Saving P2P Documents

Many providers are getting more P2P documents from consultants outside of PrimaCARE – especially since our orthopedic surgeons moved over the Steward.

In the past, I always opened a P2P document by clicking on the paperclip, than then deleting it from my list by checking the box and clicking "Delete". Since 99% of my P2P documents came from providers in Prima CARE, there was no need to save it.
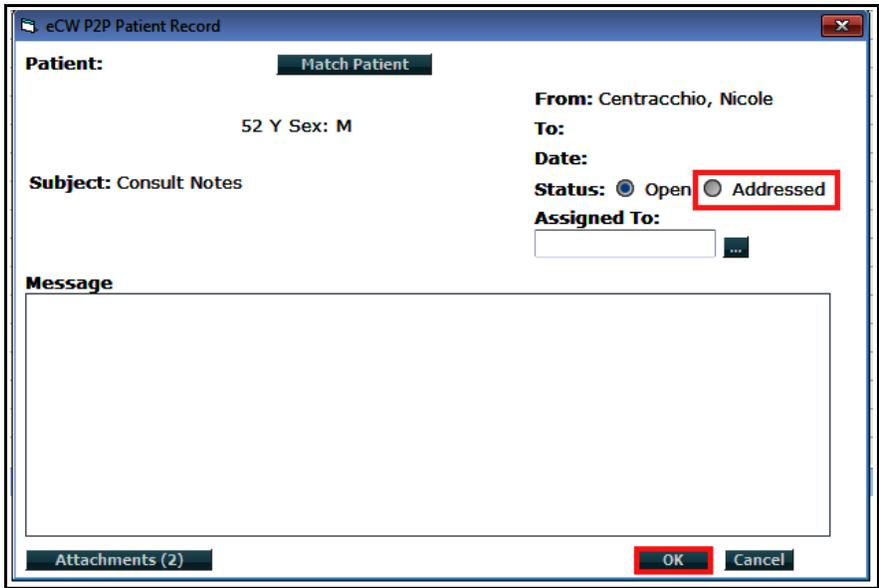

The better way to review a P2P document is to click anywhere along the line including the patient's name.
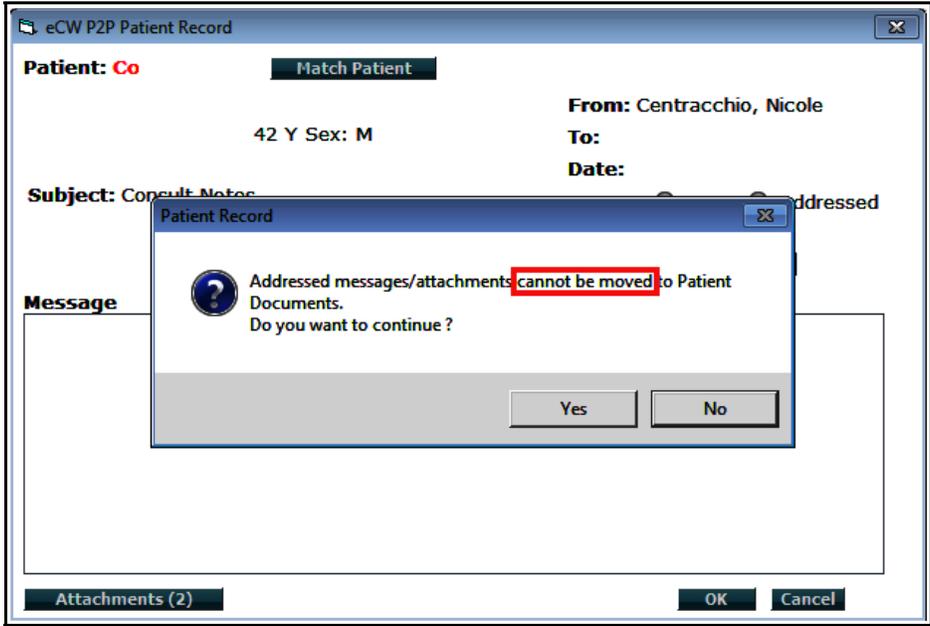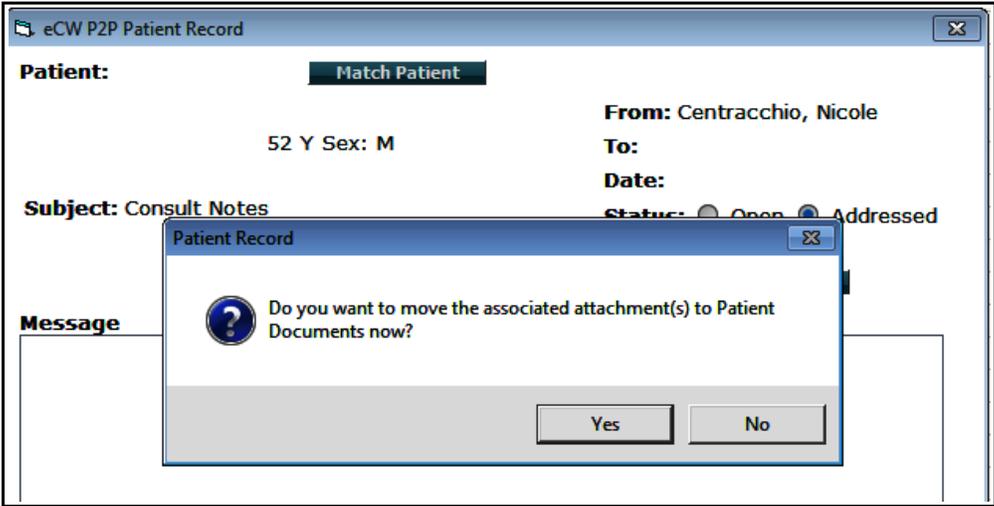
Then click on "Attachments".

