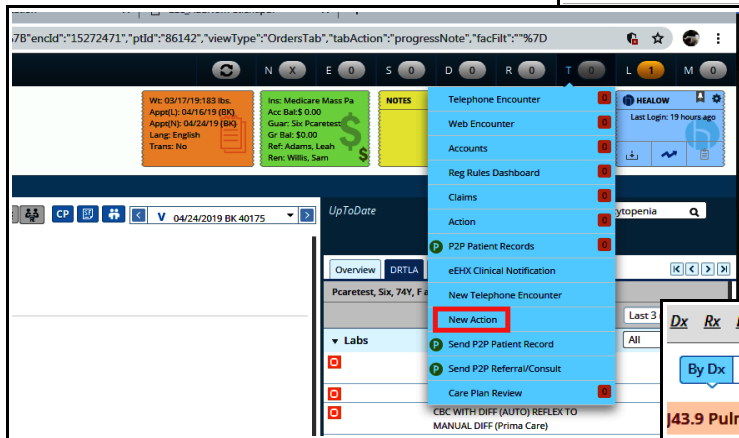
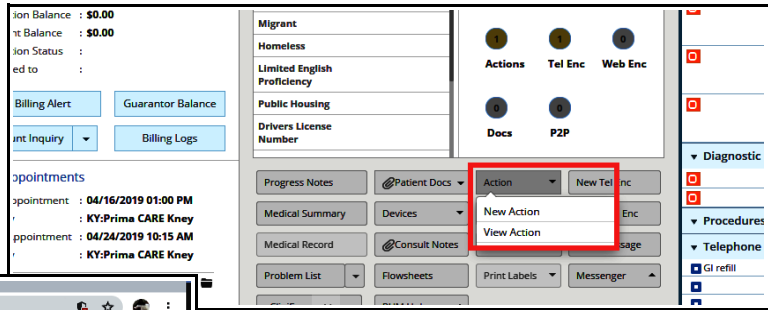


# Working with Actions and Patient Specific Alerts in ECW 11e

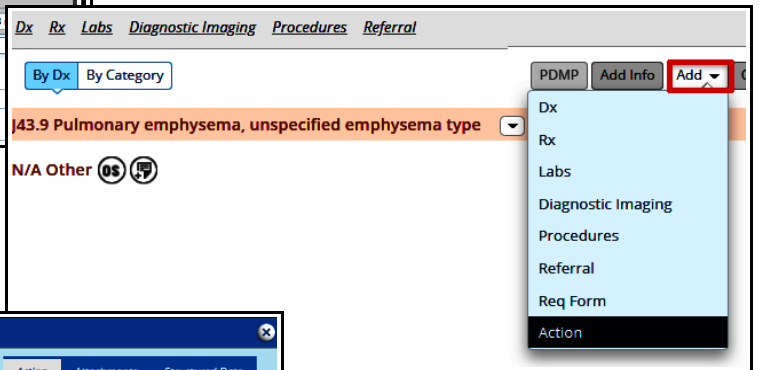
## Actions

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.

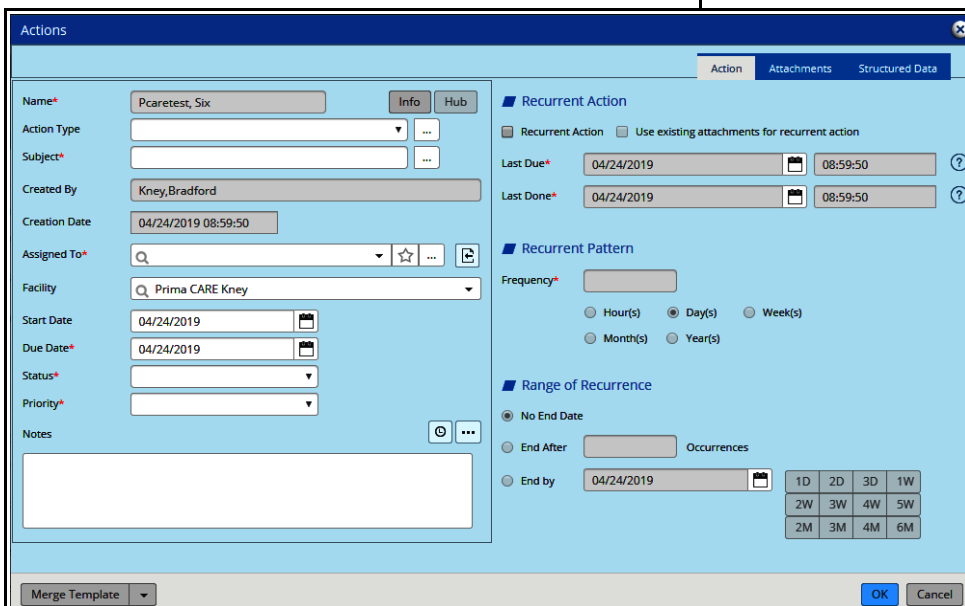
There are a few ways to open an action. The method I use most often is to start from the Hub. The small advantage of this method is that the patient name automatically populates the action.



