In this document, I will discuss some of the basics about ECW 11 – this is meant for someone very new to ECW 11.

**Signing in:** First you need to locate the ECW icon on your desktop. Note that the icon may still be called “eClinicalWorks_Version10” - but this is really ECW 11. Click on the icon on the desktop or on the taskbar.

Type in your ECW name (for most users, this is your first name and the first letter of your last name) and your password. ECW opens to the following screen.

The opening screen shows the schedule for the month – clicking on any day shows that day's schedule in the left panel. Olives show/hide some of the navigation panels. The jellybeans are navigation tools to move throughout ECW (to see labs/DI results, messages, scanned documents, ePrescription requests, and more.

To find a patient, click on the person/magnifying glass shown here next to the olives. Note that clicking on the little arrowhead to the right of the person opens a dropdown list of the names of the last few patient charts you have opened.
The Olives show and hide the right panel, top panel, and side panel – click on the olive and the center color turns from green to red. Green shows the panels, and red hides the panels. Note that the middle and right olive turn other colors (yellow, blue), but the bottom line is green = visible, red = not visible.

To get to a patient note (which is shown above), click ON the “S” jellybean.

Note that clicking ON the jellybean versus clicking ON the “S” opens different options. This behavior is true for all the jellybeans, so in this document I will specify whether to click on the jellybean or on the letter next to the jellybean when accessing different screens.

The screen to the left shows the schedule for 5/28/19. You can change the “Appt Time” from all day to morning only, or afternoon only. You can change “Sort by” from appointment time to name or check in status. The lock icon tells you this visit has not yet been locked. Once locked, a visit cannot be changed. Once it is locked, billing will send out a claim. Rich’s mantra of “Lock Your Notes” refers to the need to lock notes in a timely fashion – ideally on the day of service, but certainly within a few days of the day of service. Double-clicking anywhere on the blue that surrounds the patient name/visit time will open the progress note.
The left side navigation panel can be used to see your schedule in a few ways. The second entry (Kney, Bradford) opens the schedule shown the first page of this document. Clicking on “Office Visits” will open the screen shown at the bottom of the prior page (you can see it is named “Office Visits”). “Resource Scheduling” opens a screen where you can view your schedule for the week, as well as see the schedule for other providers whom you have selected as “My Providers”. These would typically be other providers in your office.

In the resource schedule, you can change the view from one day to five days or a full week. You can use the calendar to choose the day or week you want to view. And you can check the box next to the name of other providers to see their schedule.

To select who will appear in the “My Provider” box, go to File → Settings → My Settings. This opens a screen with multiple tabs (shown below) – but for now, you only need to pay attention to the first tab - “My Providers”.

Check the box next to a provider's name, and then click the arrow to move them into the “My Providers” box. After logging out and signing back in to ECW, when you go to the resource page, you will see that the selected provider's schedule can now be accessed.
Back to the jellybeans – these are navigation tools that open up a huge variety of screens in ECW. Clicking on the “E” shows a dropdown of navigation options. You can see there are 4 refill requests (this number is shown in the E jellybean itself) as well as a variety of other prescription areas to which you can navigate by clicking on the title. In most cases, you will be dealing with refills, but if a script fails, the jellybean turns red and the number of failures will appear in the “Error/Failed Rx” link.

Clicking ON the “E” jellybean will open the ePrescription screen.

I have obscured the patient names to maintain confidentiality, but a patient name will appear with each prescription. Clicking on the name opens to refill request for metformin in this case.

It is VERY IMPORTANT to ALWAYS choose “Approved with Changes” and then click on “Current Rx”. If you just approve a prescription without checking the current medication list, two problems arise. First, if the metformin dose was changed since the original prescription was written, you may be refilling it with the wrong dose or instructions, or refilling a medication which was stopped due to a serious adverse reaction. The patient might fill the script and take it exactly as written, creating some potentially serious problems. Second, a medication that is approved without pulling it from the current medication list will be duplicated on the patient's medication list – creating potential confusion at future visits (as well as causing medication list bloat – we have seen patients in Prima CARE with a dozen DUPLICATES of the same medication due to this error).
After clicking on “Current Rx”, find the medication that is being refilled, and select it. This takes you back to the prescription screen shown on the previous page, now altered to reflect the instructions and dose from the current medication list. Choose the number of pills and refills, then hit “Send ePrescription”. Note that links to drug interactions and allergies can be found at the bottom of the ePrescription page.

Also note at the top of the ePrescribing page there is box in which you can assign the refill to another person – if it came to you in error, or the provider is away and the refill needs to be sent to a covering provider.

As shown before, clicking on the “S” jellybean opens your schedule for the day. Clicking on the “S” provides a few other options that I won't address in this document.

The “D” jellybean refers to documents – these are typically documents scanned into ECW or received by the fax server and moved into the patients chart by the office staff. It also includes hospital documents that are automatically entered into ECW (for example H+P and discharge summaries from St. Anne's Hospital).
If a number appears in the “D jellybean”, click on the jellybean, and you will see a list of unreviewed documents. Simply click on the document to view it.

