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ABOUT THIS GUIDE

This guide explains the use of the eClinicalWorks® (eCW) Patient Portal. It describes the features of the Patient Portal and the methods that can be used to perform the tasks that support those features.

This guide shows the practice’s staff how to use the Portal’s many functions. Only standard approaches are described in this guide. Many tasks can be successfully completed in a number of ways, by various paths, beginning on diverse windows throughout the system. As users become more proficient, they will learn shortcuts to completing tasks.

Patient View on page 200 presents the patient’s view of the system, showing you what the patient sees and explaining the functions that the patient can perform through the Portal. In presenting the Patient View, the guide shows the practice’s staff how the end-user side of the system works.

Patient Portal Resources

You can find additional documentation, marketing and promotional material, videos, and training material specifically for the Patient Portal at https://my.eclinicalworks.com/Patient Portal.

Product Documentation

The following documentation supports eClinicalWorks Electronic Medical Record (EMR), Practice Management (PM), and/or additional software features:

- Billing Setup Guide
- Billing Users Guide
- eBO Canned Reports Users Guide
- eBO Metadata and Query Studio Users Guide
- eClinicalMessenger Users Guide
- eClinicalMobile Users Guide
- eClinicalWorks Nimbus Users Guide
- eClinicalWorks P2P Users Guide
- Electronic Medical Records Setup Guide
- Electronic Medical Records Users Guide
- ePayment Users Guide
- Front Office Setup Guide
- Front Office Users Guide
- Patient Portal Users Guide
- Release Notes
- Security Attributes and Logs Guide
- System Administration Users Guide
Finding the Documents


Webinars

For more information, take advantage of the free unlimited eClinicalWorks webinars—interactive seminars conducted online. These courses are presented by product trainers who are experts with eClinicalWorks and all of its capabilities.

To sign up for an eClinicalWorks webinar go to:

https://my.eclinicalworks.com/eManager/jsp/eCRM/Webinar.jsp

eClinicalWorks Newsletter

To receive important, timely, and informative product notifications, subscribe to the eClinicalWorks Newsletter e-mailing list.

To subscribe to the newsletter:

- Available on the my.eclinicalworks Customer Portal: https://my.eclinicalworks.com
  OR
- Available on the eClinicalWorks website: http://eclinicalworks.com/
  OR
- Click the direct link: eClinicalWorks Newsletter

Getting Support

Send messages directly to eClinicalWorks Support through the eClinicalWorks Customer Portal:

https://my.eclinicalworks.com

You may also call or e-mail eClinicalWorks Support:

Phone: (508) 475-0450

E-mail: support@eclinicalworks.com
Conventions

This section lists typographical conventions and describes the icons used to call out additional information and to indicate item keys, new features, and enhancements to the application.

The following typographical conventions are used in this guide:

<table>
<thead>
<tr>
<th>Bold</th>
<th>Identifies options, keywords, and items in a description.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italic</td>
<td>Indicates variables, new terms and concepts, foreign words, or emphasis.</td>
</tr>
<tr>
<td>Monospace</td>
<td>Identifies examples of specific data values, and messages from the system, or information that you should actually type.</td>
</tr>
</tbody>
</table>

The following icons are used to highlight new features and indicate enhanced features and item keys:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌐</td>
<td>Indicates this is an item key.</td>
</tr>
<tr>
<td>💡</td>
<td>Identifies new features, suggested by clients, from the eCWIdeas website: <a href="http://ecwideas.eclinicalworks.com">http://ecwideas.eclinicalworks.com</a>.</td>
</tr>
<tr>
<td>⭐</td>
<td>Identifies new features.</td>
</tr>
<tr>
<td>✈</td>
<td>Indicates an enhanced feature.</td>
</tr>
<tr>
<td>🛡</td>
<td>Points out helpful tips or additional information.</td>
</tr>
<tr>
<td>🌐</td>
<td>Indicates feature meets a Meaningful Use requirement.</td>
</tr>
</tbody>
</table>
INTRODUCTION

eClinicalWorks® practices use the Patient Portal to deliver better healthcare.

At its most basic, the Patient Portal is a secure messaging system between the patient and office. Messages can be directed by the patient to various office personnel, and messages to the patient are secure, providing HIPAA compliance that standard e-mail cannot provide.

In addition to secure communication, the Patient Portal offers many other features that practices can selectively activate on their own (no call to eCW or an IT vendor needed.) Feature activation is controlled by a simple control panel (refer to Accessing and Enabling Patient Portal Settings on page 37).

This document explains the features of the Portal:

- Enabling patients to view lab and imaging results - Refer to Labs Settings on page 72
- Pushing out questionnaires to patients and having their answers flow automatically into their charts - Refer to Form Settings (Questionnaires and Immunizations) on page 76
- Enabling patients to send refill and referral requests, view current and past billing statements, add and amend their PHI in the chart, and, for new patients, pre-register prior to their first visit - Refer to Menu Settings on page 93
- Enabling patients to request specific appointment times that the practice permits, and sending automatic e-mail appointment reminders to any Web-enabled patients with scheduled appointments - Refer to Appointment Settings on page 69

These are just some of the features available in the Patient Portal, all controlled and managed by the practice.

Registry-Based Communication

With the Patient Portal, practices can use Registry-based communication with their patients. Data that practices have collected about their patients can be searched and sorted using the Registry, which is already included in the eCW EMR.
Introduction

The Registry can sort patents using over 100 different criteria including demographics, drugs, diagnoses, referrals, immunizations, providers, dates of visits, structured data elements, vital signs, lab values, and more. It can also sort using multiple criteria in a Boolean method. After sorting a group of patients, a practice can send a message to those patients in the list who are Web-enabled (and the remainder can receive their letters by “snail mail”) using templates. For example, a practice could send a Portal message (an eBlast) to all patients on a certain medication with a specific health insurance company when that company takes the medication off formulary. The practice can inform hundreds of patients at the same time instantly, instead of waiting to tell them when they come in to the office or when they call. Using Registry-based communication via the Patient Portal, practices are able to care for their entire patient population even when they are not in the office or on the phone.

Meaningful Use

The Portal plays an integral role in helping practices meet the objectives of Meaningful Use (refer to What is Meaningful Use? on page 19) and the Patient-Centered Medical Home. The Patient Portal is a must for practices attempting to attest to Meaningful Use measures.

Patient Participation

One key to successful adoption of the Patient Portal is to urge patients to sign up. To use the Portal, patients must be Web-enabled. All they need is an e-mail address, and they can access the Portal from anywhere that the Internet is accessible. eCW has developed documents to help practices promote the Patient Portal to their patients. The best times to get patients to sign up are upon checking in for a visit and when in the exam room. Just telling them about the e-mail reminders for appointments is usually enough to get them to sign up. Refer to Promote the Portal to Patients on page 17 for more information about getting patients onboard.
The Patient Portal Defined

eClinicalWorks’ Patient Portal is a Web-based communication module, designed to be used with the eCW application, that facilitates communication between a practice and its patients, improving the quality of care.

The Patient Portal is a secure, Web-based, self-service Portal that provides online interaction between patients and the practice. As part of your practice’s website, it is accessible by both your patients and members of your staff.

Practices using the Patient Portal can provide administrative and clinical information directly to their patients:

- **Want your new patients to pre-register before their first appointment?**
  
  No problem, use the Pre-Registration function in Patient Portal.

- **Need to reschedule an afternoon’s appointments?**
  
  Easy ... send a message to those patients who have been scheduled.

- **Need to send lab results to a patient?**
  
  Simple ... after reviewing lab results, indicate that they can be published, and those lab results will be published to the Portal automatically along with provider comments.

Benefits to Patients

With improved and efficient communication, patients receive the greatest benefit of all: improved healthcare.

Improving Patient Healthcare

The Portal improves patient healthcare through simple but secure communication with individuals within the practice.

Patients may:

- Submit requests for referrals, refills, lab results, and more
- Submit their messages to a general mailbox; or, in specific instances, send messages directly to an assigned recipient
- Request appointments
- Request prescription refills
- View medical records
Introduction

The Patient Portal Defined

- Receive educational material relevant to their condition
- View their current and past statements

Heightened awareness and knowledge, together with the ability to communicate directly and quickly by way of a secured network connection, enable patients to be proactive in the management of their own healthcare.

Benefits to the Practice

Through improved quality, safety, and efficiency, practices can provide their patients with a higher level of care. Practices can engage patients and, while ensuring privacy and security, reduce health disparities through data sharing.

Providing a Higher Level of Care

Practices can provide a higher level of care through improved secure communication and increased efficiency, all while decreasing their administrative costs with a streamlined workflow.

Using the Portal, practices can:

- Communicate more frequently and efficiently with patients
- Track and review patient communication
- Receive more accurate history and specific HPI information at check-in
- Respond in a timely fashion to patient requests
- Provide greater agility in patient scheduling and referrals
- Provide case-specific information to patients as needed
- Manage a streamlined, bi-directional communication conduit, reducing the time spent on phone calls, call routing, and call-backs, thereby maximizing the efficiency of the patient care process

Other Benefits to the Practice

Beyond the improvement in patient care, the Patient Portal provides several additional benefits:

- Strengthen patient communication and improve patient satisfaction
  - Provide easy access to a convenient, secure method of interaction
  - Enable patients to better manage their healthcare
  - Create a competitive advantage to attract new patients
Introduction

The Patient Portal Defined

- Reduce costs
  - Reduce hard costs for print, mail, and collection services
  - Reduce labor costs through more efficient communication
  - Shift time-consuming responsibilities to the patient

- Generate revenue
  - Increase clinical efficiency and see more patients
  - Improve appointment compliance and reduce “no shows”
  - Offer virtual visits to replace phone calls

- Present your practice’s brand
  - Clearly define your public image on the Web by using the Portal’s available tools to create your own Portal welcome page
  - Create your own URL to make your patient communications easy to identify

The Patient Portal enhances your business efficiency by improving payment timeliness; limiting no-shows and phone calls; reducing patient complaints; maximizing the efficiency of your response to questions about lab results, requests for appointments, prescription refills; sending reminders electronically rather than by phone; and reducing operating and administrative costs.
Promote the Portal to Patients

The product is called the Patient Portal. It represents one means of access to the practice for the patient, and it results in significantly improved patient communication for the practice. The only way the Portal can be effective is for both the practice and its patients to use it ... the more it is used, the more effective it becomes.

To make its use as broad and effective as possible, practices must first make their patients aware of the Portal and its benefits, then train them, then follow-up with meaningful results.

Portal Awareness

Practices can heighten the awareness of their patients in several ways:

- Send letters to all patients - formal notifications that the Portal is active, directing patients to the practice’s website or a phone number where they can access more information.
- Create flyers and brochures for mailing and distribution to patients. Attach a brief accompanying cover letter introducing the feature, or hand to patients at checkout.
- Create handouts - pamphlets or tri-fold brochures that provide more detailed information about how the portal can be used.
- Post banners and posters in and about the office and waiting areas.
- Encourage staff to wear Ask me about Patient Portal buttons.
- Add a link to the Portal from the practice’s website.
- Display video presentations in walk-in and waiting areas.
- Present audio messages during on-hold time on phone calls.

Examples and templates for many of these items are available from eClinicalWorks. To find these resources, go to https://my.eclinicalworks.com.
Portal Education

Patient education of the Portal should be incremental and rewarding for the patient:

- Help patients with their account information in the office.
  
  Hand them a simple instruction sheet with their username and temporary password included, and instructions in changing their password and reviewing their information.

- For a period of time following the promotion, assign a dedicated resource available by phone or by Internet chat to answer patients’ questions and walk them through the process.

- Show patients tangible results (can be simplistic: a new appointment or a statement).

- Periodically provide patients with basic measurements, including the percentage of patients using the feature, patient in-office time saved by completing history questionnaires in the Portal.

- Publish patient testimonials on the practice’s website or in periodic correspondence with all patients.

All of these activities will improve communication with patients at all levels, will help existing Web-enabled patients to make better use of the feature, and will encourage participation by those not yet taking part.
Addressing Meaningful Use (MU)

What is Meaningful Use?

Meaningful Use

The American Recovery and Reinvestment Act of 2009 is a bill passed by Congress, aimed at spurring economic growth. A large amount of the funds allocated for distribution is being dispensed to healthcare providers as part of the Health Information Technology for Economic and Clinical Health Act (HITECH). HITECH is intended to incentivize medical practices to adopt and implement Electronic Health Records (EHRs), also known as Electronic Medical Records (EMRs).

The first benchmark was set for the year 2011. The 2011 goal was to improve quality, safety, and efficiency in healthcare by, for example, sending reminders to patients, per patient preferences, for preventive/follow-up care. This means engaging patients by providing them with either electronic copy of or electronic access to clinical information including lab results, problem lists, medication lists, and allergies lists. In addition, the guidelines call for qualified EMR systems to provide patients with electronic access to clinical summaries for each encounter and to specific educational resources. Additional benchmarks are set for 2013 and 2015.

To qualify as “meaningful users,” eligible providers must demonstrate their use of a “qualified EHR” in a “meaningful manner.” While the terminology seems non-specific, the order specifies that e-prescribing, the electronic exchange of medical records, and the interoperability of systems are determining criteria in labeling “qualified EHRs.”
Helping Practices Meet the Goals of Meaningful Use

Meaningful Use

The eClinicalWorks Patient Portal is an important tool for practices to use in meeting the goals of Meaningful Use, as it provides ease of use in a secure environment. Web-enabling of patients is the eCW-recommended method for practices to achieve compliance with Meaningful Use measures 170.304(f), 170.304(g), and 170.304(h), which require patients to have electronic access to their Personal Health Records.

For more information, please refer to the eClinicalWorks Meaningful Use Training Scenarios Guide and other documentation presented on https://my.eclinicalworks.com. Refer to About This Guide on page 9 for more information about accessing Meaningful Use resources, including additional documentation and webinars.
Implementation

Implementing the Patient Portal involves staff and patient training and well-planned enabling of the Portal’s settings.

Learning About Patient Portal

After a practice has activated the Patient Portal, a number of resources are available to familiarize staff with its features before they begin to use it.

Training

eClinicalWorks provides training to practices that are new to the Portal. Practices with experience in using the Portal can also take advantage of training opportunities to sharpen their skills.

Training is available on-site at your location and at our corporate headquarters (in Westborough, Massachusetts and other locations). We also offer free webinars, which our instructors try to make interactive by giving participants the opportunity to ask questions and make comments whenever possible.
eCW my.eclinicalworks.com Customer Portal

Training and support resources are available on the eClinicalWorks Customer Portal (http://my.eclinicalworks.com/). Follow the path to select any of the documentation, training, or informational links from the window.

Explore any and all of these features to learn, set up, promote, and support the Patient Portal:
Setting Up the Portal

Administrators, practitioners, and other staff who may either work with the Portal or be affected by it should participate in planning its implementation.

Administrative settings enable the practice to set up menus, define the appearance of the Portal on the patient side, schedule tasks, and assign roles and responsibilities. Some of the settings are described briefly here.

Enabling Administrative Settings

Practices must establish a number of settings in the Patient Portal to set up and maintain the system. These administrative settings are enabled as part of implementation, but can be modified as the practice broadens and refines its use of the application.

Users click the Patient Portal Settings icon in the Admin band in eClinicalWorks to display the menu of administrative settings:

- Settings
  - Message Routing
  - Default Msg Names
  - E-mail Message Settings
  - Appointment Settings
  - Labs Settings
  - Form(ques &Imm) Settings
  - Menu Settings
  - Consent Form Settings
  - Welcome Message Setting
  - IMH Configuration
  - New Pt Registration
  - Medical Report Conf.
  - Feature Settings
  - Synchronize
  - Run

Enabling the administrative settings is described in another section of this document. For detailed information, refer to Patient Portal Settings on page 37.
Helping Practices Implement the Portal

eClinicalWorks has created templates for a number of promotional and educational tools. Visit the eClinicalWorks Customer Portal (http://my.eclinicalworks.com/) to find these items. Refer to eClinicalWorks Customer Portal on page 22 for more information.

Working with Patients

Patients will understand and appreciate the value of the Portal only by using it.

With the help of eClinicalWorks, practices should do all they can to assist patients in getting the full benefit of the Portal; only then will the practice benefit fully as well.

To begin a practice should solicit patients’ e-mail addresses as part of the registration process or office visit workflow. Next, the practice can give the patient credentials to access the Portal, along with introductory educational material. This gives the practice the opportunity to Web-enable as many patients as possible. When patients are Web-enabled as part of the workflow and given appropriate instructional material, the concept is a much more natural and comfortable extension of their medical office experience.

For more information about working fostering patient relationships and working with patients, refer to Promote the Portal to Patients on page 17.

Promotion is the Key

The success of the Portal implementation in any practice is determined by the number of patients who actively use it. Ensure the success of the Portal by promoting it. Refer to Promote the Portal to Patients on page 17.
ACTIVATION

Many eClinicalWorks® applications can be activated on-demand by the practice from the Admin band in the eClinicalWorks EMR product.

To activate Patient Portal:

1. From the Admin Band in eClinicalWorks, click the Product Activation icon:

![Product Activation Icon]

The Product Activation window displays.

2. Click Activate Patient Portal:

![Product Activation Form]

The Activation Consent Form window displays, showing the terms and conditions of licensing and other options for selection.

3. Select the appropriate options:
4. Check the box indicating that the conditions are accepted.

5. Click the Activate Patient Portal button.

The first of a series of Activation Process status messages displays, indicating that the appropriate connection is being established and verifying that the practice is appropriately licensed with eClinicalWorks:

As the process continues, a series of windows displays, each showing a status bar that indicates the relative percentage of completion and a message describing the completed step.

As the process nears completion, a message indicates that the connection has been established:
Activation

After server communication has been established, the final message indicates that the registration has been completed successfully and the account activated.

6. Click OK to view the Portal URL.

7. Click the URL to access the patient’s view of the Patient Portal login window.

OR

Click the link at the end of the second line to view a brief summary of the Portal’s features:

The Current T&C and Previous T&C buttons display the software license agreement for Patient Portal - eClinicalWeb. Use the Print this Page button to print the agreement:

When the registration has been successfully completed, the practice may enable individual providers to be active on the Portal.
**Note**: Practices should configure and enable their administrative settings before Web-enabling patients.

Administrative settings include features such as consent forms, welcome message, e-mail notification messages, etc.

For more information, refer to [Patient Portal Settings](#) on page 37.
Web-Enabling Patients

Patients must be set up with the appropriate access rights and information-handling capability to log in and use the Portal’s functionality.

Web-Enabling a Patient

The Web-enabling process begins from the eClinicalWorks application.

To Web-enable a patient:

1. Click the Patient Lookup icon:

   OR

   Click the Patient menu and select Lookup:

   ![Image of Patient menu and Lookup option]

   The Patient Lookup window displays.

2. Type the name of the patient in the Search Patient field.

   As you type, a list displays, showing patients whose names match the entry.

   Two columns precede the Name, including the Web column. Patients who have already been Web-enabled will have a W in the Web column before the Name:
In the example above, Andy is Web-enabled. The practice will Web-enable Leon McTest.

3. Select the correct patient by clicking once on his/her name in the list.

4. Click OK.

The Patient Hub window displays for the selected patient, showing No in the Web Enabled field.

5. Click the Info button:
The Patient Information window displays.

6. Click the Options button at the bottom of the window:

7. From the Options drop-down list, click Web Enable:
The Patient Portal Account Management window displays.
This window serves several functions. In the Web-enabling process, the practice uses it to set an initial Username and Password for the patient and enter the patient’s e-mail address.

