

eClinicalWorks

V.8.0 TRANSITION CHECKLIST

An overview in preparation for transition to eClinicalWorks v.8.0

CONTENTS

- EMR-Related Setup _____ 3**
- EMR Checklist _____ 3**
- New EMR Features and Enhancements _____ 3**
- Setting Up Immunizations and Lot Numbers Lookup New Features _____ 3
- Setting Up Vitals Ranges and Capturing Vitals _____ 3
- Setting Up Structured Data _____ 4
- Setting Up Procedures _____ 5
- Assigning LOINC Codes to Lab Attributes _____ 5
- Assigning Modality Codes to RAD tests _____ 5
- Setting Up Clinical Measures (CM) _____ 5
- Setting Up Alerts and Order Sets _____ 6
- eHIX Mapping of Community IDs to Local Data Items (Community Features) _____ 6
- Progress Notes-Related Setup _____ 7**
- Progress Notes Checklist _____ 7**
- New Progress Notes Features and Enhancements _____ 7**
- Setting Up Smart Forms _____ 7
- Searching for Encounters by Date and Dx _____ 8
- Adding Lab and DI Image Results from the Chart Panel _____ 8
- Using the Enhanced Problem List _____ 8
- Displaying Dx in Faxed and Printed Rx _____ 8
- Using the New Allergy Categories and Types _____ 8
- Using the Authorization for Rx Feature _____ 9
- Mapping the Average Wholesale Price _____ 9
- Using Health Maintenance Alerts _____ 9

EMR-Related Setup

EMR Checklist

- [Setting Up Immunizations and Lot Numbers Lookup](#)
- [Setting Up Vitals Ranges and Capturing Vitals](#)
- [Setting Up Structured Data](#)
- [Setting Up Procedures](#)
- [Assigning LOINC Codes to Lab Attributes](#)
- [Assigning Modality Codes to RAD tests](#)
- [Setting Up Clinical Measures \(CM\)](#)
- [Setting Up Alerts and Order Sets](#)
- [eEHX Mapping of Community IDs to Local Data Items \(Community Features\)](#)

New EMR Features and Enhancements

Setting Up Immunizations and Lot Numbers Lookup New Features

- Update existing lot numbers to assign lot types and VFC.
- Lot Number by Facility

Requirements:

This functionality will assist practices with multiple locations. This feature will require setup from the Admin staff and will also require training for nurses.

Please refer to the V.8.0 Release Notes more information on how to utilize this functionality.

Setting Up Vitals Ranges and Capturing Vitals

- Configure Vital Ranges (8.0)
- Configure Mandatory Fields
- Configure Qualifiers
- Associate CPTs
- Configure Additional Items:

- New Pain Scale
- New Vision
- Hearing

Requirements:

The Configure Vitals now includes a new option titled Qualifiers.

The option to associate CPT codes with Vitals is also available and will need Admin setup. Additional items have been added to the Vitals sections to document the patient's pain scale, vision, and hearing.

To set the hearing parameters, use the following path to navigate to the settings:

File > Settings > Practice Defaults > Mid-Office > Vitals - Freq. and Decibels

Documenting Vitals:

The practice must train their staff to document the Vitals information in the Progress Notes. Clinical staff needs to be aware of the CPT association. Information can be collected now pertaining to how the Vitals are configured.

For example, BP will now be a single vital parameter and can be identified if it was obtained standing or sitting.

Impact:

The practice must to retire and/or restructure all previous vital parameters.

Setting Up Structured Data

N-Level Structure Data:

The practice must convert the Structured Data elements to N-Level structured data elements. These elements must be recreated and N-Level structured data is NOT backward compatible.

Social History Tree-Structure

The Social History architecture has been redesigned as a tree structure. Please note that all existing items under Social History will be moved under a "General" folder. Practices must be aware of this and prepare their staff for this change as it will be reflected immediately after the upgrade is performed. Please verify the

folder in the test environment and design all protocols accordingly for this change to be adapted in the practice.

Impact:

The practice must redesign their bubble sheets and/or Patient Portal Questionnaire to include N-Level structure data.

Setting Up Procedures

The Procedures section has been restructured. Refer to the v.8.0 Release Notes for further information. Also, the Procedures section will now have a dictionary data file, similar to Labs and Radiology.

Requirements:

Practice will have to retire (mark as Inactive) procedures entered under LAB/RAD and recreate them as Procedures (*e.g.*, Eye Exam, Colonoscopy, etc.)

Impact:

Templates must be restructured.

