eClinicalMobile Users Guide

A guide to configuring and using the eClinicalMobile™ Version 2.0 application on smartphones.
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ABOUT eCLINICALMOBILE

Overview

eClinicalMobile™ begins a new era in connectivity for eClinicalWorks®, by allowing physicians and staff to securely access and edit a customized set of eClinicalWorks features from their smartphones. A phone-friendly user interface has been developed to help physicians perform common out-of-office tasks, such as accessing schedules, writing prescriptions, adding new patients, and capturing charges.

The eClinicalMobile login process is provider-specific; therefore the schedule and encounters information displayed is related to the logged-in user only. Schedule and encounter data is encrypted and is synchronized with the main eCW application through a secure portal.

On the portal side of the application, eClinicalMobile is similar in design to eCW’s Patient Portal product. Information is synchronized between the physician’s smartphone and the eClinicalWorks application on demand or at scheduled intervals.

eClinicalMobile is an add-on service for eClinicalWorks Version 8.0.47 and higher. For more information about eClinicalMobile, including activation and fees, contact the eClinicalWorks Sales Department at sales@eclinicalworks.com.

Product Documentation

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

- System Administration Users Guide
- Front Office Users Guide
- Electronic Medical Records Users Guide
- Billing Users Guide
- Release Notes
- Patient Portal Users Guide
- eClinicalMessenger Users Guide
- eClinicalMobile Users Guide

Finding the Documents

eClinicalWorks Documentation is available from the following:

- The eClinicalWorks Support Portal:
  http://support.eclinicalworks.com

Getting Support

Send messages directly to eClinicalWorks Support through the eClinicalWorks Support Portal: http://support.eclinicalworks.com

You may also call or e-mail eClinicalWorks Support:
  Phone: (508) 475-0450
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><strong>Bold</strong></th>
<th>Identifies options, keywords, and items in a description.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italic</strong></td>
<td>Indicates variables, new terms, and concepts, foreign words or emphasis.</td>
</tr>
<tr>
<td><strong>Monospace</strong></td>
<td>Identifies examples of specific data values, and messages from the system, or information that you should actually type.</td>
</tr>
</tbody>
</table>
ACCESSING eCLINICALMOBILE

eClinicalMobile can be accessed from the following location in any Web browser:  http://www.eclinicalmobile.com.

Supported Devices/Methods

The initial launch of eClinicalMobile was developed using the Apple® iPhone 3G™. However, the eClinicalMobile application will function on any other smartphones that can connect to the Internet through a Web browser (e.g., Blackberry Storm® and T-Mobile G1® with Google®2).

Also, the eClinicalMobile application is not required to run strictly on a smartphone; it can be used equally as well through a typical Internet browser. All of the functionality that is accessible on the smartphone is available in the browser version run on a PC, laptop, or tablet.

IMPORTANT! Because it was developed for the iPhone, it is recommended to use Apple's Safari® Internet browser when you are accessing eClinicalMobile on a computer. To download this browser, go to http://www.apple.com/safari/.

For smartphones other than the iPhone, it is recommended that you use the Opera Mini Internet browser. To download this browser from your smartphone, go to http://www.opera.com/mini/.

Note: The Blackberry Tour® native browser is also supported by eClinicalMobile.

The following image displays the eClinicalMobile application when viewed through an Internet browser on a standard laptop:
The image displayed above shows the eClinicalMobile window reduced to mimic how the application looks on a smartphone, but all functionality can also be viewed in full-screen as well:
Using eClinicalMobile on an Opera Mini Browser

To use eClinicalMobile on the Opera Mini Internet browser (which is used on many smartphones), the Minimum phone number length setting must be configured.

To configure the Minimum phone number length for the Opera Mini browser:

1. Open the Opera Mini browser.
2. Remove the www. from the address bar.
3. Type opera:config into the address bar and click Send or Enter.
   The Power User Settings screen displays.
4. Select 9 from the Minimum phone number length drop-down list:

   ![Power User Settings](image)

5. Click the Save button.
   The Opera Mini browser is now configured for use with eClinicalMobile.

Adding an eClinicalMobile Icon to the Home Page on an iPhone

A quick-link icon to access eClinicalMobile can be added to the iPhone Home Page. This allows you to access the eClinicalMobile webpage with one click, just like opening an app.
To add an eClinicalMobile icon to the iPhone Home Page:

1. From the iPhone Home Page, tap the Safari icon:

The Safari Internet browser opens.

2. Navigate to the eClinicalMobile Website.

3. Tap the plus sign (+) icon at the bottom of the window:

A drop-down list opens.

4. Tap the Add to Home Screen button:
The Add to Home window opens:

5. Optionally, change the description for this icon as desired.
6. Click the Add button:
A link to the eClinicalMobile Website is now added to your Home Page as an icon:
HOME PAGE

The eClinicalMobile Home Page is the base location for all navigation within the application. By default, the Home Page displays upon login, and it can be returned to from any point within the application by clicking the eClinicalMobile logo at the top of the screen.

Navigation

The eClinicalMobile log-in process is provider-specific; therefore the schedule and encounters information displayed is related to the logged-in user only.

The Home Page displays a set of icons that lead to the features most commonly used by physicians during out-of-office situations. Simply click an icon or link to navigate to the desired section:

**iPhone:**

- Schedule
- Tel/Web Encounters
- Labs/Imaging
- Search
- Messages
- New Patient
- Prescription Refills
- Settings
- Charge Capture
- Sign Out

**Smartphone:**

1. Schedule
2. Tel/Web Encounters (319)
3. Labs/Imaging (8)
4. Search
5. Messages (5)
6. New Patient
7. Prescription Refills (22)
8. Charge Capture

Menu 09:48 Back
The sections included are:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Opens the Schedule window for viewing past and pending appointments and appointment-related details. For more information on the Schedule screen, refer to the chapter titled Schedule on page 19.</td>
</tr>
<tr>
<td>Tel/Web Encounters</td>
<td>Opens the Telephone/Web Encounters window for viewing past telephone and Web encounters and encounter-related information. Users can manage the encounter status, indicate an action, and assign the encounter to a staff member from this screen. For more information on the Tel/Web screen, refer to the chapter titled Tel/Web Encounters on page 24.</td>
</tr>
<tr>
<td>Labs/Imaging</td>
<td>Opens the Labs/Diagnostic Imaging window for viewing past labs or diagnostic imaging tests. Users can review the test information and results, manage the status, add internal and external notes, and assign the lab/DI to a staff member from this screen. For more information on the Labs/Diagnostic Imaging screen, refer to the chapter titled Labs/Diagnostic Imaging on page 29.</td>
</tr>
<tr>
<td>Search</td>
<td>The Search screen allows users to search for patients by Last Name, First Name, Gender, and/or Phone Number. For more information on the Search screen, refer to the chapter titled Search on page 35.</td>
</tr>
<tr>
<td>Messages</td>
<td>The Messages screen allows users to view received internal messages, as well as send messages to other staff at their practice. For more information on the Messages screen, refer to the chapter titled Messages on page 38.</td>
</tr>
<tr>
<td>New Patient</td>
<td>The New Patient screen allows the user to quickly document a new patient with the basic information needed to populate the eCW Patient Information window (Demographics). The fields on this screen generally include basic demographic information, but they can also be configured to include more fields, such as Emergency Contact and Employer information. For more information on the New Patient screen, refer to the chapter titled New Patient on page 41.</td>
</tr>
<tr>
<td>Prescription Refills</td>
<td>Requests for prescription refills can be reviewed and either accepted or denied from this screen. For more information on the Prescription Refills screen, refer to the chapter titled Prescription Refills on page 45.</td>
</tr>
<tr>
<td>Settings</td>
<td>The Settings screen allows users to configure various personal settings for eClinicalMobile™. For more information on the Settings screen, refer to the chapter titled Settings on page 84.</td>
</tr>
</tbody>
</table>
## Administration

The Administration icon on the Home Page is displayed only for administrators:

### iPhone:
- Prescription Refills (0)
- Settings
- Charge Capture
- Sign Out
- Administration

### Smartphone:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Charge Capture</strong></td>
<td>The Charge Capture screen allows providers to record billing charges for out of office encounters. For more information on the Charge Capture screen, refer to the section titled Charge Capture on page 74.</td>
</tr>
<tr>
<td><strong>Sign Out</strong></td>
<td>Click the Sign Out icon to log out of the application instantly. The screen refreshes with the Login screen.</td>
</tr>
</tbody>
</table>

Clicking this icon gives the user access to administrative functions.