8. Either accept the default username or type a unique username in the Username field.
9. Type a unique password in the Password field.
10. Re-type the password in the Confirm Password field.

**Note:** the Username field displays the patient’s first name and last name, with no spaces.

11. Type the patient’s e-mail address.
    This address will be used for all automated e-mail messages sent to the patient.

**IMPORTANT!** The system encrypts the Password, and it cannot be accessed again.

12. Click OK:

The Username and Password confirmation dialog displays, asking *Do you want to print information for the patient?*
13. Click the Yes button to print the Username and Password information to send or give to the patient;  

OR

Click No to continue without printing:

With either selection, the system displays the Patient Hub window.

The Patient Hub window now shows Yes in the Web enabled field. In addition, the patient’s e-mail field now shows the patient’s valid e-mail address:
Web-Enabling a Patient from the Appointment Window

Once an appointment has been created for a patient, they can be activated during registration if they have provided an e-mail address. Web-enable the patient as part of the check-in process by checking the **W** box:

![Appointment on Monday, July 30, 2012](image)

eClinicalWorks generates a welcome e-mail to the patient in which the patient is instructed to use his/her e-mail address as a username and is given a password to access the Portal for the first time.
Security Permission to Web-Enable Patients

Staff members assigned by the practice to Web-enable patients must be given the appropriate security permission.

To set the permission to Web-enable patients:

1. From the eClinicalWorks File menu, select Security Settings.
2. On the By User tab, select the user who will be given permission to Web-enable patients.
3. In the right panel, scroll down to the Permission to web-enable patients attribute and check the box:

![Security Settings](image)

4. Repeat the process to grant permission to any additional staff members.

The assigned individual(s) have permission to Web-enable patients.

Note: This security permission is applicable only to the Patient Demographics window.
Synchronize to Complete

The final step in the Web-enabling process is to synchronize the Patient Portal Settings with the eClinicalWorks application. Running synchronization not only completes the Web-enabling process but also implements any other new or modified settings that have been established.

For more information on the synchronization process, Synchronize on page 108.

When the synchronization process is complete, the patient is ready to use the Portal.
PATIENT PORTAL SETTINGS

A number of settings must be established in the Patient Portal for the practice to set up and maintain the system.

The main windows in eClinicalWorks display drop-down menus across the top of the window and several vertically aligned menus – bands – in a panel along the left edge of the window.

Accessing and Enabling Patient Portal Settings

Work with Patient Portal Settings begins from the eCW application’s Admin Band.

To access the Patient Portal Settings:

1. From the Admin band, click the Patient Portal Settings icon:

The Patient Portal Settings menu displays.
2. Click the name of the setting to be enabled:

<table>
<thead>
<tr>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Routing</td>
</tr>
<tr>
<td>Default Msg Names</td>
</tr>
<tr>
<td>E-mail Message Settings</td>
</tr>
<tr>
<td>Appointment Settings</td>
</tr>
<tr>
<td>Labs Settings</td>
</tr>
<tr>
<td>Form(Quess &amp;Imm) Settings</td>
</tr>
<tr>
<td>Menu Settings</td>
</tr>
<tr>
<td>Consent Form Settings</td>
</tr>
<tr>
<td>Welcome Message Setting</td>
</tr>
<tr>
<td>IMH Configuration</td>
</tr>
<tr>
<td>New Pt Registration</td>
</tr>
<tr>
<td>Medical Report Conf.</td>
</tr>
<tr>
<td>Feature Settings</td>
</tr>
</tbody>
</table>

**IMPORTANT!** Settings established through this process are applied and implemented only after synchronization has been run. While it can be run manually, the synchronization process should run automatically throughout the day, on a scheduled basis. Patient Portal settings are implemented only after the synchronization process has been completed.

Refer to [Synchronize](#) on page 108 for more information.

---

**Feature Settings**

Feature Settings are established to enable, modify, or disable the Patient Portal's features.

**Note:** Since many of these features apply practice-wide, the practice’s Portal administrator normally sets them prior to establishing the remaining settings from the menu, even though the Feature Settings choice appears at the end of the menu.

**To access the Feature Settings:**

1. Click on Feature Settings in the Settings menu to display the Activate Features window.
2. Select the appropriate setting from the drop-down lists:
### Patient Portal Settings

**Feature Settings**

<table>
<thead>
<tr>
<th>Feature Setting</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enable Patient Pre-Registration</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows new patients to pre-register by filling out practice specified registration information in the patient portal. Remember to configure demographic fields in 'New Patient Registration' form after activation.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Multiple Questionnaire</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows practice to upload multiple questionnaires to patient portal.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Immunization designer</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows practice to customize an immunization form to collect immunization history information from patients.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable publishing of patient education material</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows practice to publish selected patient education material to the patient portal.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Auto-publishing of patient education material</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Enabling of this feature results in publishing of patient education material automatically if a patient education material is found in Adam's QuickSheets for the assessment made.</td>
<td></td>
</tr>
<tr>
<td><strong>Publish alert reminders to portal</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Setting this to 'no' ensures that alert reminders are not displayed in patient portal. This will also ensure that patient specific alert reminders are not sent to the patient.</td>
<td></td>
</tr>
<tr>
<td><strong>Show CDSS Alert on portal</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Setting this to 'no' ensures that CDSS alert reminders are not displayed in patient portal.</td>
<td></td>
</tr>
<tr>
<td><strong>Number of failed attempts before locking patient out</strong></td>
<td>5</td>
</tr>
<tr>
<td>Configures number of times patient can enter invalid login credentials before the patient gets locked out of the portal.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Personal Health Record, Medical Record</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows practice to upload patient's PHR (Personal Health Record) to portal. From 'Medical Record Conf.' screen configure the sections you want patient to view in Medical Record. Please Note: PHR includes all the sections [Allergies, Problems List, Procedures, Medications, Immunization, Vitals, Social History, Family History, Lab Diagnostics].</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Facility Group Based Routing</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Allows practice to route portal message based on facility group the patient belongs to. This is derived from facility group the patient's &quot;default facility&quot; belongs to. In event that no default primary service location is chosen for the patient, the message routing is done based on settings for 'default' location. On enabling this feature please go to 'Message Routing' and set up the staff who is to be assigned to receive portal messages based on the facility. <strong>IMPORTANT</strong>: Please go to Facility Group settings and ensure that a facility is associated with only one Facility Group.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable display of patient’s historical appointments in portal</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>Gives patients listing of all the previous appointments patient has had with the practice.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Appointment Confirmation Notification feature</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>If this feature is enabled, patient will be sent a confirmation email to his/her personal email address every time an appointment is created or updated. Note: After enabling this feature please go to 'eMail Message Settings' and set default message to be send in confirmation email.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Healthwise Knowledgebase</strong></td>
<td>No</td>
</tr>
<tr>
<td>If this feature is enabled, patient can view Healthwise Knowledge Base on Portal</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Visit Summary Feature</strong></td>
<td>Yes</td>
</tr>
<tr>
<td>If this feature is enabled, patient can see visit summary of their appointment on the portal. This is part of meaningful use requirement.</td>
<td></td>
</tr>
<tr>
<td><strong>Enable Realtime scheduling</strong></td>
<td>No</td>
</tr>
<tr>
<td>If this feature is enabled, patient can create appointment directly through portal.</td>
<td></td>
</tr>
</tbody>
</table>

**Save**
The features are described on the screen and in the chart below:

<table>
<thead>
<tr>
<th>Feature Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enable Patient Pre-Registration</strong></td>
<td>Enables the practice to collect specific registration information from new patients prior to their appointment. Demographic fields in the New Patient Registration form must be configured after this feature has been activated.</td>
</tr>
<tr>
<td><strong>Enable Multiple Questionnaires</strong></td>
<td>Enables the practice to upload multiple questionnaires to the Portal (rather than limiting to only a single questionnaire).</td>
</tr>
<tr>
<td><strong>Enable Immunization Designer</strong></td>
<td>Enables the practice to customize an immunization form to collect immunization history information from patients.</td>
</tr>
<tr>
<td><strong>Enable Publishing of Education Material</strong></td>
<td>Enables the practice to select and publish specific education material to the Patient Portal. <strong>Note:</strong> Publishing patient education material requires a subscription agreement with eClinicalWorks. This option will display in Feature Settings only if the subscription agreement is in effect.</td>
</tr>
<tr>
<td><strong>Enable Auto-Publishing of Patient Education Material</strong></td>
<td>Enables the practice to automatically publish education material if that material is found in Adams QuickSheets for the assessment. <strong>Note:</strong> Publishing patient education material requires a subscription agreement with eClinicalWorks. This option will display in Feature Settings only if the subscription agreement is in effect.</td>
</tr>
<tr>
<td><strong>Publish Alert Reminders to Portal</strong></td>
<td>Setting this feature to No ensures that alert reminders are not displayed in the Patient Portal.</td>
</tr>
<tr>
<td><strong>Show CDSS Alert on Portal</strong></td>
<td>Setting this feature to No ensures that CDSS alert reminders are not displayed in the Patient Portal.</td>
</tr>
<tr>
<td><strong>Number of failed attempts before locking patient out</strong></td>
<td>Sets the number of times a patient can attempt to log in without success before being locked out of the Portal. When locked out, the patient will have to contact the practice in order to be re-instated.</td>
</tr>
<tr>
<td><strong>Enable Personal Health Record, Medical Record</strong></td>
<td>Enables the practice to upload a patient’s Personal Health Record (PHR) to the Portal. Sections for patients to view are configured on the Medical Record Conf. screen <strong>Note:</strong> PHR includes all the sections (Allergies, Problems List, Procedures, Medications, Immunization, Vitals, Social History, Family History, and Lab Diagnostics).</td>
</tr>
</tbody>
</table>

Note: PHR includes all the sections (Allergies, Problems List, Procedures, Medications, Immunization, Vitals, Social History, Family History, and Lab Diagnostics).
### Patient Portal Settings

#### Feature Settings

<table>
<thead>
<tr>
<th>Feature Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Facility Group-Based Routing</td>
<td>Enables the practice to route Portal messages based on the facility group to which the patient belongs, as derived from the Default Facility. If no default primary service location is chosen for the patient, message routing is based on settings for the default location. After enabling this feature, the administrator must go to 'Message Routing' and set up staff to be assigned to receive Portal messages based on the facility. <strong>IMPORTANT!</strong> Go to Facility Group settings and ensure that a facility is associated with only one Facility Group.</td>
</tr>
<tr>
<td>Enable Display of Patient’s Historical Appointments in Portal</td>
<td>Enables all of a patient’s previous appointments with the practice to be displayed in the Portal for the patient to view.</td>
</tr>
<tr>
<td>Enable Appointment Confirmation Notification Feature</td>
<td>Allows the practice to send an e-mail to the patient’s personal e-mail account, notifying the patient that an appointment has been created or updated. Enabling this feature displays the E-mail Appointments Confirmations message type on E-mail Setting window.</td>
</tr>
<tr>
<td>Enable Healthwise Knowledgebase</td>
<td>Enables patient to view the Healthwise Knowledgbase on the Portal.</td>
</tr>
<tr>
<td>Enable Visit Summary Feature</td>
<td>Enables patient to see visit/discharge summary for all encounters. Sections displayed are based on default options set by the practice.</td>
</tr>
<tr>
<td>Enable Realtime Scheduling</td>
<td>Enables patients to create appointments directly through the Portal.</td>
</tr>
</tbody>
</table>

**When the features have been appropriately activated:**

1. Click the Save button at the bottom of the window to store the new settings.

   A confirmation dialog displays, indicating that the new settings have been saved successfully, with the caveat that some of the features may require that the system be re-started before they can be enabled.

2. Click OK to display the Feature Activation window.

   Refer to **Synchronize** on page 108 for more information about synchronization.
Message Routing

A variety of messages may be exchanged between the practice and patients through the Patient Portal. Practices may assign responsibility for receiving messages to individuals, depending upon the type of communication being exchanged. The size of a practice may determine staff responsibility for handling messages of various types. While mail recipients may be added or changed at any time, they should be set up and synchronized when the system is initially installed.

To route messages to the appropriate staff:

1. Click Message Routing in the Settings menu to display the message routing window:

   - Settings
     - Message Routing
     - Default Msg Names
     - E-mail Message Settings
     - Appointment Settings
     - Labs Settings
     - Form(Ques &Imm) Settings
     - Menu Settings
     - Consent Form Settings
     - Welcome Message Setting
     - IMH Configuration
     - New Pt Registration
     - Medical Report Conf.
     - Feature Settings

   The Message Routing window displays.

2. For each message type, click the drop-down arrow beside the Responsible Staff Member field. The drop-down list displays all staff members that have been input to the eCW application.

3. Select a staff member from the list:
The selected responsible staff member will receive all the assigned message types.

A staff member may be assigned to one or more message types, as in the example above. Or, every message type may be assigned to a different staff member, depending on your needs.

### Message Types

The Message Types are standard in eClinicalWorks.

**Message types include:**

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Messages</td>
<td>Messages sent from the practice to the patient’s Portal account and messages composed by the patient from the Portal’s Messages section (Inbox / Sent Items / Deleted Items).</td>
</tr>
<tr>
<td>Refill Messages</td>
<td>Sent from the patient to the practice requesting prescription refill(s).</td>
</tr>
<tr>
<td>Appointment Messages</td>
<td>Appointment requests sent from the patient to the practice’s staff member responsible for scheduling.</td>
</tr>
<tr>
<td>Referral Messages</td>
<td>Patient requests to the practice for referral(s).</td>
</tr>
<tr>
<td>Lab Messages</td>
<td>Patient requests to the practice for lab/diagnostic work or results.</td>
</tr>
<tr>
<td>Demographics Update Messages</td>
<td>Messages sent to the practice’s staff responsible for maintaining patients’ demographic information.</td>
</tr>
<tr>
<td>Forms (Questionnaire / Immunization)</td>
<td>Forms and reports completed by the patient and assigned to qualified individual(s) in the practice.</td>
</tr>
<tr>
<td>Web Interviews Assigned To</td>
<td>Interview reports are directed to the individual(s) named in this field.</td>
</tr>
</tbody>
</table>
Default Message Names

eClinicalWorks provides default names for all message types. However, the message names can be edited. Practices should create message type names that clearly direct patient messages to the appropriate recipient. This enables you to use terminology that is familiar to your patients in communicating through the Portal. These message type names appear in the To field of their respective messages on the patient side of the Portal.

To assign names for the message types:

1. From the Message Settings window, place the cursor in the Default Name field for the message type to be named and type the new name for the message type:

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Default name that appears in the message &quot;To&quot; section of the portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Messages</td>
<td>General Messages</td>
</tr>
<tr>
<td>Refill Messages</td>
<td>Refill Request</td>
</tr>
<tr>
<td>Appointment Messages</td>
<td>Appointment Messages</td>
</tr>
<tr>
<td>Referral Messages</td>
<td>Referral Messages</td>
</tr>
<tr>
<td>Lab Messages</td>
<td>Lab Messages</td>
</tr>
</tbody>
</table>

2. Take the same steps to create names for each of the remaining Message Type names.

3. To request a read receipt be sent to the practice for all sent messages, click the check box to Request Read Receipts for all Messages.

   The read receipt will be sent to the practice only when the patient has opened the message from the practice.

   Leave the box blank to cancel receipt delivery.

   **Note:** Read receipts will be sent to the Portal Inbox, found in the Messages band in the panel on the left side of the window.

4. Click Save to enable all settings.

   The Portal displays the Settings Saved Successfully dialog box.
E-Mail Message Settings

**Meaningful Use**

Certain e-mail messages can be sent automatically from the practice to the patient. These messages include appointment reminders, confirmations, and alerts. Templates are provided for these message types, ensuring consistency in communicating with patients.

**Note:** CMS officially confirms that *Scheduled appointment reminders for care can be counted as patient reminders for preventative/follow-up care.* Therefore, automated communication with patients constitutes compliance with requirements of Meaningful Use.

The window has two panels, the left allows you to enable or disable the e-mail message type; the right enables you to establish settings and default text for these e-mail message types:

### E-Mail Message Types

The E-mail Message Types are standard in eClinicalWorks.

E-mail Message types include:

<table>
<thead>
<tr>
<th>E-mail Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Reminders</td>
<td>E-mail messages sent from the practice to the patient’s e-mail address reminding their appointment dates.</td>
</tr>
<tr>
<td>Appointment Confirmations</td>
<td>E-mail messages sent from the practice to the patient’s e-mail address confirming that the new appointment is created or existing appointment is updated. For more information on enabling Appointment Confirmations e-mail message type, refer to <a href="#">Feature Settings</a> on page 38.</td>
</tr>
</tbody>
</table>
## Enabling E-Mail Message Types

To enable E-mail Message Types:

1. Click E-mail Message Settings in the Settings menu to display the E-mail Settings window.
2. Click the drop-down arrow beside each message type field to display Yes or No.
3. Select Yes or No to enable or disable the message type:

<table>
<thead>
<tr>
<th>Alert Reminders</th>
<th>E-mail messages sent from the practice to the patient’s e-mail address reminding their alert due date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lab Published Information</td>
<td>E-mail messages sent from the practice to the patient’s e-mail address confirming that the lab results are available on the patient’s Portal.</td>
</tr>
<tr>
<td>Statement Information</td>
<td>E-mail messages sent from the practice to the patient’s e-mail address confirming that the billing statement is available on the patient’s Portal.</td>
</tr>
<tr>
<td>New Message Information</td>
<td>E-mail messages sent from the practice to the patient’s e-mail address confirming that a new message is sent from the practice to the patient’s Portal.</td>
</tr>
<tr>
<td>E-mail Username, Password, on Web Enabling</td>
<td>E-mail messages sent from the practice to the new web-enabled patient’s e-mail address, containing the patient’s access credentials.</td>
</tr>
</tbody>
</table>

**Note:** Practices should consider setting Alert Reminders and Statement Information messages to No, as these are generally handled on a patient-by-patient basis.

4. Click Save to save the e-mail message types to be sent to the patients.
The e-mail message types are enabled.
Next, you will assign appropriate text to each of the message types.

Configuring E-Mail Message Type Settings

To configure e-mail message type settings:

Click the Settings button beside each enabled message type to display its corresponding Settings window; for example, click the Settings button for Appointment Reminders to display the Appointment Reminder Settings window:
Appointment Reminder Settings

To configure Appointment Reminder message type settings:

1. Click the Settings button beside the E-mail Appointment Reminders message type.

The Appointment Reminder Settings window displays:

2. Set the number of days for the Reminder 1 and Reminder 2 fields:

   Note: The Reminder 1 and Reminder 2 fields are applicable only to the Appointment Reminders and Alert Reminders e-mail message types.

   a. In the Reminder 1 field, enter the number of calendar days before the appointment that the first reminder notification message will be sent.
b. In the Reminder 2 field, enter the number of calendar days before the appointment that the second reminder notification message will be sent.

**Note:** If the practice wishes to send only one appointment reminder, set both Reminder 1 and Reminder 2 fields to the same number of calendar days.

3. Enter the e-mail subject.

4. In the E-mail Content panel, assign the appropriate text to the message type using the HTML editor.

   For more information on HTML editor and its functions, refer to [Applying Text to E-Mail Messages using HTML Editor](#) on page 58.

**Appointment Confirmation Settings**

Appointment Confirmation messages are sent automatically to confirm with patients that their new appointment has been scheduled or an existing appointment has been updated.

