of the Assessments in Progress Notes. eCW supports not only the Assessment section for transcription interface but also the following:

- HPI
- Examination
- Treatment
- ROS
- Procedures,
- Family History,
- Social History
- Surgical History
- Hospitalization
- Allergies
- Chief Complaints
- Medical History

eCW places the Information captured from the Progress Notes transcription inbound interface into the appropriate section of the Progress Notes:

> **Note:** This is applicable only to the transcription interface. Since the setup requires back-end configurations, contact Support for more information.

Working with Inbound Results Through an Interface

When a vendor sends HL7 results in an embedded PDF, eClinicalWorks posts an HTML document under Documents that has a link for the PDF.

When the user clicks this link, the PDF file displays.

Exporting to Microsoft Outlook

From the File menu, users can export patient, schedule, and referring physician information into Microsoft Outlook.

For more information about exporting, refer to:

- Exporting Patients to Microsoft Outlook
- Exporting Schedules to Microsoft Outlook
- Exporting Referring Physicians to Microsoft Outlook

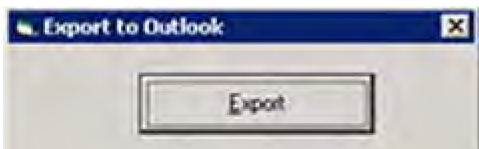
Exporting Patients to Microsoft Outlook

Export the entire contents of the patient database into Microsoft Outlook from the File menu.

To export the patient database to Microsoft Outlook:

1. From the File menu, point to *Export*, and then click *Patients to Microsoft Outlook*.

   The Export to Outlook window displays:



2. Click *Export*.

   The patient database is exported to Microsoft Outlook.

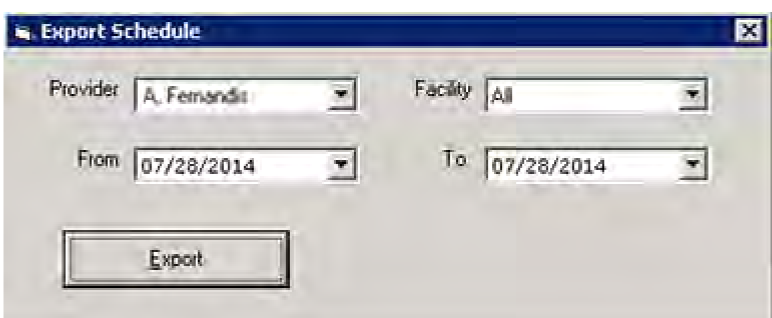
Exporting Schedules to Microsoft Outlook

Provider schedules can be exported into Microsoft Outlook from the File menu.

To export a provider's schedule to Microsoft Outlook:

1. From the File menu, point to *Export*, and then click *Schedule to Microsoft Outlook*.

   The Export Schedule window displays:



2. Select the provider whose schedule you want to export from the Provider drop-down list.

3. To export the selected provider's schedule for a specific facility, select the facility from the Facility drop-down list.
4. Select the date range of the schedule to export using the *From* and *To* drop-down calendars.
5. Click *Export*.

   The selected provider's schedule is exported to Microsoft Outlook.

Exporting Referring Physicians to Microsoft Outlook

The entire contents of the referring physician database can be exported to Microsoft Outlook from the File menu.

To export the patient database to Microsoft Outlook:

1. From the File menu, point to *Export*, then click *Export Referring Physicians to Microsoft Outlook*.

   The Export to Outlook window displays.
2. Click *Export*:

   The referring physician database is exported to Microsoft Outlook.

ADMIN SETUP

Administration setup involves merging patient accounts, configuring the FaxServer, customizing categories and items that display in the application, and organizing appointment reason keywords.

For more information about administrative setup, refer to:

- Product Activation in System Administration
- Merge Patient
- FaxServer
- Admin
- Administrator Login
- Lock
- Reporting Tasks
- System Messages

Product Activation in System Administration

Enhanced Feature

eClinicalWorks products are activated from the Product Hub: Product Activation window.

To access the Product Activation window:

1. From the Admin band, click the *Product Activation* icon.

   The eClinicalWorks Product Hub: Product Activation window displays, showing:

   - A check mark at the top left corner of the product row, indicating that the product is activated
   - The product icon, graphically identifying the product or application
   - An Activate button, used to begin the activation process for the product
   - A Settings link (if the product has already been activated), used to update or change the settings for a product
   - A URL link, available for certain products, such as Patient Portal

2. Click the *Activate* button for the product you want to activate and follow the on-screen instructions to begin.

   OR

   Proceed with other work for a product by clicking the URL or the settings button for a particular product:

3. When finished, exit the eClinicalWorks Product Hub: Product Activation window.

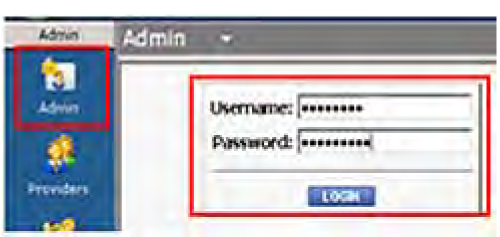
   Updates are complete.

Administrator Login

Enhanced Feature

To log in as an administrator:

1. Click the *Admin* icon on the Administration band.
2. Enter the administrator username and password into the appropriate fields, and then click the *Login* button:



License Alert Restricted to Administrators and Co-Administrators Only

The license alert pop-up is restricted to Administrators and Co-Administrators only.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 1619_IOAOO.

License Alert window:

Merge Patient

If two or more accounts are accidentally created for the same patient, the user can merge them together.

When a user merges two duplicate patient accounts, their encounters, Progress Notes, labs, vitals, patient documents, and medications combine into one patient account. The system deletes the patient demographics from the first selected patient and retains the patient demographics of the second selected patient.

To merge duplicate patient accounts:

1. From the File menu, click *Merge Patient*.

   The Merge Patients window displays:

   a. Click *Sel* next to the Merge this Patient field to select the duplicate account.

   b. Click *Sel* next to the With this Patient field to select the original account.

2. *(Optional)* Click either of the *Info* buttons to review these patients' demographic information and confirm that they are the same patient.

3. Click *Merge*.

The first account selected is merged into the second account.

IMPORTANT! Do not merge accounts unless you are absolutely sure they are for the same patient. After two accounts merge, they cannot be separated!

FaxServer

The FaxServer is the feature of the eClinicalWorks® system that actually sends prescription, referral, or other types of faxes from your practice to a pharmacy or another practice.

For more information about the FaxServer feature, refer to FaxServer Setup.

FaxServer Setup

Set up the FaxServer with information that enables the transmission of faxes on the network.

For information about configuring fax inboxes by department, refer to Configuring Fax Inboxes by Department.

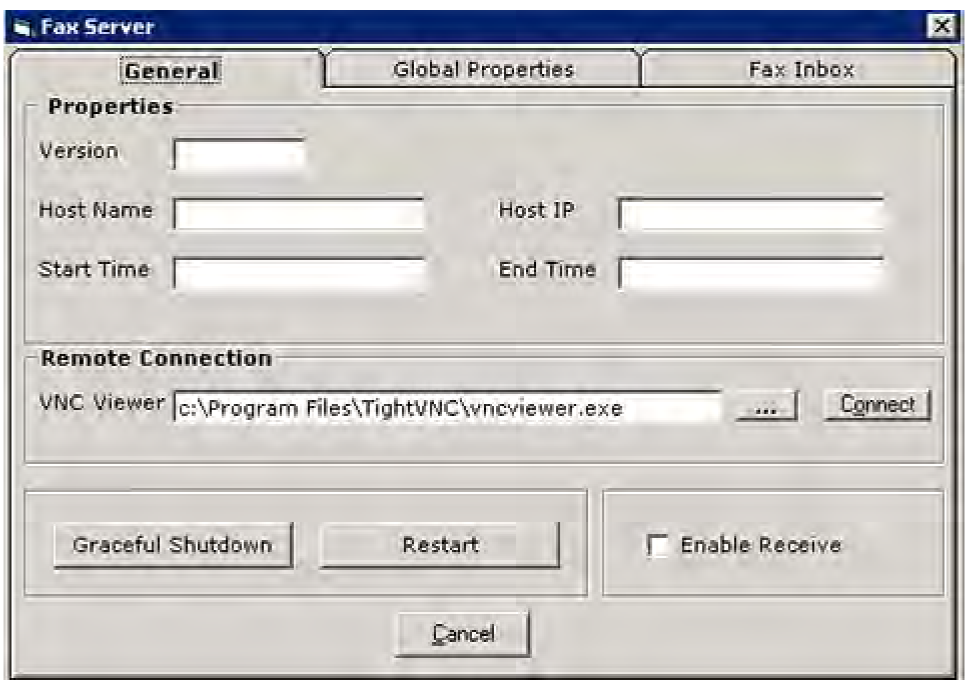
To set up the FaxServer:

1. From the Fax menu, click *Fax Server*.

The Fax Server window displays.

2. The *General* tab displays by default.

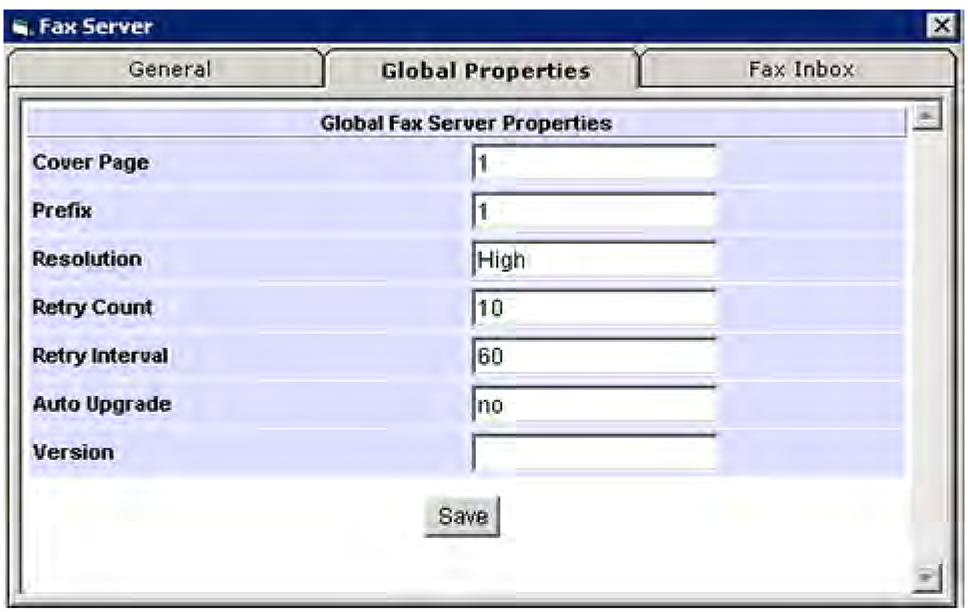
The General options display:



3. Enter the FaxServer configuration information as described in the table below:

Field	Information
Version	The version number of the FaxServer software.
Host Name	The name of the computer on which the FaxServer software is installed.
Host IP	The IP address of the host computer.
Start Time	The date and time that the FaxServer began operating.
End Time	The date and time that the FaxServer stopped operating.
VNC Viewer	■ The location and file name of the VNC Viewer software on the local computer. ■ To connect to the FaxServer host computer, click *Connect*.
Graceful Shutdown	Enables a controlled shutdown of the FaxServer. The FaxServer sends faxes in the queue before shutting down.
Restart	Shuts down the FaxServer and discards faxes in the queue.
Enable Receive	Enables the FaxServer to process incoming faxes.
Cancel	Closes the window without making changes.

4. To enter global FaxServer information, click the *Global Properties* tab:



Field	Information
Cover Page	Enter *Yes* or *No* to indicate whether faxes from your practice include a cover sheet. The cover sheet is installed on the FaxServer.
Prefix	The external access number for the telephone system at your practice (usually 8 or 9). This number populates the prefix field for fax numbers.
Resolution	The print resolution of the scanned fax image. Enter *High* or *Low*.