### eClinicalMobile Access Logs

User access logs for eClinicalMobile can be viewed by administrators by clicking the Administration icon on the eClinicalMobile Home Page:
### Using the Calendar Icons on the iPhone

The calendar icons are used to view access logs in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="All" /></td>
<td><strong>All</strong> - Displays a list of all logs for all dates.</td>
</tr>
<tr>
<td><img src="image" alt="Today" /></td>
<td><strong>Today</strong> - Displays a list of all logs for the current day.</td>
</tr>
<tr>
<td><img src="image" alt="Yesterday" /></td>
<td><strong>Yesterday</strong> - Displays a list of all logs for the previous day.</td>
</tr>
<tr>
<td><img src="image" alt="Last Week" /></td>
<td><strong>Last Week</strong> - Displays a list of all logs for the previous seven (7) days.</td>
</tr>
<tr>
<td><img src="image" alt="Last Month" /></td>
<td><strong>Last Month</strong> - Displays a list of all logs for the previous thirty (30) days.</td>
</tr>
</tbody>
</table>
### Date Range

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
<td>Displays the date range icons at the bottom of the Access Logs screen.</td>
</tr>
</tbody>
</table>

### Searching for Logs by Date Range

In addition to the calendar icons, the screen also contains date range fields as another option. To open the *From* and *To* fields, click the Date Range icon.

The *From* and *To* date range fields default to the current date. To search for logs by date range, use the *From* and *To* fields on the Schedule window to select a date range, and then click **Search**:

- **From**: 02/26/2009  
  *(mm/dd/yyyy)*
- **To**: 03/26/2009   
  *(mm/dd/yyyy)*

**iPhone Note:** Click the *From* or *To* date field to open the keyboard display.
Access Logs List Results

After the access log search criteria has been selected, the screen refreshes with a list of ten (10) results per page.

The following table describes each section of the Access Logs screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>eClinicalMobile</strong></td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td><strong>Search</strong> <strong>Access Logs</strong></td>
<td>Returns the user to the main Access Logs page.</td>
</tr>
<tr>
<td></td>
<td>Click the line item to open the selected encounter. The line item displays the encounter date, patient name, and reason for the encounter.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>iPhone:</th>
<th>Smartphone:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>&lt;&lt; Back More &gt;&gt;</strong></td>
<td><strong>&lt;&lt; Search More &gt;&gt;</strong></td>
</tr>
</tbody>
</table>

- **iPhone:** Click the back or forward arrow icon to scroll through multiple pages of results.
- **Smartphone:** Click the **<< Back More >>** links to scroll through multiple pages of results.

The total number of search results displays at the bottom of the screen.
All of your scheduled appointments can be viewed from the Schedule section.

**About the Schedule Window**

The Schedule window is accessed from the eClinicalMobile Home Page, and it provides quick navigation to provider-specific appointment schedules:

**iPhone:**

![iPhone Schedule Window]

**Smartphone:**

![Smartphone Schedule Window]

To view the schedule for a different provider, select the desired provider from the Provider drop-down list.

**Using the Calendar Icons on the iPhone**

The calendar icons are used to view appointments quickly without the need for typing. Appointments can be viewed in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Yesterday Icon" /></td>
<td><strong>Yesterday</strong> - Displays a list of all appointments for the previous day.</td>
</tr>
<tr>
<td><img src="image" alt="Tomorrow Icon" /></td>
<td><strong>Tomorrow</strong> - Displays a list of all appointments for the upcoming day.</td>
</tr>
</tbody>
</table>
Searching the Schedule by Date Range

In addition to the calendar icons, the screen also contains date range fields as another option. To open the From and To fields, click the Date Range icon.

The From and To date range fields default to the current date. To search for appointments or patients by date range, use the From and To fields on the Schedule window to select a date range, and then click Search:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Last Week Icon" /></td>
<td><strong>Last Week</strong> - Displays a list of all appointments for the previous seven (7) days.</td>
</tr>
<tr>
<td><img src="image" alt="Next Week Icon" /></td>
<td><strong>Next Week</strong> - Displays a list of all appointments for the upcoming seven (7) days.</td>
</tr>
<tr>
<td><img src="image" alt="Today Icon" /></td>
<td><strong>Today</strong> - Displays a list of all appointments for the current day.</td>
</tr>
<tr>
<td><img src="image" alt="Date Range Icon" /></td>
<td><strong>Date Range</strong> - Displays the date range icons at the bottom of the Schedule screen.</td>
</tr>
</tbody>
</table>

**iPhone Note:** Click the From or To date field to open the keyboard display.
Appointment List Results

After the appointment search criteria has been selected, the screen refreshes with a list of results.

iPhone:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Pt. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/13/2009</td>
<td>10:00 AM-10:10 AM</td>
<td>test, abhinav D</td>
</tr>
<tr>
<td>08/13/2009</td>
<td>10:00 AM-10:10 AM</td>
<td>test, abhinav D</td>
</tr>
<tr>
<td>08/13/2009</td>
<td>09:00 AM-09:30 AM</td>
<td>Great, East</td>
</tr>
<tr>
<td>08/13/2009</td>
<td>09:15 AM-09:25 AM</td>
<td>PSC, Polly</td>
</tr>
<tr>
<td>08/13/2009</td>
<td>07:00 AM-07:30 AM</td>
<td></td>
</tr>
<tr>
<td>08/13/2009</td>
<td>03:00 PM-03:10 PM</td>
<td>07th, Damian</td>
</tr>
<tr>
<td>08/12/2009</td>
<td>02:15 PM-02:30 PM</td>
<td>Sa, Sa</td>
</tr>
<tr>
<td>08/12/2009</td>
<td>01:30 PM-01:45 PM</td>
<td>PSC, Polly</td>
</tr>
<tr>
<td>08/12/2009</td>
<td>01:00 PM-01:10 PM</td>
<td>Arule, Rai</td>
</tr>
<tr>
<td>08/12/2009</td>
<td>12:15 PM-12:25 PM</td>
<td>Able, BRUCE</td>
</tr>
</tbody>
</table>

Encounters 11 to 20 of 88

Smartphone:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Pt. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/30 AM-09:40 AM</td>
<td>Test, John</td>
<td></td>
</tr>
<tr>
<td>10/01/2009</td>
<td>10:30 AM-10:40 AM</td>
<td>Patient, Seventhirty S</td>
</tr>
</tbody>
</table>

The following table describes each section of the Results screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eClinicalMobile</td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td>Search Schedule</td>
<td>Returns the user to the main Schedule page.</td>
</tr>
<tr>
<td>Date Time Pt. Name</td>
<td>Lists the date, time, and patient name for the appointment. Click the hyperlinked name to open the Patient Hub for the patient. For more information on the Patient Hub, refer to the section titled Patient Hub on page 51.</td>
</tr>
</tbody>
</table>
Schedule

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
</table>
| **iPhone:**  | Click to show or hide the appointment details, if available. The appointment details include read-only information on:  
  - Appointment Reason  
  - Notes  
  - Appointment Facility  
  - Status  
  Appointment Details can be viewed directly from the Search Results list without opening the appointment line item. |
| **Smartphone:** | |

### iPhone:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Pt. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/29/2009</td>
<td>01:00 PM-01:30 PM</td>
<td><strong>J. Karen</strong></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td>ANNUAL EXAM</td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td>Westborough Medical Associates</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>ARR</td>
<td></td>
</tr>
<tr>
<td>04/29/2009</td>
<td>09:15 AM-09:25 AM</td>
<td><strong>Smith, Mary</strong></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td>Counseling</td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td>Westborough Medical Associates</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>PEN</td>
<td></td>
</tr>
<tr>
<td>04/29/2009</td>
<td>01:30 PM-01:40 PM</td>
<td><strong>J. Michael</strong></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td>Anxiety Disorder</td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td>Westborough Medical Associates</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>PEN</td>
<td></td>
</tr>
<tr>
<td>04/28/2009</td>
<td>12:00 PM-12:10 PM</td>
<td><strong>J. Aaron</strong></td>
</tr>
</tbody>
</table>

### Smartphone:

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Pt. Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/01/2009</td>
<td><strong>Test, John</strong></td>
</tr>
<tr>
<td>09:30 AM-09:40 AM</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td>Pearl St</td>
</tr>
<tr>
<td>Status</td>
<td>CANC</td>
</tr>
<tr>
<td>10/01/2009</td>
<td><strong>Patient, Seventy S</strong></td>
</tr>
<tr>
<td>10:30 AM-10:40 AM</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>10/01/2009</td>
<td></td>
</tr>
</tbody>
</table>

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### Schedule

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>iPhone:</strong></td>
<td>Click the back or forward arrow icon to scroll through multiple pages of results.</td>
</tr>
<tr>
<td><strong>Smartphone:</strong></td>
<td>Click the &lt;&lt; Back or More &gt;&gt; links to scroll through multiple pages of results.</td>
</tr>
<tr>
<td><strong>Encounters 1 to 10 of 104</strong></td>
<td>The total number of search results displays at the bottom of the screen.</td>
</tr>
</tbody>
</table>
Tel/Web Encounters

The primary use of the Tel/Web Encounters screen is to review and respond to encounters that are open and assigned to the logged-in provider. This feature also provides read-only messages, notes, and other information related to encounters.