**To configure Appointment Confirmation message type settings:**

1. Click the Settings button beside the E-mail Appointment Confirmation message type.

   The Appointment Confirmation Settings window displays.

2. Incorporate your edits and click the Save button:
The settings for the Appointment Confirmation are saved, to be used any time an appointment confirmation is sent to a patient through the Portal.

The webpage message dialog box displays to confirm for you that the settings have been successfully saved:
Alert Reminder Settings

Alert reminders are e-mail messages sent automatically from the practice to the patient’s e-mail address, reminding of their upcoming alert due date.

To configure Alert Reminder message type settings:

1. Click the Settings button beside the E-mail Alert Reminders message type.

   The Alert Reminders Settings window displays.

   **Alert Reminder Settings window:**

   a. In the Reminder 1 field, enter the number of calendar days before the due date that the first reminder notification message will be sent.

   b. In the Reminder 2 field, enter the number of calendar days before the due date that the second reminder notification message will be sent.

      **Note:** If the practice wishes to send only one appointment reminder, set both Reminder 1 and Reminder 2 fields to the same number of calendar days.

2. Enter the e-mail subject.

3. In the e-mail Content panel, assign the appropriate text to the message type using the HTML editor.

   Refer to [Applying Text to E-Mail Messages using HTML Editor](#) on page 58.

4. Incorporate your edits and click the Save button:

   ![Alert Reminder Settings](image)

   The settings for the Alert Reminders messages are saved, to be used any time an alert reminder is sent to a patient through the Portal.
The webpage message dialog box displays to confirm for you that the settings have been successfully saved:

Lab Published Notification Settings

You can send e-mail messages from the practice to a patient’s e-mail address, informing them that lab results are available through the Portal.

To configure Lab Published message type settings:

1. Click the Settings button beside the E-mail Lab Published Information message type.

   The Lab Notification Settings window displays.

2. Enter the e-mail subject.

3. In the E-mail Content panel, assign the appropriate text to the message type using the HTML editor.

   Refer to Applying Text to E-Mail Messages using HTML Editor on page 58.

4. Incorporate your edits and click the Save button:
The settings for Lab Notification messages are saved, to be used any time a lab notification is sent to a patient through the Portal.

The webpage message dialog box displays to confirm for you that the settings have been successfully saved:
Statement Information Settings

You can send e-mail messages from the practice to a patient’s e-mail address, confirming that their billing statement is available on the Portal.

To configure Statement Notification message type settings:

1. Click the Settings button beside the E-mail Statement Information message type.
   
   The Statement Notification Settings window displays.

2. Enter the e-mail subject.

3. In the E-mail Content panel, assign the appropriate text to the message type using the HTML editor.
   
   Refer to Applying Text to E-Mail Messages using HTML Editor on page 58.

4. Incorporate your edits and click the Save button:

![Statement Notification Settings](image)

The settings for Statement Notification messages are saved, to be used any time a statement notification is sent to a patient through the Portal.
The webpage message dialog box displays to confirm for you that the settings have been successfully saved:

![Message from webpage]

**New Message Notification Settings**

You can send e-mail messages from the practice to the patient’s e-mail address informing them that a new message has been sent from the practice to the patient’s Portal.

**To configure New Message Notification message type settings:**

1. Click the Settings button beside the E-mail New Message Information message type.
   - The New Message Notification Settings window displays.
2. Enter the e-mail subject.
3. In the E-mail Content panel, assign the appropriate text to the message type using the HTML editor.
   - Refer to [Applying Text to E-Mail Messages using HTML Editor](#) on page 58.
4. Incorporate your edits and click the Save button:
The settings for New Message Notification messages are saved, to be used any time a new message notification is sent to a patient through the Portal.

The webpage message dialog box displays to confirm for you that the settings have been successfully saved:

![Message Settings Saved Successfully](image-url)
**Credential Information E-mail Settings**

You can send e-mail messages from the practice to the patient’s e-mail address providing them with the credentials they need to login to the patient Portal for the first time.

**To configure Credential Information message type settings:**

1. Click the Settings button beside the E-mail Username, Password on Web Enabling message type. The Patient Portal Credential Information Settings window displays.

2. Enter the e-mail subject.

3. In the E-mail Content panel, assign the appropriate text to the message type using the HTML editor.
   
   Refer to [Applying Text to E-Mail Messages using HTML Editor](#) on page 58.

4. Incorporate your edits and click the Save button:
The settings for New Credential messages are saved, to be used any time credentials are sent to a newly web-enabled patient through the Portal.

### Applying Text to E-Mail Messages using HTML Editor

A WYSIWYG (What-You-See-Is-What-You-Get) HTML (Hyper Text Markup Language) editor, CKEditor, enables practices to send HTML content in notification messages.

A plug-in enables appointment message notifications (appointment reminders and appointment confirmations). In these messages the practice can add appointment-specific tags such as appointment date/time, links to Google® maps, and others. A generic tag containing normal patient-specific tags, is used in Lab, New Message, and Statement settings.
Pre-designed templates can be selected for notification messages.

Practices can send messages to responsible parties, including guarantors, instead of patients, to accommodate pediatric practices, for example.

**The E-mail Content panel enables the practice to:**

- Add header/footer with practice information-practice name, address, phone number, etc.
- Compose standard reminders using HTML editor or pre-defined templates
- Update messages
- Add images
- Other information for the patient

Each message may include, for quick-access convenience, a link to the practice’s Portal website.

The E-mail Content panel displays at the bottom of each e-mail message type Settings window:

![E-mail Content panel](image)

The function of each icon in the E-mail Content panel is described below:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
</table>
| ![Source](image) | Click this icon to display a coded version of the text that appears in the message panel. The display includes formatting characters and other elements that can be edited to change the format of the text in the display.  
**Note:** Click the Source button to disable all other icons available in the E-mail Content panel. |
### Icon (Continued)

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
</table>
| ![Insert tags icon](image) | Tags listed in this drop-down menu vary from one message type to another. While composing messages, the practice can add these tags specific to each message type.  

1. Place the cursor position in the editor.  
2. Click the Insert Tags drop-down menu to view the list of available tags.  
3. Select the tag to place it at the cursor position.  
   For example, the practice can add tags such as *Appointment Date*, *Appointment Time*, etc., while composing the appointment notification message.  

For more information on these tags for each message type, refer to Notification-Related Tags on page 256.  

**Note:** Insert Tags icon is *not* available in the Welcome Page Message Setting window.|

| ![File icon](image) | Templates are available for the practice to compose the standard reminders with the pre-defined layout and content. However, the practice can modify the content of the notification message as needed.  

1. Click the Templates icon to display the list of available content templates:  
   - New Message Template  
   - Lab Notification Template  
   - Appointment Reminder Template  

2. Before selecting the template, check the Replace actual contents box to replace the original content, that was previously entered in the editor with the new template.  
   **OR**  
   Uncheck the Replace actual contents box to append the new template to the original content, that was previously entered in the editor.  

3. Click any template to open in the editor.  
   Once the template is displayed in the editor, the practice can modify the content, change the background colors, etc.  

**Note:** Templates icon is *not* available in the Welcome Page Message Setting window. |
<table>
<thead>
<tr>
<th>Icon (Continued)</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Blank Page Icon" /></td>
<td>Click this icon to display a new blank page on which to type or paste the text of the message.</td>
</tr>
</tbody>
</table>
| ![Editing Icons](image) | The five icons presented here are typical editing functions found in publishing software of many types. The icons enable the user to:  
  - Cut  
  - Copy  
  - Paste  
  - Paste as Plain Text  
    (from any source, to create formatting later)  
  - Paste from Word  
    (to accommodate formatting elements applied in a Word file) |
<p>| <img src="image" alt="Print Icon" /> | Click this icon to print the welcome message. |
| <img src="image" alt="Undo/Redo Icons" /> | Click these icons to undo the previous action or redo the action, respectively. |</p>
<table>
<thead>
<tr>
<th>Icon (Continued)</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Find and Replace icons" /></td>
<td>These are the Find and Replace icons. Use the binoculars to perform a search. Use the second icon to replace a selected item with a cut or copied item.</td>
</tr>
<tr>
<td><strong>Find:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Click the binoculars to display the Find and Replace window.</td>
<td></td>
</tr>
<tr>
<td>2. Type the text to be found.</td>
<td></td>
</tr>
<tr>
<td>3. Click the Find button:</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Find and Replace window" /></td>
<td></td>
</tr>
<tr>
<td><strong>Replace:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Click the second icon:</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Find and Replace window" /></td>
<td>The Find and Replace window displays.</td>
</tr>
<tr>
<td>2. Type the text to be found in the Find What field.</td>
<td></td>
</tr>
<tr>
<td>3. Type the text to replace it in the Replace With field.</td>
<td></td>
</tr>
<tr>
<td>4. Click the Replace button to replace one instance of the text; OR</td>
<td></td>
</tr>
<tr>
<td>5. Click the Replace All button to replace all instances of the text:</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Find and Replace window" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Select All and Remove icons" /></td>
<td>Use the Select All icon to select (highlight) all text and graphics on the window. Use the Remove icon to remove (delete) any selected items in the window.</td>
</tr>
<tr>
<td>Icon (Continued)</td>
<td>Function</td>
</tr>
<tr>
<td>-----------------</td>
<td>----------</td>
</tr>
<tr>
<td><img src="image" alt="Bold, Italics, Underline, Strikethrough icons" /></td>
<td>These are standard formatting icons, used to apply <strong>Bold</strong>, <em>Italics</em>, <em>Underline</em>, or <em>Strikethrough</em> formats to any selected text.</td>
</tr>
<tr>
<td><img src="image" alt="Subscript and Superscript icons" /></td>
<td>Additional standard formatting icons, these are used to apply <strong>subscript</strong> ($x_2$) or <strong>super-script</strong> ($x^2$) formats to selected text.</td>
</tr>
<tr>
<td><img src="image" alt="Numbered or Bulleted List icons" /></td>
<td>Use these icons to create numbered or bulleted lists in the text.</td>
</tr>
<tr>
<td><img src="image" alt="Indent and Block Quote icons" /></td>
<td>These icons are used to increase or decrease a paragraph indent or create a block quotation. A Block quote is an indented, block style format, with no quotation marks.</td>
</tr>
<tr>
<td><img src="image" alt="Paragraph Formats icons" /></td>
<td>These are paragraph formats, enabling the user to assign <strong>left justified</strong>, <strong>centered</strong>, <strong>right justified</strong>, or <strong>block styles</strong> to any paragraph in the welcome message.</td>
</tr>
<tr>
<td><img src="image" alt="Link icons" /></td>
<td>Use these icons to add a link to another location (such as the practice’s website) or to disconnect a link. Three tabs on the Link window enable the practice to identify the link, set a target, or perform advanced linking functions.</td>
</tr>
</tbody>
</table>
This icon enables the practice to add an image.

**Image:**

1. Click the first icon.
2. Type the URL where the image is located.
3. Type the text identifying the image.
4. Assign the width, height, and other formatting elements of the image in the window.
5. Use the Link and Advanced tabs to assign other properties to the image.
6. Click the OK button when finished:
<table>
<thead>
<tr>
<th>Icon (Continued)</th>
<th>Function</th>
</tr>
</thead>
</table>
| Flash:          | This icon enables the practice to insert a Flash.  
1. Click the Flash icon.  
2. Type the URL where the Flash is located.  
3. Use the Properties and Advanced tabs to assign other formatting elements defining the Flash:  
4. Click the OK button when finished: |

**Flash Properties**

<table>
<thead>
<tr>
<th>General</th>
<th>Properties</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td>Height</td>
<td>HSpace</td>
</tr>
</tbody>
</table>

**Preview**

[Image of Flash Properties dialog box]

**OK** | **Cancel**
### Table

<table>
<thead>
<tr>
<th>Icon (Continued)</th>
<th>Function</th>
</tr>
</thead>
</table>
| ![Table Icon](image) | **Table:**  
Use this icon to insert a table.  
1. Click the Table icon.  
2. Assign the number of rows and columns, their height and width, headings, and other formatting.  
3. Click the OK button when finished: |

#### Table Properties

- **Rows:** 5
- **Columns:** 2
- **Width:** 200 pixels
- **Height:** pixels
- **Headers:** None
- **Border size:** 1
- **Alignment:** <not set>
- **Caption:**
- **Summary:**

![Table Properties](image)

Click the drop-down arrow beside the Normal icon to display a list of style formats to apply to a paragraph.

Use the scroll bar to display the full list.

Click the selection to be applied:

- **Normal**
- **Font**

![Font](image)
<table>
<thead>
<tr>
<th>Icon (Continued)</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Font Icon" /></td>
<td>Click the Font icon to display a drop-down list of available fonts to use. Click to select the font style:</td>
</tr>
<tr>
<td><img src="image" alt="Size Icon" /></td>
<td>Click the Size icon to display a drop-down list of available font sizes. Click to select the font size.</td>
</tr>
</tbody>
</table>
### Icon (Continued)

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
</table>
| ![Icon](image) | Use these icons to apply color to text or the background in the message.  
With either choice, the Color panel displays.  
Click on the color to be assigned to the selected text or the background:  

![Color Panel](image)  
Click More Colors to display a broader array:  

![More Colors Panel](image) |

Using the formatting tools, complete the design and creation of the notification message:

1. Place the cursor in the text area and type the content of the notification message.
2. Click Save when the content is complete.

   The system will acknowledge the saved message.
Appointment Settings

Meaningful Use

Practices can establish time preferences for appointments and list available appointment types. These settings determine the information that displays to the patients.

To enable appointment settings:
1. Click Appointment Settings in the Settings menu to display the New Appointment Settings window:
2. Enter the Time Preferences for Appointment requests:
Patient Portal Settings

- Time preferences can be entered by typing Morning, Afternoon, or Evening.
- Time preferences can also be entered specifically by separating the hour and minutes with a colon or a period (e.g., 4:30pm or 4.30pm).

OR

Enter without any characters separating the hour and minutes (e.g., 430pm).
In addition, only an A or a P is required to indicate AM or PM (e.g., 430p).

- Time Preferences for Appointment should be entered with a comma between each proposed appointment time (e.g., 4:30p, 4:45p, 5:00p).
  These times are displayed to patients as options for their First and Second choice when they request a new appointment.

3. Enter the Appointment Types as a list, separated by commas.

4. In the Allow Appointment Request field, use the drop-down to select the number of days in advance that a patient can request an appointment through the Patient Portal.

5. Select the Providers available for appointments during the established appointment times:

   - Click the name of a provider in the list of Providers Not Available, and click the right arrow button to move the selected provider from the Not Available list to the Available Providers list.
   - Click the name of a provider in the Available Providers list, and click the left arrow button to move the selected provider from the Available list to the Not Available list.

6. Select the Facilities open for appointments during the established appointment times:

   - Click the name of a facility in the list of Facilities Not Open, and click the right arrow button to move the selected facility from the Not Open list to the Open Facilities list.
   - Click the name of a facility in the Open Facilities list, and click the left arrow button to move the selected facility from the Open Facilities list to the Not Open list.

7. In the Scheduled Appointment Settings panel, check either or both of the boxes to enable patients to request to either reschedule previously scheduled appointments or cancel scheduled appointments.

   Leaving the boxes unchecked prevents the patients from sending these requests through the Portal.

8. Click the Save button when the Appointment Settings are complete.

   The Portal displays the Appointment Settings Saved Successfully dialog.

9. Click OK.

   The system displays the New Appointment Settings window.

   Following synchronization, the new Appointment Settings will be enabled.

   A telephone Web encounter is created when the patient sets up an appointment using this feature.
Labs Settings

Meaningful Use

Use this window to enter the categories of lab tests for which requests from patients will be accepted.

To establish the settings:

1. From the Settings menu, select Labs Settings.

   The system displays the Labs Settings window.

2. Type the Lab Test categories, separated by commas, in the text field on the Labs Settings window.

3. Click the Save button to store the settings, then click OK:

   The system returns to the Labs Settings window.

   The Labs Settings will be enabled following synchronization.

Publishing Lab Results

Meaningful Use

Practices may publish the results of lab or DI tests to the Portal. For new patients, the default value is Do not publish to Portal.

To enable publication of lab and diagnostic reports to the Portal (or to revert back):

1. From the File menu, hover over the Settings option to reveal a second drop-down list.
2. Click Practice Defaults to display the Practice Defaults window.
3. Click the Portal tab.

   The system displays the Practice Defaults for Portal Settings.

4. In the Lab Settings panel at the bottom of the window, check either or both boxes to indicate that the results will not be published.
Leaving either or both boxes blank means that the results will be published to the Portal by default.

5. Click OK to enable the settings.

Following synchronization, the Labs Settings will be enabled.

Note: This is a practice-wide default, applying to all new labs created by the practice.

**Publishing Lab Letters to the Portal**

Meaningful Use

When the lab results are received, a lab letter can be generated with the results and published to the patient’s Portal.

Lab letters are sent as messages to the Patient Portal, and read receipts can be used with them to confirm that the patient has received the results.

To publish the lab letter:

1. Click the L Quick-Launch button (jelly bean) to open the Labs window.
2. Click the To be reviewed tab.
3. Select the patient encounter by checking the box.

4. Click the Patient Letter button:

![Patient Letter window](image)

The Patient Letter window opens.

5. Click the *Publish To Portal & Review Lab* button to publish the lab letter to patient’s portal.
A message notifies you that the lab letter has been successfully published to the patient’s Portal:

For more information about publishing Lab Letters, refer to Lab Results - L Quick-Launch Button on page 141.
Viewing Lab Letters Sent Out from the Portal Outbox

To view Lab letters sent out from the Portal Outbox:

1. Open the Messages band in EMR.
2. Click the M Quick-Launch button (jelly bean).
3. Click the Portal Outbox icon.

The Patient Portal Outbox displays, showing the list of messages sent to the patient:

If the practice has enabled *New message notification*, then the notification of the published lab letter will be sent automatically to the patient's e-mail account, informing them of the new message in the Portal.

For more information about publishing Lab Letters, refer to [Lab Results - L Quick-Launch Button](#) on page 141.

Form Settings (Questionnaires and Immunizations)

Meaningful Use
The Form Settings window enables the practice to choose the questionnaires and/or immunization forms to be filled out by patients in the Portal.

**To enable the settings:**

1. Select Form (Ques & Imm) Settings from the Settings menu.

   The system displays the selection window for questionnaires:

   ![Questionnaires Selection Window](image)

   **Note:** The practice may use multiple questionnaires only if the default has been changed from N to Y (No to Yes) and Multiple Questionnaires has been enabled in Feature Settings. For more information, refer to Feature Settings on page 38.

   The practice may use up to nine (9) questionnaires.

2. If the Multiple Questionnaires feature has enabled, determine how many questionnaires will be uploaded to the Portal.

3. Click the drop-down list to the right of the Number of Questionnaires field and select the number.

   The columns on the left side of the panel re-configure to enable the selection of the same number of questionnaires as have been chosen to be uploaded.

4. Beginning in the first Selected Questionnaire field, click the drop-down arrow to display the list of questionnaires.

5. Click once on the name of the questionnaire to select it, then click in the Portal Menu Name field beside your selected questionnaire.
6. Type the name of the questionnaire that the patient will see in the menu.