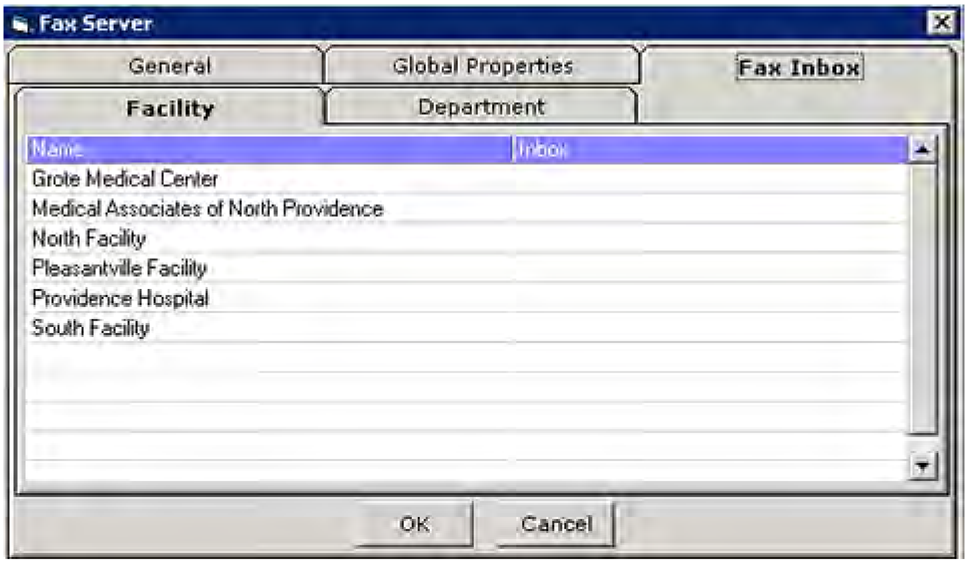
Field	Information
Retry Count	The number of times the FaxServer attempts to send a fax. eCW recommends three to four retry attempts.
Retry Interval	The number of seconds between each retry attempt. eCW recommends 60 seconds.
Auto Upgrade	Enter *Yes* or *No* to indicate whether to perform automatic upgrades of the FaxServer.
Version	FaxServer version number.

5. Click *Save*.

The information entered on the General and Global Properties tabs is saved.

6. Click the *Fax Inbox* tab.

The Fax Inbox options display:



7. Click in the *Inbox* column of the facility to specify a fax inbox folder.

A More (...) button displays to the right of the selected row.

a. Click *More* (...).

The Browse for Folder window displays.

b. Highlight the appropriate folder and click *OK*.

The selected folder's path displays in the Inbox column for the selected facility.

8. Click *OK*.

The Fax Server window closes and your changes are saved.

Configuring Fax Inboxes by Department

To configure fax inboxes for a specific department, enable them first.

For more information, refer to Enabling Fax Inboxes by Department.

To configure fax inboxes by department:

1. From the Fax menu, click *Fax Server*.

The Fax Server window displays.

2. Click the *Fax Inbox* tab.

The Fax Inbox options display.

3. Click the *Department* tab.

The Department options display:

4. Click the *Inbox* field for the department.

A More (...) button displays to the right of the selected row.

5. Click the *More* (...) button.

The Browse for Folder window displays.

6. Navigate to the folder for this fax inbox and click *OK*.

The Browse for Folder window closes and the Inbox field populates with the selected path.

7. Click *OK*.

The fax inbox is configured.

Admin

From the Admin window, the administrator can set the Visit Types, customize various categories and items that display in the application, and organize appointment reason keywords.

For more information about administration, refer to:

Active Directory

With this feature enabled, the system authenticates a user's credentials to the defined directory upon login, rather than to the eCW database. When accessing the Admin section in eCW, the user will no longer need to log in.

To use the Active Directory, eClinicalWorks Support sets up this configuration at the back end.

After establishing this setting at the back end, users no longer need to log in as Admin.

Note: Contact eClinicalWorks Support for more information about enabling Active Directory.

Active Directory Authentication

This feature enables Active Directory (AD) Authentication. Once implementation is complete, users can log in to the eClinicalWorks application using the Active Directory domain credentials as long as the Active Directory username exists in eCW.

eClinicalWorks verifies the Active Directory username and password of the second user on the same machine, and access is enabled for that user.

For more information, refer to Active Directory Authentication for SSO.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 1590_IO.

Active Directory Authentication for SSO

Enhanced Feature

The Active Directory (AD) Authentication has been implemented in the eCW user login window for Single Sign on (SSO). Users can log in to the eClinicalWorks application using the Active Directory domain credentials, as long as that username exists in eCW. Once the user is logged in to Windows, he/she can double-click the eCW icon and the application will log them in. The user who logged in to Windows will auto-log in to eCW.

When AD authentication is enabled for SSO:

- Users will no longer need to log in each time they access the Admin section under the Admin band.

Path: Admin band > Admin tab

- The Change Password option on the Provider and Staff demographics window is disabled.

  Path: Admin band > Provider tab or Staff Admin tab > Personal Info window

- Except for the *Session Activity Timeout*, all other options on the Authentication Settings window are disabled.

  Path: File menu > Settings > Authentication Settings

- The Hard Reset Password option is disabled on the eClinicalWorks Administrator window.

  Path: File menu > Settings > eClinicalWorks Administrator > Allow Hard Reset Password By option

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 1637_IOAOO.

Visit Type Codes

Visit types define the length of time for scheduled appointments and the format for the Progress Notes attached to the visit. Visit type codes identify each of the visit types.

For more information about visit type codes, refer to:

- Configuring Visit Type Codes
- Creating Vision Examination Visit Types
- Creating Orthopaedic Visit Types

Configuring Visit Type Codes

Enhanced Feature

Visit type codes define the types of patient visits. The system uses the visit type codes in various parts of the application, such as for booking appointments, displaying various types of Progress Notes, defining visit type rules for provider and resource schedules, and other functions in several other parts of the application. Users with Admin permissions can configure visit type codes.

To configure a Visit Type Code:

1. From the Admin band in the left navigation pane, click *Admin*.

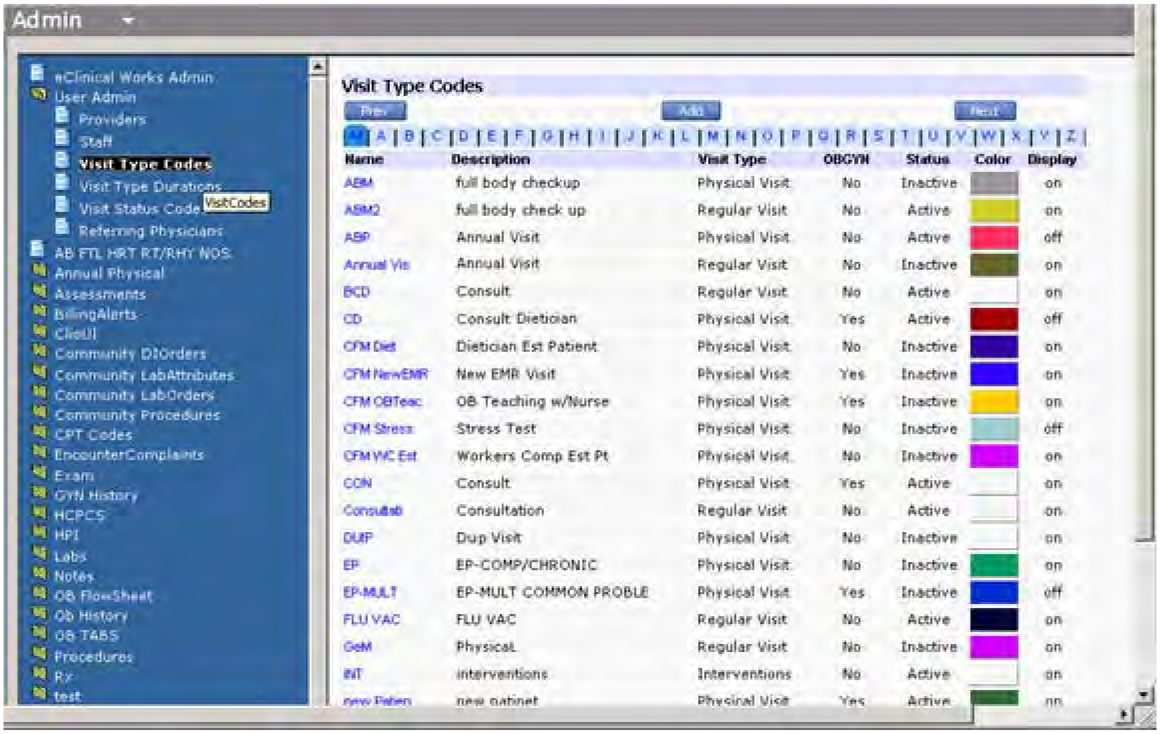
   The Admin login window displays.

   a. Enter the administrator username and password, then click *Login*.

      The Admin window displays.

   b. Click the *User Admin* heading in the left pane, and select the *Visit Type Codes* option from the drop-down list.

      The Visit Type Codes window displays:



2. Click *Add* to add a new Visit Type Code.

The Visit Codes window displays:

a. Enter a Visit Type Code in the Name field.

The code name field has a character limit of 10 letters, so you may want to use an abbreviation or acronym as a code name. For example, a code name for a visit *Office Visit* could be *OV*.

b. Enter a description of the Visit Type Code in the *Description* field.

c. Enter *Progress Notes* in the Chart Title field.

3. Click *Pick Color* to assign a unique color to the Visit Type Code.

This helps to identify the visit types for appointments in the Resource Schedule window.

The color chart displays.

a. Move your cursor over the color blocks, and click a color to select it.

b. Click *Close* to save the color choice and return to the Visit Codes window.

- The Visit Type Code color is the outline color for the appointment.
- The Visit Status color is the fill color of the appointment slot on the schedule.

For more information, refer to Configuring Visit Status Codes.

4. From the Visit Type field, select a specific visit type from the available options:

- Regular Visit
- Physical Visit
- Operational Procedures
- Interventions

Note: Each Visit Type is associated with a Progress Note type.

For more information about visit types and the types of Progress Notes, please refer to the *EMR Navigation* and *Progress Notes* sections of the *Electronic Medical Records Users Guide*.

5. Enter the visit duration (in minutes) in the Visit Type Duration field.

The visit end time in the Appointment window is automatically adjusted using this duration, depending on the Visit Type chosen.

A visit type with the visit duration set to zero (0), will not display in the Visit Type selection options available for appointments.

For more information, refer to Visit Type Durations.

Note: The visit duration specified during the setup of visit codes is applicable only to providers and not to resources. To specify the same for resources, refer to Visit Type Durations.

6. In the next section, check the boxes that apply to the Visit Type:

- **OBGYN History** - Check this option to include the OB/GYN History section in the Progress Notes for this visit type.

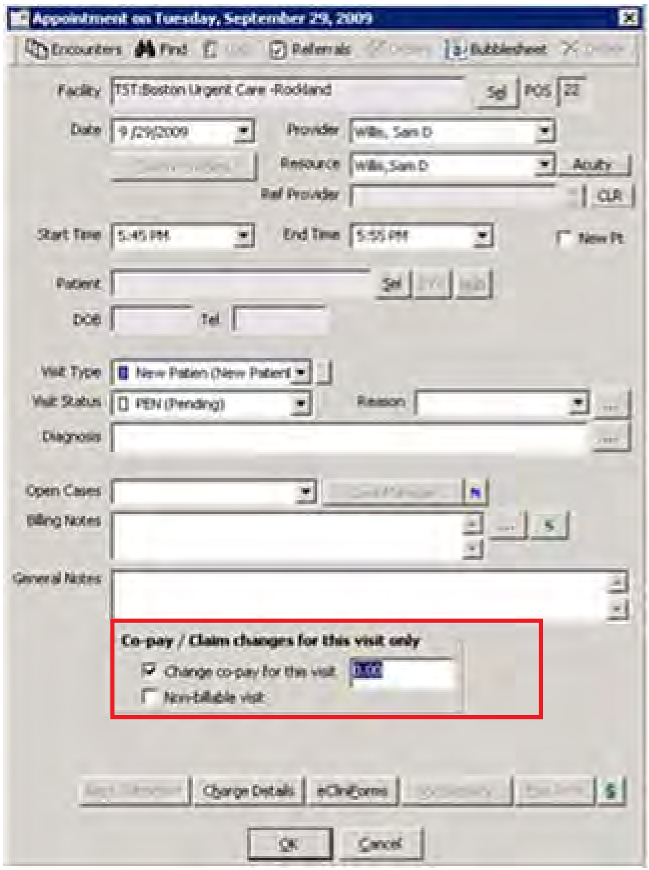
  For more information, refer to the Progress Notes Customization section of the *Electronic Medical Records Users Guide*.
- **Physical Therapy** - Check this option to include the Physical Therapy Assessment section in the Progress Notes for this visit type.

