V10-SP2.5.2 Release Notes

March 2017
FRONT OFFICE

This section provides an overview of the eClinicalWorks® application, describes how to access the application, and gives a summary of the options available from the windows often used by front office employees.

Search Functionality Added on the Left Navigation Band for eCW Menu

Real-time search functionality has been introduced on the eCW menu of the left navigation band, enabling users to easily locate the menu items by typing in the search field:

Patient Lookup Window

Use the Patient Lookup window to add a new patient, delete an existing patient, or display and edit the Patient Hub or Patient Information window (demographics).

Patient Lookup Window Look and Feel

Path: Home > Patient Lookup

The Patient Lookup window in V10e has a slightly different look than previous eCW versions but the functionality remains unchanged.
Executable (.exe) version:

![Patient Lookup Window]

Web version:

**Patient Lookup**

**Search Patient**

- **Search by Name**
- **DOB**
- **Phone No**
- **Account No**

When staff members search for a patient from the Appointment window, the system performs a real-time search and displays the matching result along with the additional search criteria, such as DOB, Facility, and Status:
The Patient Hub provides a convenient, single point of access to all information available in a patient record.

Patient Hub Look and Feel

Path: Patient Lookup > Select patient > Patient Hub

In V10e, the Patient Hub has been refined and condensed, relying on easy-to-recognize icons for the most common Hub actions.

Executable (.exe) version:

Web version:
The following table describes the enhancements made to the Patient Hub window in V10e:

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toolbar</td>
<td>Encounters and Rx buttons have been replaced with icons and added to the toolbar for easier access:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Toolbar Icons" /></td>
</tr>
<tr>
<td>Billing and Appointment sections</td>
<td>All billing and appointment information is now categorized into respective sections for easier viewing:</td>
</tr>
</tbody>
</table>
|                           | ![Billing Section](image)  
|                           | ![Appointments Section](image) |
## Data Summary

A new Data Summary section has been added on the Patient Hub. It provides a snapshot of the number of Labs, DIs, Procedures, Referrals, Web or Telephone Encounters, Actions, and Documents for the patient:

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Summary</td>
<td>A new Data Summary section has been added on the Patient Hub. It provides</td>
</tr>
<tr>
<td></td>
<td>a snapshot of the number of Labs, DIs, Procedures, Referrals, Web or</td>
</tr>
<tr>
<td></td>
<td>Telephone Encounters, Actions, and Documents for the patient:</td>
</tr>
</tbody>
</table>

![Data Summary Image](image.png)

## Show/Hide Right Chart Panel

Show/Hide arrow capability has been added to the Patient Hub. Click the arrow to expand or collapse the Right Chart Panel (ICW).

**Show ICW:**

![ICW Image](image.png)
Patient Information Window

During the patient's encounter, all medical information is stored in the medical record and becomes part of the overall patient record.

Patient Information Window Look and Feel

Path: Patient Lookup > Patient Demographics

The Patient Information window in V10e includes mandatory and few other fields that were previously within the Additional Information window. This new look provides easy access to all the information with fewer clicks.

Executable (.exe) version:
The following enhancements have been made to the Patient Information window in V10e:

- The Email, Language, Race, Ethnicity, and Characteristic fields that were previously available on the Additional Information window, are now part of the parent Patient Information window:

- The Remove buttons has been replaced with a trash icon, and is located on the Insurance row next to the Group No.

- The Pharmacies, Contacts, Attorneys, Case Management, and Circle of Care tabs have also been added to this window and are located next to the Insurance tab:
Validating the Patient Responsible Party Selected with Relation Status On the Patient Information Window

The Patient Responsible Party selected on the Patient Information window has been validated with the Relation status. A pop-up window opens informing the user to select the correct relation status for the selected patient if the responsible party selected does not match the with the relation status:

![Patient Information Window](image)

eCW Resource Schedule

Manage staff schedules and patient appointments from the Resource Scheduling window.