7. Using the same process, select the remaining questionnaires and assign a name for each.

8. In the Questionnaire Display Options section of the window, check the appropriate box(es) to select either or both of the selections:
   - Display previously submitted patient responses in Portal questionnaire(s)
   - Display previously submitted Surgical History, Allergies, and Hospitalization responses in Portal

9. Click Save when finished and the forms will be available for use with any patients.
   The system enables the selected features. Patients will see the entries when they log in again, after completing the questionnaires) or form(s).
   The Form Settings will be enabled following synchronization.

**Designing a Questionnaire**

**Meaningful Use**

Practices may design their own questionnaires, creating their own topics, lines of questioning, and levels of detail. They may create and manage as many questionnaires as they need to effectively collect the information they require from their patients.

To do so, designated staff members in the practice use the main eCW menu.

**To design a questionnaire:**

1. In eClinicalWorks, select the EMR menu.

2. Click on Questionnaire Designer.
   The Questionnaire Setup window displays.

3. Choose the function to be performed by clicking on the button before the name, electing to Create a New Questionnaire, Edit an Existing Questionnaire, or Delete a Questionnaire.
   The system asks the user to enter a name for the questionnaire (or, if the user is editing or deleting an existing one, to enter or select the requested questionnaire).
4. Type the name and click the Next button:

The Questionnaire Sheet Wizard window displays.

The Questionnaire Designer functions as a “Wizard,” prompting users through each step of the design process.

5. Select one of the heading categories in the left panel of the window to open the questioning tree, showing the sub-categories available for that selection; for example, under Review of Systems (ROS), the branches showing physiological systems that the practice may choose to ask about in the questionnaire are displayed. Here, Musculoskeletal has been selected:
6. To add a question, double-click one of the items below Musculoskeletal.
The selected item displays in the data grid in the main panel of the window:

7. Double-click in the item row to edit the question.

The Questionnaire Editor for the question selected, *joint stiffness* displays:

8. Type the new question in the Question field and enter the options the patient will have to respond. These may be, for example Yes/No, True/False, or other choices.
9. Select the question type, Single or Multiple Choice:
   - Single Choice allows the patient to select only one answer
   - Multiple Choice allows the patient to select more than one answer

Allowing a Free Text response is always valid. However, there are implications that must be considered in including questions that require responses of this type. For more information about using Free Text, refer to Applying Free-Text Responses on page 88.

Questions in the Past Medical History and Family History categories are entered in the same manner as those described above. Questions regarding Social History may be posed in a number of different ways, including the use of structured data.

---

**Designing Questionnaires for Use with Structured Data**

One of the keys to most effectively using eCW’s Questionnaire Designer is understanding its handling of structured data. Assigning and using structured data elements enables the practice to design its questionnaires in a manner that efficiently collects information precisely directed at particular conditions or complaints.

Beginning with a basic “root” question, the patient’s response determines the next question to be asked. In this way, the practice can conduct a questionnaire dialog with the patient, directing responses to the most specific level possible.

As shown below, the user may select, for example, the Social History folder in the left panel to open the color-coded ‘tree” of leveled responses to questions in the category. Lines of questioning that are presented in blue are Structured Data items:
Patient Portal Settings

Form Settings (Questionnaires and Immunizations)

---

<table>
<thead>
<tr>
<th>Seq No</th>
<th>Linked Section</th>
<th>Linked Item</th>
<th>Options</th>
<th>Selective</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review Of Systems</td>
<td>joint stiffness</td>
<td>Yes, No</td>
<td>Single</td>
</tr>
<tr>
<td>2</td>
<td>Review Of Systems</td>
<td>joint pain</td>
<td>Yes, No</td>
<td>Single</td>
</tr>
<tr>
<td>3</td>
<td>Social History</td>
<td>Do you smoke?</td>
<td>Current Smoker, pack per day?</td>
<td>Single</td>
</tr>
<tr>
<td>4</td>
<td>Social History</td>
<td>Packs Per day?</td>
<td>Numerical</td>
<td>Single</td>
</tr>
<tr>
<td>5</td>
<td>Social History</td>
<td>Are you a:</td>
<td>Current smoker, for how long?</td>
<td>Single</td>
</tr>
<tr>
<td>6</td>
<td>Social History</td>
<td>How often do you smoke?</td>
<td>Every day, some day</td>
<td>Single</td>
</tr>
<tr>
<td>7</td>
<td>Social History</td>
<td>How soon after you smoke?</td>
<td>Within 5 min, 6-30 min</td>
<td>Single</td>
</tr>
<tr>
<td>8</td>
<td>Social History</td>
<td>How many cigarettes do you smoke?</td>
<td>5 or less, 6-10, 11-20</td>
<td>Single</td>
</tr>
<tr>
<td>9</td>
<td>Social History</td>
<td>Are you interested in quitting?</td>
<td>Ready to quit, thinking about it, never thought of quitting</td>
<td>Single</td>
</tr>
<tr>
<td>10</td>
<td>Social History</td>
<td>How long has it been since you last smoked?</td>
<td>1-3 months, &lt;1 month</td>
<td>Single</td>
</tr>
<tr>
<td>11</td>
<td>Social History</td>
<td>Do you intend to quit?</td>
<td></td>
<td>Single</td>
</tr>
</tbody>
</table>

---

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To design the structured line of questioning:

1. Click the Social History category in the Progress Notes window:

```plaintext
Patient: test  DOB: 06/30/1983  Age: 27Y  Sex: Male
Phone: 774-275-1775  Primary Insurance:
Address: test, Tokyo, CO  55555
Pcp: eclinical_testing
Encounter Date: 07/30/2010  Provider: Sam Willis, MD
Appointment Facility: Shrewsbury Medical Associates

Subjective:
Reasons for Visit:  test!
HPI:  
Current Medication:  
Medical History:  
  • Acne
  • abhi
  • allergic rhinitis
  • s/p appy: Yes
  • panic attacks: Yes
  • DJD: Yes
  • Anxiety disorder: Yes
Allergies/Intolerance:  
Gyn History:  
  • Pap Smears  Normal.
OB History:  
  • Prior Pregnancies  3.
Surgical History:  
Hospitalization:  
Family History:  
Social History:  
Misc
Social History  Status  test!
Smoking
Stress
  do you have stress  Yes
ROS:  

Note:  This category and line of questioning are examples only.

The Social Hx dialog displays.
```
2. Double-click one question in the Details column:

![Social History Notes window](image)

The Social History Notes window displays, open to the Structured tab.

3. Click the Custom button at the bottom of the window:
The Properties window for the Smoking Hx selection displays. The window shows the lines of questioning, including the question name and type, whether it is mandatory, and what is its trigger ... the prompting question that generated it:

![Structured Data](image)

The user can add a new item (question), add a child (a question that only follows a particular response to a previous question), update an existing item, remove an item, or reorder the listed items.

The item Types are important:

- The Boolean type is one upon which others are based. *Are you a current smoker?* for example, is a *Yes/No* root question that leads to a line of questioning related to addiction, health consequences of the habit, and other information.

- Structured Text items are ones which have directed responses and follow-up questions based upon those responses. They may be either parent or child questions in relationship to others preceding and following them.

- Numeric items demand specific answers.

- Date items ask for dates in response to specific questions about events, such as, for example, *When did you stop smoking?*

4. Click the *Customize Structured Text* button to manipulate the details of a particular question.

   Add an item to the list of answers, remove one, or select one and change its order in the display by clicking the up/down arrows on the right frame of the window.
5. Click OK to apply the changes:

The Structured Data window displays.

6. Click Close.

The Social History Notes dialog displays.

7. Click OK to save the changes.

The next time the questionnaire window displays, the “tree” display in the left panel, will include the new Social History items as created with the Questionnaire Designer.

**Note:** Plan the approach.

The key to using the Structured Text approach to questionnaire design is in planning the questionnaire before beginning the process. Knowing the objective of a line of questioning will result in a clear, effective series of questions that extract the most precise information set possible.
The Questionnaire Sheet Wizard Design Document shows a more complete set of questions ready for the questionnaire:

The design document now includes the questions in the Social History category that were added using the Structured Data approach.

**Applying Free-Text Responses**

**Continuing the current scenario:**

The Withdrawal symptoms item has been selected. It was created to have a Free Text response.

**Continue designing the line of questioning:**

8. Double-click on the item to open the Questionnaire Editor window for this Free Text selection:
Notice that there are no Options listed, as the answer will be given in a free text format.

The Question Type is Free Text, so no other items are selected.

A question requiring a Free Text response cannot have a “child” (a question following it as a structured data item).

Data collected in these free text responses is not reportable. It will, however, appear in the Progress Notes.

9. Run the synchronization process to upload questionnaires to the Portal.

Once the synchronization process has been completed, the new Questionnaire will be available as an Intake Form on the patient’s view of the Patient Portal.
The patient selects the new questionnaire, *Dr. Willis - Form 1*, from the Intake Forms menu:

<table>
<thead>
<tr>
<th>Caffeine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you consider yourself addicted to caffeine?</td>
</tr>
<tr>
<td>C Yes  C No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smoking HX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you a:</td>
</tr>
<tr>
<td>C Current Smoker  C Former Smoker  C Never Smoker</td>
</tr>
<tr>
<td>How many packs of cigarettes do you smoke per day?</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>How soon after you wake up do you smoke your first cigarette?</td>
</tr>
<tr>
<td>C Within 5 minutes  C 5 - 60 minutes  C After 60 minutes</td>
</tr>
<tr>
<td>Have you tried quitting?</td>
</tr>
<tr>
<td>C Yes  C No</td>
</tr>
<tr>
<td>What methods did you use?</td>
</tr>
<tr>
<td>C Nicotine Patch  C Nicotine pills  C Just willpower</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alcohol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you drink alcohol?</td>
</tr>
<tr>
<td>C Never  C 2 to 4 times a month  C 2 to 4 times a week  C Everyday</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Musculoskeletal [Please indicate if you have any of the following:]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have joint stiffness</td>
</tr>
<tr>
<td>C Yes  C No</td>
</tr>
<tr>
<td>Do you have joint pain</td>
</tr>
<tr>
<td>C Yes  C No</td>
</tr>
<tr>
<td>Do you have joint swelling</td>
</tr>
<tr>
<td>C Yes  C No</td>
</tr>
</tbody>
</table>
The patient then selects the Caffeine question to begin a structured series of questions drilling down to more specific details:

The example shows that answering Yes to the question *Do you experience withdrawal symptoms if you do not get caffeine?* results in the question *Please describe any withdrawal symptoms you’ve suffered when deprived of caffeine.* This question requires a free text response.

10. When the patient completes and submits the questionnaire, the collected information will be compiled and the report reviewed by the appropriate provider in the practice.

The results can then be imported into the patients progress notes on the date of service, using the Imp button at the top of the Progress Note. The button appears only when there is information to import:
Once the response has been imported, refresh the progress note to view the information.
Menu Settings

The menu selections available to patients are established and enabled through this function. Menu items can be displayed or not, depending on the needs of the practice.

To set up the menu options:

1. Select Menu Settings in the Settings menu.

   The system displays the Menu Settings list, showing editable menu names and a Show/Hide field for each menu item:
2. Click the drop-down arrow for each menu item name, selecting either Show or Hide.

3. Click Save to enable the settings.
Following synchronization, the menu in the patient’s view will display all the items that have been labeled Show.

**Modifying the Patient Menu**

All of the items that were labeled Show appear in the menu list in the patient’s view.

For example, all the available selections in the Appointments section of the menu - *New Appointment*, *Current Appointment*, and *Historical Appointments* - may be displayed and available for Web-enabled patients.

The Appointments display can be changed on the Menu Settings window:

1. Select Menu Settings from the Settings menu.
2. Click the drop-down arrow beside the Show/Hide field for the New Appointment item.
3. Select Hide.
4. Click the drop-down arrow beside the Show/Hide field for the Current Appointment item.
5. Select Hide.
6. Click the drop-down arrow beside the Show/Hide field for the Historical Appointments item.
7. Select Hide to suppress the display of these menu items in the patient’s window:

8. Click Save when the Menu settings changes have been completed.
The system displays a dialog indicating that the settings have been saved successfully.

9. Click OK to acknowledge the successful save.

Following synchronization, the menu in the patient view will display without the appointment items.

Any similar changes to the patient's menu can be made using this process.

Changes will be implemented only after synchronization has been run.

**Consent Form Settings**

You can paste in or compose the content of your consent form in the Consent Form Settings window.

**To set up the consent form:**

1. Select Consent Form Settings from the Settings menu.

   The Consent Form Settings window displays:

2. Place the cursor into the text area and either paste an existing consent form or type in a new version.

   **Note:** This is the practice's consent form, addressing issues and policies of the practice in exchanging information with its patients.

   eClinicalWorks consent forms cannot be modified.

3. Click Save when finished:
The consent form is now saved.

When patients agree to the consent form on the Patient Portal, a copy is saved to the Chart Documents folder of their Patient Documents. This document is titled *PracConsentForm* followed by a time stamp, and is marked *Reviewed* as controlled by practice default, set in the Portal tab of the Practice Defaults window in eCW.

## Welcome Message Setting

The Welcome Message setting enables practices to create an attractive and functional first impression for patients opening the Portal. The Welcome Message setting enables practices to design, compose, and present a Welcome message that represents them in the finest way to their patients.

**To set up the Welcome Message:**

1. Select Welcome Message Setting from the Settings menu.

   The system displays the Welcome Page Message Setting window:
You can compose and type your own message, or paste a message from another source.

2. Compose the Welcome Page message using the icons available in the Welcome Page Content panel.

For more information on the icons, refer to Applying Text to E-Mail Messages using HTML Editor on page 58.

3. Using the formatting tools, complete the design and creation of the Welcome Page:

a. Place the cursor into the text area and type the content of the Welcome Page greeting.

   The content of the Welcome Page may be anything the practice would like, including, for example, requests for updated demographic information, notices regarding office hours, information about new walk-in availability, or any other notifications the practice would like to present. The Welcome Message may also include a reference or link to other information in the Portal that may be new or changed.

b. Click Save when the content is complete.

   The system will acknowledge the saved message.
IMH Configuration

You can use the Patient Portal's Instant Medical History (IMH) settings to construct an online interview of patients to compile their medical history.

The Portal provides dozens of categories that practices can choose to include in the data collection process from the interview. While the actual number of questions in one category may differ from the number in other categories, practices can configure the level of detail for each category. The steps below explain the process.

To configure the virtual interview:

1. Select IMH Configuration in the Settings menu.

The Configure Interview Detail window displays:

Configure Interview Detail

Configure the interview detail level settings preferred for each category. Each category can be configured to number between 0 - 10. Lower numbers mean fewer questions. Higher numbers mean more questions.

- **0** - No questions to asked for the particular category
- **5** - Moderate number of questions asked on the category (Default)
- **10** - Detailed questions on this category

Click [here](#) for further help with configuration.

After you have the settings configured, click 'Save'.

From this window, you can configure the level of detail for each category of questioning.

The scale represents a general guide to how detailed the questions presented to the patient will be. An assigned level of 0 means the fewest questions will be asked for that category, while a level of 10 means that every question that the practice has considered for a given symptom may be asked. The “fewest” may be none or only a question or two, depending upon the category and its relationship with the complaint.
2. Place the cursor on the slide button for each category and move it left to reduce the level of detail or right to increase it, assigning the level of detail. Alternatively, you may click in the number field and type a number to designate the new level manually. The slider button will move appropriately to reflect the number you entered.

The level of detail is set to 5, the mid-range, by default. This level roughly corresponds to what a primary care physician might want to ask in the virtual interview.

If you find that either too much or too little information is being collected by the survey for any category, the IMH Configuration window can be opened at any time to adjust the level of detail.

**This table presents a rough guide to the 0 – 10 slider settings:**

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>First level complaints with essential branches; multiple symptoms may be elicited by single questions; largely useful in superficial screening.</td>
</tr>
<tr>
<td>Level 2</td>
<td>Short questionnaires for minimal service exam-level questions for brief visit for treatment of a routine problem.</td>
</tr>
<tr>
<td>Level 3</td>
<td>Short question sets for routine follow-up visits; contain symptom qualifiers of complaints without any branching to detail of these symptom descriptors. Very useful, short question sets typical of urgent care or emergency departments.</td>
</tr>
<tr>
<td>Level 4</td>
<td>Intermediate questionnaires for routine exam evaluation and common self-rating scales like CAGE, AUA, and MHI-5.</td>
</tr>
<tr>
<td>Level 5</td>
<td>Past, Family, Surgical, and Social History for most disorders; typical primary care, internal medicine, or family practice parameters apply.</td>
</tr>
<tr>
<td>Level 6</td>
<td>Medications, tests, treatments, basic outcomes, and less common but helpful self-assessment tools and scales; Prevention; Activities of Daily Living; uncommon disorders; Past Medical History; Past Medical History dates; Surgical History dates.</td>
</tr>
<tr>
<td>Level 7</td>
<td>Comprehensive Examination typical for a specialty practice.</td>
</tr>
<tr>
<td>Level 8</td>
<td>Advanced and uncommon self-assessment tools and scales; basic functional assessment tools. For surgical follow up questionnaires to properly work, a specialist will need a level of detail of 8 in the specialty organ system. e.g., otolaryngologist = Ear, Nose, and Throat = Level of Detail 8.</td>
</tr>
<tr>
<td>Level 9</td>
<td>Subspecialty level questions not routinely applied in primary care setting because of level of detail required for surgical or treatment decisions; published research tools, complex outcomes, and functional assessment tools.</td>
</tr>
<tr>
<td>Level 10</td>
<td>Patient issues, customer satisfaction, and advanced customer-specific or research oriented questionnaires.</td>
</tr>
</tbody>
</table>

3. After configuring the history questionnaires, click Save.
The Portal confirms that the new IMH configuration has been saved.
The configuration will be enabled after synchronization.

Following synchronization, when a patient fills out an Instant Medical History form on the Patient Portal, a Web Encounter is created for that patient in the system and is automatically assigned to the patient's provider.

**New Patient Registration / Patient Pre-Registration Settings**

Practices can use the Patient Portal to validate and review registration information prior to a patient's visit. The staff member assigned to this role must have the Patient Pre-Registration Security Setting enabled to perform this task.

**To configure the New Patient Registration form:**

1. Click on New Pt Registration in the Settings menu.

   The Configure Demographic Fields in the New Patient Registration form displays.

2. Select the items to be included in the registration form by selecting the appropriate check boxes to Display fields and selecting the appropriate check boxes to indicate that fields are mandatory.

   The Portal displays three columns in this window: Field Name, Display Field, and Mandatory Field.
   - **Field Name** - Shows all the data elements that may be collected from a new patient.
   - **Display Field** - Consists of check boxes that indicate whether the field will be displayed in the practice's version of the Portal.
   - **Mandatory Field** - Indicates whether a field is required to be filled by the patient.

   The Portal requires several fields to be displayed or filled; these are shown in gray and are not accessible for modification.

3. The practice may choose to display or require an entry in any of the fields not already required by the Portal. Move the cursor to the appropriate check box and click once to select it and make the item mandatory.

   If a box, other than one required by default in the Portal, has already been checked, click it once to clear the check mark – and the requirement.

4. When all elements have been chosen for the practice, click the Save button:
The settings will be enabled following synchronization.

### Pre-Registering a New Patient

A new patient can pre-register with the practice before coming in for an initial visit.

From the Login window on the Patient side, the new patient clicks Pre-Register to bring up a form from which the practice collects that patient’s information. Refer to for a description of the patient’s registration process [New Patient Pre-Registration](#) on page 202.
To access patient pre-registration information:

Once patients have submitted the pre-registration information, the practice can access it from eCW by using a Quick Launch button.