For more information, please refer to the Physical Therapy section in the Progress Notes Workflow section of the *Electronic Medical Records Users Guide*.

- **Requires Claim** - Check this option to make the visit Billable. When this box is not checked, and the user creates an appointment with this visit type, the system displays the message:

  `Are you sure to make the visit Non Billable?`

- **Requires Copay** - Check this option to select the *Change co-pay for this visit* segment of the Appointment window for this visit type, and enter zero (0) as the default amount automatically:



- **Pregnancy Visit** - Check this option to display the OB/GYN Flowsheet as the Progress Notes for this visit type. The user will have the option to alternate between the OB/GYN Flowsheet and the general Progress Notes.

  For more information, please refer to the OB/GYN Flowsheets section of the *Electronic Medical Records Users Guide*.

- **Vision Visit** - Check this option to include the Vision Examination section in the Progress Notes.

  For more information, please refer to the Creating Vision Examination Visit Types.

- **Orthopaedic Visit** - Check this option to display the Orthopaedic Chart as the Progress Notes for this visit type. The user will have the option to alternate between the OB Flowsheet and the general Progress Notes.

  For more information, please refer to the Creating Orthopaedic Visit Types.

- **Care Plan Visit** - Check this option to include appointments with this visit type in a care plan.

- **Dental Visit** - Check this option to mark encounters with this visit type as a dental visit.

7. Check the Active or Inactive radio buttons in the Status segment to assign a status to the Visit Type.
   - **Active** - Displays the visit in the Visit Type field for selection from the Appointment window.
   - **Inactive** - Does not display the visit in the Visit Type field for selection from the Appointment window.
8. Check the *Do not display Appointments with this visit type in 'Progress Notes' visits Drop Down* pick list if you do not want the encounter with this visit type to display in the Progress Notes encounter drop-down list.

   For information about the *Synchronize this Visit Type to Patient Portal* box, refer to the *Patient Portal Users Guide*.
9. Click:
   - **Save** to store the changes and information
   - **Delete** to delete the Visit Type Code
   - **Clear All** to remove the information from all the fields in the Visit Type Code

Updating Visit Code Details

- To update or view details of a specific Visit Type Code, click the blue heading for that Visit Type Code.
- To view only those Visit Type Codes beginning with a specific letter, click one of the blue letters at the top.
- To scroll down, use the scrollbar.
- To view additional pages of Visit Type Codes, click *Next* or *Prev*.

Creating Vision Examination Visit Types

This version adds a Vision Examination section to the Progress Notes window. The encounter must be marked as a Vision Visit Type in the Admin options for this section to display.

To mark a Visit Type as a Vision Visit:

1. From the Admin band in the left navigation pane, click *Admin*.

   The Admin Login window displays.
2. Enter your username and password in the Username and Password fields and click *Login*.

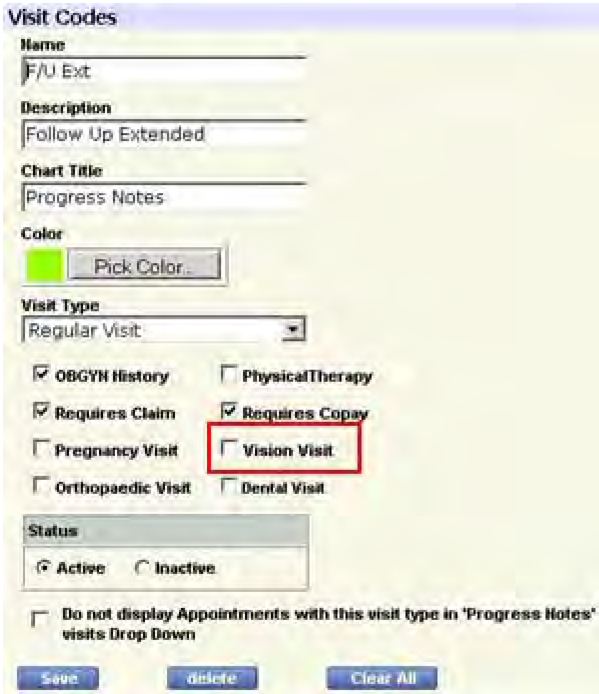
   The Admin window displays.
3. Click the *User Admin* heading in the left pane.

   The User Admin options display in the left pane.
4. Click the *Visit Type Codes* option.

   The Visit Type Codes window displays.
5. Click *Add* to add a new Visit Type Code.

   OR

   Click the blue heading to update an existing Visit Type Code.
6. Check the *Vision Visit* box:



7. Click *Save*.

   The selected Visit Type Code is marked as a Vision Visit type.

   For more information about using this feature, refer to the *Electronic Medical Records Users Guide*.

Creating Orthopaedic Visit Types

Specify the Visit Type as an Orthopaedic Visit in order to access the Orthopaedic Chart.

To create Orthopaedic Visit Types:

1. From the Admin band in the left navigation pane, click *Admin*.

   The Admin Login window displays.

2. Enter your username and password in the Username and Password fields and click *Login*.

   The Admin window displays.

3. Click the *User Admin* heading in the left pane.

   The User Admin options display in the left pane.

4. Click the *Visit Type Codes* option.

   The Visit Type Codes window displays.

5. Click *Add* to add a new Visit Type Code, or click the blue heading to update an existing Visit Type Code.

6. Check the *Orthopaedic Visit* box:

7. Click *Save*.

   The selected Visit Type Code is marked as an Orthopaedic Visit Type.

   For more information about using this feature, refer to the *Electronic Medical Records Users Guide*.

Using the Visit Code Option for Medication Reconciliation

Use a visit code option for medication reconciliation on the Visit Type Codes window. With the option enabled, all current medications, including the medications from the last visit and present visit, display under the Medication Summary, Overview tab in the Right Chart Panel for that visit, and in Current Medications in Progress Notes.

To enable Medication Reconciliation:

1. From the Admin band, click the *Admin* icon.
2. Log in with your username and password.

   For more information, refer to Administrator Login.

   The Admin window displays.
3. Click the *User Admin* heading in the left pane and select the *Visit Type Codes* option from the drop-down list.

   The Visit Type Codes window displays:

Visit Type Codes

Prev Add Next

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Name	Description	Visit Type	OBGYN	Status	Color	Display
ANN VISIT	Annual Visit	Physical Visit	Yes	Active		on
Care Plan	Care Plan	Physical Visit	No	Active		on
CCMR	CCMR Visit	Regular Visit	No	Active		on
CON	Consult	Physical Visit	Yes	Active		on
cp	cp	Regular Visit	No	Inactive		on
ESTOB	Established OB Visit	Physical Visit	Yes	Active		on
ESTPT	Established Patient	Physical Visit	Yes	Active		on
F/U	Follow Up Visit	Physical Visit	No	Active		on
NOB	New OB Visit	Physical Visit	Yes	Active		on
NP	New Patient	Physical Visit	Yes	Active		on
NV	Nurse Visit	Physical Visit	No	Active		on
OBV	OB visit	Physical Visit	Yes	Active		on
obv test	obv test	Regular Visit	No	Inactive		on
ORTHO CONS	Ortho Consult	Physical Visit	No	Active		on
OV	Office Visit	Physical Visit	Yes	Active		on

4. Click *Add* to add a new Visit Type Code.

The Visit Codes window displays.

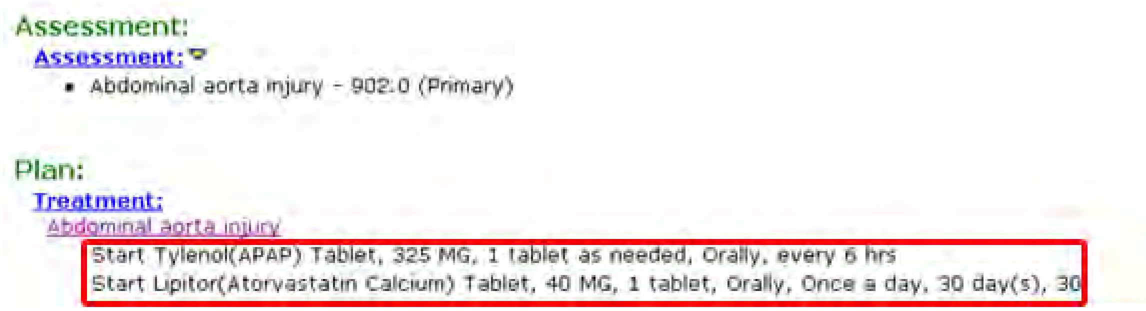
5. Check the box next to *Allow Rx reconciliation further than this Office Visit*:

6. Click *Save*.

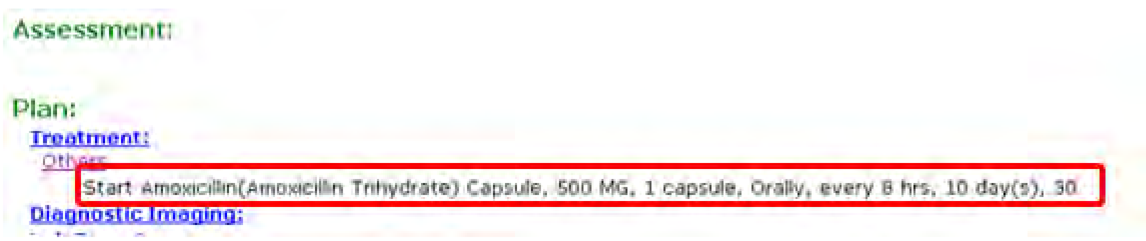
The Current Medication > Current Rx > Medication Summary in Progress Notes displays all current medications for the current and the last visit. The Medication Summary under the Overview tab on the Right Chart Panel in the current encounter also reflects the same information.

The scenario below describes this functionality:

In the first visit, the patient does not have any Current Medications, but the doctor prescribes two medications for her from the Treatment window:



In the second visit, which is flagged as *Allow Rx reconciliation further than this Office visit,* the doctor prescribes her another medication from the Treatment window:



In the third visit, the Current Medication section > Cur Rx > Medication Summary, and the Chart Panel > Medication Summary displays the medication added in the last visit (the second visit), as well as medication added from visit before the last visit (the first visit).

Current Medication section > Cur Rx > Medication Summary:

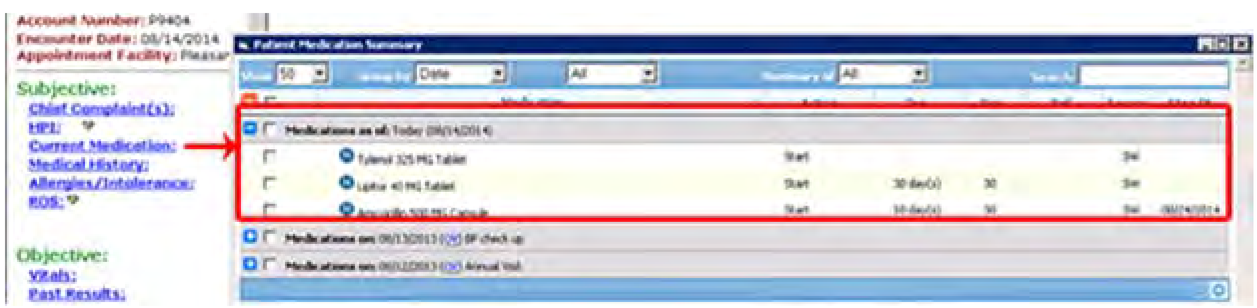


Chart Panel > Overview tab > Medication Summary:

Display Sections in Progress Notes Based on Visit Type

Enhanced Feature

Customize sections that display for Physical and Regular Visit Types from the Admin - Visit Type window. This option is not available for Operational Procedures or Interventions visits.