The second method is to hover over the “T” of the the T jellybean – and choose “New Action”.



Yet another method is to open a new action from the treatment section of a progress note.



The items marked with a red asterisk are required. The other items do not need to be completed if you choose not to.

**Actions**

Name\* Pcaretest,Six Info Hub

Action Type

Subject\* Freetext here or use dropdown

Created By

Creation Date

Assigned To\*

Facility

Start Date

Due Date\*

Status\*

Priority\*

Notes

Insurance Demographics

Name

General -testing

Pharmacy Order Call -

Inactive insurance

MVA Action

Miscellaneous

WCOMP Action

result notification

Make Appointment

Referral completed

referral FU

Glucometer readings

Reminder

Self Pay

New Patient

Merge Template

Once the patient name has been entered, the next field to be populated is the subject. You can freetext into the box, or use the dropdown list of options.

Next, assign the action to someone, and add a due date. The due date is the same as the creation date by default, but can be changed to any date in the future.

**Actions**

Name\* Pcaretest,Six Info Hub **Recurrent Action**

Action Type

Subject\* Testing

Created By Kney,Bradford

Creation Date 04/24/2019 08:12:16

Assigned To\* Kney, Bradford

Facility Prima CARE Kney

Start Date 04/24/2019

Due Date\* 05/16/2019

Status\*

Priority\*

Notes

Recurrent Action

Recurrent Action

Last Due\* 04/24/2019

Last Done\* 04/24/2019

Recurrent Pattern

Frequency\* 0

Hourly

Monthly

Range of Recurrence

No End Date

End After 0

End by 04/24/2019

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
28	29	30	31	1		

**Actions**

Name\* Pcaretest,Six Info Hub **Recurrent Action**

Action Type

Subject\*

Created By Kney,Bradford

Creation Date 04/24/2019 08:12:16

Assigned To\* Kney, Bradford

Facility Prima CARE Kney

Start Date 04/24/2019

Due Date\* 04/24/2019

Status\* In Progress

Priority\*

Notes

Recurrent Action

Use existing a

Last Due\* 04/24/2019

Last Done\* 04/24/2019

Recurrent Pattern

Frequency\* 0

Hour(s)

Day

Month(s)

Year

Range of Recurrence

No End Date

End After 0 Occ

End by 04/24/2019

The status needs to be set – typically this is set to “In Progress” when the action is started.

**Actions**

Name\* Pcaretest,Six Info Hub

Action Type ▼ ...

Subject\* Testing ...

Created By Kney,Bradford

Creation Date 04/24/2019 08:12:16

Assigned To\* Q Kney, Bradford ☆ ... ↻

Facility Q Prima CARE Kney ▼

Start Date 04/24/2019 📅

Due Date\* 05/16/2019 📅

Status\* In Progress ▼

Priority\* Low ▼

Notes 🔔 ...

Free text here  
Add a timestamp if you need to - Kney,Bradford 04/24/2019 09:28:22 >  
Or choose the ellipsis and add a macro or an existing message

**Recurrent A**

Recurrent Actio

Last Due\* 📅

Last Done\* 📅

**Recurrent P**

Frequency\* 📅

**Range of Re**

No End Date

End After 📅

End by 📅

Now, add a message in the Notes section of the action. A timestamp can be added by clicking on the icon of a clock. Clicking on the ellipsis opens a larger Notes screen in which macros can be used.