1. Click the P Quick Launch button (yellow P jelly bean) at the top of the window:

![Quick Launch Button](image)

A list of new pre-registered patients displays.

For more information, refer to Pre-Registration of Patients and the P Quick-Launch Button on page 112.

2. Check the box in the first column for one of the new patients to select that patient from the list:
A detail window displays, showing the patient’s registration information:

Because the information provided by the patient consists of only pre-registration data, you may need to collect additional information when the patient arrives.

3. Review the information in the window to determine whether it is valid and whether any other information has to be collected.

4. Click the Import New Patient Info button to import the patient information.

The information may also be printed for review.

If the system finds no match with the data of a patient already in the system, it imports the new patient’s information, populating the new patient’s Patient Information window.
However, if there is a match between the data being imported and the data of a patient already in the system, a window displays showing that conflict:

In this example, the match is on the patients’ Social Security Numbers. This is a serious conflict, so the practice administrator should click the Close button and not import the new patient data until the conflict has been resolved.

To resolve the conflict:

1. Click View Patient Info to see the existing patient’s Patient Information window to verify that the data does, in fact, match that entered by the new patient.

2. If there is a match, clear the matching data elements by clicking their check boxes.
   Only data elements that are checked will be imported.

3. Click Proceed With Creating a New Patient Record in the System to create a new patient account in spite of the conflict.
   Once all conflicts have been addressed and the new patient’s pre-registration information has been imported, that information appears in the new patient’s Patient Information window.
Medical Report Configuration

Meaningful Use

This function enables the practice to determine which elements of a patient's health record will be available for a patient to view through the Portal using PHR-View. Indicating that Meds will be configured for display, for example, means that information about a patient's prescription history will appear in the patient's Personal Health Record (PHR) when the patient uses PHR-View to display it.

Note: Making these display selections does not impact the PHR-Complete Report or Visit Summary. It effects only the display in PHR-View.

To configure the medical report:

1. Select Medical Report Conf. in the Settings menu.

   The Configure window displays.

   All the items are checked, indicating that they all will be displayed in the patient's PHR-View window:

   ![Configure sections to display in portal](image)

   When a patient with this configuration clicks PHR-View, the PHR-View window displays with all nine categories displayed in separate tabs:
Each tab corresponds to one of the items checked on the Configuration window. One or more of the items can be removed from the patient’s PHR-View display.

2. Check one or more of the checked boxes to clear those items; in this case, Allergies and Immunizations:

3. Click Save.

4. Run synchronization to implement the new items for display.

After synchronization the patient’s PHR-View window shows only the tabs for items that were left checked on the Medical Report Configuration window:
Synchronize

To enable any new or modified settings, you must run the synchronization process.

**Note**: Uploading questionnaire data and administrative settings to the Web Portal should be done at implementation.

You can also read a summary list of the synchronization tasks that have been performed.

Run Synchronization

Run Synchronization to implement and enable selected Patient Portal settings.

To set up and run synchronization:

1. Click Run in the Synchronize menu in the Patient Portal Settings band:

The Web Portal Tasks Schedule window displays:
The Tasks Schedule window includes:

- an column listing a check box for each task, used to select the tasks to be run
- a Task column in which each of the synchronization tasks is named
- a Status column which displays the status of running tasks or tasks scheduled for synchronization, that are either underway or scheduled to run at a later time

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download Web Portal Messages</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Practice Messages</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Web Enabled Patient data</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Questionnaire to the Web</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Download Questionnaire response</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Immunization form</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Download Immunization response</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Download new patient registration</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Patient Education</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload information to lock accounts</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Admin Settings</td>
<td></td>
<td>mins</td>
</tr>
<tr>
<td>Upload Provider/Pharmacy Data</td>
<td></td>
<td>mins</td>
</tr>
</tbody>
</table>

Note: The *Failed* status appears only when a synchronization task was unsuccessfully completed or was aborted for any reason.

- an Interval column showing the frequency of scheduled synchronizations by task

2. Select the tasks by checking each task's check box.

OR

Select all tasks with one click by checking the blank box at the top of the first column (Select All).

3. Assign an interval, in minutes, to each selected task.

Intervals are variable, depending upon factors including implementation, volume, and system resource utilization. Remaining tasks may be scheduled at various different intervals depending upon need and resource utilization. For example:

- Uploading questionnaire data and administrative settings to the Web Portal should be done at implementation
The only other time it might be run is in the event that the practice needs a new questionnaire or modifications to an existing one.

- Because its need is not as critical, uploading information to lock the accounts of Portal-disabled patients need not be done as frequently as other tasks; therefore, a practice may set this synchronization to occur every 1,000 minutes.

- Finally, because it is so system-resource-performance intensive, the Upload Provider/Pharmacy Data to Web Portal task should be scheduled no more often than every 2,000 to 4,000 minutes.

4. Once the tasks have been selected and the intervals assigned, click the Schedule button at the bottom of the Task list:

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download Web Portal Messages to the Practice</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Practice Messages to Web Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Web Enabled Patient data to Web Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Questionnaire to the Web Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Download Questionnaire response from Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Immunization form to the Web Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Download Immunization response from Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Download new patient registration information</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Patient Education Information to Portal</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload information to lock accounts of portal disabled patients</td>
<td>Scheduled</td>
<td>3 mins</td>
</tr>
<tr>
<td>Upload Admin Settings to Web Portal</td>
<td>Scheduled</td>
<td>200 mins</td>
</tr>
<tr>
<td>Upload Provider/Pharmacy Data to Web Portal</td>
<td>Scheduled</td>
<td>2380 mins</td>
</tr>
</tbody>
</table>

5. Click the Stop Schedule button at any time to stop the scheduled tasks from running. The task(s) will be stopped immediately.

**Note:** It is advisable to Stop the Schedule in the morning, before the practice becomes active. This will avoid any impact on tasks that may be running. The next-best choice would be at the end of the day, but be sure there are no tasks running when the Stop is executed.
6. Synchronization for any or all of the tasks can be run immediately at any time:
   a. Stop any scheduled synchronizations (Stop Schedule button).
   b. Select the check boxes for the tasks to be run and click Run Now.
      All of the selected tasks will run immediately upon clicking the button; the status *Running* displays in the Status column until synchronization is complete.
CONFIGURATION AND WORKFLOW

This section provides a brief description of several key functions available in the Patient Portal. Use the available links to find additional information.

Pre-Registration of Patients and the P Quick-Launch Button

New patients can pre-register before their first visit to the practice.

New Patient Access and Data Entry

The Pre-Register link on the Login page enables patients to submit basic demographic information to the practice.

Note: This information is to be used for new patients only.

Patients find the Login page by using a search engine, like Google® for example, or by selecting a hyperlink from the practice's website home page.

Once on the Login page, new patients click the Pre-Register link:
The new patients are informed that this form is intended for new patients only:

The new patient then enters data (red asterisks indicate required data) and clicks Submit:
The new patient’s demographic data will now be available by selecting the P Quick-Launch button (jelly bean) in eClinicalWorks:

**Configuration**

Patient pre-registration has to be configured and enabled in order to function.
To configure and enable Patient Pre-Registration:

1. From the Patient Portal Settings window, select Yes on the drop-down list to Enable Patient Pre-Registration:

2. In the New Pt Registration window, select the check box to display the fields to be displayed to the new patients.

3. Select the Mandatory Field box for any of those selected fields for which data must be entered.

4. Click the Save button at the bottom of the window to complete the configuration:

5. Run the Synchronization process to enable the demographic data collection.

For more information about Synchronization, refer to Synchronize on page 108.
Security Attribute

To enable selected staff to access the P Quick-Launch button (jelly bean), from the Security Settings window in EMR, click the Patient Pre-registration Records attribute, then select the box for each staff member who will be able to use the P Quick-Launch button to view new patient registration information:

Pre-Registration Workflow

The workflow for completing the patient pre-registration process is a combination of automated importing of the patient’s data and a telephone interview.

Note: There is no assigning or routing of new patient submissions to staff as there is with messaging. Practice policy determines the monitoring/importing of records using the P Quick-Launch button (jelly bean).
Working with a New Patient

To begin working with a new patient:

1. Click the P Quick-Launch button (jelly bean):

   ![Patient Pre-Registration window](image)

   The Patient Pre-Registration window displays.

2. Click the patient name to select the patient:

   ![New Patient Registration window](image)

   The New Patient Registration window opens.

3. Call the patient at the number listed:

   **IMPORTANT!** If you cannot reach the patient by telephone, be sure to click Close without importing, as you will be asked to complete more information. You will not be able to collect this additional information without the patient on the phone.
4. Once you have reached the patient by phone, click the Import New Patient Info button:

The demographic window opens:
5. Collect and enter additional demographic data on this window and the Additional Info window.

Note: All required fields, as determined when you configured the demographic mandatory fields, must be completed.
6. Click OK when finished:

![New Patient Registration Information Window](image)

**Working With Duplicate Records**

A dialog box displays at the top of the New Patient Registration Information window when the system finds a duplicate record.
To resolve the duplicate record:

1. With the patient on the phone, click View Patient Info:

The Demographic window displays.
2. Ask the patient to state their date of birth, employer, address, contacts, etc., to confirm that you are talking to the patient who already has a record in the system:

3. If the patient on the phone is the same patient whose record was found in the system:
   a. Update the demographic information as necessary and click OK.

   **Note:** Because the record submitted through the Patient Portal is a duplicate, it must be deleted.

   b. Select the box at the beginning of the patient’s row, then click the Delete button to delete the duplicate record submitted through the Patient Portal.
4. If the patient on the phone is not the patient whose record you viewed, select the box to *Proceed with creating a new patient record in the system*:

![New Patient Registration Information Window]

5. Click OK when the confirmation message displays.

   The Demographic window opens.

6. Continue collecting the patient’s information by phone, entering it into the appropriate fields.

7. Click OK.

   The pre-registered patient is now fully registered as a patient in your system.
Patient Portal Questionnaires and the D Quick-Launch Button

Completed intake forms arrive in the EMR as images in Pt. Docs.

Questionnaires as Patient Documents

The system appends HHF (Health History Form) to the name you gave the questionnaire when you designed it in EMR > Patient Questionnaire designer:

Sample Consent Form

The sample below shows a consent form that the patient would sign upon first logging on to the Patient Portal. The consent form language is defined from the Consent Form selection under Portal Settings:
Questionnaires in the Chart Panel in EMR

Questionnaires can also be viewed under the Documents section of the DRTLA tab on the Chart Panel:
Questionnaires for Import in the Progress Note

Responses to Questionnaires can be imported into the Progress Note by clicking the IMP button.

**Note:** The IMP button does NOT appear if there are no questionnaires to be imported. For recommendations, refer to [Questionnaire Workflow](#) on page 138.

Click the Imp button to import the response to the Progress Note:
Configuration

Questionnaires are designed based upon information to input in EMR. The process for configuring and receiving Portal Questionnaires is displayed below:

Questionnaire Designer

As providers may have already established information to collect from the patient in a template, ROS for example, use these questions as the blueprint for the questionnaire to be filled out by the patient. Design the questionnaire in Questionnaire Designer.

For a complete description of the process to design a questionnaire, refer to Designing a Questionnaire on page 78.

Note: You can create new categories, items, and responses as you normally would using the Custom button in the ROS or any other section of the Progress Notes.
Click Print to print the template for reference:

To use the Questionnaire Designer:

1. From the EMR menu, select Questionnaire Designer:

The Questionnaire Setup window displays.
2. Click to select one of the three options:

- Create a New Questionnaire
- Edit an existing Questionnaire
- Delete a Questionnaire:

Whether designing a new questionnaire or modifying an existing questionnaire, use the Questionnaire Sheet Wizard to add items in the same manner.

3. To find an item, type the first one or two letters with one item highlighted and the system will move to the item beginning with the letters you entered.

4. Click the respective folder and double-click the item to add it to the form.
5. Click the Save button, then click either Preview to see the questionnaire or Close to complete your design:

Click Preview button to display the questionnaire:

6. To change the question type or patient options, double-click the item in the Questionnaire Sheet Wizard.

The Questionnaire Editor window opens.
7. Enter the options and select the question type, then click Save:

![Questionnaire Editor](image)

8. In the Questionnaire Sheet Wizard window, click Save again and Preview to see the questionnaire.

**Note:** Date format is available only when using structured text fields defined as 'date' - available in Social History only.

---

**Immunization Designer**

The Immunization Designer enables you to create questionnaires specifically to collect immunization information.

To use the Immunization Designer:

1. From the EMR menu, select Immunizations/Therapeutic Injections and the option *Immunization Designer*.

   The Immunization Form Setup window opens.

2. Select the Create, Edit, or Delete option.

3. From the Immunization Sheet Wizard Page, click the Immunization folder and double-click an item to add it to the form.

4. To find an item, type the first one or two letters with one item highlighted and the system will move to the item beginning with the letters you entered.

5. Click the respective folder and double-click the item to add it to the form.
6. Click the Save button, then click either Preview to see the questionnaire or Close to complete your design:

![Questionnaire Editor](image)

**Note:** Dates are collected for immunization history only. For immunizations done in sequence, you can use the same item again with a different dose number.

Immunizations then appear in the Immunization chart link on the HUB or in the Progress Notes as *OutsideProvider*:

![Immunizations/Therapeutic Injections](image)

**Entering Questionnaire and Immunization Forms in Settings**

Enter the Questionnaire and Immunization forms in Settings.
To enter the forms in Settings:

1. From the Admin band, click the Patient Portal Settings icon.
   The Patient Portal Settings menu displays.

2. Click the name of the setting to be enabled (Quest & Imm settings).

   **Note:** The name of the questionnaire is the name that files in Patient Documents (HHF will be appended).

3. Change the name to a patient-friendly Portal Menu Name name to display in the Portal:

![Image of Patient Portal Settings menu]

4. Click Save.
   The Questionnaire and Immunization forms are entered.

**Patient Portal Security Attribute**

Set the security attribute as appropriate.

**Practice Defaults for the Patient Portal**

Set the Practice Defaults for the Patient Portal.
To set the Practice Defaults for the Patient Portal:

1. From the File menu, point to Settings, and then click the Practice Defaults option.
   The Practice Defaults window opens.

2. Select the Portal tab.

3. Mark responses in the EMR as imported from the Patient Portal.

4. Enter a qualifier to append to data imported from the Patient Portal:

The Practice Defaults are set for the Patient Portal.
Responses with the qualifier will appear as shown below when imported:

![Progress Notes screenshot]

**Assigning Questionnaires from the Patient Portal to Staff Members**

Display the list of questionnaires from the Patient Portal in the Outstanding tab of the D Quick-Launch button (jelly bean).

**To set the questionnaires to display in the Outstanding tab of the D Quick-Launch button:**

1. From the File menu, point to Settings, and then click the Practice Defaults option.
   The Practice Defaults window opens.
2. Select the Portal tab.
3. Clear the *Mark document generated for archival purposes of portal questionnaire response*... option:

The questionnaires will arrive in the *Outstanding* tab of the D Quick-Launch button.
Assigning Message Types to Staff Members

To assign message types to staff members:

1. From the Patient Portal Settings menu, click Message Settings.
2. Assign a staff member responsible for importing *Forms (Questionnaire/Immunization)*.

For more information about assigning message types, refer to Message Routing on page 42.

The questionnaire is assigned in the D Quick-Launch button (jelly bean):

For more information, refer to Questionnaire Workflow for recommendations on importing questionnaires.
Questionnaire Workflow

The most efficient process to use in importing the questionnaire is for the provider/MA staff to do so at the time of the visit.

To import the questionnaire:

1. From the Progress Notes, click the IMP button:

   ![Progress Notes Image]

   **Note:** Providers and nurses should be trained to look for the Imp button. The IMP button will NOT appear if the data has NOT been submitted by the patient.

   The message *Patients response successfully imported* displays when the import process is complete:

   ![Import Confirmation Image]
2. Click OK.

The questionnaire is successfully imported:

Verifying Imported Patient Portal Questionnaire Responses

To verify the Patient Portal questionnaire responses:

Open the record and validate each section with the patient, including allergies and histories (family, medical, social, surgical, prior hospitalization):
Importing Questionnaires Prior to a Patient Visit

To import questionnaires prior to a patient visit:

1. Open the Review Documents window:
   - Click the D on the Dashboard taskbar
   - OR
   - From the Documents band, click Review Documents
   The Review Documents window displays.

2. Click the Outstanding tab, then click the patient name to open the form:

The patient’s questionnaire window opens.
3. Click Progress Notes, select the patient visit, and click the IMP button:

4. Verify each section of the imported Progress Note by clicking the blue hyperlinks.

Note: To view the questionnaires submitted before importing them, click the DRTLA tab – Documents, or use the chart link Patient Documents.

Lab Results - L Quick-Launch Button

Lab results can be added and viewed in a number of ways.

Lab Results from the Patient View

To display a patient’s view of his/her lab results, click the L Quick-Launch Button (L Jelly Bean). The Order Date, Name, Reason, and Result will display for all the Lab and Diagnostic reports available to the patient.

The patient clicks the Name text to view or print the results and any notes from the provider:
The specific result displays:

![Lab Result Table]

### Configuration

The practice can configure the display of lab results for the patient.

### Preventing the Publishing of Sensitive Tests to the Patient Portal

To prevent sensitive tests from being posted to the Portal:

1. Collect a list of tests to never publish to the Patient Portal from the providers.
2. Click *do not publish to Portal*.

This setting cannot be changed by providers when reviewing lab results (the box is grayed out):
By default, lab tests will not publish to the Patient Portal.
This is the recommended setting. With this setting in place, providers will publish only on a patient-by-patient, test-by-test basis:
Security Attribute

The Publish/Unpublish Reviewed Labs attribute enables the user to access the *do not publish to portal* box in a lab that has already been reviewed.

Lab Results Workflow

Review lab results by individual test.

**To review the labs by individual test:**

1. Click on the L Quick-Launch button (jelly bean).

   The Labs/DI/Procedure window opens.

2. Click on a test to view the results:

   ![Labs/DI/Procedure Window](image)

   The test result window for the selected lab test displays.

   Click Reviewed to enable the result to be published to the Patient Portal. In the example below it will not, because the *Don’t publish to Web Portal* box is selected.

   When published, the results can be viewed by the patient along with any notes added to the Notes field.
To communicate with the nurse, MA, or provider, use the internal notes field:

To review normal lab results:

1. Click the L Quick-Launch button (jelly bean).
   
The Labs/DI Procedures window opens to the *To be reviewed* tab.

2. Select the patient whose lab results will be reviewed.
3. Click view all reports – By Patient or Visit:

The View All Reports window displays.

4. Select and clear the Don’t publish to Web Portal button to publish all results to the Portal (tests defined in EMR > Labs will not publish if set to Do Not Publish).

If the check box remains checked, the tests will all be set to do not publish to the Patient Portal.

5. Use the Notes field for patient notes.

6. Select Reviewed, select a practitioner in the Assigned to drop-down, and select a Result.
7. Click Apply All after all values have been entered:

![Image of the Configuration and Workflow Lab Results - L Quick-Launch Button window]

**Note:** To change any values on any test, go to the individual test and make the edit in the green box. The values on the other tests remain unaffected.

8. Click OK to exit the window.
To review abnormal lab results:

1. In the Notes section, click the Open status for the lab tests that are abnormal or require follow-up. They will not publish to the Portal while set to the Open status.