To customize sections that display for Physical or Regular Visit Types:

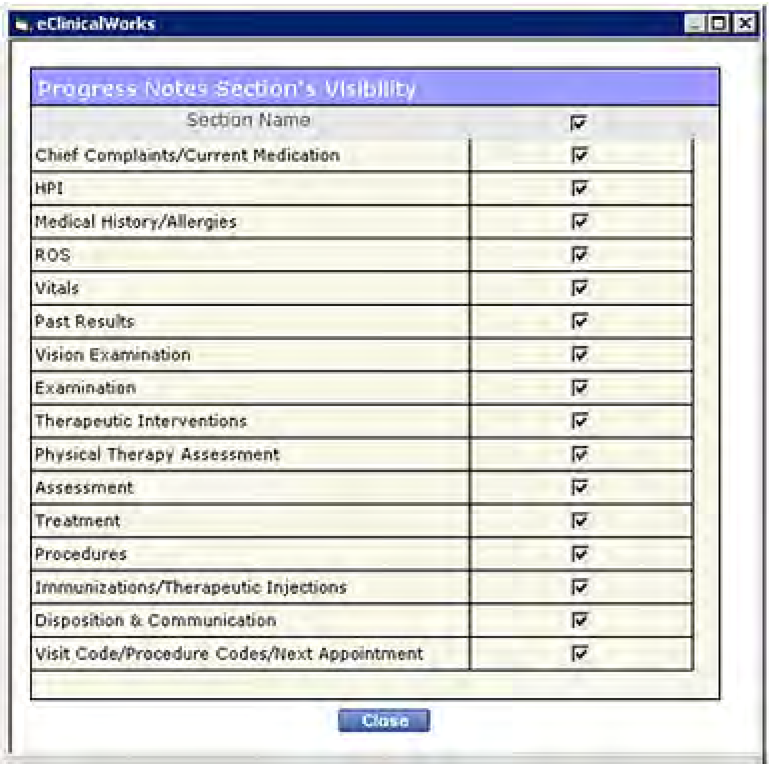
1. From the Visit Codes window, click the *Visit Type* drop-down arrow, and select *Physical* or *Regular Visit*.
2. Click *Customize*:

The Progress Notes Section's Visibility window displays.

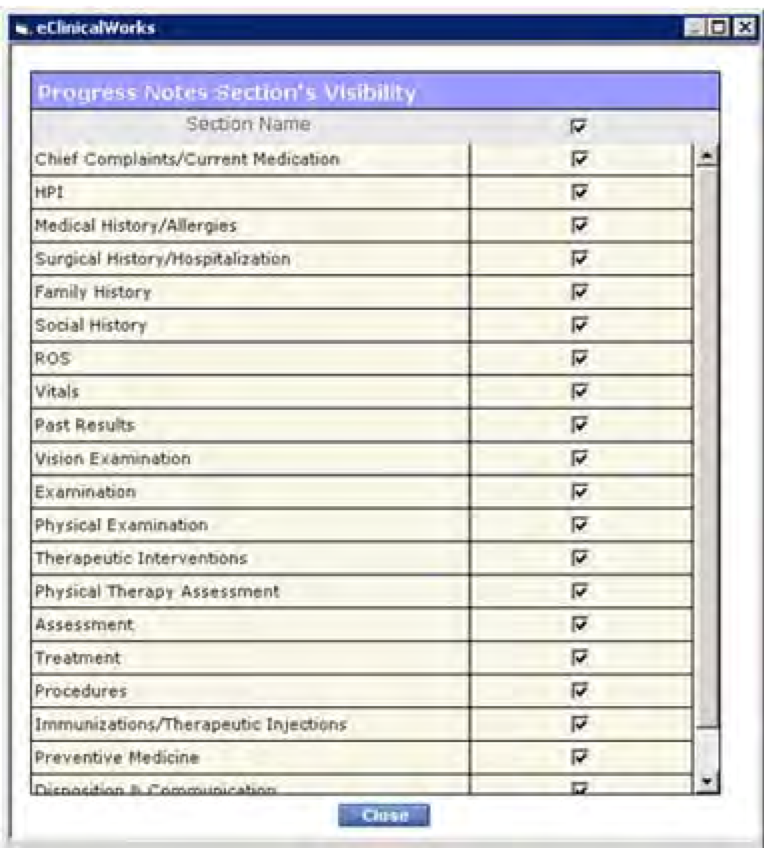
Note: Enable the Customize button for users that can access the security attribute *Customize links on Progress Notes based on visit type*.

The options in this window vary by the type of visit selected - Physical or Regular, and also by the additional boxes checked in the Visit Type window, such as OBGYN History, Physical Therapy, *etc*.

The Regular Visit Progress Notes Section's Visibility window:



Physical Visit Progress Notes Section's Visibility window:



3. Check the boxes for the sections that should display in the Progress Notes.

   To hide a section, clear the check box for that section.

4. Click *Close*.

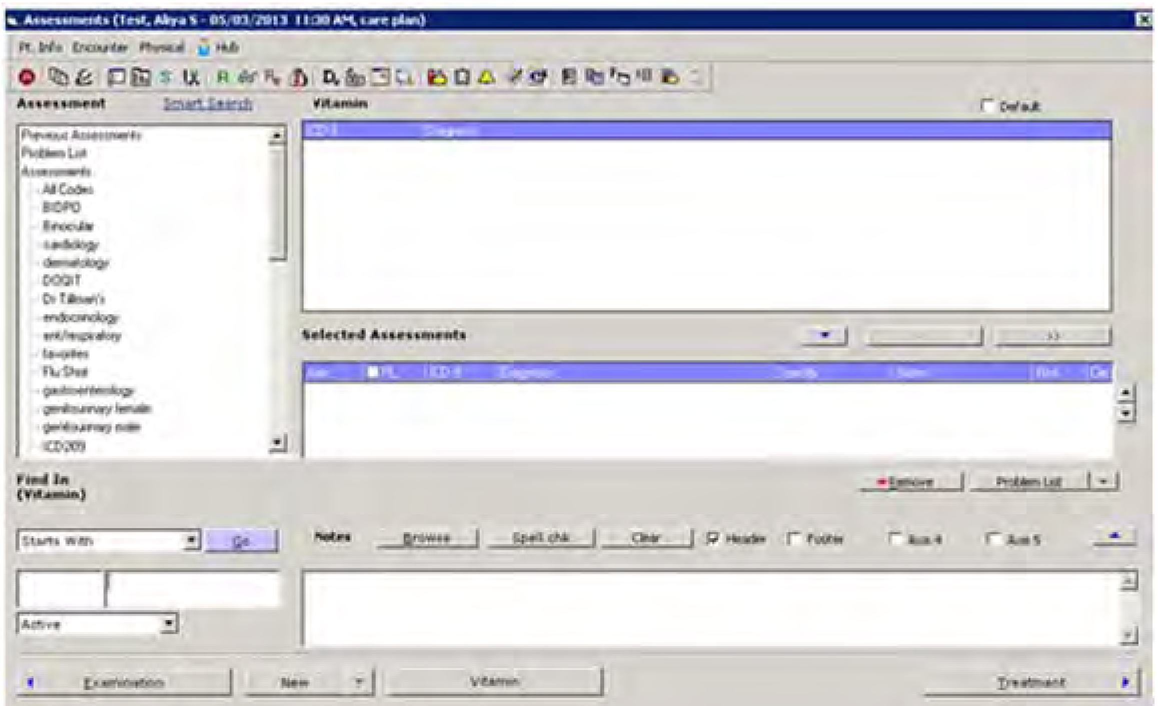
5. Click *Save*.

6. Open the Progress Notes for a customized Regular or Physical visit type.

   Selected sections display based on the customization of the visit type.

   Additional Information on Visit Type Customization:

   - With the security attribute *Show Toolbar on Progress Notes Screen* enabled for a user, that user can see the hidden Progress Notes section icon in the toolbar of any Progress Notes window, and can open that section from the toolbar:



For example, if the user did not select *Social History* from the Visit Type customization, then Social History will not display in the Progress Notes.

However, if the user selected the assessment from Visit Type customization, the user can then open the Assessments section in the Progress Notes and click the *Social History* icon from the toolbar, provided they have access to the security attribute.

The Social History window then displays, and the user can enter the appropriate information. Entering any information in the window makes the Social History section visible in the Progress Notes, regardless of whether the user has hidden the section in Visit Type customization.

Note: Any sections that were hidden in Visit Type customization will not be merged or copied to the Progress Notes when you merge or copy templates to Progress Notes.

Visit Type Durations

The Visit Type Duration defines the length of time for provider or resource appointment scheduling and the format for the Progress Notes attached to the visit.

IMPORTANT! Set the Visit Type durations for each provider to display the Visit Type in the appointment schedule.

To set up Visit Type durations:

1. From the Admin band in the left navigation pane, click *Admin*.

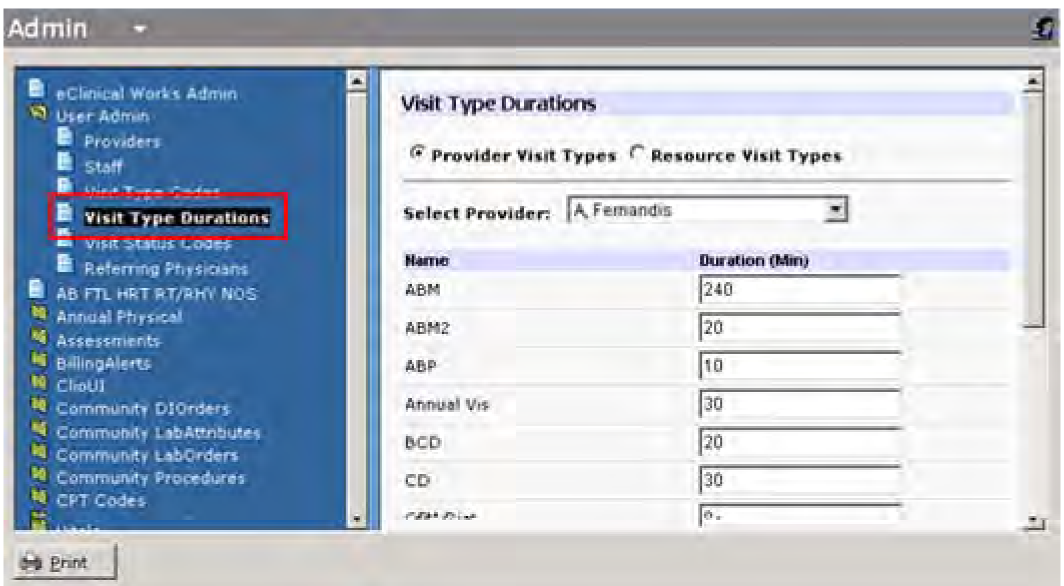
   The Admin login window displays.

2. Enter the administrator username and password.

   The Admin window displays.

3. Click the *User Admin* heading in the left pane and select the *Visit Type Durations* option from the sub-headings list.

   The Visit Type Duration window displays:



4. To set Visit Type Durations for a specific Provider or Resource, click either *Provider Visit Types* or *Resource Visit Types*.

   The corresponding Provider Visit Types or Resource Visit Types list displays.

5. Select a provider or resource from the list.

   The system applies the configured Visit Type Durations configured to only the selected provider or resource.

6. Enter the duration, in minutes, in the Duration field for each visit type.

   Based on these values, and depending on the visit type chosen, the system automatically adjusts the visit End Time in the Appointment window.

A visit type with the visit duration set to zero (0), will not display in the Visit Type selection options available for appointments.

7. Click *Save* to store the changes.

   Visit Type Durations can also be configured from the Visit Type Code window.

   For more information, refer to Configuring Visit Type Codes.

Enabling Patient Pre-Registration

The Patient Pre-registration feature is enabled from Patient Portal settings.

To enable pre-registration:

1. From the Admin band, click Patient Portal Settings.
2. Click *Feature Settings* in the Patient Portal Settings menu to display the *Activate the Features* window.
3. Click *Yes* to Enable Patient Pre-Registration:

The practice can now collect specific registration information from new patients prior to their appointment.