Encounters can be marked as open or addressed from this screen. The screen also contains a text area for entering a new actions taken, which includes an automated user/date/time stamp:

### iPhone:

![iPhone Calendar Icons]

### Smartphone:

![Smartphone Calendar Icons]

### Viewing Telephone and Web Encounters

#### Using the Calendar Icons on the iPhone

The calendar icons are used to view encounters in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![All Icon] (All)</td>
<td>All - Displays a list of all encounters for all dates.</td>
</tr>
<tr>
<td>![Today Icon] (Today)</td>
<td>Today - Displays a list of all encounters for the current day.</td>
</tr>
</tbody>
</table>
Searching for Encounters by Date Range

In addition to the calendar icons, the screen also contains date range fields as another option. To open the From and To fields, click the Date Range icon.

The From and To date range fields default to the current date. To search for appointments or patients by date range, use the From and To fields on the Schedule window to select a date range, and then click Search:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Yesterday Icon" /></td>
<td><strong>Yesterday</strong> - Displays a list of all encounters for the previous day.</td>
</tr>
<tr>
<td><img src="image" alt="Last Week Icon" /></td>
<td><strong>Last Week</strong> - Displays a list of all encounters for the previous seven (7) days.</td>
</tr>
<tr>
<td><img src="image" alt="Last Month Icon" /></td>
<td><strong>Last Month</strong> - Displays a list of all encounters for the previous thirty (30) days.</td>
</tr>
<tr>
<td><img src="image" alt="Date Range Icon" /></td>
<td><strong>Date Range</strong> - Displays the date range icons at the bottom of the Telephone/Web Encounters screen.</td>
</tr>
</tbody>
</table>

 iPhones Note: Click the From or To date field to open the keyboard display.
Tel/Web Encounters

Tel/Web Encounters List Results

After the encounter search criteria has been selected, the screen refreshes with a list of ten (10) results per page.

iPhone:

<table>
<thead>
<tr>
<th>Date</th>
<th>Patient Name</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/30/2009</td>
<td>Mittal</td>
<td></td>
</tr>
<tr>
<td>02/02/2009</td>
<td>Test, Vmsg</td>
<td></td>
</tr>
<tr>
<td>02/04/2009</td>
<td>Smith, Bruce</td>
<td>Update Demographics - Personal Info</td>
</tr>
<tr>
<td>02/04/2009</td>
<td>Able, BRUCE</td>
<td>New Refill Request</td>
</tr>
<tr>
<td>02/04/2009</td>
<td>Sandy, Raju</td>
<td>Refills</td>
</tr>
<tr>
<td>02/11/2009</td>
<td>Talha, Syed</td>
<td></td>
</tr>
<tr>
<td>02/13/2009</td>
<td>11th, January</td>
<td>check up on disease management</td>
</tr>
<tr>
<td>02/13/2009</td>
<td>14th, ire</td>
<td>test</td>
</tr>
<tr>
<td>02/13/2009</td>
<td>07th, March</td>
<td>Testing</td>
</tr>
<tr>
<td>02/19/2009</td>
<td>Curran, Jeff</td>
<td>Refills</td>
</tr>
</tbody>
</table>

Encounters 11 to 20 of 261

Smartphone:

<table>
<thead>
<tr>
<th>Date</th>
<th>Patient Name</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/07/2008</td>
<td>AMANDA</td>
<td>Message J</td>
</tr>
<tr>
<td>08/08/2008</td>
<td>F, ALMA</td>
<td>Message</td>
</tr>
<tr>
<td>10/01/2008</td>
<td>A, DANJUMA</td>
<td>Message</td>
</tr>
<tr>
<td>11/13/2008</td>
<td>11th, APRIL</td>
<td>Refills</td>
</tr>
</tbody>
</table>

Menu 10:48 Back

Note: A red exclamation point icon displays to the left of any item that is marked High Priority.

Note: The list of telephone and Web encounters is displayed in real-time; synchronization is not required to load the list.

To view a particular Telephone/Web encounter:

- **iPhone** - Click anywhere in the row of the desired encounter.
- **Smartphone** - Click the blue date link for the desired encounter.

The following table describes each section of the Tel/Web Encounters Results screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eClinicalMobile</td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
</tbody>
</table>
Using the Encounters Screen

In comparison to the main PC-based eCW application, the Telephone/Web Encounters functionality within eClinicalMobile has been pared down for addressing the most common tasks, such as general message response.

The following is an example of a typical Telephone/Web Encounter message:

The general message window includes the following sections:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returns the user to the main Telephone/Web Encounters page.</td>
<td></td>
</tr>
<tr>
<td>Indicates a Web encounter.</td>
<td></td>
</tr>
<tr>
<td>Click the line item to open the selected encounter. The line item displays the encounter date, patient name, and reason for the encounter.</td>
<td></td>
</tr>
<tr>
<td>Click the back or forward arrow icon to scroll through multiple pages of results.</td>
<td></td>
</tr>
<tr>
<td>Click the &lt;&lt; Back or More &gt;&gt; links to scroll through multiple pages of results.</td>
<td></td>
</tr>
<tr>
<td>The total number of search results displays at the bottom of the screen.</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Patient Name</td>
<td>The patient's name for the encounter. The patient name is hyperlinked; click the link to display the patient’s Hub. For more information on the Patient Hub, refer to the section titled Patient Hub on page 51.</td>
</tr>
<tr>
<td>Date</td>
<td>The date of the Telephone or Web encounter.</td>
</tr>
<tr>
<td>Time</td>
<td>The time of day when the encounter took place.</td>
</tr>
<tr>
<td>Reason</td>
<td>States the reason for the encounter, as given by the patient.</td>
</tr>
<tr>
<td>Message</td>
<td>The original read-only message included with the telephone or Web encounter.</td>
</tr>
<tr>
<td>Prev. Action Taken</td>
<td>A read-only version of the previous action taken, including a time stamp of the user, date, and time.</td>
</tr>
<tr>
<td>New Action Taken</td>
<td>A free-text field for describing the new action taken on the encounter by the logged-in user. This text field has keyword functionality for ease of use. For more information on setting up commonly used keywords for this field, refer to the section titled Configuring Keywords Setup on page 109.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Encounters can be assigned to other staff members displayed in the drop-down list. The users available in the Assigned To drop-down list are determined by your My Favorites list. For more information on configuring favorites, refer to the section titled Configuring My Favorites on page 90. These favorites must be synced with eClinicalMobileTM before they are available. For more information on syncing your favorites, refer to the section titled Synchronizing My Favorites on page 91. A one-time process must be performed to enable favorites on eClinicalMobile. For more information on activating favorites, refer to the section titled Activating My Favorites on page 92.</td>
</tr>
</tbody>
</table>

**IMPORTANT!** Any changes or updates to patient information made on eClinicalMobile display as real-time edits on the smartphone; however, these changes will **NOT** be applied or visible on the main eClinicalWorks® application until an information synchronization takes place. Synchronization typically occurs at short, regularly scheduled intervals, or can be processed on demand by an administrator. For more information on synchronization, refer to the section titled Synchronize on page 114.
Labs/Diagnostic Imaging

The eClinicalMobile Labs/Diagnostic Imaging screen allows physicians to review lab/DI test results assigned to them from their smartphones. The test information is read-only, but physicians can mark the labs or imaging as reviewed, and enter notes if necessary.

Using the Calendar Icons on the iPhone

The calendar icons are used to view the schedule in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="All" /></td>
<td><strong>All</strong> - Displays a list of all labs/imaging tests for all dates.</td>
</tr>
<tr>
<td><img src="image2" alt="Today" /></td>
<td><strong>Today</strong> - Displays a list of all labs/imaging tests for the current day.</td>
</tr>
<tr>
<td><img src="image3" alt="Yesterday" /></td>
<td><strong>Yesterday</strong> - Displays a list of all labs/imaging tests for the previous day.</td>
</tr>
<tr>
<td><img src="image4" alt="Last Week" /></td>
<td><strong>Last Week</strong> - Displays a list of all labs/imaging tests for the previous seven (7) days.</td>
</tr>
</tbody>
</table>
Searching for Lab/DI Tests by Date Range

In addition to the calendar icons, the screen also contains date range fields as another option. To open the From and To fields, click the Date Range icon.