**Actions**

Action View > Action Notes

Q Search Keyword

Punctuation ▼ 🔔 📄 🗑

Free text here  
Add at timestamp if you needed - Kney,Bradford 04/24/2019 08:41:56 >  
Or choose the ellipsis and add a macro or an existing message

ANA SILVA	🔔	🗑
Appt	🔔	🗑
CCM	🔔	🗑
Claim with no insurance	🔔	🗑
Deceased Patient Notification	🔔	🗑
DMC DOT	🔔	🗑
DMC No Show Physical Letter	🔔	🗑
DMC PPD	🔔	🗑
DMC Sports/Work/School Phy	🔔	🗑
mary pavao	🔔	🗑
need referral	🔔	🗑
Please check scanned insurance card	🔔	🗑

**Recurrent Action**

Recurrent Action  Use existing attachments for recurrent action

Last Due\* 04/24/2019 📅 00:00:00

Last Done\* 04/24/2019 📅 00:00:00

**Recurrent Pattern**

Frequency\* 0

Hour(s)  Day(s)  Week(s)

Month(s)  Year(s)

**Range of Recurrence**

No End Date

End After 0 Occurrences

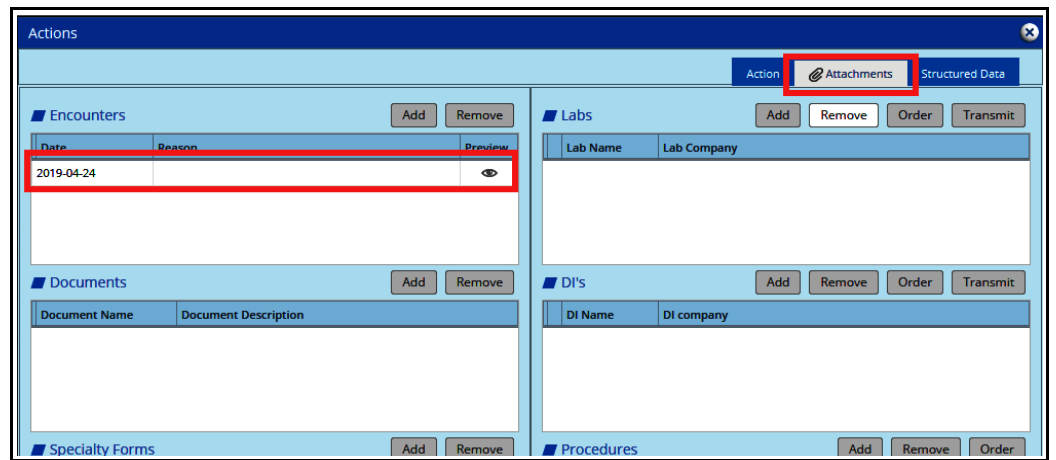
End by 04/24/2019 📅

1D	2D	3D	1W
2W	3W	4W	5W
2M	3M	4M	6M

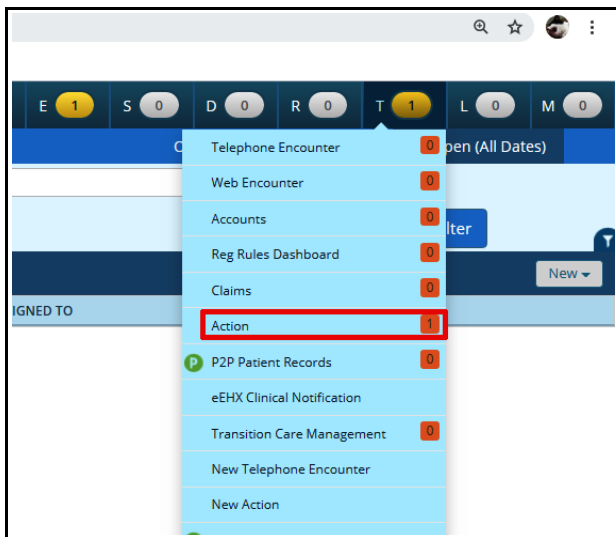
OK Cancel

I don't personally have much use for recurrent actions, but say you have a patient with a volatile INR – you might set up an action to remind someone to make sure that the INR is being done weekly. Or to remind someone to make sure that a patient on clozapine is getting a CBC every week.

Here, I have attached the encounter from 4/24/19 to the action. Clicking on the eye to the right of the encounter date opens a preview of the encounter.