Resource Scheduling Window Look and Feel

Path: Main Menu > Practice > Resource Scheduling

The Resource Scheduling window has a new look and feel. However, the functionality of the features within this window are still the same, but are now represented with new icons/buttons.
The following table describes the enhancements made to the Resource Scheduling window in V10e:

<table>
<thead>
<tr>
<th>Icons/Buttons</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the Date field to select a date for viewing provider(s) schedule. Click the Date field to open the calendar:</td>
<td></td>
</tr>
<tr>
<td>Click the right and left arrow to move the calendar forward or backward by one day.</td>
<td></td>
</tr>
<tr>
<td>Icons/Buttons</td>
<td>Descriptions</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------</td>
</tr>
<tr>
<td>![](1 Day)</td>
<td>Use the schedule viewer drop-down list to display the 1-day, 5-day, or 7-day view per week in schedule:</td>
</tr>
<tr>
<td><img src="15" alt="" /></td>
<td>Use the slot drop-down list to select the time (5, 10, 15, 20, 30, or 60 minutes) for the length of the appointment:</td>
</tr>
<tr>
<td><img src="Refresh" alt="" /></td>
<td>Use the Refresh button to update the Resource Schedule.</td>
</tr>
<tr>
<td>![](New Appointment)</td>
<td>Click the <em>New Appointment</em> button to schedule an appointment.</td>
</tr>
<tr>
<td>![](Multiple Appointment)</td>
<td>Click the <em>Multiple Appointment</em> button to search for an appointment or to schedule multiple appointments.</td>
</tr>
<tr>
<td><img src="Block" alt="" /></td>
<td>Click the <em>Block</em> button to set time slot as unavailable for the provider or resource.</td>
</tr>
<tr>
<td>![](Bump List)</td>
<td>Click the <em>Bump List</em> button to view the patients whose appointment(s) have been bumped.</td>
</tr>
<tr>
<td><img src="Copy" alt="" /></td>
<td>Click the <em>Copy button</em> to display the copied appointment on the Clipboard window. The number on this button represent the number of copied appointment that have not yet been pasted.</td>
</tr>
<tr>
<td><img src="Paste" alt="" /></td>
<td>Click the <em>Paste</em> button to paste the copied appointment.</td>
</tr>
</tbody>
</table>
Multiple Appointments Window

This new Multiple Appointments window in 10e enables users to book multiple appointments all at once, and also specify when each appointment should be booked in respect to the time that the first appointment ends. Users can search for the available time slots and book appointments as per the patient’s request or availability. A package option enables users to save the appointment details like Visit Type, Provider, and Facility for multiple appointments, and apply it for various patients.

To book multiple appointments:

1. From the Resource Schedule window, click the Appointment Search & Multiple Appointment Booking icon:

2. Complete the fields described in the following table:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient</strong></td>
<td>Click the Patient field to select a patient.</td>
</tr>
<tr>
<td><strong>Visit Type</strong></td>
<td>Select a visit type from the drop-down list.</td>
</tr>
<tr>
<td><strong>Reason</strong></td>
<td>Select a reason from the drop-down list OR Type in the reason.</td>
</tr>
<tr>
<td><strong>Facility</strong></td>
<td>Select a facility from the drop-down list.</td>
</tr>
<tr>
<td><strong>Providers &amp; Resources</strong></td>
<td>Select providers or resources by checking the boxe(s) next to their names from the drop-down list.</td>
</tr>
</tbody>
</table>

**Note:** If a provider is selected on the Providers & Resources field, the Provider field can be left blank. However, if a resource is selected on the Providers & Resources field, be sure to enter the provider on the Provider field.

A green check mark next to the provider or resource applies the Visit Rules for this provider or resource. For example, the provider has set up certain hours to take audiology appointments. Having the Rule Applied check enabled (green check mark) will display only the available audiology slots. Click the green check to disable the Rule Applied feature and thus remove the Visit Rules:

| Provider          | Select a provider from the drop-down list.                               |
3. Click the *Adv* button to select a preferred date and time for the appointment:

![Multiple Appointments](image)

4. Enter the number of minutes after which the next appointment will start, if booking another appointment.

   **Note:** If the second appointment needs to be scheduled few days or weeks after the first appointment, use the *Start Date* field, accessed by clicking the *Adv* button on the second appointment details row.