Note: Demographic fields in the New Patient Registration form must be configured after this feature has been activated.

For more information, refer to the *Patient Portal Users Guide*.

Configuring Mandatory Fields for Patient Pre-Registration

A new patient can pre-register with the practice before coming in for an initial visit. This step enables the practice to collect, review, and validate registration information prior to the patient's initial visit to the practice.

Note: The staff member assigned to this role must have the Patient Pre-Registration Security Setting enabled to perform this task.

To configure the New Patient Registration form:

1. From the Patient Portal Settings menu, click *New Pt Registration*.

The Configure Demographic Fields in the New Patient Registration form displays.

The Portal displays three columns in this window: Field Name, Display Field, and Mandatory Field:

- **Field Name** - Shows all the data elements that may be collected from a new patient.
- **Display Field** - Consists of check boxes that indicate whether the field will be displayed in the practice's version of the Portal.
- **Mandatory Field** - Indicates whether a field is required to be filled by the patient.

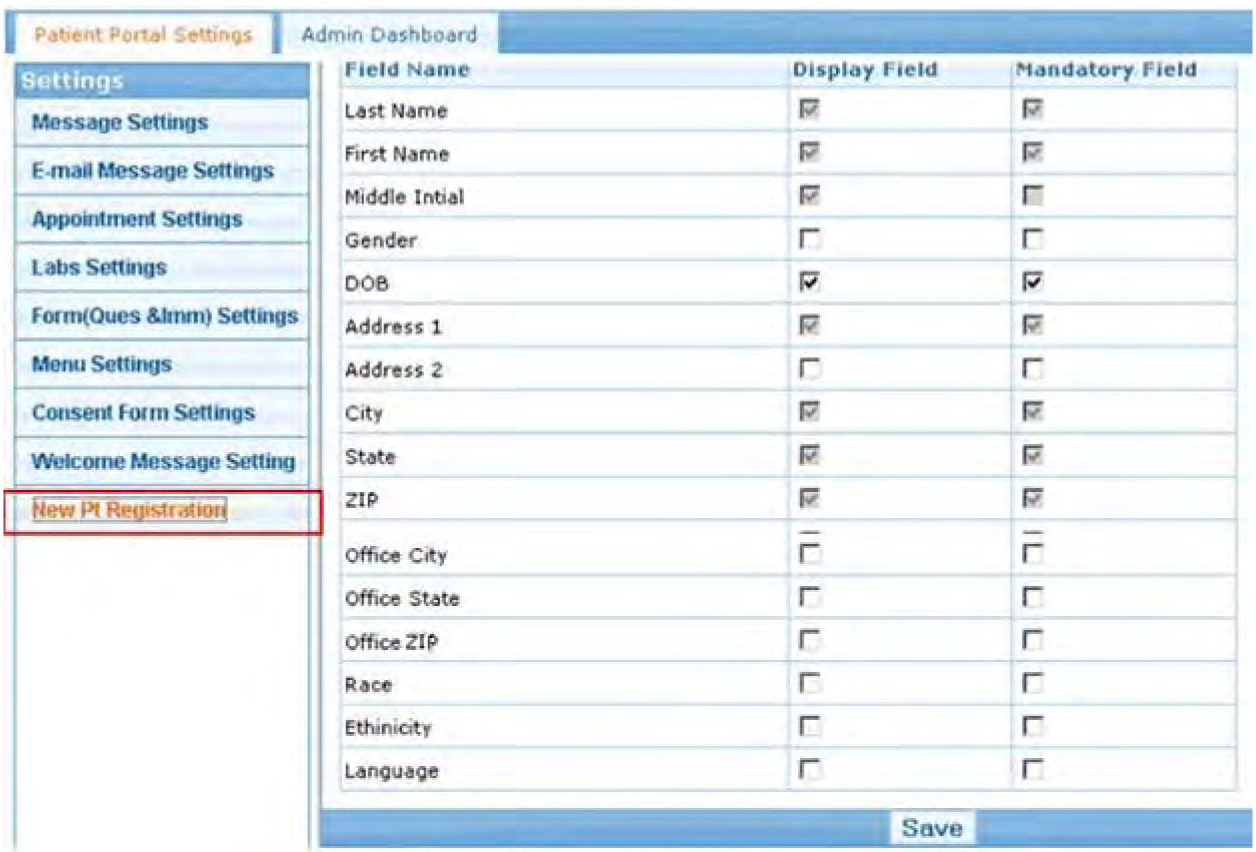
The Portal requires several fields to be displayed or filled; these are shown in gray and are not accessible for modification.

2. Select the items to be included in the registration form by checking the appropriate boxes to display fields.

3. Select the appropriate check boxes to indicate that fields are mandatory.

4. If a box, other than one required by default in the Portal, has already been checked, click it once to clear the check mark – and the requirement.

5. When all elements have been chosen for the practice, click the *Save* button:



The settings will be enabled following synchronization.

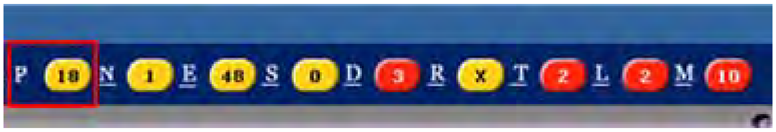
For more information about patient pre-registration through the Patient Portal, refer to the *Patient Portal Users Guide*.

Pre-Registering a New Patient

Once patients have submitted their pre-registration information, the practice can access it from eCW by using a Quick-Launch button.

To access the pre-registered patient's information:

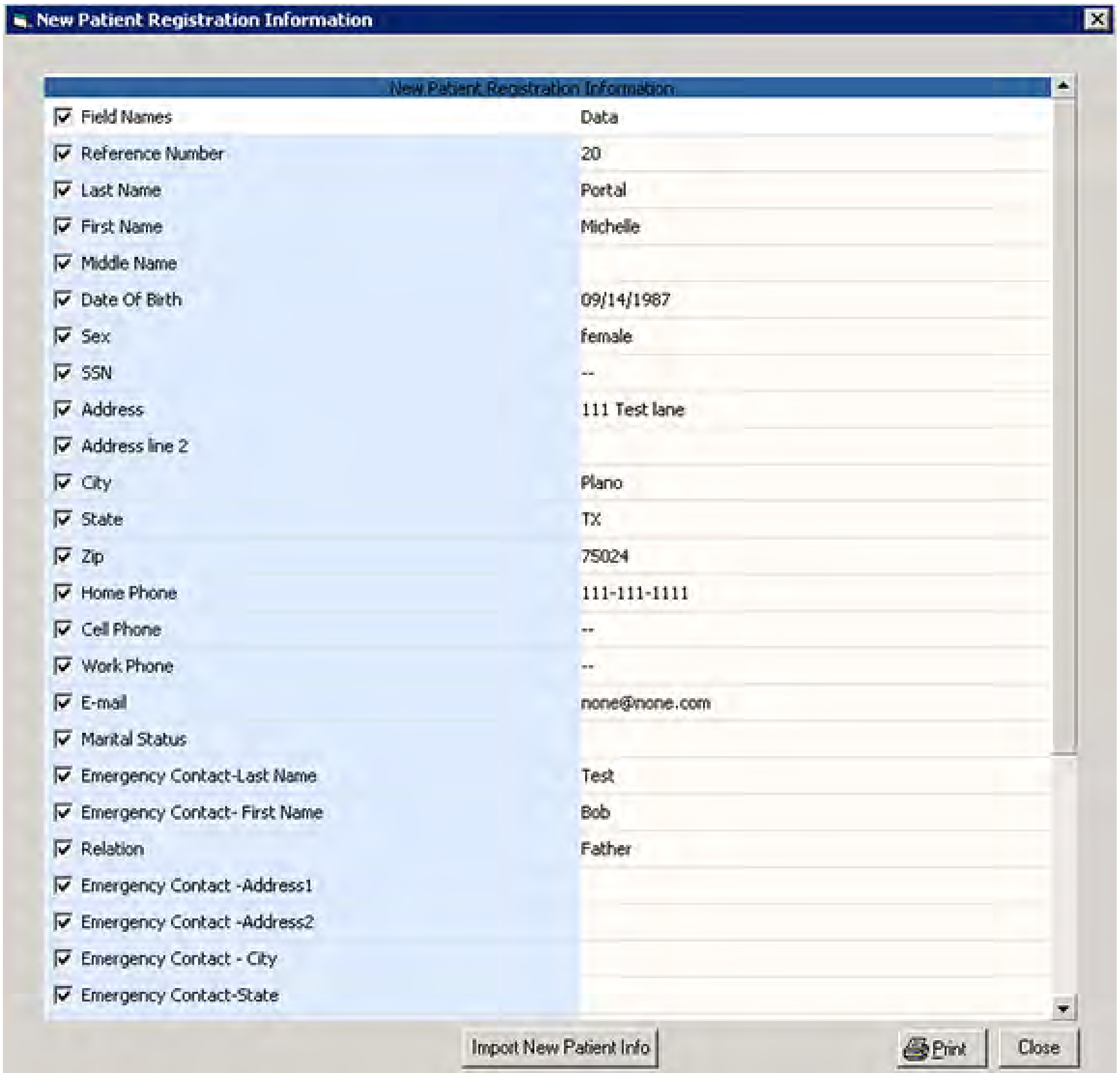
1. Click the *P* Quick-Launch button (yellow P jelly bean) at the top of the window:



A list of new pre-registered patients displays.

2. Check the box in the first column for one of the new patients to select that patient from the list:

A detail window displays, showing the patient's registration information:



Since the information provided by the patient consists of only pre-registration data, you may need to collect additional information at the front desk when the patient arrives for the initial visit.

3. Review the information in the window to determine whether it is valid and whether any other information has to be collected.

4. Click the *Import New Patient Info* button to import the patient information.

The information may also be printed for review.

If the system finds no match with the data of a patient already in the system, it imports the new patient's information, populating the new patient's Patient Information window.

However, if there is a match between the data being imported and the data of a patient already in the system, a window displays showing that conflict.

For example, a match on the patients' Social Security Numbers is a serious conflict, so the practice administrator should click the *Close* button and **not** import the new patient data until the conflict has been resolved.

To resolve the conflict:

1. Click *View Patient Info* to see the existing patient's Patient Information window to verify that the data does, in fact, match that entered by the new patient.
2. If there is a match, clear the matching data elements by clicking their check boxes.

   Only data elements that remain checked will be imported.
3. Click *Proceed With Creating a New Patient Record in the System* to create a new patient account in spite of the conflict.

   Once all conflicts have been addressed and the new patient's pre-registration information has been imported, that information appears in the new patient's Patient Information window.

   For more information, refer to the *Patient Portal Users Guide*.

Visit Status Codes

Visit Status Codes indicate the status of a current encounter on the Resource Scheduling window.

For more information about visit status codes, refer to Configuring Visit Status Codes.

Configuring Visit Status Codes

Users who have Admin permissions may create Visit Status codes from the Admin band.

The Visit Status codes define the status of the patient's visit, and may include such names as *Arrived*, *Pending*, *Checked In*, *Cancelled*, *Rescheduled*, *etc.* You can use the default set of visit statuses, add a new status, or update a status.

Map the Visit Status with the eCW Visit Codes. The system uses these for an internal routine function required by the Resource Schedule. When mapped to eCW Visit Status Codes, these codes aid in tracking and reporting visits in eCW. Failing to map the codes can affect the Office Visits window and Reports. It is especially important to map the Arrived and Checked Out statuses, which enable the system to calculate visit durations.

For more information about mapping Visit Status codes, refer to *Mapping Visit Status Codes* in the *Front Office Users Guide*.