The From and To date range fields default to the current date. To search for labs/imaging tests or patients by date range, use the From and To fields on the Schedule window to select a date range, and then click Search:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Last Month - Displays a list of all labs/imaging tests for the previous thirty (30) days.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Date Range - Displays the date range icons at the bottom of the Labs/Imaging screen.</td>
</tr>
</tbody>
</table>

**iPhone Note:** Click the From or To date field to open the keyboard display.
Labs/Imaging List Results

After the labs/imaging search criteria has been selected, the screen refreshes with a list of ten (10) results per page.

**Note:** A red exclamation point icon displays to the left of any item that is marked High Priority.

The following table describes each section of the Labs/Imaging Results screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>eClinicalMobile</strong></td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td><strong>Search Labs/Imaging</strong></td>
<td>Returns the user to the main Labs/Imaging screen.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
<td>Displays the order date, patient name, lab name, reason, and a high-level result for the tests.</td>
</tr>
<tr>
<td><strong>Patient Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Lab Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Reason</strong></td>
<td>Click the line item to open the selected labs/imaging information.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td></td>
</tr>
</tbody>
</table>
To view a particular lab or imaging test for a patient:

- **iPhone** - Click anywhere in the row of the desired lab or imaging test.
- **Smartphone** - Click the blue date link for the desired lab or imaging test.

### Using the Labs/Imaging Screen

The information displayed on the Labs and Diagnostic Imaging screen in eClinicalMobile™ will vary depending upon the type of test that was performed. Also, some lab or diagnostic imaging test results are lengthy, so scrolling may be necessary to view all of the information:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>iPhone:</strong></td>
<td>Click the back or forward arrow icon to scroll through multiple pages of results.</td>
</tr>
<tr>
<td><strong>Smartphone:</strong></td>
<td>Click the &lt;&lt; Back or More &gt;&gt; links to scroll through multiple pages of results.</td>
</tr>
</tbody>
</table>

Labs 1 to 9 of 9

Displays the total number of search results at the bottom of the screen.
Each Labs/DI window includes the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Click the Open or Addressed button to specify the status of these lab or diagnostic imaging test results.</td>
</tr>
<tr>
<td><strong>Don’t Publish to Portal</strong></td>
<td>Remove the check mark from the box to allow the patient to view the test results from the Patient Portal.</td>
</tr>
<tr>
<td><strong>Patient Name</strong></td>
<td>The patient’s name for the lab or imaging. The patient name is hyperlinked; click the link to display the patient’s Hub.</td>
</tr>
<tr>
<td><strong>DOB</strong></td>
<td>The patient’s date of birth.</td>
</tr>
<tr>
<td><strong>Phone</strong></td>
<td>The patient’s phone number. This number is taken from the patient’s Home Phone field on the Patient Information (Demographics) field within eClinicalWorks®. The phone number is hyperlinked; click the link to call the number directly from the smartphone.</td>
</tr>
<tr>
<td><strong>Ordered Date</strong></td>
<td>The date on which the test was ordered.</td>
</tr>
<tr>
<td><strong>Coll Date</strong></td>
<td>The date on which the test took place.</td>
</tr>
<tr>
<td><strong>Assessments</strong></td>
<td>The assessment of the condition as determined by the physician.</td>
</tr>
<tr>
<td><strong>Lab</strong></td>
<td>The name of the lab or imaging test ordered.</td>
</tr>
<tr>
<td><strong>Name/Value/Reference Range</strong></td>
<td>The name of the test, along with its associated value and reference ranges. Any items that are out of the reference range are displayed in red:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
<th>Reference Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATININE</td>
<td>1.26</td>
<td>0.60-1.30 mg/dL</td>
</tr>
<tr>
<td>SODIUM BLOOD</td>
<td>143</td>
<td>136-145 mmol/L</td>
</tr>
<tr>
<td>POTASSIUM BLOOD</td>
<td>4.5</td>
<td>3.5-5.3 mmol/L</td>
</tr>
<tr>
<td>CHLORIDE BLOOD</td>
<td>110</td>
<td>97-110 mmol/L</td>
</tr>
<tr>
<td>CARBON DIOXIDE</td>
<td>25</td>
<td>24-32 mmol/L</td>
</tr>
<tr>
<td>ANION GAP</td>
<td>8</td>
<td>5-15</td>
</tr>
<tr>
<td><strong>GLUCOSE RANDOM BLOOD</strong></td>
<td>64</td>
<td>70-99 mg/dL</td>
</tr>
<tr>
<td><strong>BLOOD UREA NITROGEN</strong></td>
<td>26</td>
<td>7-23 mg/dL</td>
</tr>
<tr>
<td><strong>GLOMERULAR FILTRATION RATE</strong></td>
<td>58</td>
<td>&gt;60</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>The results of the lab, if received from the lab company and entered into the system, are displayed here.</td>
<td></td>
</tr>
<tr>
<td><strong>Received Date</strong></td>
<td>The date the results were received.</td>
<td></td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>The read-only notes entered when the test results were submitted.</td>
<td></td>
</tr>
<tr>
<td><strong>Add to Notes</strong></td>
<td>Notes made by the mobile user, to be appended to the existing Notes section. This field has browse keyword functionality. For more information, refer to the section titled Configuring Keywords Setup on page 109.</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Internal Notes</td>
<td>The read-only internal notes entered when the test results were submitted.</td>
<td></td>
</tr>
<tr>
<td>Add to Internal Notes</td>
<td>Internal notes made by the mobile user, to be appended to the existing Internal Notes section. This field has browse keyword functionality. For more information, refer to the section titled Configuring Keywords Setup on page 109.</td>
<td></td>
</tr>
<tr>
<td>Assigned To</td>
<td>Labs/Imaging can be assigned to other staff members displayed in the drop-down list. The users available in the Assigned To drop-down list are determined by your My Favorites list. For more information on configuring favorites, refer to the section titled Configuring My Favorites on page 90. These favorites must be synced with eClinicalMobile before they are available. For more information on syncing your favorites, refer to the section titled Synchronizing My Favorites on page 91. A one-time process must be performed to enable favorites on eClinicalMobile. For more information on activating favorites, refer to the section titled Activating My Favorites on page 92.</td>
<td></td>
</tr>
</tbody>
</table>
SEARCH

Users can search for patients and open the Patient Hub to perform actions on the desired patient from the Search Patients screen:

**iPhone:**

From the Patient Hub, users can perform the following actions on patients:

- View Encounters
- View Labs and Diagnostic Imaging tests
- Send e-Prescriptions
- View a Medical Summary
- Create Telephone Encounters
- View and Create Charge Captures
- Create Appointments
- Order Labs and Diagnostic Imaging tests

For more information on the Patient Hub, refer to the section titled [Patient Hub](#) on page 51.

**Searching for Patients**

Users can search for patients using the following criteria:

- First and/or Last Name
- Phone Number and Extension

The gender of a patient must always be selected in order to search.
To search for a patient and access the Patient Hub:

1. From the Search Patients screen, select the desired gender from the Gender drop-down list.

2. Enter information in one or more of the following fields as desired:
   - **Last Name** - Enter the last name of the desired patient into this field.
   - **First Name** - Enter the first name of the desired patient into this field.
   - **Phone No.** - Enter the phone number, without dashes or parentheses, of the desired patient into the left-most field in this section. If applicable, enter the desired patient’s extension into the right-most field in this section.

   **Note:** To clear all the fields here of information, click the Reset button.

3. Click the Search button.
   The patients that meet the search criteria are displayed:

   **iPhone:**
   ![iPhone Search Patients](image1)

   **Smartphone:**
   ![Smartphone Search Patients](image2)

4. To access a patient’s hub:
   - **iPhone** - Click anywhere in the row of the desired patient.
   - **Smartphone** - Click the blue last name link for the desired patient.