   **OR**

   Check the *Start at the same time* box to start both the appointments at the same time.

5. Click the (+) icon next to the *Visit Type* field to add the visit type information of the second appointment:

![Multiple Appointments](image)

6. Click *Search* to display a list of available appointment slots:
7. Click the (+) sign to expand and view the details of the appointment before booking.

**Note:** If no suitable appointment slot is found, click the *Multiple Appointment Search* on the top left to return to the previous window, and click the *Add to Wait List* button to add the patient to the wait list:

8. Click *Book*. The appointments display on the Resource Schedule with a linked appointment symbol (<<>>):

![Appointment Schedule](image-url)
Wait List

Patients can be added to the wait list in two ways:

- After performing an appointment search, if no suitable appointment slot is found, users can click Multiple Appointment Search to go back to the previous window, and then click Add to Wait List to add this patient to the wait list:

- If a front office staff member knows that all appointments slots are booked on the patient's preferred day, the user can simply enter the patient name in the Patient field and click Add to Wait List to add this patient to the wait list. The Visit Type, Facility, and Providers & Resources field is not mandatory in this case:

Click the Wait List button on the Multiple Appointment button to view the list of patients on the wait list. Search suitable appointments for the patients in the wait list to book appointments. Once the appointment has been booked, the front office staff must delete the patient from the wait list.

To book appointments for patients on the wait list:

1. From the Multiple Appointments window, click Wait List:

2. From the list of patients added to the wait list, click anywhere on the preferred patient's Patient Name row:
3. From the Multiple Appointments window, enter the information in the fields as necessary and click Search:

4. Click Book on the preferred time slot:

The appointments display on the Resource Schedule with a linked appointment symbol (<<>>).

5. Click the Delete icon on the Patient Name row of the Multiple Appointments window to delete the patient from the wait list.
Deleting a Visit

A visit can be deleted when two or more visits details are added on the Multiple Appointments window.

To delete a visit:
1. Click the Remove Visit (X) icon next to the visit details to delete the visit:

![Multiple Appointments Window]

Deleting a Linked Appointment

To delete a linked appointment:
1. From the Resource Schedule window, right-click on the appointment, and then select Delete to display a confirmation window:

![Confirmation Window]

2. Click Yes. A second confirmation window displays:

![Confirmation Window 2]

3. Click Yes to delete all the associated appointments.
   OR
   Click No to delete only the selected appointment.
Saving a Package

The selected criteria like Visit Type, Facility, and Provider can be saved as a package. This simplifies the process of booking multiple appointments without having to select the same criteria every time.

For example, most patients come in for their labs few days after their annual physical. In such instances, the user can save these visit types as a package and use it to book appointments for their patients without having to enter the details every time.

**To save a package:**

1. Enter the details (Visit Type, Facility, and Provider) on the Multiple appointment booking window:

2. Click the (+) sign next to the Visit Type field:

3. Enter another set of details for a different appointment:

4. Enter the package name and click **Save**: 
A confirmation window displays. The saved package now displays on the Select Package drop-down list:

Using the Saved Package

Saved packages can be used to book multiple appointments.

To use the saved package:
1. From the Multiple Booking Appointment window, select a patient.
2. Select the preferred package from the Select Package drop-down list to display the package details:
3. Enter the reasons for both visits.
4. Click the Adv button on the first appointment detail row to select the date and time for the appointment:

5. In the Next appointment after field, enter the number of minutes after which the second appointment starts.

Note: If the second appointment needs to be scheduled few days or weeks after the first appointment, use the Start Date field, accessed by clicking the Adv button on the second appointment details row.
6. Click the **Adv** button on the second appointment details row to select the date and time for the second appointment:

![Multiple Appointments](image1)

7. Click **Search** to display a list of open appointment slots:

![Multiple Appointments](image2)

8. Click **Book** to book the appointments in the selected time slots.

**Updating a Package**

Follow the steps to update a package.