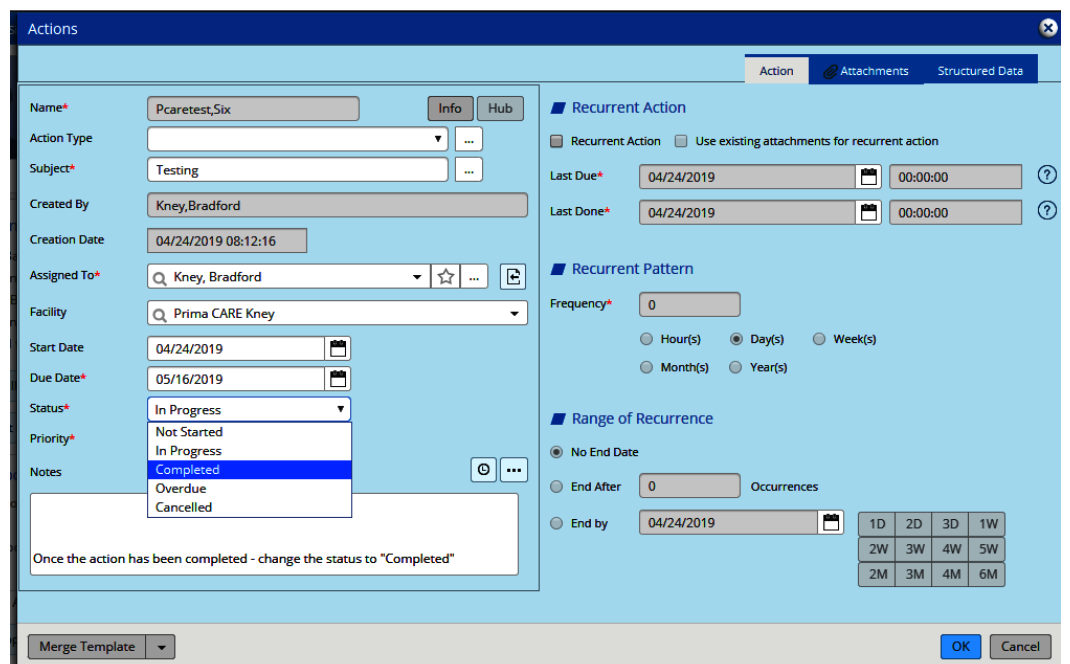


Although there is the option to order a lab, DI, or procedure from the action screen, this workflow is not supported by Prima CARE.

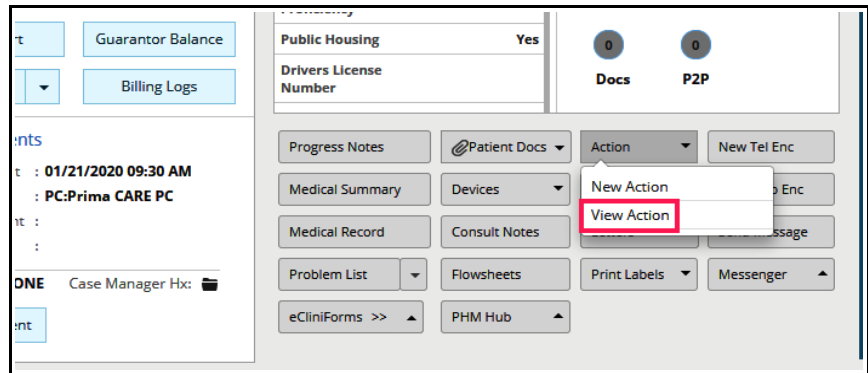


The action shows up in the number in the T jellybean – hovering over the “T” opens the dropdown menu where the number of active/due actions can be seen. Clicking on “Action” in this menu opens the list of actions assigned to the user. The user can then open the action and change the status to “Completed”.

Once the status is changed to “Completed”, it is locked, and no longer shows up in the T jellybean.