   The Patient Hub screen displays for the selected patient:
For more information on the Patient Hub, refer to the section titled Patient Hub on page 51.
MESSAGES

The Messages screen is a simple, standard messaging interface for users to compose, read, and reply to messages:

**iPhone:**

![iPhone Messages Interface]

**Smartphone:**

![Smartphone Messages Interface]

The following table describes each section of the Messages screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="eClinicalMobile" /></td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td><img src="image" alt="Home" /></td>
<td>Returns the user to the eClinicalMobile home page.</td>
</tr>
<tr>
<td><img src="image" alt="From" /></td>
<td>Displays the name of the staff member that sent each message, the subject of each message, and the date that each message was sent. Click the line item to open the selected refill request information.</td>
</tr>
</tbody>
</table>
Messages

From this window, you can perform the following actions:

<table>
<thead>
<tr>
<th>To...</th>
<th>...Then</th>
</tr>
</thead>
</table>
| Compose a new message | 1. On the Messages screen, click the Compose button. A new message window opens. The From field defaults to the logged-in user and cannot be edited. The Sent field is populated automatically with the date and time and cannot be edited.  
2. Select the user to whom you want to send this message from the To drop-down list. Currently, eClinicalMobile is limited to one recipient per message; future enhancements may extend to multiple recipients.  
3. Enter a subject for this message in the Subject field.  
4. Select a priority from this message from the Priority drop-down list.  
5. Enter the desired message into the Body field.  
6. Click the Send button. The message is sent. |
| View received messages | From the Inbox tab on the Messages screen:  
  - **iPhone** - Click anywhere in the row of the message you want to view.  
  - **Smartphone** - Click the blue From link for the message you want to view.  
  Unread messages are displayed in bold. |
### Messages

<table>
<thead>
<tr>
<th>To...</th>
<th>...Then</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reply to a message</strong></td>
<td>1. From the Inbox tab on the Messages screen, click the message you want to reply to. The selected message displays.</td>
</tr>
<tr>
<td></td>
<td>2. Click the Reply button. The Compose Message screen displays. The From field defaults to the logged-in user and cannot be edited. The Sent field is populated automatically with the date and time and cannot be edited. The To field is populated automatically with the user that originally sent you the message and cannot be edited. The Subject field is populated automatically with &quot;RE:&quot; followed by the original message’s subject, and can be edited if desired.</td>
</tr>
<tr>
<td></td>
<td>3. Select a priority for this message from the Priority drop-down list.</td>
</tr>
<tr>
<td></td>
<td>4. Enter the desired message into the Body field. \nThe reply is sent.</td>
</tr>
<tr>
<td></td>
<td>5. Click the Send button. \nThe reply is sent.</td>
</tr>
</tbody>
</table>

| **View sent messages**        | 1. On the Messages screen, click the Outbox tab. All sent messages are displayed. Unread messages are displayed in bold. |
|                               | 2. Click the message you want to view. \nThe selected message displays. |

| **Delete received messages**  | 1. From the Inbox tab on the Messages screen, check the box(es) next to the message(s) you want to delete. \n**OR** \nCheck the top-most box to select all messages at once. |
|                               | 2. Click the Delete button. \nThe selected messages are deleted. |

| **Delete sent messages**      | 1. From the Messages screen, click the Outbox tab. All sent messages are displayed. |
|                               | 2. Check the box(es) next to the message(s) you want to delete. \n**OR** \nCheck the top-most box to select all messages at once. |
|                               | 3. Click the Delete button. \nThe selected messages are deleted. |

| **Return to the main Messages window from a message** | Click the Close button on the message. |
New patients can be created directly from eClinicalMobile™:

### iPhone:

[Screen capture of eClinicalMobile showing New Patient screen with input fields for Last Name, First Name, MI, Cell Phone, Date of Birth, and Sex.]

### Smartphone:

[Screen capture of eClinicalMobile showing New Patient screen with input fields for Last Name, First Name, MI, Cell Phone.]

Personal details, emergency contact, and employer information can be entered for new patients from eClinicalMobile. Once a patient has been created, they can be used on eClinicalMobile immediately. However, this information must be verified in the eClinicalWorks® application before this patient can be used there.

For more information on verifying new patients, refer to the section titled **Verifying New Patients in the eCW Application** on page 42.

**Creating a New Patient**

New Patients can be created at any time from the New Patient screen.

**To create a new patient:**

1. From the eClinicalMobile Home Page, click the New Patient icon.

   The New Patient window opens.

2. Enter the desired information concerning the new patient into the Personal Details fields. Fields marked with a red asterisk (*) are mandatory.

   The fields that are marked as mandatory on this screen are configured from the eClinicalWorks application. For more information, refer to the section titled **Configuring New Patient Demographics Field** on page 108.

3. Click OK.
New Patient

This patient is now created in the system and their Hub opens. This patient must be verified in the eClinicalWorks application before it can be used on the application side.

For more information on verifying new patients in the eClinicalWorks application, refer to the section titled Verifying New Patients in the eCW Application on page 42.

eClinicalMobile Patient Registration

Patients that have been added through eClinicalMobile must be reviewed and verified in the eClinicalWorks application.

Verifying New Patients in the eCW Application

New patients created through eClinicalMobile must be verified in the eClinicalWorks EMR application.

To verify new patients in the eCW application:

1. From the Practice band in the left navigation pane, click the eClinicalMobile Patient Registration icon:

   ![eClinicalMobile Patient Registration](image)

   The eClinicalMobile Patient Registration window opens:

2. To select the date range within which the desired patients were created in eClinicalMobile:
   a. Click the More (...) button next to the From Date field to open a drop-down calendar.
   b. From this drop-down calendar, click the desired starting date.
   c. Click the More (...) button next to the To Date field to open a drop-down calendar.
   d. From this drop-down calendar, click the desired ending date.

3. To search for a newly created patient by last name:
   a. Enter the desired patient’s last name in the Last Name field.
   b. Click the Go button.
   The patients that match the entered text are displayed.

4. To review and confirm the information entered about a new patient:
   a. Click the desired patient.
   The Patient Information window opens.
   b. Review the information here, and add or change any information as necessary.
c. Click OK.
   This patient is now removed from the list and may be used in the eCW application.

5. To delete a newly created patient without entering them into the eCW system:
   a. Check the box next to the patient you want to delete.
   b. Click the Delete button.
      A confirmation window opens.
   c. Click OK.
      The selected patient is now deleted.

---

**Reviewing Previously Addressed Patients**

Patients that were originally created through eClinicalMobile, but who have already been verified in the eClinicalWorks EMR application, can be reviewed from the Addressed tab on the eClinicalMobile Patient Registration window.

To review previously addressed patients:

1. From the Practice band in the left navigation pane, click the eClinicalMobile Patient Registration icon:

   ![eClinicalMobile Patient Registration Icon](image)
   
   The eClinicalMobile Patient Registration window opens.

2. Click the Addressed tab.
   
   The Addressed options display:

   ![Addressed Tab Options](image)

3. To select the date range within which the desired patients were created in eClinicalMobile:
   a. Click the More (...) button next to the From Date field to open a drop-down calendar.
   b. From this drop-down calendar, click the desired starting date.
   c. Click the More (...) button next to the To Date field to open a drop-down calendar.
   d. From this drop-down calendar, click the desired ending date.

4. To search for addressed patients by last name:
   a. Enter the desired patient’s last name in the Last Name field.
   b. Click the Go button.
      The patients that match the entered text are displayed.

5. To review and change any information entered about an addressed patient:
   a. Click the desired patient.
      The Patient Information window opens.
New Patient

b. Review the information here, and add or change any information as necessary.

c. Click OK.
   Any modified information is saved.

6. To delete a patient account:
   a. Check the box next to the patient you want to delete.
   b. Click the Delete button.
      A confirmation window opens.
   c. Click OK.
      The selected patient is deleted.
Prescription Refills

Users can view refill requests, and deny or approve them, from the Refill Requests screen:

### iPhone:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="All" /></td>
<td><strong>All</strong> - Displays a list of all refill requests for all dates.</td>
</tr>
<tr>
<td><img src="image" alt="Today" /></td>
<td><strong>Today</strong> - Displays a list of all encounters for the current day.</td>
</tr>
<tr>
<td><img src="image" alt="Yesterday" /></td>
<td><strong>Yesterday</strong> - Displays a list of all refill requests for the previous day.</td>
</tr>
<tr>
<td><img src="image" alt="Last Week" /></td>
<td><strong>Last Week</strong> - Displays a list of all refill requests for the previous seven (7) days.</td>
</tr>
</tbody>
</table>

### Smartphone:

Using the Calendar Icons on the iPhone

The calendar icons are used to view encounters in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="All" /></td>
<td><strong>All</strong> - Displays a list of all refill requests for all dates.</td>
</tr>
<tr>
<td><img src="image" alt="Today" /></td>
<td><strong>Today</strong> - Displays a list of all encounters for the current day.</td>
</tr>
<tr>
<td><img src="image" alt="Yesterday" /></td>
<td><strong>Yesterday</strong> - Displays a list of all refill requests for the previous day.</td>
</tr>
<tr>
<td><img src="image" alt="Last Week" /></td>
<td><strong>Last Week</strong> - Displays a list of all refill requests for the previous seven (7) days.</td>
</tr>
</tbody>
</table>
Prescription Refills

**Approving and Denying Refill Requests**

Refill requests can either be approved or denied once they are opened.