Click on “View” to see the item in a separate screen – where you can scroll between pages if it is a longer document, like a consult from a specialist. Once you have reviewed it, you can assign it to someone else, or label it at “Reviewed” - then click “OK”.

Clicking on the “D” itself offers the option of seeing the fax inbox or fax outbox – this is a minor issue that does not need to be addressed in this document.

Clicking on the “T” jellybean opens a list of your unaddressed telephone encounters. Clicking on the “T” itself provides information about the number of web encounters (from the patient portal), actions, and P2P records that are waiting for your review. You can also create a new telephone encounter, action, or P2P document from this list. For now, I would focus mainly on telephone encounters.

Click on the “T” jellybean. Now click on the blue reference number to open the telephone encounter.
A telephone encounter does not have to pertain to a phone call – but to any significant event or interaction outside of an office visit. The TE can be labeled as “High Priority”, which turns to T jellybean red. It can be assigned to another person. Often, a patient calls with a problem, a message is taken by a front office staff or MA, and then assigned to a provider for his/her input. These TE can bounce back and forth between people until the issue is resolved, and the final recipient labels the TE as “Addressed”. Prescriptions can be written under the “Rx” tab (or current medications can be stopped, or doses changed). Immunizations given outside the office can be documented in the right panel of the TE. Labs and X-rays can be ordered by going to the “Virtual Visit” tab. All these issues are discussed in greater detail in other ECW documents. For now, just be aware of the potential uses/functions of telephone encounters.

Clicking on the “L” jellybean opens your lab/DI results screen. To view a single lab or diagnostic image, click anywhere on the selected line (patient names have been erased to maintain confidentiality). In general, I prefer to check the box next to a lab result, and then click “View All Reports” - this opens a screen with all the labs resulted for that particular patient that need to be reviewed.
You can see from the scroll bar to the right that there are a few labs to review. You can reassign the labs to someone else if necessary. Once you have reviewed the labs, change the status from “Open” to “Reviewed” and the lab will disappear from your lab result queue. Looking at the cumulative report can be very helpful to compare the current values to past values. Simply click on “Cumulative Lab Report”, and the following screen opens.

The default time period is two years, but you can alter the date range in this screen (not shown here).

Reviewing diagnostic images follows the same workflow.

The last jellybean I will discuss is the “M” jellybean – clinical messages. These are brief email-type messages that can be exchanged quickly among office staff and providers. The messages can be labeled as routine, urgent, or emergent. The jellybean will turn red when emergent messages are received. In this screen, I have clicked on “Compose Message” - and I am selecting myself as the recipient.
I set this message as emergent to demonstrate the change in color of the jellybean.

You have the option of replying to the message, or deleting it. You can open a new action, but I have never done this from a clinical message. If there are multiple recipients and you want to reply to all, you can – just like email. Note that clinical messages cannot be viewed by others.

The navigation bar at the top of the progress note screen is very useful for opening new screens while remaining in the progress note.

Opening prior visits or TE while remaining in the current note is very useful. The same is true for checking lab and DI results while you are working on the progress note.
Another way to view a lab/DI while in the progress note is to click on the paperclip next to the result in the right panel of the chart.

The Hub is the center of the ECW wheel. From here you can send P2P messages, make new appointments, navigate to patient documents and progress notes, view the current medication list as well as the medication list at prior visits (“Rx”), view encounters, view this patient's ePrescription log, and much more. I have highlighted some of the links I use quite often. The Hub also includes the right panel – which is an incredibly useful resource as well. As you can see across the top of the Hub, there is an navigation panel that includes links to lab and DI – links I also use often.

The last item in this introduction to ECW that I want to highlight are three tabs in the right panel that I find incredibly useful – Overview, DRTLTA, and History. The Overview tab includes access to the CCM timer – Chronic Care Management allows providers to be paid for time spent addressing patient-related activities that are not face-to-face. Reviewing labs and X-rays, completing paperwork, phone calls to the patient, family members, and other providers – any time that is spent on this patient's care. If the patient is enrolled, a screen similar to the one shown here is found in the right panel of the Hub as well as the progress note. Clicking “Add Time” starts a clock, keeping track of the time you spend addressing this patient's care.
The right panel under Overview also allows access to advance directives as well as the problem list. Clicking on the ellipsis in the problem list panel opens a screen in which you make corrections to the list.

The Overview tab also includes the medication list. Changing the filter from “Date” to “Medication” allows you to scroll through all the medications taken by the patient during their history with ECW.

Allergies and immunizations can also be found in the Overview tab of the right panel.
The DRLTA tab – which I think stands for Documents, Referrals, Telephone encounters, Labs, Actions – is a rich resource. In the Hub, you cannot open labs, DI, or telephone encounters – you only see the items and dates. In the right panel of the progress note, you can click on paperclips in the lab/DI areas to open the results, as well on open up telephone encounters.

Also notice the UpToDate link at the top of the right panel. If UTD is activated in your My Settings, you will see this option.

The History tab gives you quick access the medical/surgical history, family history, and social history.

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