**To update a package:**

1. Select a package from the **Select Package** drop-down list.
2. Make the changes as necessary and Click **Update**:
3. Click **OK** on the confirmation window to update the package.

**Deleting a Package**

Follow the steps to delete a package.

**To delete a package:**

1. Select a package from the **Select Package** drop-down list and click **Delete**.

2. Click **OK** on the confirmation window to delete the package.

**Insurance Participation by Provider Lookup**

The Insurance Participation by Provider Lookup option enables the front office and/or other staff to easily search or verify the insurances that are accepted by providers.

**Path:**

- **Main Menu > eCW Menu > File > Insurances > Insurance Participation by Provider Lookup**
- **Patient Lookup caret icon > Insurance Participation by Provider Lookup**
To lookup provider by insurance participation:

1. From the Front Office View window, use the filters to search for providers by insurance participation:

   - Enter the name of the provider in the real-time search field.
   - Enter the name of the insurance in the real-time search field.
   - Enter the specialty or use the drop-down list to select the specific field of concentration.
   - Select Yes, No, or All from the drop-down list to view the list of providers who accepts or rejects the selected insurance.
   - Select the service date using the drop-down calendar. To find insurances the providers participate with and accepts, the effective dates must be less than equal to the Service Date entered, and termination dates greater than or equal to the Service Date entered.

2. Click the (+) icon on the provider name row to expand the to view the list of insurances accepted. A green check mark on the Accept and In columns mean that the provider accepts the insurance and is within the network, while a red (x) means that the provider does not accept the insurance and does not fall in the insurance network:
Appointment Window

Perform common check-in and checkout tasks from the Appointment window.

Appointment Window Look and Feel

Path: Main Menu > Practice > Resource Scheduling > New Appointment

The fields on the new Appointment window have been organized into different categories, such as Appointment, Visit, and Billing for a streamlined appointment booking process. The appointment toolbar options (Encounters, Find, Logs, Referrals, Orders, Bubblesheet, Recurrence, and Delete) have now been moved to the bottom of the window.

Executable (.exe) version:
Four new icons have been added below the Patient field to provide more information about the patient. The information that these icons represent display once the patient is selected on the Appointment window.

The following table describes the newly added icons:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🕒</td>
<td>Displays the patient's date of birth.</td>
</tr>
<tr>
<td>☑️</td>
<td>Displays the patient's phone number.</td>
</tr>
<tr>
<td>💌</td>
<td>Displays the patient's e-mail address, if provided.</td>
</tr>
</tbody>
</table>
Case Details

Path: Patient Hub > Case Manager Hx > New > Case Details

A new Case Visits button has been added on the Case Details window, enabling users to view all of the patient's case visits:

The Case Types window opens and displays the selected patient's case visits:
Displaying Insurance Balance and Credit(s) on the Appointment Right Chart Panel

The Appointment Right Chart Panel now displays insurance balance and credit(s) on the Patient Account Summary section, easily providing account information on the Appointment window:

Concurrent Lock and Session Timeout Features Extended to the Appointment Window

eClinicalWorks provides two features, Concurrent Lock and Session Timeout in Minutes, preventing users from overriding patient data when more than one system user is attempting concurrent access to the same area of a patient's chart.

The Session Timeout in Minutes is item key-driven and determines the length in time a window is locked by a system user, preventing another user from accessing it.

These Concurrent Lock and Session Timeout features have been implemented to the Appointment window.

Note: This Concurrent Lock feature and the Session Timeout in Minutes are enabled by item keys. Contact eCW Support and refer to the Item Key Codes — 2089_AOSPACT and 2090_AOSPACT, respectively.
Telephone Encounters

Use the Telephone/Web Encounter window to document the encounter, review information, or assign it to a responsible staff member such as a physician, nurse, or front office personnel.

Telephone Encounters Window Look and Feel

Path: T Quick-Launch button > New Telephone Encounter

The Telephone Encounters window has been updated in V10e with a cleaner look and feel. The Info and Hub buttons have been replaced with a patient name and demographics (age and date of birth) hyperlink. Simply click patient name to launch the Patient Hub window and age or date of birth to launch the Patient Information windows, respectively.