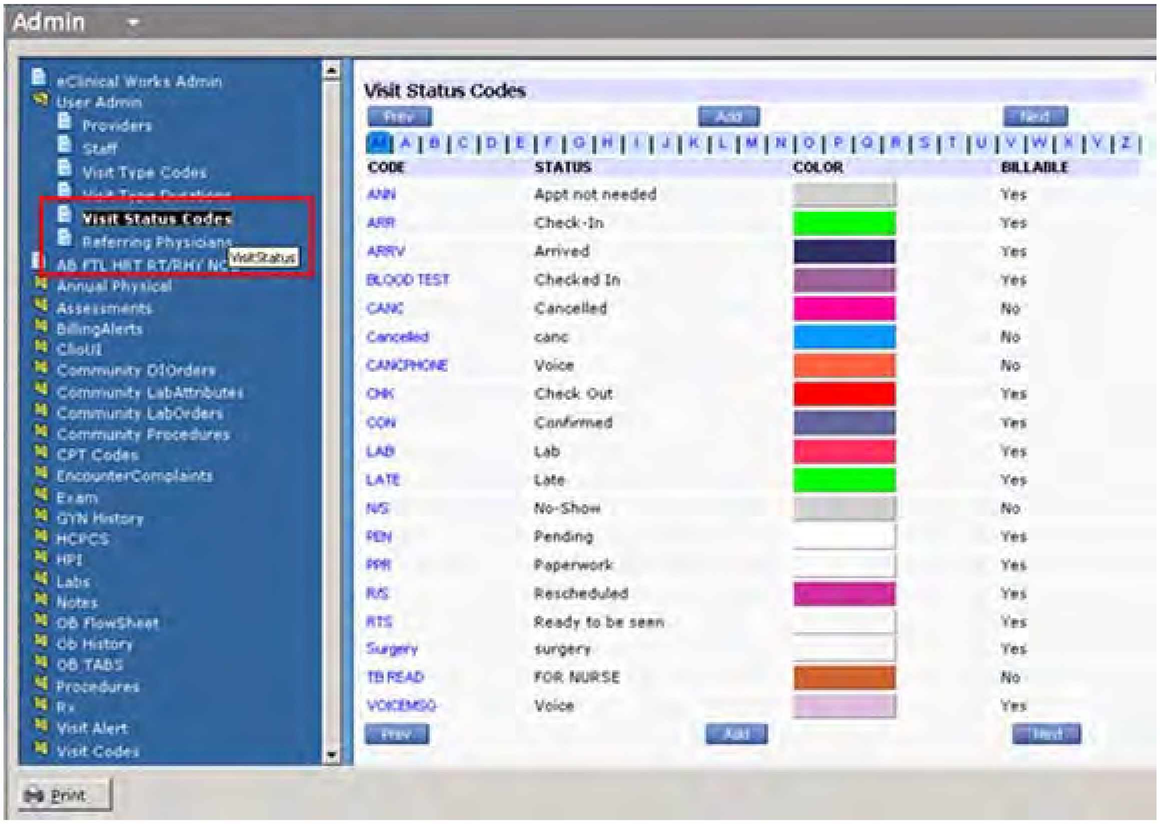
To create a Visit Status code:

1. From the Admin band in the left navigation pane, click *Admin*.

   The Admin login window displays.
2. Enter the administrator username and password.

   The Admin window displays.
3. Click the *User Admin* heading in the left pane and select the *Visit Status Codes* option from the drop-down list.

   The Visit Status Codes window displays:



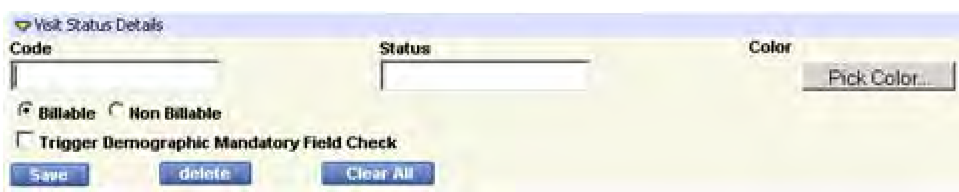
- To display the Visit Status sorted by name, click the blue letters from the alphabetical tabs at the top of the window.
- To flip to the next or previous page, click *Next* or *Previous*.

4. To create a Visit Status code, click *Add*.

The Visit Status Details window displays.

a. Enter a short name in the Code field.

b. Enter a full description in the Status field.



5. To assign a unique color to the Visit Status code, click *Pick Color*. This helps in identifying the status of the appointments in the Resource Schedule window.

The color chart displays.

a. Move your cursor over the color blocks, and click a color to select it.

b. Click *Close* to save your color choice and return to the New Visit Status window.

- The Visit Status color is the fill color of the appointment slot on your schedule.
- The Visit Type color, described previously, is the outline color.

6. Click *Billable* or *Non Billable* to associate the appropriate flag with the appointment status.

> **IMPORTANT!** A visit status removes the Progress Notes from the patient's chart and does not include an indication that the encounter needs a claim.

If a user clicks *Non Billable*, the system displays the following message when a user selects this visit status from the appointment window:

```
The selected code '…' is non-billable. Do you want to continue? The user has to click 'Yes' or 'No' to proceed.
```

If the user clicks *Yes*, the system removes the appointment from the Resource Schedule window.

7. Check the Visit Status code *Trigger Demographic Mandatory Field* check box to ensure that the system validates that the patient's demographic information contains all mandatory fields.

> **Note:** This feature is available only to users who have permission for the Patient Pre-Registration Security Attribute.
>
> For more information, refer to Security Attributes.

8. Click *Save* to store the changes.

> **IMPORTANT!** Map the Visit Status with the eCW Visit Codes. The system uses these for an internal routine function required by Resource Schedule. Failing to map the codes can affect the Office Visits window and Reports.
>
> For more information about mapping Visit Status codes, refer to *Mapping Visit Status Codes* in the *Front Office Users Guide*.

Updating a Status Code

You can update or view details of a specific Visit Status at any time.

To update a status code:

1. From the Admin band in the left navigation pane, click *Admin*.

The Admin login window displays.

2. Enter the administrator username and password.

The Admin window displays.

3. Click the *User Admin* heading in the left pane and select the *Visit Status Codes* option from the drop-down list.

The Visit Status Codes window displays.

4. To update or view details of a specific Visit Status, click the blue Visit Code from the Visit Status Codes window.

5. Click *Clear All* to remove all the Codes and Status fields in the Visit Status Details window.

6. Click *Save* to store your changes.

Deleting a Status Code

Unused status codes can be deleted.

To delete a status code:

1. From the Admin band in the left navigation pane, click *Admin*.

   The Admin login window displays.

2. Enter the administrator username and password.

   The Admin window displays.

3. Click *User Admin* in the left pane and select *Visit Status Codes* from the drop-down list.

   The Visit Status Codes window displays.

4. Click the blue Visit Status code.

   The Visit Status Details window displays.

5. Click *Delete* to remove the Visit Status Code.

6. Click *Yes* when prompted to delete the status code.

   The Visit Status code is deleted.

Customizing Categories and Items

Many categories and items that display throughout the system can be managed and customized from the Admin window. Add, delete, and rename, and reorder Categories, Items, and Properties, all from the Admin window. Users can set many other customizations elsewhere in the system.

For more information, refer to:

- Accessing the Admin Window
- Organizing Appointment Reason Keywords

Accessing the Admin Window

To access the Admin window:

1. From the Admin band in the left navigation pane, click *Admin*.

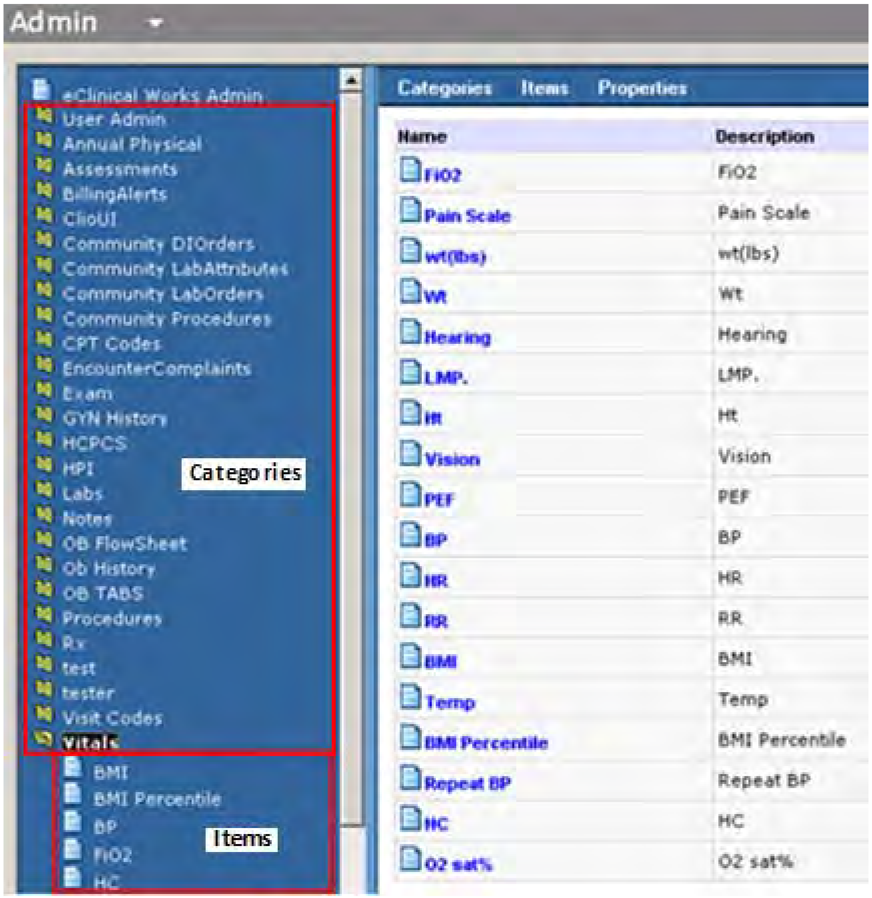
   The Admin login window displays.

2. Enter the same username and password you use to log in to the application.

3. Click *Login*.

   The Admin window displays.

   In the left pane of the Admin window, a tree view of all the customizable categories and items displays. Folder icons indicate categories. Items are indicated by page icons:



IMPORTANT! Deleting or renaming certain items from the Admin window may cause the application to function improperly. Do not attempt to customize any areas not mentioned without receiving explicit instructions from eClinicalWorks Support.

For more information about reason keywords, refer to Organizing Appointment Reason Keywords.

Organizing Appointment Reason Keywords

When creating appointments, reorder the keywords accessed from the More (…) button next to the Reason field.

To reorganize Appointment Reasons keywords:

1. From the Admin band in the left navigation pane, click *Admin*.

The Admin login window displays.

2. Enter the Admin username and password and click *Login*.

The Admin window displays.

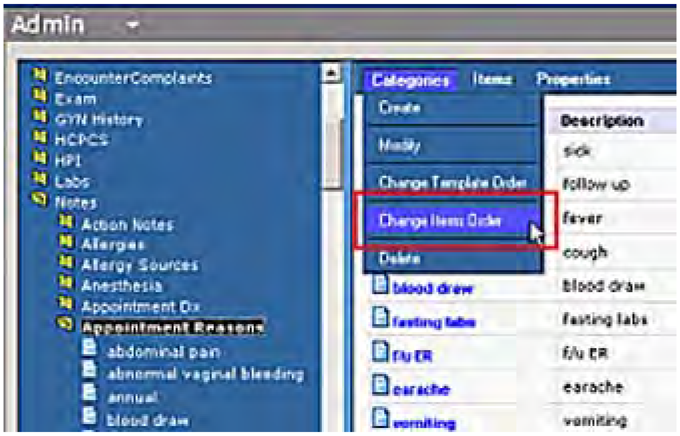
3. From the Admin window, click the *Notes* category.

a. From the Notes category, click the *Appointment Reasons* category.

A list of Appointment Reasons keywords displays.

b. Pass your mouse over the Categories menu to display a list of options.