**To approve or deny a refill request:**

1. From the Refill Requests screen, click the desired calendar icon or enter a custom date range.

   The refill requests that fit the selected criteria display:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Last Month" /></td>
<td><strong>Last Month</strong> - Displays a list of all refill requests for the previous thirty (30) days.</td>
</tr>
<tr>
<td><img src="image2" alt="Date Range" /></td>
<td><strong>Date Range</strong> - Displays the date range icons at the bottom of the Telephone/Web Encounters screen.</td>
</tr>
</tbody>
</table>
Prescription Refills

Note: Green check marks display next to patients for which a matching account in the eClinicalWorks application is detected. Patients with a red X next to their name do not have matching accounts in the EMR.

The following table describes each section of the Refill Requests results screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eClinicalMobile</td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td>Search Refill Requests</td>
<td>Returns the user to the main Labs/Imaging screen.</td>
</tr>
<tr>
<td>Patient Name, Drug Description, Sent Date</td>
<td>Displays the patient name, drug description, and sent date for the refill requests. Click the line item to open the selected refill request information.</td>
</tr>
</tbody>
</table>
Prescription Refills

2. To access a refill request:
   - **iPhone** - Click anywhere in the row of the desired refill request.
   - **Smartphone** - Click the blue Drug Description link for the desired refill request.

The Refill Details screen displays:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>iPhone:</strong></td>
<td>Click the back or forward arrow icon to scroll through multiple pages of results.</td>
</tr>
<tr>
<td><strong>Smartphone:</strong></td>
<td>Click the &lt;&lt; Back or More &gt;&gt; links to scroll through multiple pages of results.</td>
</tr>
<tr>
<td>Refills 11 to 20 of 39</td>
<td>Displays the total number of search results at the bottom of the screen.</td>
</tr>
</tbody>
</table>
The medication being requested is displayed in the Medication Details section.

**Note:** The Patient Hub for this patient can be accessed by clicking their underlined name at the top of the screen.

3. To select the prescription to be refilled on the iPhone:
   
   a. Begin entering the desired text into the Search Rx field.
      
      As text is entered, the prescriptions that match the text pop up below the Search Rx field in real time.
   
   b. Click the desired prescription from the pop-up window.
      
      The Drug Description field is populated automatically.

   **IMPORTANT!** The Strength, Days Supply, Quantity, Last Fill Date, Direction, and Controlled Drugs are not changed based on the drug selected here. Be sure to select a medication that fits the description of the refill. If a different drug is required, leave this section blank and click the **Denied New Rx to Follow** button.

4. To select the prescription to be refilled on smartphones:
   
   a. Enter the desired text into the Search Rx field.
   
   b. Click the More (...) button next to the Search Rx field.
      
      A list of prescriptions that match the text are displayed in a pop-up pane below the Search Rx field.
   
   c. Click the desired medication.

   **OR**

   Click the Close row to close the pop-up pane without selecting a medication.
5. Enter the desired number of refills in the Refills field in the Refill Details section.
6. If this is a take-as-needed prescription, check the PRN Refills box.
7. Enter any miscellaneous notes concerning this refill in the Refill Notes field.
8. If this refill request is being denied, select the reason for the denial from the Denied Reason drop-down list.
9. Click one of the following buttons:
   - **Approved** - This refill request has been approved. To review this refill in the eClinicalWorks® application, click the ePrescriptions icon under the Documents band, and select the Refill Requests option from the Category drop-down list.
   - **Denied** - This refill request has been denied. A reason must be selected from the Denied Reason drop-down list in order to select this option.
   - **Denied New Rx to Follow** - This specific refill request has been denied, but a new medications will be prescribed in its place.

**IMPORTANT!** The Strength, Days Supply, Quantity, Last Fill Date, Direction, and Controlled Drugs are not changed based on the drug selected here. Be sure to select a medication that fits the description of the refill. If a different drug is required, leave this section blank and click the Denied New Rx to Follow button.

**Note:** Controlled medications cannot be approved through eClinicalMobile™.
PATIENT HUB

The Patient Hub is accessed by searching for and selecting a patient. For more information on searching for patients, refer to the section titled Searching for Patients on page 35.

The Patient Hub relies on synchronization because of the large volume of data. To reduce the effect on performance, the Patient Hub information is cached for a day. It is recommended to click this button whenever you need the most up-to-date patient information from the eClinicalWorks® application:

iPhone:

Smartphone:

An overview of basic demographic information is displayed for the selected patient:

- Patient Name
Patient Hub

- Address
- Primary Insurance
- Primary Care Provider
- Date of Birth
- Age
- Gender
- Home, Work, and Cell Phone Numbers

**iPhone Note:** Click any of these numbers to call that number directly.

- E-mail Address

**iPhone Note:** Click this address to send the patient an e-mail directly.

- Patient, Account, and Collections Balance

**Note:** Collections Balance information is controlled by an item key. If this item key is not enabled, then the collections balance is displayed as $0. For more information, contact eClinicalWorks Support.

- Pharmacy Name
- Allergy and reactions

The following actions can be performed from the Patient Hub:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Reload" /></td>
<td><strong>Reload</strong> - Click this button to refresh the information displayed here. Since this information is cached for a day for performance, it is recommended to click this button whenever you need the most up-to-date patient information from the eClinicalWorks application.</td>
</tr>
<tr>
<td><img src="image" alt="Encounters" /></td>
<td><strong>Encounters</strong> - Click this button to view the encounters for this patient. The past twenty (20) encounters for any patient can be viewed here.</td>
</tr>
<tr>
<td><img src="image" alt="Labs" /></td>
<td><strong>Labs</strong> - Click this button to view the last twenty (20) labs and diagnostic imaging tests that have been ordered for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="ePrescription" /></td>
<td><strong>ePrescription</strong> - Click this button to send e-Prescriptions for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="Medical Summary" /></td>
<td><strong>Medical Summary</strong> - Click this button to view the Medical Summary for this patient.</td>
</tr>
</tbody>
</table>
### Viewing Encounters

The last twenty (20) encounters for a patient can be viewed directly from the Patient Hub. This information is read-only and is not editable.

Only encounters that were created after you were enabled for eClinicalMobile™ are available.

**To view an encounter:**

1. From the Patient Hub, click the Encounters button.
   
   The Patient Encounters screen opens, displaying the past twenty encounters for this patient.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Telephone Encounter" /></td>
<td><strong>Telephone Encounter</strong> - Click this button to create a telephone encounter for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="Charge Capture" /></td>
<td><strong>Charge Capture</strong> - Click this button to view and capture billing information for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="Create Appointment" /></td>
<td><strong>Create Appointment</strong> - Click this button to create an appointment for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="Order Labs" /></td>
<td><strong>Order Labs</strong> - Click this button to order a lab for this patient.</td>
</tr>
<tr>
<td><img src="image" alt="Order DI" /></td>
<td><strong>Order DI</strong> - Click this button to order a diagnostic imaging test for this patient.</td>
</tr>
</tbody>
</table>
2. Click the encounter you want to view.

   The Progress Note for the selected encounter opens, with the following information displayed:
   - Locked/Unlocked status
   - Patient Demographic Information
   - Date of Appointment
   - Visit Type
   - Reason for Appointment
   - Current Medications
   - Past Medical History
   - Allergies
   - Assessments
   - Treatment Information
   - Procedure Codes
   - Facility

   **Note:** This information is cached for a day for performance. It is recommended to click this button whenever you need the most up-to-date patient information from the eClinicalWorks application.

3. To fax this Progress Note from the iPhone:
   a. Click the Fax heading at the top of the Progress Note.

   The Fax fields display:
b. Begin entering the name of the physician to which this Progress Note is being faxed, last name first, in the To: (Lname,Fname) field.

Referring physicians in the system that match the entered text display in a pop-up pane beneath the To: (Lname,Fname) field in real time.

c. Click the name of the desired referring physician in the pop-up pane.

d. Enter the number to which this Progress Note is being faxed into the right-most Fax No. field. If any prefix is required to dial out, enter it in the left-most Fax No. field.

e. Begin entering the name of the facility from which this Progress Note is being faxed in the Facility field.

Facilities in the system that match the entered text display in a pop-up pane beneath the Facilities field in real time.

f. Click the name of the desired facility in the pop-up pane.

g. Click the Send button.

This fax is sent to the eClinicalWorks application to be faxed. Once a synchronization has taken place, the fax is sent out. To review this fax and check that it is sent properly, click the Fax Outbox icon under the Documents band in the eClinicalWorks application.