Executable (.exe) version:

Web version:
V10e introduces the following list of new or enhanced features on the Telephone Encounter window:

- The Hub button has been replaced with the introduction of hyperlink on the patient name:

  ![Hyperlink on Patient Name]

- The Info button has been replaced with the introduction of hyperlink on the patient demographics — patient age and DOB:

  ![Hyperlink on Patient Demographics]

- Check Spelling button has been replaced with space-saving icon on the Message and Notes tab:

  ![Space-saving Icon on Message Tab]

- Browse button has been replaced by the More (…) button on the Message tab:

  ![More Button on Message Tab]

- The Star icon has been added to the Provider and Assigned To fields, enabling users to search a username from their favorites list.

- The Quick Search feature has been added to the Rx tab.

**Messaging**

eClinicalWorks provides a feature for electronic communication, similar to e-mail, within the practice. Using eCW, users can create and send messages to any provider and staff member who has permission to log in to your eClinicalWorks application.

**Daily User Logs Report Sent to the User’s Inbox**

**Path:** *M Quick-Launch button > Inbox*

A daily user logs report is now sent to the user’s inbox informing the user about their login information.

The message is sent from eClinicalWorks, support with a Subject of *User Log Report*: 
Click the From link on the message row to read the message:

The User Log Report displays the login information for that user over the past 24 hours, such as the computer name, computer IP address, and the user login and logout time.

Messages Inbox Window Look and Feel

Path: M Quick-Launch button > Inbox

The Messages Inbox window in V10e has a slightly different look than previous eCW versions, but the functionality remains unchanged.

Executable (.exe) version:
Notice that in V10e, the title of the window has been renamed from Messages Inbox to Messages.

**Filter Icon on Messages Window**

A filter icon has been added on the Message Inbox window enabling users to hide the filters that are located on the top of the window:

Simply click the filter icon again to show the filters.

**Sender Field Enhancement on Messages Window**

The Sender drop-down list on the Messages window has been replaced by the real-time search field. Simply click in the field and start typing the name to dynamically display the results that matches your entry:

Notice that the results are displayed along with the Advance Search panel. This panel enables users to search staff by their name, user ID, or location. Users can also filter by Role, Location, and Status.

The Star icon has been added next to the search field to limit the search to the favorites.
Compose Message Window Look and Feel

Path: Messages > Compose Message

In V10e, the Send Message window has been renamed to Compose Message.

Executable (.exe) version:

![Executable Version Image]

Web version:

![Web Version Image]

The following table lists the enhancements that have been made to the Compose Message window:

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Description</th>
</tr>
</thead>
</table>
| To Field     | Type the name of the staff member to perform real-time search or use the drop-down list located at the top right corner of the window to limit the staff search to:  
  ▪ All Providers  
  ▪ All Providers and Staff  
  ▪ All Staff  
  ▪ My Favorite |
Use the Documents icon to manage and organize the electronic documents within the eClinicalWorks application. These documents could be lab orders, Progress Notes, prescriptions, or referrals.

Displaying New Time Format on the Document Log Window

Path: D Quick-Launch button > click the patient name on the document row > click the Document Log icon on the bottom left of the Document Details window

A new 24-hour clock format (military time) is now displayed on the Document Log window instead of the 12-hour AM/PM format:

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Options</td>
<td>The priority options (Urgent, Emergent, Routine) are all listed in a single row instead of a drop-down list:</td>
</tr>
<tr>
<td>Edit Toolbar</td>
<td>Use the icons on the toolbar to format text in the message:</td>
</tr>
</tbody>
</table>
|                   | ![Icons](image)
|                   | Point to the cursor over each icon to display the description of its function. |
| More (...) button | The Browse button has been replaced by the More (...) button: |
|                   | ![More Button](image)
|                   | Click More (...) button to select a keyword to add to the message. |

Note: The display and function of the following feature is affected by the plugin. This feature will not display or function properly if the plugin is not installed or is disabled. Please ensure that the plugin is installed and turned ON prior to using this feature. For information on installing the plugin, refer to the section Plug-In Setup.