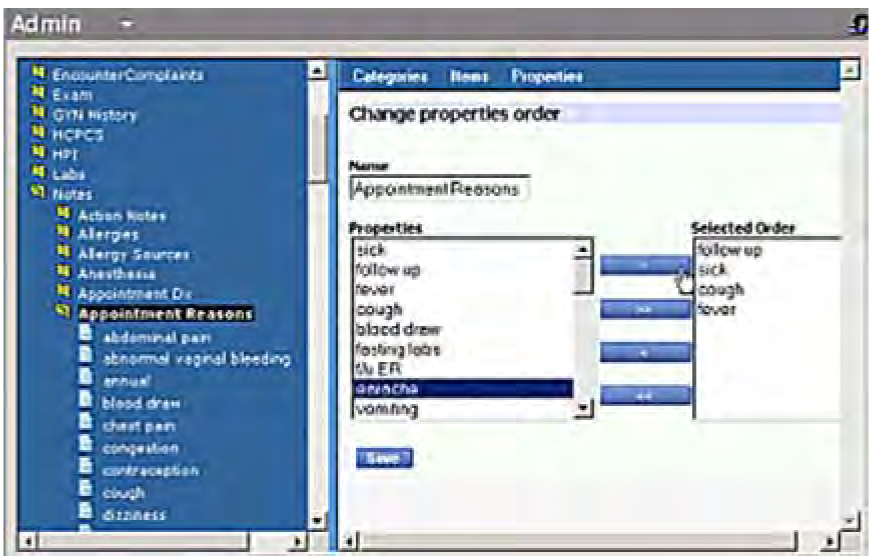
c. Click *Change Items Order*:



The Change Properties Order window displays.

d. Highlight the item in the Properties field that you want to display first from the Appointment window Reasons keywords field.

e. Click > to move the highlighted item to the Selected Order field:



4. Repeat steps a-e until all the properties have been moved from the Properties field to the Selected Order field.

5. Click < to move a selected item from the Selected Order field back to the Properties field.

> **IMPORTANT!** All the items must be moved to the Selected Order field or the changes made will not be reflected on the Reasons keywords window.

6. Click *Save*.

The items are reorganized into the order specified in the Selected Order field.

Lock

Lock the eClinicalWorks application and your workstation to ensure security.

For more information about locking, refer to:

- Locking eClinicalWorks
- Locking Your Workstation

Locking eClinicalWorks

To lock the eClinicalWorks application:

1. From the Lock menu, click the *Lock eClinicalWorks* option.

   The login window for your eClinicalWorks displays.

2. To log in again, enter your username and password.

Locking Your Workstation

To lock your workstation:

1. From the Lock menu, click the *Lock Workstation* option to lock your computer.

   The login window for your computer displays.

2. To log in again, enter your username and password.

Reporting Tasks

The system administrator downloads APL reports from the eClinicalWorks FTP server or from the local server, for use with the eClinicalWorks system.

To download APL reports…	Do this…
Directly from eClinicalWorks	The system administrator clicks *Download eCW Reports from the eClinical FTP Server* option from the Help menu. The APL reports are downloaded to your local FTP server.
From the local server	From the Help menu, click *Download eCW Reports* from Local FTP Server. The reports download to your local system. Use these reports to generate reports with data from your eClinicalWorks system.

System Messages

If an upgrade is available for the eClinicalWorks application, when logging in to the application, a pop-up window notifies you of the upgrade and prompts users to upgrade.

If you click *No*, a new message displays describing the discrepancy between the client and application server and the potential risks of not upgrading.

LOGS AND REPORTS

The System Administrator has access to a number of logs and reports that provide information about user activity and changes to the system.

For information about logs, refer to System Admin Logs; and, for information about reports, refer to System Admin Reports.

System Admin Logs

System Admin logs contain information relating to changes made to the eClinicalWorks system by users. This built-in feature provides a detailed audit trail of user activity and other changes to patient information within the system.

- The following sections describe the logs available to the administrator to track this activity:
  - Viewing the User Log
  - Viewing the Server Log
  - Viewing the Practice Management Scheduled Tasks Status Report
  - Enabling Debug Logs
  - Viewing the HIPAA Logs
- For information about the following logs that are useful to the front office staff, refer to the *Front Office Setup Guide*:
  - Appointment Log
  - Fax Log
  - Letter Log
- For information about the following logs related to referral appointments and patient information, refer to the *Security Attributes and Logs Guide*:
  - Referral (Outgoing) Appointment Log
  - Patient Information Log
- For information about the logs related to a patient encounter, refer to the *Electronic Medical Records Setup Guide*:
  - Encounters Log
  - Telephone/Web Encounter History Log
  - Prescription Log
  - e-Prescription Logs
  - Progress Notes Log
- For information about the descriptions of the many billing-related logs, refer to the applicable sections of the *Billing Setup Users Guide*.

Viewing the User Log

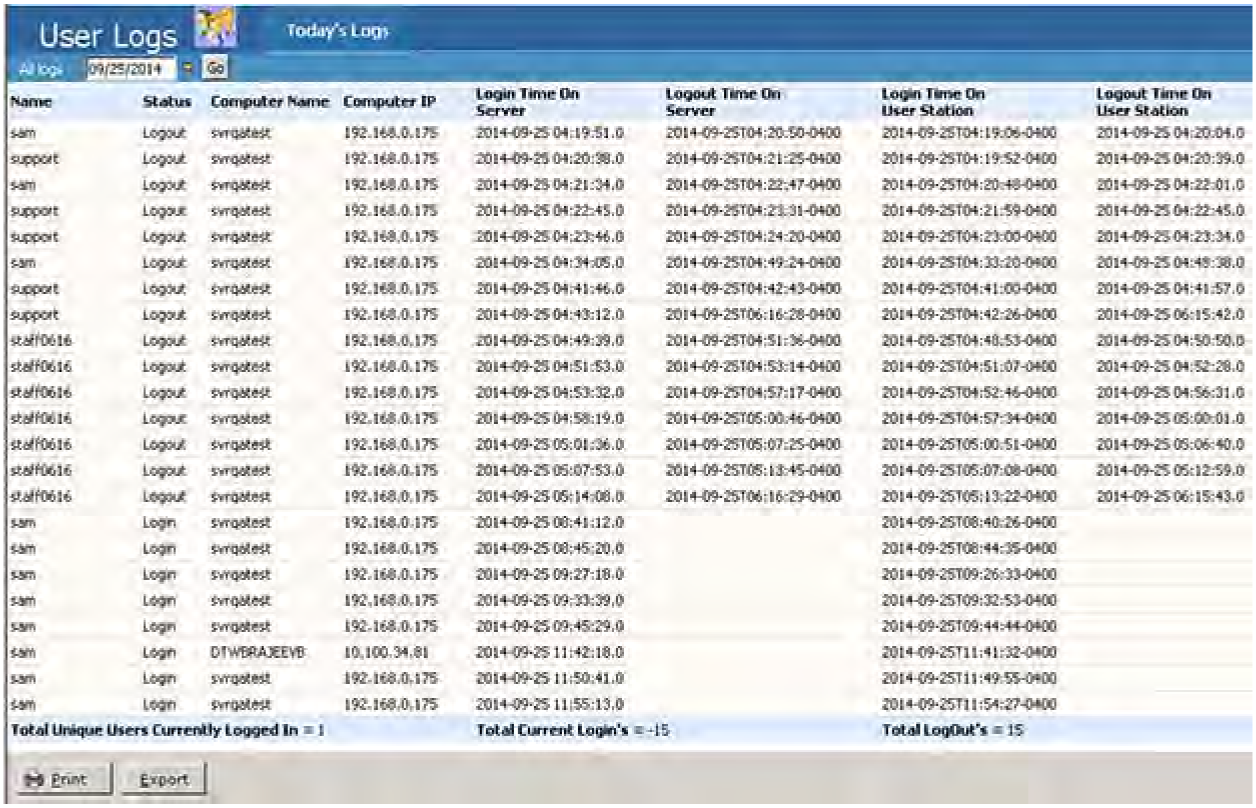
The User Log displays a record of when users log into and out of the system. This view defaults to the current date.

To accommodate for workstation and server times that may be in different time zones, additional columns added to the User Logs window display users' workstation logout and login times. This feature incorporates logs based on both server and workstation.

To view the logs:

1. From the Admin band in the left navigation pane, click *User Logs*.

The User Logs window opens, displaying the User Logs for today's date:



Name	Status	Computer Name	Computer IP	Login Time On Server	Logout Time On Server	Login Time On User Station	Logout Time On User Station
sam	Logout	svrqatest	192.168.0.175	2014-09-25 04:19:51.0	2014-09-25T04:20:50-0400	2014-09-25T04:19:06-0400	2014-09-25 04:20:04.0
support	Logout	svrqatest	192.168.0.175	2014-09-25 04:20:38.0	2014-09-25T04:21:25-0400	2014-09-25T04:19:52-0400	2014-09-25 04:20:39.0
sam	Logout	svrqatest	192.168.0.175	2014-09-25 04:21:34.0	2014-09-25T04:22:47-0400	2014-09-25T04:20:48-0400	2014-09-25 04:22:01.0
support	Logout	svrqatest	192.168.0.175	2014-09-25 04:22:45.0	2014-09-25T04:23:31-0400	2014-09-25T04:21:59-0400	2014-09-25 04:22:45.0
support	Logout	svrqatest	192.168.0.175	2014-09-25 04:23:46.0	2014-09-25T04:24:20-0400	2014-09-25T04:23:00-0400	2014-09-25 04:23:34.0
sam	Logout	svrqatest	192.168.0.175	2014-09-25 04:34:05.0	2014-09-25T04:49:24-0400	2014-09-25T04:33:20-0400	2014-09-25 04:48:38.0
support	Logout	svrqatest	192.168.0.175	2014-09-25 04:41:46.0	2014-09-25T04:42:43-0400	2014-09-25T04:41:00-0400	2014-09-25 04:41:57.0
support	Logout	svrqatest	192.168.0.175	2014-09-25 04:43:12.0	2014-09-25T06:16:28-0400	2014-09-25T04:42:26-0400	2014-09-25 06:15:42.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 04:49:39.0	2014-09-25T04:51:36-0400	2014-09-25T04:48:53-0400	2014-09-25 04:50:50.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 04:51:53.0	2014-09-25T04:53:14-0400	2014-09-25T04:51:07-0400	2014-09-25 04:52:28.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 04:53:32.0	2014-09-25T04:57:17-0400	2014-09-25T04:52:46-0400	2014-09-25 04:56:31.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 04:58:19.0	2014-09-25T05:00:46-0400	2014-09-25T04:57:34-0400	2014-09-25 05:00:01.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 05:01:36.0	2014-09-25T05:07:25-0400	2014-09-25T05:00:51-0400	2014-09-25 05:06:40.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 05:07:53.0	2014-09-25T05:13:45-0400	2014-09-25T05:07:08-0400	2014-09-25 05:12:59.0
staff0616	Logout	svrqatest	192.168.0.175	2014-09-25 05:14:08.0	2014-09-25T06:16:29-0400	2014-09-25T05:13:22-0400	2014-09-25 06:15:43.0
sam	Login	svrqatest	192.168.0.175	2014-09-25 08:41:12.0		2014-09-25T08:40:26-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 08:45:20.0		2014-09-25T08:44:35-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 09:27:18.0		2014-09-25T09:26:33-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 09:33:39.0		2014-09-25T09:32:53-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 09:45:29.0		2014-09-25T09:44:44-0400	
sam	Login	DTWBRAJEEVB	10.100.34.81	2014-09-25 11:42:18.0		2014-09-25T11:41:32-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 11:50:41.0		2014-09-25T11:49:55-0400	
sam	Login	svrqatest	192.168.0.175	2014-09-25 11:55:13.0		2014-09-25T11:54:27-0400	
Total Unique Users Currently Logged In = 1				**Total Current Login's = -15**		**Total LogOut's = 15**	

2. Click the *Date* drop-down.

3. Select a date.

4. Click *Go*.

The following information displays:

- **Name** - Displays the name of the user.
- **Status** - Displays whether the user logged in or logged out.
- **Computer Name** - Displays the name of the computer used to access eClinicalWorks.
- **Computer IP** - Displays the IP address of the computer used to access eClinicalWorks.
- **Login Time on Server** - Displays the date and time when the user logged in to the local system.
- **Logout Time on Server** - Displays the date and time when the user logged out of the workstation.

- **Login Time on User Station** - Displays the date and time when the user logged in to the local system.
- **Logout Time on User Station** - Displays the date and time when the user logged out of the workstation.
- **Version** - Displays the version of eClinicalWorks accessed.

Printing the User Log

Users can print a hard copy of the user log.

To print the log, click *Print*.