For more information, refer to the section titled Synchronize on page 114.

4. To fax this Progress Note from smartphones:

a. Click the Fax link.

The Fax fields display:

b. Enter the name of the physician to which this Progress Note is being faxed, last name first, in the To: (Lname,Fname) field.
c. Click the More (...) button next to the To: (Lname,Fname) field.  
All the referring physicians that match the entered text display in a pop-up pane beneath the To: (Lname,Fname) field.

d. Enter the number to which this Progress Note is being faxed into the right-most Fax No. field. If any prefix is required to dial out, enter it in the left-most Fax No. field.

e. Entering the name of the facility from which this Progress Note is being faxed in the Facility field.

f. Click the More (...) button next to the Facility field.  
All the facilities that match the entered text display in a pop-up pane beneath the Facilities field.

g. Click the name of the desired facility in the pop-up pane.

h. Click the Send button.

---

**Viewing Labs and Diagnostic Imaging Tests**

The last twenty (20) lab and diagnostic imaging tests that have been ordered for a patient can be viewed from the Patient Hub.

This screen is only used to view the information on tests. To actually address or perform any actions on the tests, go to the Labs/Imaging screen. For more information on the Labs/Imaging screen, refer to the section titled Labs/Diagnostic Imaging on page 29.

**To view lab and diagnostic imaging tests:**

1. Click the Labs icon on the Patient Hub.

The Labs Summary screen opens, displaying the last twenty tests that have been ordered for this patient:

<table>
<thead>
<tr>
<th>Lab Name</th>
<th>Result Date</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glucose</td>
<td>02/12/2006</td>
<td></td>
</tr>
<tr>
<td>CBC, Platelet, No. Differential</td>
<td>09/19/2007</td>
<td></td>
</tr>
<tr>
<td>CBC</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>ALT, AST</td>
<td>12/20/2006</td>
<td></td>
</tr>
<tr>
<td>anti hcv antibody</td>
<td>08/10/2006</td>
<td></td>
</tr>
</tbody>
</table>

2. Click any of the tests to open additional information, which includes:
   - Reason for the test
   - Order Date
   - Collection Date
   - Attribute Values
Transmitting and Faxing e-Prescriptions

e-Prescriptions can be transmitted or faxed directly from the Patient Hub.

To transmit or fax e-Prescriptions:

1. From the Patient Hub, click the ePrescription button.
   The Prescription screen opens.

   **iPhone:**
   
   ![Prescription screen](image)

   **Smartphones:**
   
   ![Prescription screen](image)

2. To select the pharmacy to which you want to transmit or fax this prescription on the iPhone:
   
   a. Click the Pharmacy heading.
      The Pharmacy options display:

   ![Pharmacy options](image)

   b. To clear the text in the Pharmacy field, click the Clear button.
   
   c. Begin entering the desired text into the Pharmacy field.
      As text is entered, the pharmacies that match the text pop up below the Pharmacy field in real time.
   
   d. Click the desired pharmacy from the pop-up window.
The address, phone number, and fax number for the selected pharmacy are populated automatically. When a pharmacy that does not accept e-Prescriptions is selected, the ePrescribe Rx button is grayed out.

e. Optionally, alter the fax number in the Fax field as desired.

3. To select the pharmacy to which you want to transmit or fax this prescription on the smartphones:
   a. Click the Pharmacy heading.
      
      The Pharmacy options display:

      ![Pharmacy Options](image)

      b. Enter the name of the desired pharmacy in the Pharmacy field.
      c. Click the More (...) button.
         
         All the pharmacies that match the entered text display in a pop-up pane beneath the Pharmacies field.
      d. Click the name of the desired pharmacy in the pop-up pane.
         
         The address, phone number, and fax number for the selected pharmacy are populated automatically. When a pharmacy that does not accept e-Prescriptions is selected, the ePrescribe Rx button is grayed out.
      e. Optionally, alter the fax number in the Fax field as desired.
      f. To check mail-order eligibility for this pharmacy, click the Check Mail Order Eligibility button.

4. Check the box(es) next to the medication(s) you want to transmit or fax.

5. To add a new prescription on the iPhone:
   a. Begin entering the desired text into the Add Rx field.
      
      As text is entered, the prescriptions that match the text pop up below the Add Rx field in real time.
   b. Click the desired prescription from the pop-up window.
      
      The selected prescription is added beneath the Add Rx field.
   c. Check the box next to the added prescription to include it in this transmission or fax.

6. To add a new prescription on smartphones:
   a. Enter the name of the prescription you want to add into the Add Rx field.
   b. Click the More (...) button.
      
      All the prescriptions that match the entered text display in a pop-up pane beneath the Add Rx field.
   c. Click the name of the desired prescription.
      
      OR
      
      Click the Close row to close the pop-up pane without selecting a prescription.
The selected prescription is added beneath the Add Rx field.

d. Check the box next to the added prescription to include it in this transmission or fax.

7. To view any potentially harmful interactions, click the Interaction heading. All applicable allergies and interactions are displayed:

<table>
<thead>
<tr>
<th>Drug</th>
<th>Food Class</th>
<th>Severity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tylenol Allergy Complex Oral Tablet 2-3000 MG</td>
<td>Ethanol</td>
<td>Moderate</td>
</tr>
<tr>
<td>Tylenol Allergy Complex Oral Tablet 2-500 MG</td>
<td>Ethanol</td>
<td>Moderate</td>
</tr>
<tr>
<td>Tylenol Chlorpheniramine Oral Liquid 500-200 MG/5Ml</td>
<td>Ethanol</td>
<td>Moderate</td>
</tr>
</tbody>
</table>

8. To transmit this prescription to the pharmacy electronically:

a. Click the ePrescribe Rx button.

On the iPhone, the ePrescription screen opens:

For smartphones, skip to step h.

b. To prevent any previously selected medications from being transmitted, uncheck the Name box next to the desired medication(s).

c. To change the strength of this medication, alter the text in the Strength field.
d. Select the details for this medication from the drop-down lists provided.

e. Determine whether a generic medication may be substituted for this prescription by clicking the desired radio button in the Substitute Allowed section.

f. Enter any miscellaneous comments in the Comments field.

g. To alter the information contained in the Web Encounter that is automatically created for this e-prescription, click the Web Encounter Details heading.

The Web Encounter Details options display:

- Optionally, enter the name of the person requesting this e-prescription in the Caller field.
- If desired, alter the reason for this e-prescription in the Reason field.
- If desired, alter the message in the Message field.
- Click the Send ePrescription button.

This e-prescription is now transmitted to the pharmacy. A Web Encounter is created and assigned to this user, notifying them of the e-prescription. All medications sent here are displayed under the Rx tab of the Web Encounter and are entered into the Rx History of the patient.

Note: Controlled medications cannot be transmitted electronically from eClinicalMobile.

9. To fax this prescription to the pharmacy, click the Fax Rx button.

This fax is not sent directly from eClinicalMobile. An electronic copy of the fax is sent to the eClinicalWorks application where, once a synchronization has been performed, the fax will be sent. To review this fax and check that it is sent properly, click the Fax Outbox icon under the Documents band in the eClinicalWorks application.

For more information on synchronizing information between eClinicalMobile and the eClinicalWorks application, refer to the section titled Configuring and Using the Run Synchronization Window on page 115.

---

**Viewing the Medical Summary**

The Medical Summary for any patient can be viewed from the Patient Hub.

**To view the Medical Summary:**

1. From the Patient Hub, click the Medical Summary button.

The Medical Summary screen opens:
2. Click the blue plus sign icon (+) next to any section to show the information contained in that section.

OR

Click the orange plus sign icon (+) at the top of the screen to show all the information contained in every section at once.

3. Click the blue minus sign icon (-) next to any expanded section to hide the information contained in that section.

OR

If all sections have been expanded, click the orange minus sign icon (-) at the top of the screen to hide the information contained in all sections at once.

---

### Creating a Telephone Encounter

New Telephone Encounters can be created for a patient from their Patient Hub.

**To create a new Telephone Encounter:**

1. From the Patient Hub, click the New Telephone Encounter button.
   
The Telephone Encounter screen opens, with the Patient Name, Date, Time, and Facility populated automatically.
2. If this encounter is a high priority, check the H box.

3. To change the facility from the default on the iPhone:
   a. Remove the text in the Facility field.
   b. Begin entering the desired text into the Facility field.
      As text is entered, the facilities that match the text pop up below the Facility field in real time.
   c. Click the desired facility from the pop-up pane.

