Working with Actions and Patient Specific Alerts in eCW 11

Both actions and patient specific alerts provide the user a way to create reminders about important follow-up appointments, lab/radiology testing, immunizations, and more.

**Actions**

Actions are short messages that can be set to activate in the future, or can be set to recur at regular intervals. Patient documents, encounters, and specialty forms can be attached to an action.

To create a new action, click on “New Action” from the dropdown menu for actions in the Hub.

The fields marked with * are required. For a new action, choose “In Progress” as the status.

In this case, this new action with the subject “Testing” is assigned to me, due on 2/11/20, with a brief comment and timestamp in the notes box.
An encounter, patient document, or specialty form can be attached to the action.

A paperclip icon in the attachment tab indicates that there is something attached to this action. Clicking on the attachment tab, and then clicking on the attachment will open it for review.

Although there is an option to order labs, DI, and procedures from an action, this workflow is not supported at Prima CARE.
In some circumstances, creating an action that recurs at some regular interval can be helpful. To accomplish this, check the box next to “Recurrent Action” and set the desired parameters.

When an action comes due, it will appear in the T jellybean numbers – click on the “T” dropdown menu to access the action.

Once the action has been satisfied, change the status to “Completed”, and the action is locked and disappears from the T jellybean.
To view completed actions, click on “View Actions” from the Hub.

Click on an action, and the action screen will open. Completed actions can be reviewed, but cannot be modified.

**Patient Specific Alerts**

Patient specific alerts have some similarities with actions. To create a patient specific alert, click on the “Alerts” tab of the top navigation panel of the Hub.

To create a new patient specific alert, click “Add”.
In this case, I have created an alert to prompt me to make sure this patient had a follow-up chest CT. I chose the “D.I.” alert type, then clicked on “Sel” to open the DI compendium to locate and select a chest CT. I then entered a 6 month recall time.

In the screen below, the alert information can be seen. This can be updated if needed by clicking on the “Update” button highlighted in the screen below.
The alert will be seen in the CDSS tab of the right panel – in the Hub, telephone and web encounters, and all progress notes. Once the follow-up CT has been ordered, the alert can be suppressed by clicking on the icon of a hand.

Opening the CDSS tab allows the user to see the due date for the alert, with the option of suppressing it if appropriate.

The advantage of an alert is that all users will see this when accessing the patient's chart – the disadvantage is that the alert will not be seen unless the chart is accessed. The advantage of an action is that the patient's chart does not need to be accessed for user notification – the action will show up automatically in the T jellybean.

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