2. Click OK:

3. Open the test to enter Internal Notes or Clinical Info to the medical staff regarding follow-up.
This step is recommended to document notes you do not want the patient to view:

4. Enter Internal Notes or Clinical Info, which do not display on the Patient Portal.

5. Enter the result and click OK.

6. When the test is ready to publish, clear the *Don't publish to Web Portal* button and click reviewed (with the security attribute publish/un-publish reviewed labs you can always be published/unpublished from the Portal after they are reviewed):
Reviewing Lab Results with Patient Lab Letters

The patient receives an e-mail message and clicks to open the contents of the lab letter. The window opens, displaying the contents of the lab letter:
October 31 2011
Connie Portal
26 Main St, Northborough, MA, US 01532

Dear Connie Portal:

Our records show your active medications (prior to this letter) to be:
St. John's Wort 159 MG Capsule, Sig: as directed orally once a day Start Date: 08/21/2011
Penicillin G Benzathine & Proc 900000-300000 Unit/2ML Suspension, Sig: 1 ml intramuscular Start Date: 08/06

Our records indicate you have had an allergic or adverse reaction to: <br>R-Tanne

Our records indicate your current Problem List is: <br>Cough <br>Diabetes mellitus type II <br>PSAC

The results of your recent tests are explained below:
Lipid Profile: Your Lipid Profile your lab results were normal
(Collection Date: 10/31/2011)
Total Cholesterol 200, Range: 5 - 56 ml KEEP UP THE GOOD WORK

A1c: Your A1c your lab results were normal
(Collection Date: 10/31/2011)
test 0.8, Range: KEEP UP THE GOOD WORK

Sincerely,
Dr. Sam Willis MD MD.
Requesting a Read Receipt for Lab Letters

To request a Read Receipt for lab Letters:

1. From the EMR menu, hover over Miscellaneous Configuration Option, then click Configure Lab Letter:

The Patient Portal Settings window displays.
2. Select *Request read receipts for all the messages* in message settings:

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Default name that appears in the message &quot;To&quot; section of the portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Messages</td>
<td>General Messages</td>
</tr>
<tr>
<td>Refill Messages</td>
<td>Refill Request</td>
</tr>
<tr>
<td>Appointment Messages</td>
<td>Appointment Messages</td>
</tr>
<tr>
<td>Referral Messages</td>
<td>Referral Messages</td>
</tr>
<tr>
<td>Lab Messages</td>
<td>Lab Messages</td>
</tr>
</tbody>
</table>

3. From the left navigation pane, click the Portal Inbox icon.
   The Portal Inbox/Outbox window displays.

4. Enter a Date and provider to see the read receipt:
Entering Results for Lab Letters

To enter results for lab letters:

1. Click on Patient Letter in the Labs/DI/Procedures window.

2. Select the box for the patient whose lab letter will be opened and click OK:

   ![Patient Letter window](image)

   The Patient Letter window opens.

3. Select the lab test name to include results on the letter. Clear individual attributes that are not to appear.

4. To show comparative results, click *Show last* to include the results reviewed for this test in the past.

5. Click the result (the following example shows only Normal). Build the results from the EMR menu by first selecting Miscellaneous Configuration then Configure Lab Letter):

   ![Configure Lab Letter](image)
6. Click Publish to Portal & Review Lab (the patient must be Web-enabled to view this).

For results that require follow-up, clear them, then follow the steps from the previous section.

**Telephone Encounters - Working with the T Quick-Launch Button**

Requests sent by the patient from the Patient Portal arrive in the EMR as Telephone/Web encounters. There are two exceptions:

- Questionnaires, which arrive as documents
- New patient pre-registrations, which arrive under the P Quick-Launch button (jelly bean)

**Telephone Encounter Configuration**

Correctly configuring the Portal is critical to ensuring that all encounters are correctly and appropriately received, routed, acknowledged, and responded to in a timely and efficient manner.
Configuring Reminder E-mail Settings

Reminders are automatic e-mail messages sent to patients to inform them of upcoming events affecting the management of their healthcare.

To configure reminder e-mail settings:

1. On the Patient Portal E-mail Settings window, set all the events to Yes, that you wish to trigger an automated reminder e-mail message.

2. Click Settings after the reminder type to determine the content of the e-mail:

   The settings window for that event displays.

3. Enter the number of days before the appointment to send the reminder.

   **IMPORTANT!** Enter your practice name in the E-mail Subject field.

4. Select the correct template:
   a. Click insert tags.
   b. Update text in the body of the letter.
   c. Click Save:
5. Create the content for each e-mail message defined with Yes:

a. Type the content for each message in the E-mail Content window:

Dear ((pt_firstName)),

We have exciting news regarding your health care!

As we continue in our efforts to provide you, our patients, with the highest quality of care, we are constantly looking for methods of working together with you to ensure that you are not only aware of but also involved in the maintenance and improvement of your health.

To that end, we are proud to announce that our practice now offers you the opportunity to use the power of the web to track all aspects of your health care through our office. The Patient Portal enables our patients to communicate with our practice easily, safely, and securely over the internet.

Patient Portal URL: ((ptportal_url))
Username: ((pt_username))
Password: ((pt_password))
b. Click Save.

Showing and Hiding Patient Portal Features - Menu Settings

To show and hide Patient Portal Features:

1. From the Patient Portal Settings window, click Menu Settings to Show or Hide features the patient may use.
   
   For example, set Message the Practice to display (Show) in Phase I.
   
   Set other features, such as appointment requests, to Hide until phase II.

2. Change the Menu Name by typing a description of your choice - Message the Practice, for example.

Routing Incoming Messages from the Patient Portal - Single-Office Locations

Settings are available to enable practices to correctly route incoming messages, whether the practice has multiple facilities or a single office or call center.

To route incoming messages:

1. Click Feature Settings.
   
   ♦ Practices with one office or call center should set Enable Facility Group Based Routing to No
   
   ♦ Practices with more than one office, should set this to Yes:

   ![Enable Facility Group Based Routing](image)
   
   Allows practice to route portal message based on facility group the patient belongs to. This is derived from facility group the patient's "default facility" belongs to. In event that no default primary service location is chosen for the patient, the message routing is done based on settings for 'default' location. On enabling this feature please go to 'Message Routing' and set up the staff who is to be assigned to receive portal messages based on the facility.
   
   **IMPORTANT:** Please go to Facility Group settings and ensure that a facility is associated with only one Facility Group.

2. Next, click Message settings:
   
   a. From the appropriate drop-down list, select the name of the staff member to assign to each message type.

   b. Enter your practice name in the Default name field and click Save.

Routing Incoming Messages from the Patient Portal - Multiple Office Locations

Set up a facility group for each call center or facility that handles calls. This may involve creating one facility group for each facility.
1. Click Feature Settings.
   - Practices with one office or call center should set Enable Facility Group Based Routing to No
   - Practices with more than one office, should set this to Yes

2. Enter the group name and select associated facilities and programs:

3. Next, click Message Routing, and select from the drop-down list, the name of the staff member to be assigned to each message type.
   Default is used for patients without a default facility, or for patients with a facility that has no staff member assigned to receive the message type.

4. Use the drop-down to select each facility group (facility) and assign a responsible staff member for that facility group:

   The patient’s default facility, taken from the Additional Info window, is used to assign the facility group from which to assign the staff that receives the message:
For more information about message routing, refer to Message Routing on page 42.
Enabling Appointment Requests

When the Appointment Requests function has been enabled on the Portal, patients can open the New Appointment Request window to request an appointment within the date and time frames that you have established.

The Appointment Requests function must be enabled in order for patients to be able to see this window and request appointments.

Refer to Appointment Settings on page 69 for more information about establishing appointment settings.

Enabling Real-Time Scheduling (RTS)

Using Real-Time Scheduling, the patient selects from an available list of appointment dates and times. The appointment is booked directly on the provider’s calendar without intervention.

**Note:** This feature does not create a Telephone/Web encounter, even though it is covered here under T Quick-Launch button (jelly bean).

To configure RTS:

1. Enable RTS from the Feature Settings window.
   
   For information about enabling Real-Time Scheduling, refer to Feature Settings on page 38.

2. Next, configure available providers and facilities for RTS from the Appointment Settings window.

3. When finished, open the Admin band:
   
   a. From the Outlook Tree click Visit type codes.
   
   b. Open a visit type code.

   c. Select *Synchronize to the Patient Portal* to display available time slots for this visit type in real-time scheduling:
4. Set up working hours for the provider.
   
   a. From the Schedule Menu, click the Working Hours and Resource Availability option.
   
   b. From the Schedule menu, click Working Hours and Resource Availability.

   The Working Hours and Resource Availability window opens.

5. Select the provider and the day of the week:

   **Note:** The facility for that day must be a facility that is available in the Patient Portal from Appointment Settings under Patient Portal Settings.
6. Select and highlight the day of the week:
   a. Click New and select a visit type that synchronizes to the Patient Portal to make this available for selection by the patient on the Patient Portal:
   b. Enter max visits (by default, 4 per hour in 15-minute increments) to display on the Patient Portal:

**Responding to Refill Requests**

Refill requests arrive as free text in the message box.
To respond to a refill request:

1. Click the RX tab and select the requested medication from the current medication list.

2. Click Send Rx, or the drop-down arrow to the right to ePrescribe or Fax Rx:

3. Click Add Action taken to send a message to the patient indicating that the prescription has been filled, then click OK.

4. Click Reply to patient to send the Portal message:
5. Click Send:
Appointment, Lab, Referral, or General Message Web Encounters

On the Telephone/Web Encounters window, all Web encounters assigned to the user display in the list. Messages from the Portal can be identified by a green w in the first column.

To view the list of Telephone/Web encounters:

1. Click the T Quick-Launch button (jelly bean).
   Web Encounters assigned to you display.

2. If necessary, change the assigned user:

3. Select a message to open it.
   The message arrives as free text.

4. To respond, click Add Action Taken.
   a. Type your response, and click OK.
   b. Click Reply to Patient.

   **IMPORTANT!** This step is important. Be sure to respond to the message by clicking the Reply to Patient button.
Responding to Demographic Updates

Updates to a patient’s demographic information are imported through the Portal, the changes are reviewed and may be accepted.
To respond to a demographic update:

1. From the Web Encounter, click the Import button:

   The Preview Patient Info window displays.

   Changes are highlighted in green or bold.

2. Review the changes, then scroll down and click the Accept Changes button:
3. Optional: Send a confirmation response to the patient.

4. Click the Add Action Taken button.
   a. Type a confirmation response.
   b. Click OK, enter your response, then click Reply to Patient:
Viewing Patient Web Encounter Logs

Logs of all encounters are retained and available for review.

To view the Encounter logs:

1. From the Patient Hub, click encounters.
2. Select an encounter and double-click to open it:

3. Click the Message folder icon:
The log displays.

4. Use the scroll bar to scroll the display to the right to see the patient’s comments.

Creating a New Message from the Patient Hub

To send a new message to a patient, first open a new Web encounter, then compose and send the message.
To create the new message:

1. From the Patient Hub, click the New Web Enc button:

2. Type your message in the Action Taken panel, then click Send eMessage.

3. If applicable, select Preventive Care Reminder to update the MAQ dashboard.

4. Click Send:
Messaging Multiple Patients Using the Registry

To send a message to multiple patients:

1. From the left navigation pane, click the Registry icon.
   The Registry window opens.
2. Select Show Web Enabled:
3. Continue to filter the patients who will receive the message, for example, all those diabetics without an A1C.

4. Clear (de-select) patients as needed.

5. Click Run Subset (NOT) or Subset, as appropriate.

6. Click Send eMessage:
Viewing eMessage Logs

Logs of eMessages are maintained in the system and can be viewed.

To view message logs:

1. From the Messages band, click Portal Outbox.

   All message logs for the selected date display.

2. Double-click a message to view the message detail:
Configuration and Workflow  Telephone Encounters - Working with the T Quick-Launch Button

![Image of a software interface showing a message with a subject labeled 'ASC reminder message']
COMMUNICATING WITH PATIENTS

Meaningful Use

Practices can communicate with their Web-enabled patients from a number of locations in the eCW application. Practices may select individual patients, groups of patients, or all Web-enabled patients to be recipients of these electronically transmitted messages.

Sending eMessages from the Patient Hub

eMessages can be sent to Web-enabled patients from the Patient Hub. When a Web-enabled patient has been selected, a message can be transmitted to that patient through the Portal. The message may be sent as a Web Encounter, preserving the historical record of the communication, or by choosing Send eMsg to communicate without creating a historical record of the communication.

New Web Encounter

To send a message to a Web-enabled patient from the Patient Hub by creating a Web Encounter:

1. Select the appropriate patient.
2. Open that patient’s Hub.
3. Click the New Web Enc button on the Patient Hub window:

Note: Using New Web Enc rather than the Send eMsg function retains a historical record of the message by creating a new Web encounter, while using the Send eMsg button directly from the Hub does not retain any historical record of the communication.
The Web Encounter window displays.

4. From the drop-down list, select a reason for sending the message.

5. Type the message into the Message field and click the Send eMessage button:
The message is sent, and an encounter dialog displays, asking if you want to save the encounter.

6. **Click Yes.**

   The Portal eMsg window displays.

7. **If the message concerns Preventive or Follow up care, check the corresponding box.**

   This check box includes the message in the Meaningful Use tally.

8. **Click the Send button:**
The Web encounter is created and can be viewed from the patient’s list of encounters by selecting the Encounters button from the Patient Hub. A Web encounter will be annotated with a w in the list of encounters.

9. Click OK in the confirmation dialog.
   The Web Encounter window displays.

**Add Action Taken**

Use the *Add Action Taken* button on the Web Encounter window to add notes about either the encounter (the message sent) or the patient’s response.

To add notes about the encounter:

1. Click the Add Action Taken button.
   The Notes window displays.

2. Type the notes about the encounter or message and click OK.
   The *Action Taken* notes display in the Action Taken field on the New Web Encounter window, with the name of the writer, date, and time they were entered:
Reparing to a Patient

Users can select the “T” quick launch button to view the number of Web encounters that have been created from messages received.

For more information about using the “T” quick launch button, refer to Telephone Encounters - Working with the T Quick-Launch Button on page 155.

You can reply to a patient’s message in response to a new Web encounter message by using the Reply to Patient button on the Web Encounter window.

To reply to the patient’s message:

1. Click Reply to Patient on the Web Encounter window:

The Portal eMsg window displays, showing the previous notes added as Action Taken.
2. Type the response to the patient’s message and click Send:

The message is sent to the patient, and a confirmation window displays.

**Send eMsg**

To send a message to a Web-enabled patient from the Patient Hub by creating a Web Encounter:

1. Click *Send eMsg* on the Patient Hub.
   
   The Portal eMsg window displays.

2. Enter the message subject in the Subject field.

3. Enter the text of the message and click Send:
Communicating with Patients

Processing Demographic Update Messages

Note: Message text can be entered manually or by importing a template:
- To enter a new free-text message, click in the blank message field and type the message
- To enter message text using a template, click the Load button to see a list of templates. Select the template message

The new message can be saved to use later by clicking the Save button; or it can be saved as a template by clicking the Save As button.

The message is sent to the patient, and a confirmation displays.

Click OK to send the message with no historical record of the message saved in the system.

Processing Demographic Update Messages

When processing a demographic update received from a patient, the update has to be imported into the encounter before it can be accepted.
Click the Import button:

The Preview Patient Info window opens, showing the changes made and submitted by the patient. Changes display in green.

Review the new information, then click Accept Changes to send it to the patient’s profile:
Sending eMesses from the Registry Band

eMesses can be sent to Web-enabled patients from the Patient Hub and from the Lookup Encounters, Recalls, and Registry windows, accessed from the Registry band. Web-enabled patients can be selected from the results list when doing a lookup, and a message can be sent to the selected patient(s) through the Portal.

To send Web-enabled patients a message:

1. From the Registry band in the left navigation pane, select the Lookup Encounters, Patient Recall, or Registry icon.
2. Enter and select search criteria and perform the search.
   A green W displays next to the name of Web-enabled patients.
3. Check the box(es) next to the patient(s) name.
Communicating with Patients

Sending eMessages from the Registry Band

4. Click Send eMsg:

The Portal eMessage window displays.

5. Enter the message subject in the Subject field.

6. Enter the text of the message.

Note: More than one patient may be selected; however, the selected patients must be Web-enabled to create and send a message.

To enter a new free-text message, click in the blank message field and type the message.

To enter message text using a template, click the Load button to see a list of templates. Select the template message.

The new message can be saved to use later by clicking the Save button; or it can be saved as a template by clicking the Save As button.

7. Click Send:
The message is transmitted to the Web-enabled patient(s), and a confirmation displays.

8. Click OK.

**Note:** The Portal eMsg window can be opened from several different windows:
- From the Lookup Encounters window, shown above
- From the PatientRecalls window by clicking the eMsg button
- From the Registry window by clicking eMessage

The functionality is the same regardless of the source.
No Web encounter is created, and no historical record of the message is preserved.

**Sending Blast eMessages**

Blast eMessages enable practices to send messages simultaneously to all Web-enabled patients.
To send a Blast eMessage:

1. From the Registry band on the left navigation pane, click the Lookup Encounters icon.
   The Lookup Encounters window opens.
2. Assign the appropriate filters to define the search criteria.
3. Click the Lookup button.
   The list of encounters displays.
4. Click Blast eMsgs:
   The Portal eMsg window opens with the text All Web-Enabled Patients in the To field.
5. Enter the message subject in the Subject field.
6. Enter the text of the message.

**Note:** Message text can be entered manually or by importing a template:
- To enter a new free-text message, click in the blank message field and type the message.
- To enter message text using a template, click the Load button to see a list of templates. Select the template message.

The new message can be saved to use later by clicking the Save button; or it can be saved as a template by clicking the Save As button.
7. Click Send to transmit the Blast eMessage to all Web-enabled patients.

**Note:** An eMessage will not be logged in the patient’s history. This type of message will not create an encounter in the chart. The only log will be listed in the Portal Outbox.

---

**Creating Blast eMessage Templates**

Templates can be created and saved to reuse Blast eMessages.

**To create a Blast eMessage Template:**

1. Click the Save button after entering the message, and give the template a name.
2. Click OK:

   ![Save Template As](image)

   The template is saved under the Load button.

3. Click the Load button.

   The Web Reply Template window opens.

4. To use a template as a message, highlight the template name and click OK.

---

**Using the Portal Inbox and Portal Outbox**

Staff members having appropriate rights to view patient communications can open new messages and review sent messages from the Portal Inbox and Portal Outbox.

**To access the Portal Inbox or Outbox:**

1. Open the Messages band in eCW.
2. Click either Portal Inbox or Portal Outbox:
The Portal Inbox/Outbox window displays.

3. Click the tab at the top of the window to view the Inbox or Outbox:

4. Select a From Date and To Date to establish a date range.
   
   The list of messages within that date range displays.

5. Click on the Subject name for any message to open it.
SUPPORTING PATIENT SIGN-ON TO THE PATIENT PORTAL

The most frequent questions from patients using the Patient Portal are related to signing in.

When patients pose questions about signing in, use the steps below to ensure that they are provided with a helpful, meaningful, and successful experience in accessing the Portal.

Before performing any other Portal activity with the patient, be sure to take Step 1 to validate the patient’s identity.

Note: Validating patients’ identity is critical to ensuring patients’ privacy. Be sure patients confirm their address, social security number, date of birth, or even all three, before continuing to work with them on these Portal access activities.