This will open the note from the outside provider to be reviewed.
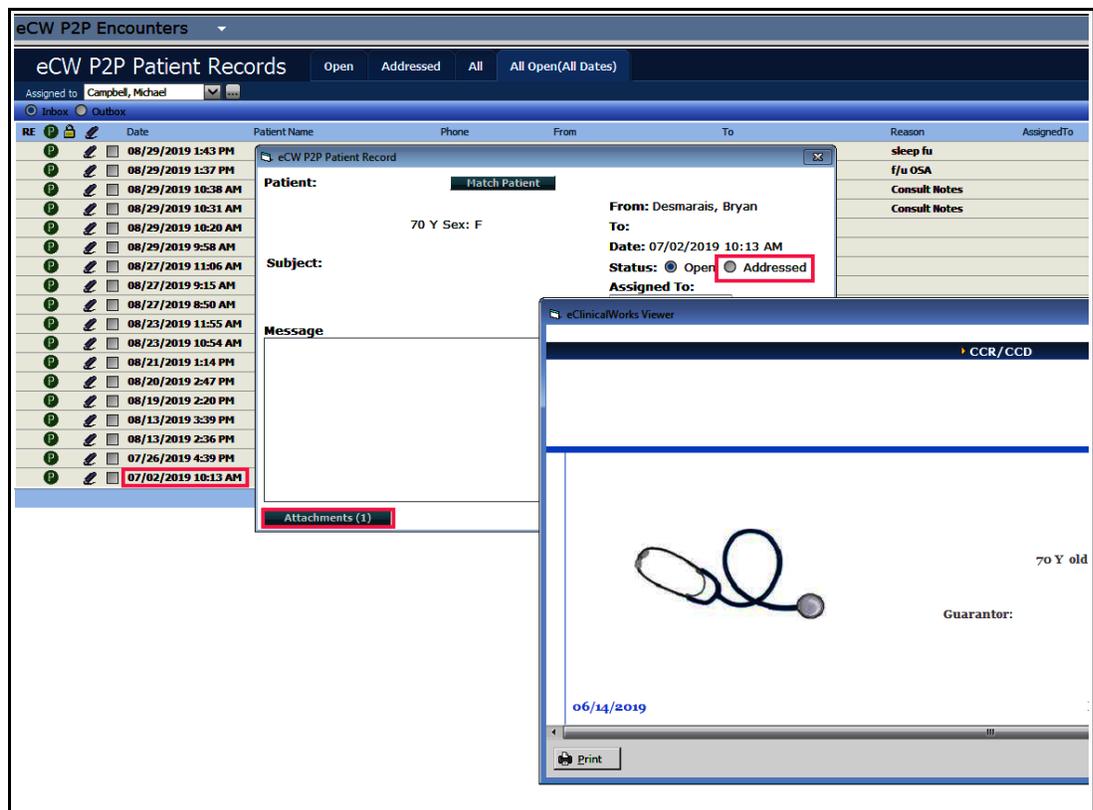
Once the note has been reviewed, check the circle adjacent to "Addressed". When you click "OK", ECW will ask if you want to save this document .