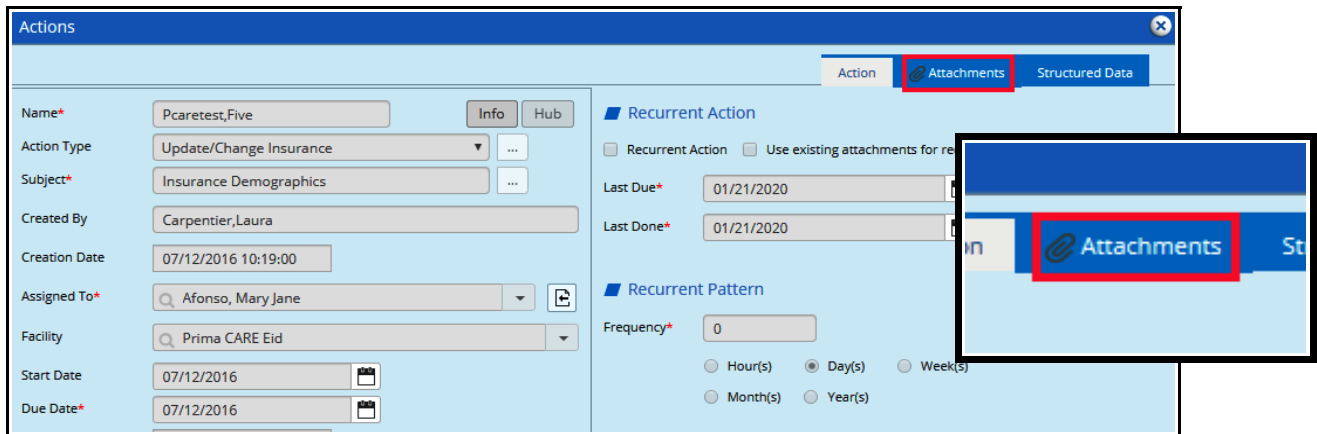
To view a completed action, click on “View Action” from the Hub.



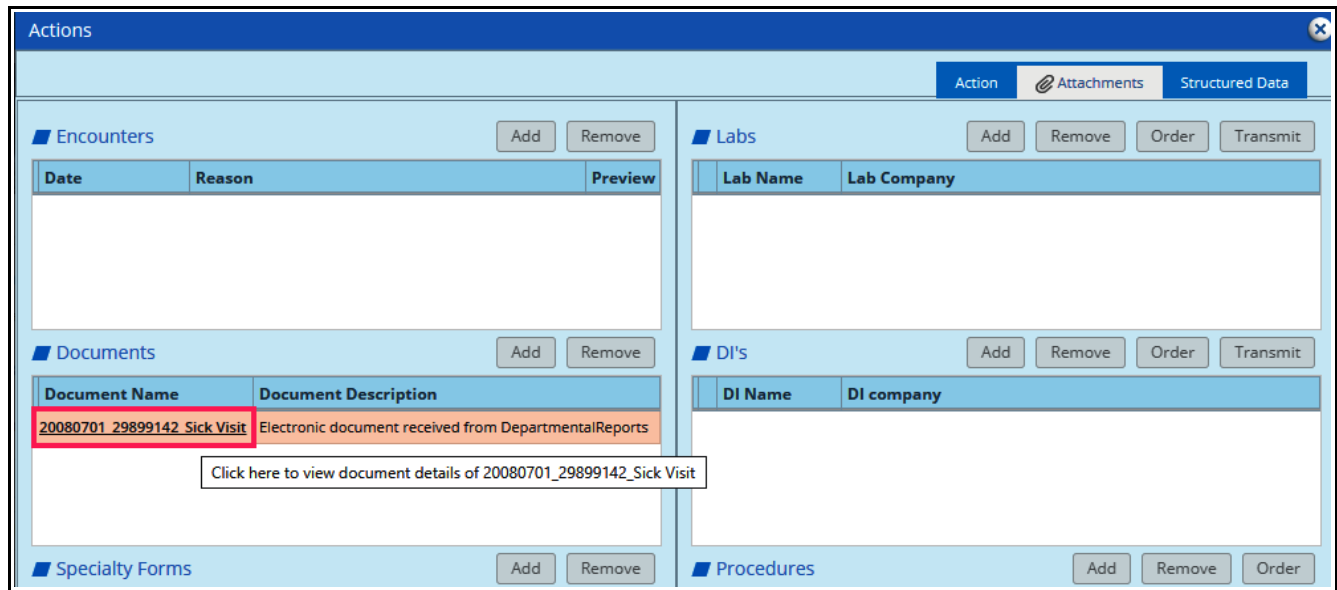
Click anywhere along the action to be reviewed.