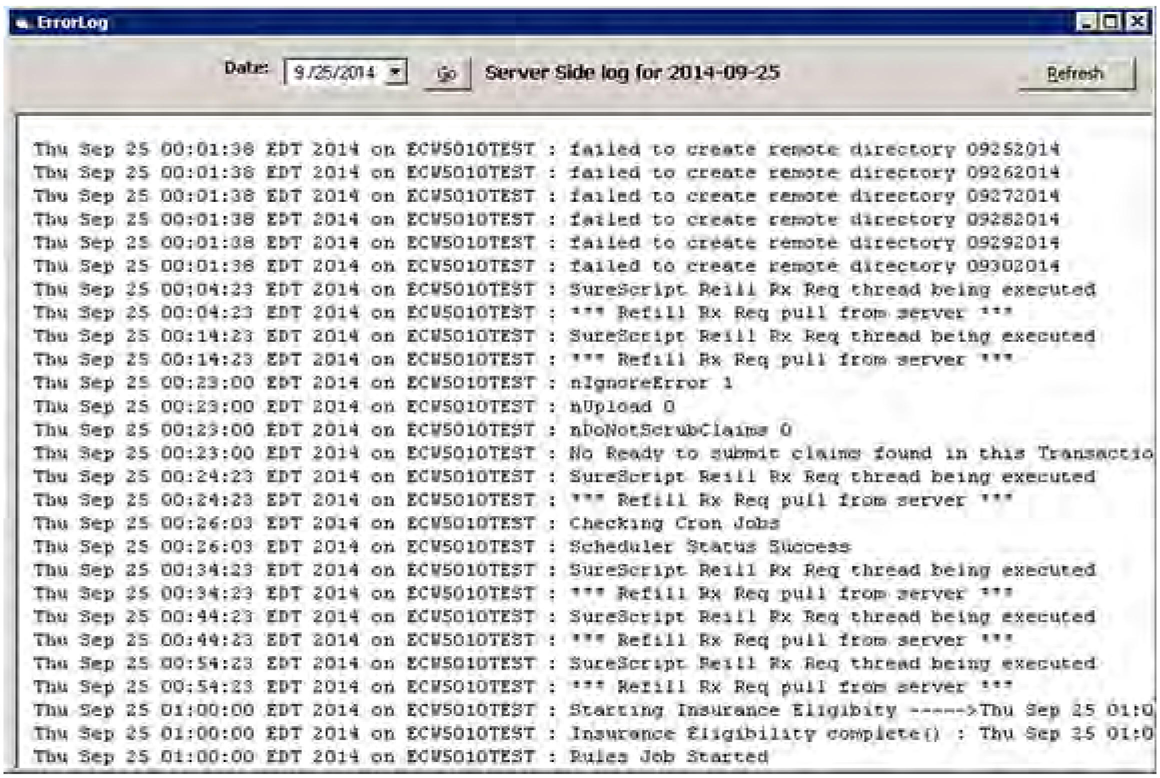
Viewing the Server Log

View the date-specific server log files using the following steps.

To access Server Logs:

1. From the Help menu, point to the *Logs* option, and then click *Server Log*.

   The ErrorLog window displays:



2. To view the server logs for a specific date:

   a. Select the date from the Dates drop-down calendar.

   b. Click *Go*.

      The Server logs for the selected date display.

> **Note:** To refresh the information displayed in this window, click the *Refresh* button.

Enabling Debug Logs

Debug logs can be enabled from the Help menu.

To enable Debug Logs:

From the Help menu, point to the *Logs* option, and then click *Enable Client Debug Logs*.

Debug logs are enabled.

Viewing the Practice Management Scheduled Tasks Status Report

You can run a report on the status of the Practice Management scheduled tasks in your practice.

To generate a scheduled tasks status report:

1. From the Reports menu, click *PM Scheduled Tasks Status*.

   The PM Scheduled Tasks Status window displays:

Task Description	Begin Date	Begin Time	End Date	End Time	Status	Notes
Auto Claim Creation	09/25/2014	11:35:00	09/25/2014	11:35:00	Completed Successfully	
Electronic Patient Statements	09/25/2014	10:10:00	09/25/2014	10:10:03	Completed Successfully	
Automatic Download :ERA files	09/25/2014	07:00:00	09/25/2014	07:00:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	06:00:00	09/25/2014	06:00:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	05:00:00	09/25/2014	05:00:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	05:00:00	09/25/2014	05:00:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	05:00:00	09/25/2014	05:00:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	05:00:00	09/25/2014	05:00:00	Completed Successfully	
Electronic Patient Statements	09/25/2014	04:30:00	09/25/2014	04:30:04	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	04:30:00	09/25/2014	04:30:00	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	04:00:00	09/25/2014	04:00:00	Completed Successfully	
Automatic Download :Claims Reports	09/25/2014	02:00:00	09/25/2014	02:00:00	Completed Successfully	
Electronic Claim Batch Creation	09/25/2014	01:05:00	09/25/2014	01:05:01	Completed Successfully	
Insurance Eligbility Scheduled Job	09/25/2014	01:00:00	09/25/2014	01:00:00	Completed Successfully	
Electronic Claim Batch Creation	09/25/2014	00:23:00	09/25/2014	00:23:00	Completed Successfully	
Auto Claim Creation	09/24/2014	22:59:00	09/24/2014	22:59:00	Completed Successfully	
Electronic Claim Batch Creation	09/24/2014	22:00:00	09/24/2014	22:00:00	Completed Successfully	

2. To create a date range for the report, select the dates from the drop-down calendars in the From Date and To Date filters.
3. Select the status of the tasks you are interested in reviewing from the drop-down list in the Status filter.
4. Click *Run Report*.

   The list of reports that meets the criteria you selected displays in the grid and provides the details of each report. The Status column lists the state of each task.

Viewing the HIPAA Logs

New Feature

The schedule jobs *HippaLogs* and *HippaLogsWkEnd* are configured to parse the logs from an XML form to readable data. eCW stores these logs as raw XML data and generates access logs for Progress Notes and patient demographics.

The *HippaLogs* job is triggered on a daily basis and parses number of rows from XML form to readable format.

The *HippaLogsWkEnd* job is triggered if there is any backlog from the week.

The log tables are archived once they reach a size of 4GB in a MySQL® environment (not for MSSQL®). The weekend job *HippaLogsWkEnd* also looks at these archived tables to check whether any data needs to be parsed:

System Admin Reports

For more information about system administration reports, refer to:

- Producing an Oversight Physician Productivity Report
- Viewing the Authentication Security Log

Producing an Oversight Physician Productivity Report

Generate a report on the productivity of oversight providers from the Reports menu.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 0593_UK.

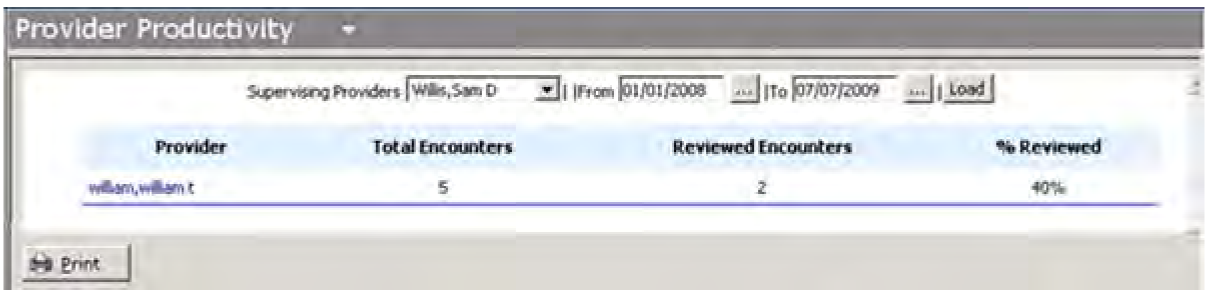
To produce the Oversight Physician Productivity report:

1. From the Reports menu, click *Oversight Physician Productivity*.

   The Provider Productivity window displays.

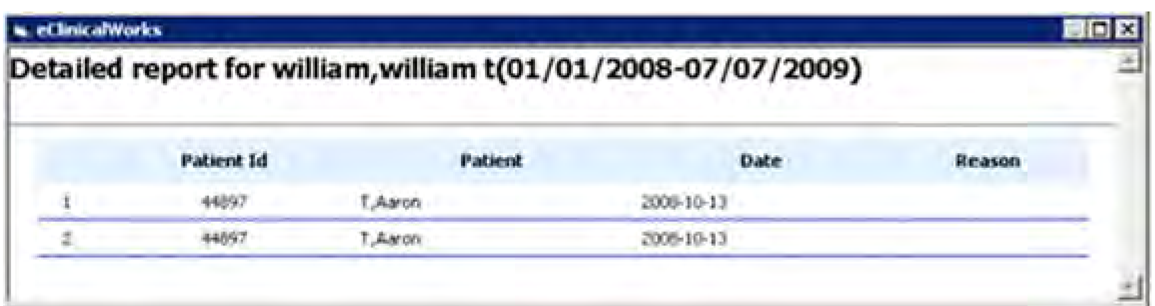
2. To look up a productivity report, select the oversight provider and a date range, then click *Load*.

   The report displays the Provider name along with Total Encounters, Reviewed Encounters, and % Reviewed:



3. Click the *Provider* name.

   A detailed report for the oversight provider displays the Patient ID, Patient name, Date, and Reason for the encounter:



Viewing the Authentication Security Log

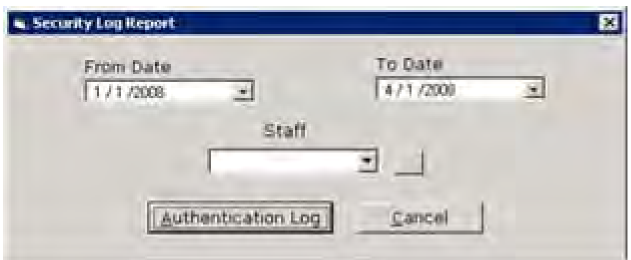
The Security Log enables administrators to view information concerning accounts that XXX locked/unlocked, session-activity timeouts, and any changes made by the administrator on the Authentication window.

Note: This feature is enabled by item key. Contact eCW Support and refer to the Item Key Code 0403_UK.

Note: Authentication Security Logs are viewable only by the system administrator.

1. From the Reports menu, click *View Security Logs*.

   The Security Log Report window displays:



2. Select the date range of the log to view using the From Date and To Date fields.
3. To view the logs for a specific user, select them from the Staff drop-down list.

   OR

   Click *More* (...) next to the Staff field. Leave the Staff field blank to view a log of all users.
4. Click *Authentication Log*.

   The Security Log Report displays with the specified information.

   Note: The Authentication Failure Lockout must be enabled for the log to generate. To configure this setting, go to the File menu > Settings > Authentication Settings, check the *Authentication failure lock out* box, and enter the number of failed attempts before a user is locked out.

APPENDIX A: BACKING UP DATA

Backups

Make regular scheduled backups as described in the following sections.

Essential Backups

Make the following backups on a daily basis:

- **Database** - Back up the entire mobiledoc directory.

  This location of the directory is:
  `<*drive*>\eClinicalWorks\mySQL\data directory`

  For example, if the installation is on the C: drive, back up the following:
  `C:\eClinicalWorks\mySQL\data\mobiledoc`

- **Scanned Documents and Images** - Scanned documents and images are placed on a FTP site on your eClinicalWorks® server. The FTP site should have two folders:
  - **Scanned documents** - Placed in the root level of the FTP site.
  - **Images** - Placed in the Patients folder.

  Your FTP site is located within the FTP folder in the <drive>\eClinicalWorks directory.

  For example:

  C:\eClinicalWorks\FTP

- **OB Database** (for OB/GYN practices only)

  The OB Database is located under OBDB folder in the < drive> \eClinicalWorks folder.

  For example:
  `C:\eClinicalWorks\obdb`

Recommended Backups

eClinicalWorks also recommends a monthly backup of the entire eClinicalWorks server installation:

Back up the following directories each month:

- <*Install Drive*>\eClinicalWorks
- Program Files\ eClinicalWorks
- C:\ecw

APPENDIX B: NOTICES

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