Click "Yes", and I have been told that **sometimes** ECW matches the patient automatically – in my testing, this never occurred.

It is very likely you will get this message. Click "No", then click "Match Patient" (though it probably makes more sense to always match the patient to the correct patient in ECW before importing the document).
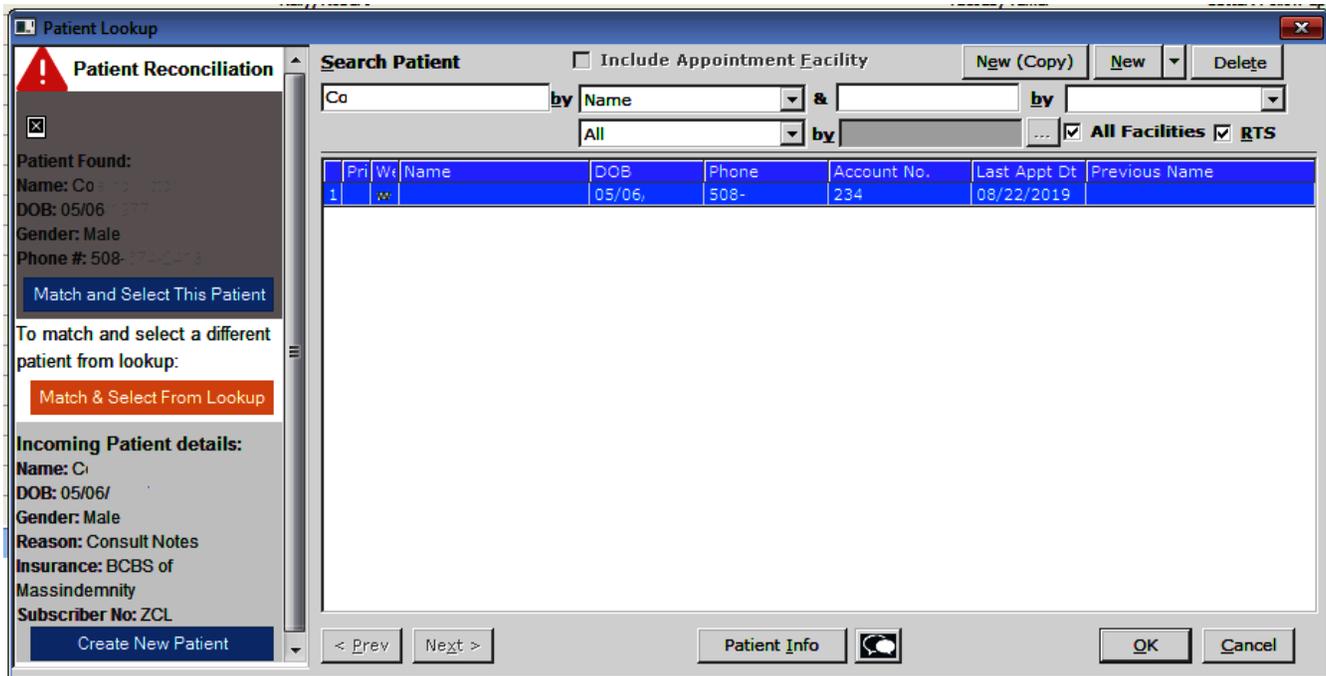
In this screen, the patient referenced in the incoming note is listed at the bottom left, and the patient in ECW is listed at the top left. If the information is correct, click "OK".
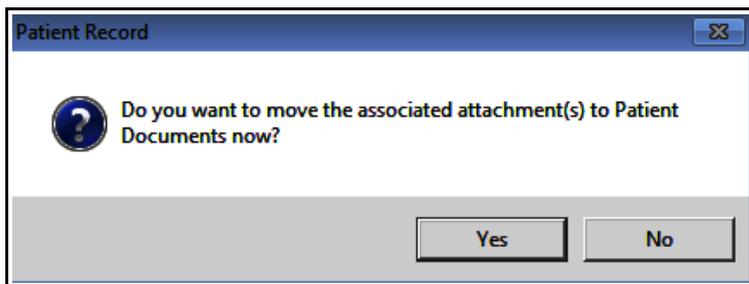
ECW generates 2 more pop-up boxes – the answer to the first box is always "Yes" (why else are you doing all this work if not to move the note!?!)