Actions List - "Pcaretest, Five"							
Provider	All	Facility	All	Assign To	All	Action Status	All
! C	DUE DATE	STATUS	ASSIGNED TO	ACTION TYPE	SUBJECT	CREATED BY	START DATE
	06/28/2016 12:00 AM	Completed	Afonso, Mary Jane	Update/Change Insurance	Insurance Demographics	Ross, Petrona	06/28/2016
	07/12/2016 12:00 AM	Completed	Afonso, Mary Jane	Update/Change Insurance	Insurance Demographics	Carpentier, Laura	07/12/2016
	08/09/2016 12:00 AM	Completed	Afonso, Mary Jane	Update/Change Insurance	Insurance Demographics	Robert, Jason	08/09/2016
	09/10/2019 12:00 AM	Completed	Torres, Stacie	Miscellaneous	Miscellaneous	Torres, Stacie	09/03/2019

The paperclip in the attachment tab indicates that there is something attached to this action. Clicking on this tab opens the attachment screen.

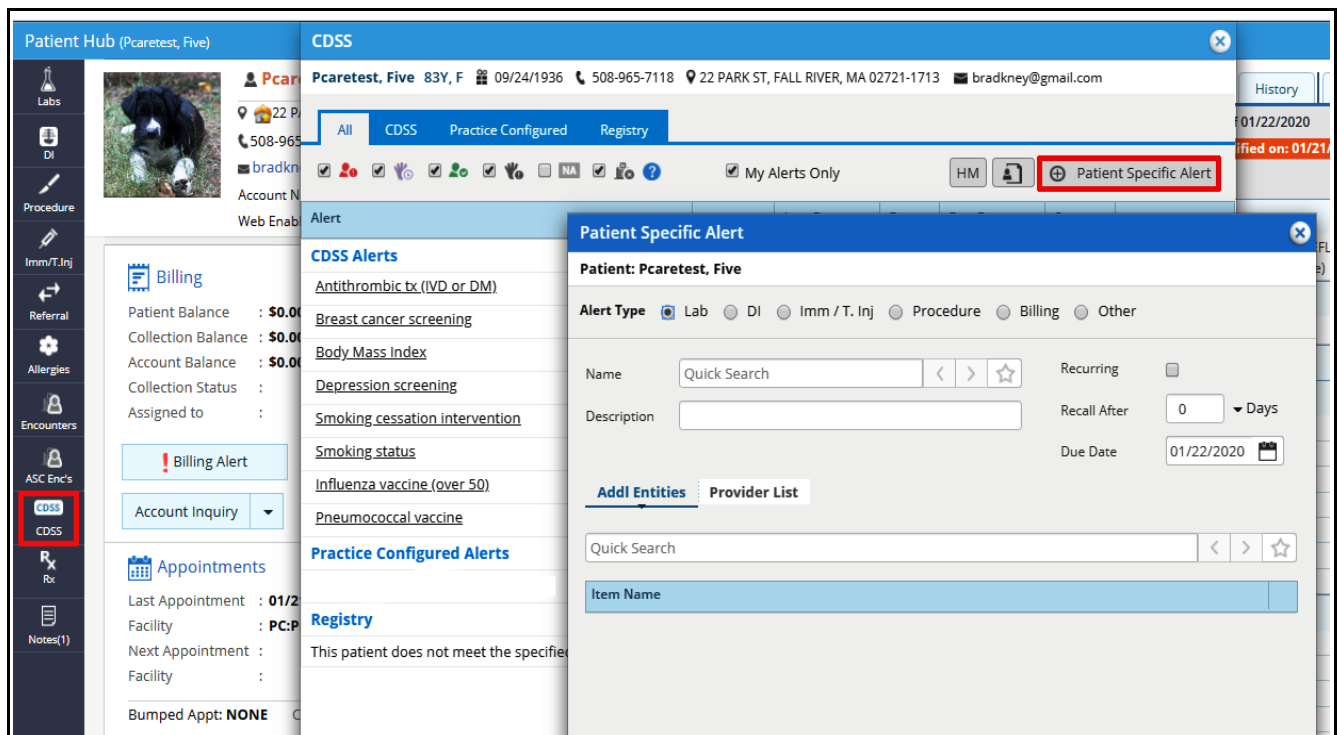


Clicking on the document name in the attachment screen opens the contents of the attachment.