Enhancement

Description
Fax Outbox

The Fax Outbox displays all documents in the eClinicalWorks fax queue that are waiting for transmission or have been transmitted by the fax server.

Fax Outbox Window Look and Feel

**Path:** D Quick-Launch button > Fax Outbox

The Fax Outbox window has been redesigned in V10e, introducing the Send By filter on the window.

**Executable (.exe) version:**
Web version:

The following enhancements have been added to the Fax Outbox window in V10e:

- A Send By filter has been added to Fax Outbox window, enabling users to only see the faxes sent by the selected user instead of having to go through the entire list:

  ![Fax Outbox window with Send By filter]

  Use the star icon to search from a list of favorites.

- The buttons available on the bottom bar of the Fax Outbox window have been moved to the middle of the window, below the fax outbox filters:

  ![Fax Outbox window with buttons moved]

  Click the Filter icon to show or hide the fax outbox filters and view more sent faxes on the same page:

Fax Inbox

The Fax Inbox contains all received fax transmissions. Faxes are also documents and therefore, just as with any other document, you can assign faxes to encounters and attach faxes to a patient record.

Fax Inbox Window Look and Feel

**Path:** D Quick-Launch button > Fax Inbox

The Fax Inbox window has been redesigned in V10e, introducing the Send By filter on the window.
**Executable (.exe) version:**

![Fax Inbox Window](image1)

Click the blue arrow to show or hide the left panel.

**List of Faxes on the Fax Inbox Window**

**Path:** *D Quick-Launch button > Fax Inbox*

All electronic copies of the faxes are now listed on the left pane of the Fax Inbox window. When a fax is selected from the list, three icons will display on the fax row and contents of the fax will display on the right-hand side:

![Fax Row Icons](image2)

The following table describes the three icons on the fax row:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image3" alt="Fax Received Icon" /></td>
<td>Fax received successfully</td>
</tr>
<tr>
<td><img src="image4" alt="Fax Sending Icon" /></td>
<td>Fax sending in progress</td>
</tr>
<tr>
<td><img src="image5" alt="Fax Failed Icon" /></td>
<td>Fax sending failed</td>
</tr>
</tbody>
</table>

---

**Web version:**

![Fax Inbox Window](image6)

Click the blue arrow to show or hide the left panel.

**List of Faxes on the Fax Inbox Window**

**Path:** *D Quick-Launch button > Fax Inbox*

All electronic copies of the faxes are now listed on the left pane of the Fax Inbox window. When a fax is selected from the list, three icons will display on the fax row and contents of the fax will display on the right-hand side:

![Fax Row Icons](image7)

The following table describes the three icons on the fax row:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image8" alt="Fax Received Icon" /></td>
<td>Fax received successfully</td>
</tr>
<tr>
<td><img src="image9" alt="Fax Sending Icon" /></td>
<td>Fax sending in progress</td>
</tr>
<tr>
<td><img src="image10" alt="Fax Failed Icon" /></td>
<td>Fax sending failed</td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Send To Staff Icon](image) | Click the *Send To Staff* icon to assign the fax to a staff member:  
![Send To Staff Icon](image)  
Type the name of the staff member in the Staff field and click OK. The *Delete document from inbox* box is checked by default. |
| ![Add to Patient Icon](image) | Click the *Add to Patient* icon to attach the document to the Patient Documents:  
![Add to Patient Icon](image)  
Click the trash icon to delete the selected fax document from the system. A pop-up window displays: |
| ![Trash Icon](image) | Click *Yes* to delete the fax. |
Referrals

The following section describes the enhancements made to the Referrals section.

Disabling the Referral To and From Drop-Down Lists on the Referral Outgoing and Incoming Windows

Path: R Quick-Launch button > Incoming or Outgoing

An item key has been introduced to disable the *Referral To* and *From* drop-down lists from the Referrals Outgoing and Incoming windows, respectively. Users can use the *More (..)* button next to these fields to select the referring To and From providers from the Referring Physician Lookup window.