The user may want to leave this document un-reviewed if the provider still needs to review it.

Be patient – the transfer of the document into ECW takes a bit of time.
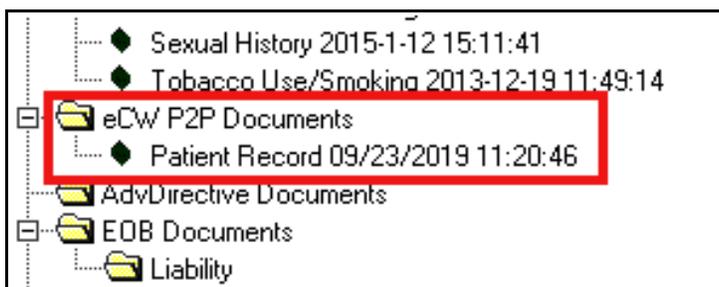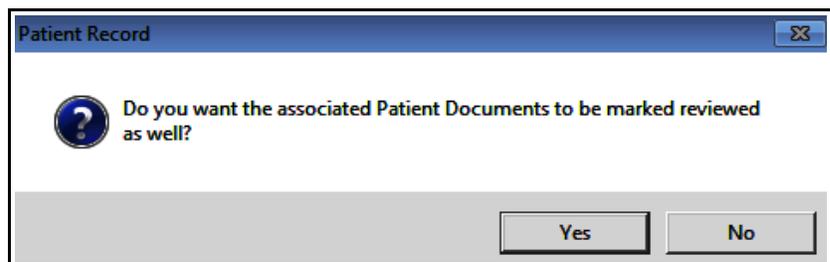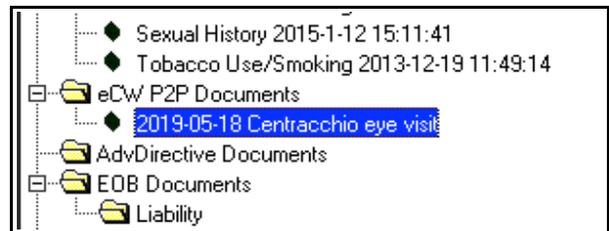

The attached document can now be seen in the P2P folder. However, the naming by ECW is not correct – the date of service for this document was really 5/18/19. ECW generates a name using the date the document was imported into the patient documents folder.

This information can be corrected with a few clicks. In "Patient Documents", click on the document, let it open, then close it – then click "Update".

Uncheck the "Reviewed" box and change the name of the document as well as the service date. Then check the "Reviewed" box again and click "OK".

Now the name of the document is more descriptive, and the date of service is correct.

Brad Kney, MD
September 23, 2019