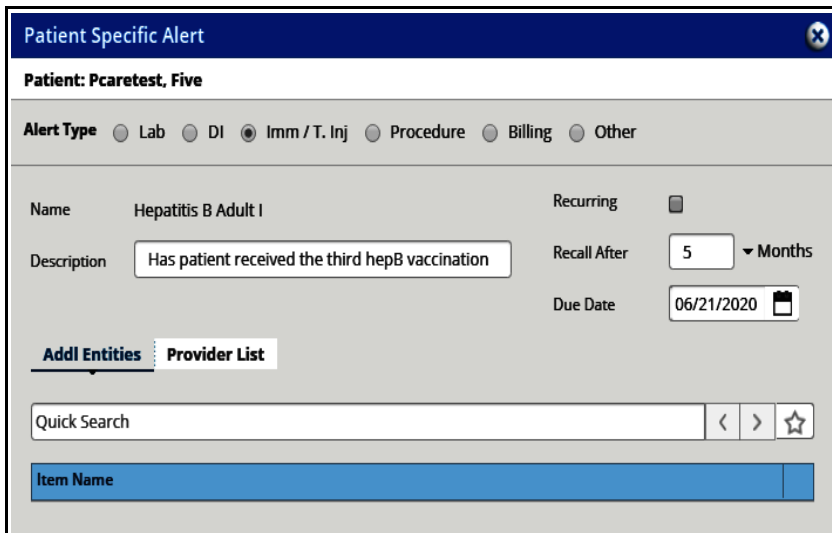
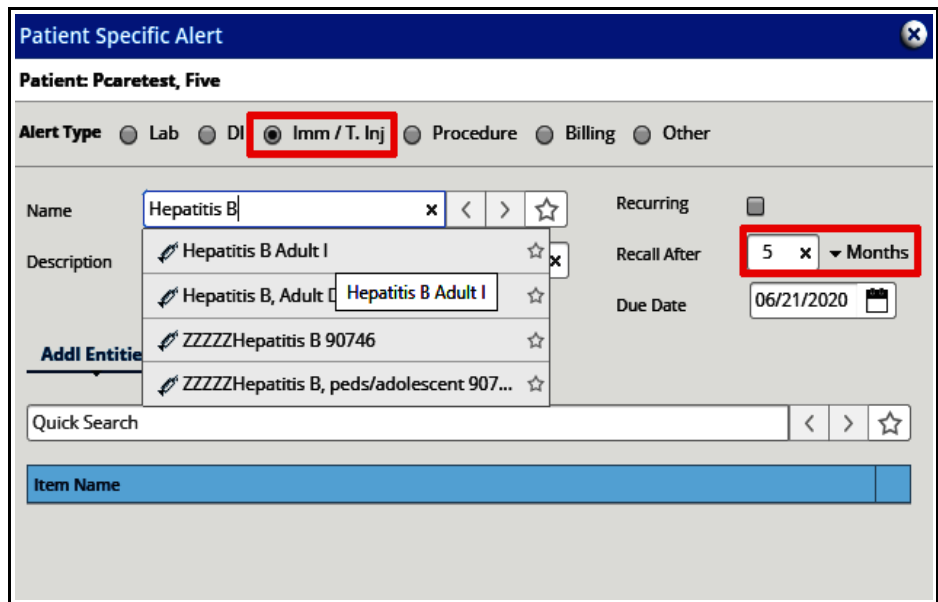


## Patient Specific Alerts

Patient specific alerts have some similarities with actions. To create a patient specific alert, click on the CDSS icon found in the navigation panel along the left side of the Hub. Then click on "Patient Specific Alert" - which opens the screen at the bottom right of this screenshot.



Choose the alert type from the options listed across the top of the alert screen. A provider might create an alert to make certain a follow-up chest CT is done on a patient with a small nodule, or an alert to make certain a creatinine is repeated at some interval after a medication was started, or an alert to make certain a patient followed up for a third hepatitis B vaccination.



This alert will now appear in the CDSS/alert tab of the right panel whenever the Hub, a telephone encounter, or a progress note is opened for Five Pcaretest.

The advantage of an alert is that all users will see this when accessing Five Pcaretest's chart. 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.

This screenshot of the right panel in the Hub illustrates the appearance of the alert. Clicking on the “i” provides more information about the alert.