Assigning LOINC Codes to Lab Attributes

eClinicalWorks has analyzed the emerging need for standardization, and now identifies the lab codes and attributes with LOINC Codes. These can be added to the current Lab dictionary.

Assigning Modality Codes to RAD tests

Update RAD to include Modality Codes - community compendium.

Setting Up Clinical Measures (CM)

Health maintenance measures currently identified in the system are hard-coded and cannot be changed. Each practice will be required to activate the measures applicable to them.

Please refer to the V.8.0 Release Notes for more information on the Clinical Measures.

Setting Up Alerts and Order Sets

The alerts system in eCW has been modified and is now known as the Clinical Decision Support System (CDSS).

Requirements:

- Please Change Alerts view from Generic to CDSS.
- Create/Update Order Sets as necessary.
- The practice must also be trained on the CDSS score sheet, and providers need to be trained to check this sheet during every visit in order for it to work efficiently.

eEHX Mapping of Community IDs to Local Data Items (Community Features)

- Master list/database must be installed.
- Manually configure the practice-side elements mapping to Community data items (2 user interfaces).

Progress Notes-Related Setup

Progress Notes Checklist

The following Progress Notes-related features must be set up to ensure a smooth transition into V.8.0:

- [Setting Up Smart Forms](#)
- [Searching for Encounters by Date and Dx](#)
- [Adding Lab and DI Image Results from the Chart Panel](#)
- [Using the Enhanced Problem List](#)
- [Displaying Dx in Faxed and Printed Rx](#)
- [Using the New Allergy Categories and Types](#)
- [Using the Authorization for Rx Feature](#)
- [Mapping the Average Wholesale Price](#)
- [Using Health Maintenance Alerts](#)

New Progress Notes Features and Enhancements

Setting Up Smart Forms

The Smart Forms feature populates clinical information in the chart with a user interface that mimics a form. The Smart Form option is also available as a part of a toolbar.

These are custom forms and they currently require additional programming to make them customizable.

This feature will be available as needed and can be enabled/disabled according to the practice's requirements.

Requirements:

- Load Smart Form in the practice database.
- Configure the trigger from where the Smart Form will be invoked.
- Practice can perform the Smart Form configuration from the Front End UI (under EMR).

Searching for Encounters by Date and Dx

There is a new option on the Patient Hub from the Encounter button to search Encounters by Date and Dx.

Requirements:

Practice needs to evaluate the need and the training requirements for this functionality.

Adding Lab and DI Image Results from the Chart Panel

- If you have a Lab/DI on the Chart Panel that is not reviewed/received, it will have a "circle" option (you cannot pull it under Past Results in the Progress Notes).
- Once a provider receive and/or reviews a LAB/DI, an arrow will show for the provider to pull in this LAB/DI into today's Progress Notes under the Past Results section.

Requirements:

Proper training must be provided to users to help them understand and deploy this feature in their workflow.

Using the Enhanced Problem List

The Problem List now displays the functionality of assign problem statuses. Users can now view the Problem List in the Chart Panel and add problem statuses to Problem List. These statuses are currently static and the options cannot be changed from the front end.

Displaying Dx in Faxed and Printed Rx

- Users must be instructed that the printing and faxing of Rx will show the diagnosis associated with medications.

Using the New Allergy Categories and Types

- Update 'Structured' and 'Type' columns to existing allergy entries.
- NDC codes are associated with non-drug entities as well.

- There is also a link to access and update the NDC code for the drug.

Requirements:

Training is required for this new functionality. The super users at the practice must review the Release Notes for better understanding of this feature and to help identify the protocols for the staff.

Using the Authorization for Rx Feature

A new field available on Rx window (Treatment Screen) allows the practice to enter the authorization number for a medication.

The remaining days for the Rx can also be seen on the Right Chart Panel. It will count down from the Days column in Rx window. Refer to the v.8.0 Release Notes for more information about this feature.

Impact:

Additional training is required.

Mapping the Average Wholesale Price

- The practice must run the Multum to Medispan conversion/mapping utility. The Average Wholesale Price column will be blank unless this utility is run.

Note: This is a Medispan feature only. Contact eClinicalWorks Support for information about this feature.

Using Health Maintenance Alerts

The Health Maintenance Alerts are based on CDSS. The feature can be found at the following location:

File > Settings > My Settings > Views tab

From the View tab, the practice can choose between CDSS or Classic Alerts. The practice must decide which alerts option to use and establish this option as a practice-wide standard for all users.