Note: This feature is enabled by disabling an item key. Contact eCW Support and refer to the Item Key 3008_VAOE.

Referrals Outgoing window:

![Referrals Outgoing window](image)

Referrals Incoming window:

![Referrals Incoming window](image)
Displaying Referrals on the Patient Orders Window

Path: Office Visits window > select an encounter > View Orders

An item key has been introduced to display the referral added to the patient’s encounter (Progress Notes > Treatment) on the Referral section of the Patient Orders window:

Note: This feature is enabled by disabling an item key. Contact eCW Support and refer to the Item Key 3008_VAOE.

Disable Editing of Addressed Incoming and Outgoing Referral

Path: R Quick-Launch button > Outgoing/Incoming > click any addressed referral

An item key has been introduced to disable the editing of addressed incoming and outgoing referrals. Once a referral has been addressed, users can no longer add, edit, or delete the locked information.

Note: This feature is enabled by an item key. Contact eCW Support and refer to the Item Key 2085_AOSPACT.
Letters

The eClinicalWorks Letters feature provides a way to create generic letters within Microsoft® Word®, and to have patient-specific information automatically merged into specific fields within the letter.

**Saving Letter Name Format**

**Path:** Patient Hub > Letters > select a letter > Run Letter

Special characters are not allowed in the Save As field on the Letters window, accessed by selecting a letter and then clicking Run Letter. A pop-up displays when a user enters a special character in the Save As field, informing the user that it is not allowed:

![Special character not allowed](image)

**Note:** This feature is enabled by item key. Contact eCW Support and refer to Item Key Code 2053_AOSPACL.

**Letter Window Enhancements**

**Path:** Patient Hub > Letter

The following enhancements have been made on the Letter window:

- The Letter Designer button have been renamed to Edit.
- The Add, Edit, and Delete buttons now displays on the bottom left of the Letter window:
Category Drop-Down List Added on the Letter Window

Path: *Patient Hub > Letter*

A *Category* drop-down list has been added on the Letter window, enabling users to filter the letter templates based on the category selected:
Mapping Letter Tags

A new option *Enable Mapping* has been added on the Letter Designer window, enabling users to map letter tags. Some state forms have tags (field names) that do not match the eCW tags. In such situations, users can use the Mapping Letter Tags feature to populate information from the patient and system data into specific fields within the letter.

**Note:** This feature is enabled by item key. Contact eCW Support and refer to Item Key Code 2071_VAOE.

**Path:**
- *Patient Hub > Letters > select a letter > click New > upload a letter*
- *Patient Hub > Letters > select a letter > click Edit*

**To map the letter tags to eCW letter tags:**

1. From the Letter Designer window, check the *Enable Mapping* box. The *Name* and *map with eCWTag* fields display:

2. Click the tag on the letter that you want to map. The selected tag displays on the *Name* field:

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3. Select the preferred tag from the Tags section on the left pane. The selected tag displays on the map with eCWTag field:

4. Click **Map All Tag**.

   **Note:** Click the **More (…)** button next to the map with eCWTag field to view the Mapping List window. This window displays the letter tags mapped to the eCW tags:

5. Repeat steps 2 - 4 for the rest of the tags that require mapping.

6. Click **Close**.
Download Template Button Added on the Letter Designer Window

**Path:** Patient Hub > Letters > select a letter and click Edit

A Download Template button is now available on the Letter Designer window, enabling users to download the selected letter template to their local computer. Users also have the option to password-protect the letter:

![Download Template button](image)

**Note:** Only users with the Allow to Download Letter security attribute enabled can download the template to the local machine.

Click the Download Template button to display the following options:

- **Download** - Click to download the letter to the local computer.
- **Download with Security** - Click to download the letter to the local computer and apply password protection.

**To download with security:**

1. From the Letter Designer window, click Download Template, and then select Download with Security:

2. From the Set password window, enter and confirm the password:
3. Click Download to save the computer to the local computer. The password is required to open the letter every time.