For new patients, after validating the patients’ identity, take Step 2 to ensure that they have the proper credentials to access the Portal and begin using it.

Steps 3 - 5 address questions that come in from existing patients who need help.

Validate the Patient - Step 1
Assign a Temporary User-Friendly Password - Step 2
Change the Username for a Patient - Step 3
Change the E-Mail Address of a Patient - Step 4
Assign a New Owner to the Account - Step 5
Unlocking a Locked Account - Step 6
Disabling a Web-Enabled Patient - Step 7

Validate the Patient

Always validate that the person you are talking with on the phone is, in fact, the patient by asking them to confirm an address, SSN, DOB, or all three.
1. Confirm the patient's username by clicking Web Enable on the Patient Information window:

The Patient Portal Account Management window displays.

2. Confirm the patient’s username.

Request that the patient read the name he/she is using.

3. If the name the patient reads to you is incorrect, give him/her the name shown in the example below, then click OK:
Assign a Temporary User-Friendly Password

After patients have used this temporary password the first time they sign in, they will be prompted to choose their own password.

To assign a user-friendly password:

1. On the Patient Portal Account Management window, type a password into both password fields.
2. Read the password you just typed aloud to the patient.

   Note: At no time will the passwords display.

3. Click OK:

   Note: When patients indicate that they cannot sign in, and they indicate that they have exceeded the maximum number of login attempts as assigned in Feature Settings, check the Unlock Account check box on this window. The patient may then attempt to log in again with the new password.
4. Remind the patient that the changes will take effect in about five minutes. Patients will then be asked to choose their own password after they sign in with this temporary user-friendly password.

**Change the Username for a Patient**

To change a patient’s username:

1. On the Patient Portal Account Management window, type the new name into the User Name field.
2. Click OK:
Remind the patient that the changes will take effect in about five minutes.

Change the E-Mail Address of a Patient

To change a patient’s e-mail address:

1. On the Patient Portal Account Management window, type the new e-mail address into the e-mail field.

2. Ask the patient if he/she would like to update their username to their e-mail address at the same time.
   
   If so, go to Step 3 for instructions in changing the username.

3. Click OK:
Remind the patient that the changes will take effect in about five minutes.
Assign a New Owner to the Account

Account owners may need to be changed, for example, when a patient turns 18.

To assign a new owner to an account:

1. Type the new username.
2. Type and confirm the password
Unlocking a Locked Account

Patients may call because their accounts are locked. When patients’ accounts are locked, they see this message:

To unlock a patient’s account:

1. From the Web Enable menu, click Unlock Account.
2. Click OK. A dialog box displays, indicating that the account was successfully unlocked.
3. Click OK.

Patients can continue using the same password.
They should wait four to five minutes before attempting to sign in again.

**Disabling a Web-Enabled Patient**

Patients who do not want to remain Web-enabled can request to have their account status disabled.

**To disable a Web-enabled patient’s account:**

1. From the Account Management window, click the *Disable patient’s portal account*.
2. Click OK.

   A dialog box displays, indicating that the account was successfully disabled.
3. Click OK:

   ![](image)

   Again, the change will take effect in four to five minutes.
PATIENT VIEW

This section describes the features available for patients using the Patient Portal.

The Patient Portal is used only by patients who have been enabled by the practice to access the system (Web-enabled). The features available for the patients depend upon the settings established by the practice. Refer to Patient Portal Settings on page 37 for more information about setting up the Portal.

A new user interface (UI) replaces all earlier versions of the Patient Portal UI in V5.0. However, patients still have the option to select the previous interface if they choose to do so. As a result, while the new UI is featured, the “Classic View” is available as well.

Login and Pre-Registration

Patients can access the Patient Portal application from their home computers once they have been Web-enabled by the practice. When patients open the Patient Portal application, the Portal login window displays:
Patients enter a valid Username and secure Password, then click the Sign In button to access the Patient Portal.
New Patient Pre-Registration

Patients who are not already registered with the practice may register through the Portal. This saves the staff from having to manually enter pre-registration information when patients come into the office for their first visit.

**New patients take the following steps to pre-register:**

1. Click Pre-Register:
The Pre-Registration window displays:

2. The patient completes, at minimum, all required fields, indicated by a red asterisk (*), then clicks the Submit button when complete.
   The confirmation message displays, and the new patient information is sent to the practice.

3. The patient clicks the Home link to return to the Login window:

   The Login window displays.
Your practice now has the patient’s basic demographic information before the patient comes in for his/her first visit.

**Initial Login**

When a Web-enabled patient logs in to the Portal for the first time, the patient is asked to authenticate his/her identity before proceeding. After the patient clicks the SignIn button, the portal displays the User Validation window.

The patient enters either his/her birth date or phone number, then clicks the Submit button:

![User Validation Window]

The Reset Password window displays. Here, the patient enters a new password and a security question to ensure privacy and confidentiality. The example illustrates that the new password and its confirmation must be identical; and, the patient may select a security question or create his/her own:
Password Guidelines

For information about creating a strong password, the patient clicks the Password Guidelines link.

The Portal displays a dialog presenting guidelines for a strong password:
After entering and confirming a new password and selecting and answering a security question, the patient clicks the Submit button:

The next window displays two tabs, one opens the eClinicalWorks® consent form; the other, the practice’s consent form. The eClinicalWorks consent form opens first by default. The patient should use the scroll bar to read the entire consent form, then click the Next button:

The Practice Consent Form tab opens, displaying your practice’s consent form.
The patient scrolls down to read the entire document, then selects the check box to indicate that “I have read the consent form and the above information.” The patient then clicks the Agree button to accept the terms:

![Practice Consent Form](image)

I have read the consent form and the above information.

The Portal then displays an acknowledgement for the patient. The patient clicks OK, and the practice’s Portal Home Page displays.

This acknowledgement of the consent forms occurs only once, on a patient’s initial login to the Portal.

**Forgot Password**

When a Web-enabled patient forgets his/her login password, that password can be recovered using either the patient’s e-mail address and security question or the patient’s date of birth and phone number.

**Web-enabled patients take the following steps to recover their password:**

1. Click *Forgot Password?* on the login window:

   ![Forgot Password](image)

   The first Password Recovery Help window displays.

2. The patient enters the username and clicks the Submit button:
Password Recovery Help

Please enter Patient Portal username you received from the practice. Information to reset your portal password will be sent to email address associated with your account.

User Name
AnnHaand1972

The Portal displays a second Password Recovery Help window to confirm the patient’s request and indicate that an e-mail has been sent to the patient’s e-mail inbox.

The patient clicks the Login link to display the Login window:

Password Recovery Help

We have sent an e-mail to assist you with resetting your Patient Portal password to e-mail address j*****a@eclinicalworks.com. If you do not have access to this account, please contact your doctor’s office to update your record. Please Login after you recover your password.

A confirmation e-mail with password recovery link named Reset My Password is sent to the e-mail address associated with the patient’s account.
3. The patient clicks the password recovery link received in the e-mail from Portal Support:

![Password Recovery Email]

**Note:** The password recovery link is a one-time link and is valid for only 48 hours.

The Patient Portal Password Recovery window opens.

4. The patient enters the Username and answers the question associated with the Security Question, then clicks the Submit button:

![Password Recovery Form]

**Note:** If the Security Question is not set up for the patient’s account, he/she is asked to enter date of birth or phone number information to authenticate.
The New Password window opens.

5. The patient enters the new password then re-enters the new password to confirm it; and, if desired, the patient can change the Security Question and its Answer and click Submit.

If necessary, the patient can refer to the Password Guidelines on the window to create a secure password:

![Password Reset Window]

The patient’s Portal home page displays.
Welcome: Patient Portal Home Page

After logging in, patients see the practice’s customized Patient Portal Home page, from which they can access information, ask medical or administrative questions of the practice, receive reminders from the practice, and review specific documents, results, and reports regarding their healthcare. The home page display defaults to the Dashboard:

Note: Items on the Home Page appear at the discretion of the practice. Refer to Menu Settings on page 93 for more information.

Navigating the Home Page

The Home Page is divided into several panels to make it easier to categorize types of information and functionality.
Top Menu

A list of buttons displays across the top of the Home Page. These enable the patient to navigate, change their view of the Portal, get help, learn more about the practice, and Sign Out. The practice determines the items to appear in this menu:

Home

Clicking this icon returns the display to the patient’s Home Page.

Switch to Classic View

The patient clicks this button to change the display to the Classic View of Patient Portal. Classic View is the user interface that patients used in the previous versions of the Portal.

Help

The patient clicks this item to open the full Help system, enabling the patient to easily find any topic related to using the Patient Portal and learn about it.

Practice Details

The patient clicks the Practice Details button to open a drop-down menu listing detailed information that the practice chooses to make available to the patient, such as those shown in this example, Our Doctors, Working Hours, Directions, and Policies:
Sign Out

The patient clicks this button to sign out of the Portal. The Login window displays.

Menu Band

A menu band displays on the left side of the Home Page. The band includes menu items that have been added by the practice. Refer to Menu Settings on page 93 for more information about enabling the menu items.

From the band, the patient can select a particular function to perform. The configuration and makeup of your menu band may look like this example:
The patient can click on any of the categories to expand the display and see all the functionality available in that category.

For example, if the patient clicks My Account, that category expands to display all the features available under My Account:

The patient clicks My Account again to collapse the menu.

The patient can expand all the menu categories simultaneously by clicking Expand All, at the top of the band. The Expand All button then changes to read Collapse All, and the patient can collapse all the menu categories simultaneously by clicking that button:
From the menu band, patients can access the following categories:

- **Dashboard**: The Dashboard displays a key message from the practice and a number of panels, giving access, at the practice’s discretion, to messages, medical records, current medications, and more.

- **My Account**: This category gives patients access to their account information and billing statements, and enables patients to reset their password.

- **Messages**: This category gives patients access to their messages and enables them to request refills, lab/test results, and referrals.

- **Appointments**: The Appointments category enables patients to request a new appointment, see the date and time of scheduled appointments, and display a list of previous appointments.

- **Questionnaires**: This category gives patients access to questionnaires which the practice will use to collect information about patients’ medical history, surgeries and allergies, and immunizations; and enables the practice to conduct Web interviews with patients.

- **Medical Records**: In this category patients can access the medical records on file with the practice, display visit summaries, and request labs, refills, and referrals.

- **Health Tracker**: This category enables patients to review alerts and reminders sent to them from the practice.

- **Education**: The Education category gives patients access to any patient education that has been made available to them individually by the practice; and, it enables them to access the Healthwise® Knowledgebase, an interactive Web-based tool for enhancing patients’ knowledge of various medical conditions and questions.

The main panel in the home page window displays the practice’s welcome message and specific information for the patient:
The welcome message can be modified as needed to address the needs of the practice, including changing seasons (e.g., the fall flu shot season) or unique situations (e.g., a weather-related office closing). Refer to Welcome Message Setting on page 97 for more information about setting or modifying the welcome message.

**Using the Portal’s Features**

The Portal’s features and functions are accessible from the home page.

**Dashboard**

The dashboard presents an easy, graphical interface for patients to use in accessing information through the Portal.

Each panel in the dashboard represents one of the categories in the menu band. The example below shows panels for messages, medical records, and medications.

Within each panel, the patient has options for accessing different functions or types of information. In the messages panel, for example, the patient can click Create a message to compose a new message to the practice; or, the patient can click View all messages to display a list of messages in their inbox. Similar links display in each of the dashboard panels:
My Account

The My Account category enables patients to access their account information and change it as necessary.

Personal Information

Patients can click Personal Information to change or enter any valid demographic information for the practice. Required fields are indicated by a red asterisk:
Additional Information

Patients click Additional Information to enter or change other information for the practice, including their choice of pharmacy, employer, contacts, and other information:
Reset Password

Patients click Reset Password to change their password. Since they are already logged into the Portal, there is no authentication required (such as the security question set up in the Forgot Password function.

Patients enter their current password, then enter their new password twice, and click Submit:
Current Statement

Patients click Current Statement to display their current statement:
Past Statement

Patients click Past Statement in the My Account category to display a list of their past statements, from which they can select and display the detail of any one:
Patient View

Messages

The Messages category enables patients to manage the messages they have sent to and received from the practice.

Patients can:

- Check their Inbox for new messages and use it to store messages received from the practice
- View their list of Sent messages and maintain a record of the notes they have sent to the practice
- View a list of both sent and received messages that they have deleted
- Send messages to request labs and refills
- Send messages to request referrals

Inbox

Patients click Inbox to display a list of messages currently in their Inbox:

Messages that have not been opened are highlighted in **bold** type. The window displays 20 messages per page, and the right arrow enables the patient to see the next successive page.

Patients select and view messages in the following manner:

1. Click the message title.
   
   The new message displays.

2. The patient can click the Print button to print the message, or click Reply:
3. After reading the new message, the patient clicks the Close button. The Portal returns the display to the patient's Inbox. Clicking Reply displays the message window to compose a reply.

4. The patient clicks in the Message panel, types the reply message, and clicks Submit to send the message to the sender:

   Sent and Deleted Messages

   The messages window displays three tabs. In addition to the Inbox tab, there are also tabs for sent messages and Deleted messages:
Clicking on Sent Messages displays the patient's Sent Items list. Here the patient may either double-click a sent message to review it or click the check box before the message to select it for deletion. Selecting an item and clicking on the Delete button will remove the message from the Sent Items list and place it in the Deleted Items list:

Clicking the Deleted Messages tab displays a list of all the messages that the patient has deleted. Maintaining these items in the Deleted Items list gives the patient a record of previous communications to and from the practice.

The patient may open any one of the messages on the Deleted Messages list by double-clicking it. Or the patient may click the check box before one or more of the deleted messages to select them for deletion.

Deleting messages from the Deleted Messages list hides them from the view of the patient, but the system stores them to retain the historical data.
Composing a New Message

Above the list of messages in the Inbox – and the Sent and Deleted lists also – are two buttons that enable patients to compose a new message or delete a selected message from the displayed list.

Patients take the following steps to compose a new message:

1. The patient clicks the Compose button:

   ![Compose Button](image)

   The new general message window displays:

   ![Composing a New Message](image)

   - **To**: General Messages
   - **Subject**: 
   - **Addressed To**: 
   - **Message**: 

2. The patient clicks in the Subject field and types a subject for the message, then may click in the Addressed To field and type the name of a specific recipient in the office.

   When the patient enters a specific recipient’s name, the message will still go to whomever the practice has designated as the recipient of general messages. That person may then re-direct the message to the individual specified by the patient.

3. The patient clicks in the Message field and types the message.

4. The patient clicks Send to send the message.
5. The patient clicks OK.

The Portal displays the patient’s Inbox. The new message will appear in the patient’s list of Sent messages.

The patient’s message to the practice constitutes a Web encounter.
Deleting a Message

Above the list of messages in the Inbox and the Sent and Deleted message lists is a button that allows patients to delete a selected message from the displayed list.

To delete messages, the patient takes the following steps:

1. The patient first selects the empty check box(es) before the Received From or Sent To field, as shown below:

   Action will be taken on each of the selected messages.

2. Next the patient clicks the Delete button.

   The Portal displays the list without the items that have been deleted.

   If the items were deleted from the Inbox or Sent Items list, they will appear on the Deleted Items list. Items deleted from the Deleted Items list are hidden from the view of the patient, but stored in the system.
Refill Requests

Patients may request refills of their current prescriptions by taking the following steps:

1. Patients click Refill Requests in either the Messages or Medical Records category to request refills. The Portal displays the Current Medication list, displaying all the medications that the patient currently has prescribed by the practice.

2. The patient clicks the check box before the medication(s) requested for refill.

3. The patient then clicks the Refill Request button at the bottom of the list:

The Portal displays a Refill Request message to the practice to request the refill:
4. The patient next selects a pharmacy from the drop-down list of available pharmacies on record:
Refill Request

To:
Refill Messages

Subject:
New Refill Request

Priority: Routine

Pharmacy:

A & P Pharmacy #391-75 Mayhill St, , Saddle Brook, NJ [Phone 201-712-9151]
A & P Pharmacy #413-120 N Main St, , Manville, NJ [Phone 908-685-9858]
A & P Pharmacy #417-407 King George Rd, , Easking Ridge, NJ [Phone 908-991-0007]
ABC Pharmacy- 841 W. Valley Blvd, , Alhambra, CA [Phone 626-457-8888]
ABC PHARMACY- 3050 E BONANZA RD STE #140, , LAS VAGAS, NV [Phone 702-541-8000]
ABC Pharmacy- 201 Ave. De Diego, Ste 55, , San Juan, PR [Phone 787-763-8996]
Costco 1185-65TH INFANTRY AVENUE- 1185-65TH INFANTRY AVENUE, , SAN JUAN, PR [Phone 787-999-7203]
Costco 469- 8125 FLETCHER PARKWAY, , LA MESA, CA [Phone 619-667-8520]
Costco Pharmacy # 1000-6675 Marie Curie Drive, , Elkridge, MD [Phone 410-423-4059]
Costco Pharmacy # 1001-2700 PARK AVENUE, , TUSTIN, CA [Phone 714-238-1942]

After the patient clicks one pharmacy to select it, that pharmacy name displays in the Pharmacy field.

5. The patient edits the message.
The patient should respond to any questions from the practice, including the number of refills being requested:

6. The patient clicks Submit so send the request to the practice.

The Portal displays a confirmation that the message was sent successfully.
Test/Lab Request

Lab requests are made by clicking on Lab Request in the Messages category.

The Portal displays the New Lab Request window, like the one shown below, in the form of a New Lab Request message to the practice:

New Lab Request
To: Lab Messages
Subject: New Lab Request

Category (Press Ctrl key to select multiple Categories):

Message:
Please reorder the selected lab(s).

The patient takes the following steps to complete the request:

1. The patient may change the default subject (New Lab Request) by clicking in the field, deleting the default subject, and typing their own subject.

2. The patient next selects the category or categories of lab work to be requested.

   To do so, the patient clicks the Category drop-down arrow and then clicks once on the appropriate category.

   If the patient wants to select more than one category, he/she can click once on additional categories in the list while holding down the CTRL key.
3. Once the category has been selected, the patient can then place the cursor in the Message field and modify or add to the existing message.

4. Finally, the patient clicks the Submit button to send the request to the practice, and the Portal acknowledges that the message has been sent.

5. The patient then clicks OK in the acknowledgement dialog.

   The Portal displays the Portal Home Page.

---

**Referrals**

To request a new referral, the patient selects Referral Request from either the Messages category or the Medical Records category. The Portal displays a list of the patient’s past referrals:
Request a new Referral

To request a new referral:

1. The patient clicks the Request Referral button.

   The Portal displays the New Referral Request window. The To and Subject fields are populated by default, to be directed to the appropriate recipient in the practice with the appropriate subject to identify the message.

2. The patient clicks the Message field and types an explanation/request for the practice, then clicks the Submit button:

   ![New Referral Request Window]

   The Portal displays a confirmation that the request has been sent.

Renew a Past Referral

To renew a past referral:

1. The patient selects the check box for the referral to be renewed:

   ![Past Referrals Table]

   The Portal displays the New Referral Request window with all past referrals displayed in the Message field.
2. If necessary, the patient scrolls down to display each referral displayed in the Message field.
3. The patient types a message indicating that the referral should be renewed, and clicks Submit:

The Portal displays an acknowledgment that the referral request has been submitted.

Appointments

The Patient Portal enables the patient to request a new appointment, to view current/future appointments scheduled with the practice, and, if the Enable Display of Patient’s Historical Appointments item is set to Yes in Feature Settings, to view a list of previous appointments.