**Save To Local Button Added on the Letters Window**

**Path:** Patient Hub > Letters > select a letter and click Run Letter

A Save to Local button is now available on the Letters window, enabling users to save the letter to the local computer with password protection:

**Note:** Only users with the Allow to Download Letter security attribute enabled can download the template to the local machine.

Click Save to Local and enter and confirm the password on the Set password window.

Click Download to save the letter on the local computer. The password is required to access the letter every time.
Action Column Added on the Letter Logs Window

**Path:** Patient Hub > Logs > Letter Logs

An Action column is now available on the Letter Logs window. When a letter is printed, saved, or downloaded, the action is logged in the Actions column:

Click anywhere on the letter row to open the letter.

Enhancements Made to the Letters

The following enhancements have been made to the Letter section:

- When a user attempts to upload any other file than a PDF file, a pop-up message displays reminding the user to select a PDF file:

  ![Popup Message]

  **Please select pdf file only**

  **Path:** Patient Hub > Letters > New > Select pdf file > select a file from your local computer

- When a user clicks *New* on the Patient Designer window to upload a new letter template but does not select any file and clicks *Cancel* and then clicks *Save*, a pop-up displays reminding the user to enter a Custom Name. When the user enters a custom name and clicks *Save* again, a pop-up window reminding the patient to select a file and the Open window to select the file displays simultaneously:
Path: Patient Hub > Letters

- The Patient Account Number tag added in Collection Letter

Running Letters without Plug-In Enhancements

The following section describes the enhancements in the Running Letters without Plug-in section.

Choose File Button Renamed to Select PDF File in the Upload Window

Path: Patient Hub > Letters > New

The Choose File button in the Upload window has been renamed to Select PDF file:
Displaying Trash Icon Next to the Letter Template Name By Default on the Letter Window

Path: Patient Hub > Letters

The Delete icon now displays next to the letter template name on the Letter window by default. Previously the Delete icon only displayed if the user put the cursor on the letter template name row:

Added a Delete Confirmation Window

Path: Patient Hub > Letters

A delete confirmation window now displays on the Letter window, when a user clicks the Delete icon next to the letter template name:

Click Yes to delete the letter template.
Added Pop-Up Message for Tags

Path: Patient Hub > Letters > select a letter and click Letter Designer

Without the plug-in, only letter templates saved in PDF format can be uploaded on the Letter window. Users cannot add the letter tags from the Letter Designer window. These tags are in a view-only mode in the Letter Designer window. So, when a user clicks a letter tag from the left pane, a pop-up message opens, informing the user that the letter tags can only be used with an external PDF editor:

![Letter Designer](image)

Save In and As Fields Grayed Out if the Do Not Save Box is Checked when Running Letters

Path: Patient Hub > Letters > select a letter template > Run Letter

When the user selects a preferred template to run a letter, the letter displays with the patient-specific information populated automatically into the defined fields, on the Letters window.

Click the Do Not Save box to print or fax the letter without saving a copy of the letter in the patient documents. When this box is checked, the Save In and As fields are grayed out, eliminating any confusion:
Saving Custom Letter Names and Descriptions

**Path:** Patient Hub > New > Select PDF file > Upload

The *Custom Name* field and the Description field in the Letter Designer window does not support special characters. Custom letter names and descriptions with special characters cannot be saved.

When a user enters a special character on the Custom Name field or Description field, a pop-up displays informing the user to enter a valid Custom Name or Description.

**Custom Name:**

**Description:**
The following enhancements have been made to eCliniForms:

- A maximum file size (3 MB) restriction has been added on the eCliniForms window. When a user attempts to upload a file that is greater than 3 MB on the eCliniForms window, a pop-up displays informing the user that the selected file exceeds the maximum size allowed:

  ![Image](https://via.placeholder.com/150)

  **Path:** Documents > eCliniForms > select a patient > select a category > Add Document

- Special characters cannot be used on a file name, such as Category Name and Name fields (eCliniForms > right-click on a category > Add or Edit category OR eCliniForms > right-click on a document > Edit document).

- No alphabetical are allowed on the numeric fields of the Document Properties window (eCliniForms > right-click on a document > Edit Document).