The Patient Portal menu also allows the patient, if the Enable Real-Time Scheduling item is set to Yes in Feature Settings, to create a new appointment directly from the Portal.

The patient can request a new appointment by selecting New Appointment, review current and future appointments that have already been set by selecting Current Appointments, or review a list of previous appointments by clicking Historical Appointments if that item has been set to display.

Current Appointment

Patients can display their current, upcoming appointments by clicking Current Appointment in the Appointments category. The Portal displays a graphic with options enabling the patient to view details about the current appointment, request a new appointment, or view additional appointments:
When the patient clicks the *Click here for more details* link, the Portal displays the appointment details window. The appointment details include the date and time of the appointment, the reason (if entered), the provider seeing the patient, and the facility.

The Scheduled Appointment Details window give the patient the option to reschedule or cancel the appointment:

**Reschedule an Appointment**

To reschedule an appointment:

1. The patient clicks the Reschedule button on the Scheduled Appointment Details window. The Portal displays a dialog asking the patient to confirm that the appointment should be changed.

2. The patient clicks OK to proceed with rescheduling the appointment, or Cancel to get out of the process without cancelling:
The Portal displays the Reschedule Appointment Request window.

3. The patient enters data in all required fields (marked with a red asterisk).

Some of the entries will be selected from drop-down lists; others will be selected after clicking in the field (calendar for dates, for example); others will be typed manually:

4. The patient scrolls to the bottom of the window and completes the entries, including a text entry in the Message field to explain the reason for the rescheduling.

5. The patient then clicks Submit to complete the request to reschedule:
Cancel an Appointment

The patient clicks the Cancel button on the Appointment Details window to cancel an appointment.

The Portal displays a confirmation dialog.

The patient clicks OK to confirm the cancellation:
New Appointment

To set up a new appointment, patients click New Appointment in the Appointments category. The Portal displays the New Appointment Request window:

1. The patient selects the facility from a Facility, Provider, and Visit Type from their respective drop-down lists.
2. Next, the patient enters a reason for the appointment in the Reason field.
3. The patient clicks in the Date From field, which displays the current date. A calendar displays:
4. After using the navigation tools to select the correct month, the patient clicks the earliest date on which the appointment should be scheduled.

5. The patient next enters a message to the practice, in which any additional information about the appointment can be added.

6. The patient clicks the Search button.

   The appointment request is submitted to the practice.

   The Portal acknowledges the successful communication of the message.

   If mail Appointment Confirmation is enabled in Feature Settings, a confirmation message will be sent to the patient’s inbox when the appointment is set up:
Historical Appointments

To view previous appointments, the patient clicks Historical Appointments in the Appointments category. The Portal displays the Previous Appointment Listing:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Facility</th>
<th>Provider</th>
<th>Reason</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/21/2012</td>
<td>02:45 PM</td>
<td>Boca South</td>
<td>Sam Willis</td>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td>08/16/2012</td>
<td>04:00 PM</td>
<td>Westborough Medical Assoc</td>
<td>Sam Willis</td>
<td></td>
<td>Pending</td>
</tr>
</tbody>
</table>

The patient can contact the practice for specific information about any one of the appointments.

Questionnaires

Various questionnaires (intake forms) and their specific content are selected by the practice to collect and maintain information about patients. The various forms are used to categorize and specify information particular to the practice and the patients it serves.

Since the practice can select and name these forms and the questions that appear on them, the menu items listed under Intake Forms will vary from one practice to another.

The forms, created in Questionnaire Designer, are completed by the patient in advance of treatment. For information on Questionnaire Designer, refer to Designing a Questionnaire on page 78 in the Settings section.

The various questionnaires are accessed from the Questionnaires category. The questionnaire names selected and designed by the practice display as tabs across the top of the Questionnaires window.
Medical History

To enter medical history, the patient clicks the Medical History tab. The questions have been developed by the practice in the Questionnaire Designer, as an administrative function in preparing the content of the forms:

1. The patient completes the form by clicking the appropriate button to indicate a Yes or No response, by selecting one of multiple options, or by entering a free-text response.

2. Depending upon the length of the questionnaire, the patient may be asked to either Submit and Continue if there are follow-up questions on another page, or just Submit if questioning is complete.

When questioning is complete, the Portal responds with the message:
The Medical History questionnaire has been submitted successfully.

Each questionnaire can be submitted only once per session.

Other menu items, such as Social History, Family History, Demographics, and others, may be selected for use by the practice and added to the Questionnaires category. They are completed by the patient in the same manner as the example above.

**Surgical and Allergies**

Practices may require their patients to complete the Surgical and Allergies form prior to their first visit to the practice to ensure that appropriate history has been collected. This form is completed by the patient in a different manner than the previous forms:

<table>
<thead>
<tr>
<th>Surgical History and Allergies Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please fill out your surgical history if you have not already submitted.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Surgery</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The form is made up of three sections, one each for Surgery, Hospitalizations other than those for surgical treatment, and Allergy information. The surgery and hospitalization sections ask for the name of the surgery or the reason for hospitalization and the dates of treatment for each. In the Allergy section the Portal asks for the drug or substance the patient is allergic to and the allergic reaction the patient has upon exposure to the allergen.
To complete the form, the patient clicks the Surgery or Hospitalization field for example, to enter the type of surgery or reason for hospitalization, then clicks the Date field to display a calendar. The patient clicks the appropriated date on the calendar to add it to the form:

When the form has been completed, the patient clicks on the Submit button. The Portal presents the message *Surgical and Allergies Information have been successfully submitted.* The patient clicks OK. The Portal returns the display to the Portal Home Page.

**Immunizations**

Those practices that have been enabled to do so can collect a record of the patient's immunizations, including a list of immunizations with a date field for the patient to complete. If a patient has had no access to a particular vaccine, there is a check box to indicate the reason for an incomplete record.

If the practice has been enabled for this feature, the patient can select Immunizations in the Questionnaires category, and the Portal will display a window listing a typical course of immunizations.

The patient indicates each immunization by entering the date of the immunization in the Date field. The patient may type the date manually (mm/dd/yyyy format) or click the calendar box at the end of the field to display a calendar where the patient clicks the date he/she received the vaccine:
When the record is complete, the patient clicks Submit. The Portal displays an acknowledgment that the forms have been submitted successfully, and reminding the patient that Immunization information should be submitted only once.

**Medical Records**

Patients can use this category to display a variety of types of information selected by the practice, including lab and diagnostic reports, a summary or their visits, and two views of their personal health records. They can also make refill requests and view referrals.

**Lab/Diagnostic Reports**

Selecting the Lab / Diagnostic Reports item in the Medical Records category displays a list of lab reports available for viewing by the patient. The list shows the date the test was ordered, the name of the test, the reason for the test, and the result:
The patient can click the report name to display that report’s detail:

<table>
<thead>
<tr>
<th>Order Dt</th>
<th>Name</th>
<th>Reason</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/14/2012</td>
<td>Hemoglobin A1c</td>
<td></td>
<td>Normal</td>
</tr>
<tr>
<td>08/14/2012</td>
<td>Lipid Panel</td>
<td></td>
<td>Abnormal</td>
</tr>
<tr>
<td>08/08/2012</td>
<td>CBC With Differential/Platelet</td>
<td>Annual Physical</td>
<td></td>
</tr>
</tbody>
</table>
**New Lab Request**

Lab requests are made by clicking the Lab Request link.

The Portal displays the New Lab Request message to the practice.

The patient first selects the lab category from the drop-down list, then adds any additional text to the message, and clicks Submit:

```
New Lab Request
To: Lab Messages
Subject: New Lab Request

Category (Press Ctrl key to select multiple Categories):
- Cholesterol
- Glucose
- PT-INR
- Mammogram
- Pregnancy Test

Message:
Please reorder the selected lab(s).

Dr. Willis instructed me to have this done every three months for the next year.
```

The portal displays an acknowledgment.

The lab request is sent to the address set up as the default by the practice, and the Subject is New Lab Request (or a term set up by the practice). The Subject field can be changed; the recipient (To) cannot.

---

**Visit Summary**

**Meaningful Use**
Selecting Visit Summary in the Medical Records category enables patients to view a list of all visits for which visit summaries are available.

To display the visit summaries, patients take these steps:

1. Select the Visit Summary option in the Medical Records category.
   The Visit Summaries window opens.

2. The patient clicks on the facility name to open the corresponding visit summary:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Facility</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
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<td>Sam Willis</td>
</tr>
<tr>
<td>08/16/2012</td>
<td>04:00 PM</td>
<td>Westborough Medical Assoc</td>
<td>Sam Willis</td>
</tr>
</tbody>
</table>

3. The patient reviews the information; and, when finished, returns to the Visit Summary list, downloads the file, or prints it:

   - << Visit Summary List
   - Download In CCD Format
   - Print

   Westborough Medical Associates Continuity Of Care Document

   **Patient**
   - Patient: Ann Haand
   - MRN: UNK
   - Sex: Female
   - Birthdate: August 13, 1972
   - Address: , MA, 941-000-0000

   **Table Of Content**
   - Allergies
   - Problems
   - Medications
   - Results

   **Allergies**
   - No Known Allergies

   **Problems**
   - Problems not verified

   **Medications**
   - Erythromycin Stearate: NDC 23490-5516-01, 1 tablet 250 MG Orally Four times a day, Unknown, Unknown, Active, Taking
   - Amoxicillin: NDC 00093-3107-01, 2 capsules 250 MG Orally every 8 hrs, Unknown, Unknown, Active, Taking

   **Results**
   - No Known Results

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   **Patient Name** Ann Haand  **Date of Birth** August 13, 1972  **Created On** August 23, 2012
**PHR - Complete Report**

**Meaningful Use**

The complete report provides a comprehensive presentation of data collected both from the patient and through the practice's encounters with the patient.

To access the report, the patient clicks *PHR-Complete Report* in the Medical Records category. The displayed report is also available for download in CCD or PDF format.

The Portal displays a window showing a summary of the patient's demographics, as well as allergies, problem lists, current medications, and lab results:
## Patient View Using the Portal’s Features

### Boca South Continuity Of Care Document

**Patient**
- **Patient:** A A
- **MRN:** UNK
- **Sex:** Male
- **Birthdate:** May 29, 1978
- **Address:** 344 Kemp St Westborough, MA, 01581555-555-5521

### Table Of Content

#### Allergies, Adverse Reactions, Alerts

**Problems**
**Medications**

**Results**

#### Allergies, Adverse Reactions, Alerts

<table>
<thead>
<tr>
<th>Substance</th>
<th>Reaction</th>
<th>Event Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penicillin G Pot in Dextrose</td>
<td>Rash</td>
<td>Drug Allergy</td>
</tr>
<tr>
<td>1st Choice Lancets Thin</td>
<td>Info Not Available</td>
<td>Non Drug Allergy</td>
</tr>
</tbody>
</table>

#### Problems

<table>
<thead>
<tr>
<th>Problem Type</th>
<th>Condition</th>
<th>ICD-9 Code</th>
<th>Effective Dates</th>
<th>OnSet Dates</th>
<th>Condition Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem</td>
<td>Asthma, unspecified with status asthmaticus</td>
<td>493.91</td>
<td>Aug 14, 2012</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>

#### Medications

**No Known Medications**

### Results

<table>
<thead>
<tr>
<th>Test</th>
<th>Attribute</th>
<th>Value (Normal Range)</th>
<th>LOINC Code</th>
<th>Result</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hemoglobin A1c</td>
<td>Hemoglobin A1c</td>
<td>6.0 ()</td>
<td>17856-6</td>
<td>Normal</td>
<td>Aug 26, 2012</td>
</tr>
<tr>
<td>Lipid Panel</td>
<td>Cholesterol, Total</td>
<td>255 ()</td>
<td>35243-5</td>
<td>Abnormal</td>
<td>Aug 26, 2012</td>
</tr>
<tr>
<td>Lipid Panel</td>
<td>Triglycerides</td>
<td>150 ()</td>
<td>3043-7</td>
<td>Abnormal</td>
<td>Aug 26, 2012</td>
</tr>
<tr>
<td>Lipid Panel</td>
<td>HDL Cholesterol</td>
<td>40 ()</td>
<td>12772-0</td>
<td>Abnormal</td>
<td>Aug 26, 2012</td>
</tr>
<tr>
<td>Lipid Panel</td>
<td>VLDL Cholesterol Calc</td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lipid Panel</td>
<td>LDL Cholesterol Calc</td>
<td>120 ()</td>
<td>46985-8</td>
<td>Abnormal</td>
<td>Aug 26, 2012</td>
</tr>
<tr>
<td>CBC With Differential/PlateletWBC</td>
<td></td>
<td>1 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletRBC</td>
<td></td>
<td>2 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletHemoglobin</td>
<td></td>
<td>3 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletHematocrit</td>
<td></td>
<td>4 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletMCV</td>
<td></td>
<td>5 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletMCH</td>
<td></td>
<td>6 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletMCHC</td>
<td></td>
<td>7 ()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletNeutrophils</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletLymphs</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletMonocytes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletEos</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletBasos</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletPlatelets</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletHematology Comments</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletNeutrophils Absolutes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletLymphs Absolutes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletMonocytes Absolutes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletEos Absolutes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletBaso Absolutes</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBC With Differential/PlateletROW</td>
<td></td>
<td>()</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© Powered by eClinicalWorks

Patient Name: A A  Date of Birth: May 29, 1978  Created On: August 27, 2012

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The patient may review the information by scrolling through the report, print the report, or download the report in CCD or PDF format by clicking the appropriate links.

While it provides comprehensive information, the report is not the patient's complete health record.

---

**PHR - View**

Selecting PHR-View enables the patient to view one segment of his/her personal health record at a time, rather than the consolidated content shown in the PHR Complete Report.

The patient selects PHR-View in the Medical Records category to display the report. Each topic displays the same content as the corresponding section of the complete report, but as a discrete piece of information.

Click any of the topics to display the detail for that item:

![PHR View Panel]

---

**Referrals**

Patients can request a new referral from this category.

For information, refer to [Request a new Referral](#) on page 235.

---

**Health Tracker**

The Health Tracker enables patients to display any reminders and alerts sent by the practice.
Reminders

The Reminders topic in the Health Tracker category enables the patient to display generic and patient specific alerts for labs, immunizations, billing items, and other topics defined by the practice.

The patient clicks Reminders in the Health Tracker category to display the list of reminders:

<table>
<thead>
<tr>
<th>Test Name</th>
<th>Last Done</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pap Smear, 1 Slide</td>
<td>Currently Due</td>
<td></td>
</tr>
<tr>
<td>CHOLESTEROL HDL SUBCLASS</td>
<td>Currently Due</td>
<td></td>
</tr>
<tr>
<td>DTap</td>
<td>Currently Due</td>
<td></td>
</tr>
</tbody>
</table>

The table shows the name of the test or alert topic, the date on which it was last done, if applicable, and the date it is currently due.

CDSS Alerts

CDSS alerts are generated automatically, based on a pre-configured set of specific quality measures. When a patient meets the criteria of a specific set of quality measures, indicating that the patient requires specific care, the alert is published for the patient.

The patient clicks CDSS Alerts in the Health Tracker category or clicks the CDSS tab on the window to display the list of CDSS alerts.

Education

To enhance the explanation of a symptom or condition, the practice may provide patients with additional information. The practice may subscribe to services and set up appropriate third-party information in order to provide the patient with the most complete information available.

When the patient clicks on Patient Education in the Education category, the Portal displays a window listing the educational material appropriate to each of the patient’s conditions, as determined by the physician.

The patient clicks one of the links in the Description column to display the educational material:
The patient can scroll through the material, with the option of reading it online or printing it. Other links enable the patient to find more information or return to the Patient Education List provided by the practice:

**Cholesterol and lifestyle**

Your body needs cholesterol to work well. But cholesterol levels that are too high can harm you.

Extra cholesterol in your blood builds up inside the walls of your blood vessels. This buildup is called plaque. Plaque reduces, or even stops, the blood flow. This can cause a heart attack, stroke, or other serious heart disease.

See also: Cholesterol - drug treatment

Cholesterol is measured in milligrams per deciliter (mg/dL). Most people should have their blood cholesterol levels tested at least every 5 years once they reach ages 20 - 45. Have your cholesterol checked more often (probably every year) if you have:

- Diabetes
- Heart disease
- Blood flow problems to your feet or legs
- Had a stroke

A blood cholesterol test measures the level of total cholesterol. This includes both HDL ("good") cholesterol and LDL ("bad") cholesterol.
APPENDIX A: E-MAIL MESSAGE TAGS

This section outlines the list of tags available in each e-mail message type. While composing the messages, the practice can incorporate these tags in the e-Mail Content panel.

Appointment-Related Tags

Below is the tabular description of the tags available in the e-mail message types:

- *Appointment Reminders*
- Appointment Confirmations

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Appointment Date</td>
</tr>
<tr>
<td>2.</td>
<td>Appointment Time</td>
</tr>
<tr>
<td>3.</td>
<td>Appnt Facility Address1</td>
</tr>
<tr>
<td>4.</td>
<td>Appnt Facility Address2</td>
</tr>
<tr>
<td>5.</td>
<td>Appnt Facility City</td>
</tr>
<tr>
<td>6.</td>
<td>Appnt Facility State</td>
</tr>
<tr>
<td>7.</td>
<td>Appnt Facility Name</td>
</tr>
<tr>
<td>8.</td>
<td>Appnt Facility Phone</td>
</tr>
<tr>
<td>10.</td>
<td>Guarantor First Name</td>
</tr>
<tr>
<td>11.</td>
<td>Guarantor Last Name</td>
</tr>
<tr>
<td>12.</td>
<td>Link to Google Map</td>
</tr>
</tbody>
</table>
E-Mail Message Tags

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Patient’s Default Facility Name</td>
</tr>
<tr>
<td>14.</td>
<td>Patient’s Default Facility Phone</td>
</tr>
<tr>
<td>15.</td>
<td>Patient First Name</td>
</tr>
<tr>
<td>16.</td>
<td>Patient Middle Name</td>
</tr>
<tr>
<td>17.</td>
<td>Patient Last Name</td>
</tr>
<tr>
<td>18.</td>
<td>Portal Link</td>
</tr>
<tr>
<td>19.</td>
<td>Patient User Name</td>
</tr>
</tbody>
</table>

Notification-Related Tags

Below is the tabular description of the tags available in the e-mail message types:

- *Alert Reminders*
- Lab Published Information
- Statement Information
- New Message Information
- Subscription Expiry Information

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Guarantor First Name</td>
</tr>
<tr>
<td>2.</td>
<td>Guarantor Last Name</td>
</tr>
<tr>
<td>3.</td>
<td>Patient’s Default Facility Name</td>
</tr>
<tr>
<td>4.</td>
<td>Patient’s Default Facility Phone</td>
</tr>
<tr>
<td>5.</td>
<td>Patient First Name</td>
</tr>
<tr>
<td>Tag</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>6. Patient Middle Name</td>
<td>Patient’s Middle Name</td>
</tr>
<tr>
<td>7. Patient Last Name</td>
<td>Patient’s Last Name</td>
</tr>
<tr>
<td>8. Portal Link</td>
<td>Practice’s Patient Portal URL</td>
</tr>
<tr>
<td>9. Patient User Name</td>
<td>Patient’s Portal User Name</td>
</tr>
</tbody>
</table>
APPENDIX B: NOTICES

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