4. To change the facility from the default on smartphones:
   a. Enter the desired text into the Facility field.
   b. Click the More (...) button.
      The facilities that match the entered text display in a pop-up pane below the Facility field.
   c. Click the desired facility from the pop-up pane.
   OR
   Click the Close row to close the pop-up pane without selecting a facility.

5. Enter the name of the person calling in the Caller field.

6. Enter the reason for this encounter in the Reason field.

7. Enter the message in the Message field.

8. Enter any action(s) taken into the Action taken field.

9. Select a user to assign this encounter to using the Assigned To drop-down list.
Note: The users available in the Assigned To drop-down list are determined by your My Favorites list. For more information on configuring favorites, refer to the section titled Configuring My Favorites on page 90.

These favorites must be synced with eClinicalMobile before they are available. For more information on syncing your favorites, refer to the section titled Synchronizing My Favorites on page 91.

A one-time process must be performed to enable favorites on eClinicalMobile. For more information on activating favorites, refer to the section titled Activating My Favorites on page 92.

10. If further action needs to be taken on this encounter, leave the Open radio button selected. If no further action is necessary, click the Addressed radio button.

11. Click OK.

Capturing Billing Charges

Billing charges can be added manually, or by using templates, from the Patient Hub. When a billing charge is created, an Out of Office Encounter is created within the eClinicalWorks system containing the CPT®1 and ICD codes specified on eClinicalMobile.

Creating New Billing Charges

To create a new billing charge on the iPhone:

1. From the Patient Hub, click the New Charge Capture button.

   The Billing Templates screen opens:

   ![Billing Templates Screen]

2. Click the New Charge Capture button.

   The Charge Capture screen opens:

---

1. CPT only © 2008 American Medical Association. All rights reserved.
3. To change the facility from the default:
   a. Remove the text in the Facility field.
   b. Begin entering the desired text into the Facility field.
      As text is entered, the facilities that match the text pop up below the Facility field in real time.
   c. Click the desired facility from the pop-up pane.

4. To add an ICD code:
   a. Begin entering the desired code into the left-most field in the Assessments section.
   OR
      Begin entering the name of the desired assessment into the right-most field in the Assessments section.
      As text is entered into either of these two fields, the codes that match the text pop up below the Assessments fields.
   b. Click the desired code from the pop-up pane.
      The selected code is added to the Assessments section.

5. To remove an ICD code:
   a. Click the ICD code you want to delete in the Assessments section.
   b. Click the Remove button.
The selected code is removed, unless it has already been linked with a CPT\textsuperscript{1} code. ICD codes that have been linked with CPT codes must be unlinked before they can be deleted.

6. To add a CPT code:
   a. Begin entering the desired code into the left-most field in the Procedure Codes section.
   
   OR
   Begin entering the name of the desired assessment into the right-most field in the Procedure Codes section.
   As text is entered into either of these two fields, the codes that match the text pop up below the Procedure Codes fields.
   
   b. Click the desired code from the pop-up pane.
   The selected code is added to the Procedure Codes section.

7. To remove a CPT code:
   a. Click the CPT code in the Procedure Codes section that you want to remove.
   The selected code is highlighted in yellow.
   
   b. Click the Remove button.
   The selected code is removed.

8. To modify the details of a CPT code:
   a. Click the downward-facing double arrows for the desired code in the Procedure Codes section.
   A pop-up pane displays:
   
   b. Enter any applicable modifiers into the M1, M2, and M3 fields.
   c. Enter the number of units for this CPT code into the Units field.
   d. If desired, modify the start and end dates for this CPT code in the Start Date and End Date fields in mm/dd/yyyy format.

9. To link/unlink an ICD code with a CPT code:
   a. Click the ICD code(s) you want to link/unlink in the Assessments section.
   The selected ICD code(s) are highlighted in yellow. The order in which you select the ICD codes determines the order in which they are linked with the CPT code (e.g., the first ICD code selected is the primary code).
   
   b. Click the CPT code you want to link/unlink in the Procedure Codes section.
   The selected CPT code is highlighted in yellow.
   
   c. Click one of the following buttons:

\textsuperscript{1} CPT only © 2008 American Medical Association. All rights reserved.
- **Link** - Link the selected ICD and CPT codes together.
- **Clear Link** - Clear any linkages between the selected ICD and CPT codes.

10. Click OK.

Billing charges are now captured successfully, and a new Out of Office encounter is created in the eClinicalWorks application.

**To create a new billing charge on a smartphone:**

1. From the Patient Hub, click the New Charge Capture button. The Billing Templates screen opens:

2. Click the Charge Capture link. The Add Assessment screen opens:

---

1. CPT only © 2008 American Medical Association. All rights reserved.
3. To change the facility:
   a. Enter the desired text into the Facility field.
   b. Click the Go button.
      The facilities that match the entered text display in a pop-up pane below the Facility field.
   c. Click the desired facility from the pop-up pane.
    OR
   Click the Close row to close the pop-up pane without selecting a facility.

4. Enter the date on which the patient is discharged in the Discharge Date field in mm/dd/yyyy format.

5. Enter the room in which this patient is staying in the Room No. field.

6. To add new ICD codes:
   a. Enter the desired code in the ICD Code field.
    OR
   Enter the desired name in the Name field.
   b. Click the Go button next to the field in which text has been entered.
      All codes that match the search criteria are displayed in a pop-up pane beneath the field.
   c. Click the desired code from the pop-up pane.
    OR
   Click the Close row to close the pop-up pane without selecting a code.

7. To remove an ICD code, click the red X icon to the left of the desired code.

8. To select a primary ICD code, click the radio button next to the desired code.

9. Click the Next button.
The New Procedure Codes window opens:

<table>
<thead>
<tr>
<th>CPT Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>99213</td>
<td>EM Level 3 - 2</td>
</tr>
</tbody>
</table>

10. To add new CPT\(^1\) codes:
   a. Enter the desired code in the CPT Code field.

   OR

   Enter the desired name in the Name field.

   b. Click the Go button next to the field in which text has been entered.

   All codes that match the search criteria are displayed in a pop-up pane beneath the field.

   c. Click the desired code from the pop-up pane.

   OR

   Click the Close row to close the pop-up pane without selecting a code.

11. To remove a CPT code, click the red X icon to the left of the desired code.

12. Click the Next button.

   The New Charge Capture window opens:

13. To link/unlock ICD codes with CPT codes:
   a. Check the box next to the desired ICD code.

   b. Check the box next to the desired CPT code.

   c. Click one of the following buttons:

   - **Unlink** - Clears any links between the selected codes.

---

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- **Link** - Links the selected codes together.

14. Enter any desired modifiers in the M1, M2, and M3 fields for each CPT code.

15. Enter the number of units in the Units field for each CPT code.

16. Enter the start date for this encounter in the Start Dt field in mm/dd/yyyy format.

17. Enter the end date for this encounter in the End Dt field in mm/dd/yyyy format.

18. Check the Done box when this encounter is ready to be billed.

19. Click the Next button.

   Billing information for this encounter is now saved.

### Creating Charges Using Billing Templates

Existing Out of Office encounters in your system can be used as templates to capture charges. When using one of these templates, a new Out of Office encounter is created for each charge capture. Billing charges are never added to existing Out of Office encounters.

**To create billing charge from a template:**

1. From the Patient Hub, click the Capture Charges button.

   The Billing Templates screen opens.

2. Click the downward-facing double arrows to the right of any template to view a pop-up of the ICD and CPT codes contained in that template.

3. Click the name of the desired template.

   The Charge Capture screen opens.

   Modify the information here as you would for a new charge capture. For more information, refer to the section titled [Creating New Billing Charges](#) on page 63.

---

### Creating an Appointment

New appointments can be created for patients directly from the Patient Hub. The Working Hours that are configured in the eClinicalWorks application for the logged-in user are used to determine open appointment slots.

**To create a new appointment:**

1. From the Patient Hub, click the Create Appointment button.

   The Schedule Appointment window opens:

---

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2. To change the facility from the default on the iPhone:
   a. Remove the text in the Facility field.
   b. Begin entering the desired text into the Facility field.
      As text is entered, the facilities that match the text pop up below the Facility field in real time.
   c. Click the desired facility from the pop-up pane.

3. To change the facility from the default on smartphones:
   a. Enter the desired text into the Facility field.
   b. Click the More (…) button.
      The facilities that match the entered text display in a pop-up pane below the Facility field.
   c. Click the desired facility from the pop-up pane.

   OR
   Click the Close row to close the pop-up pane without selecting a facility.

4. Select a visit type for this appointment from the Visit Type drop-down list.

   **Note:** The Visit Types available here are determined by the Visit Type Durations that are configured for this user within the eClinicalWorks application.

5. Enter a reason for this appointment in the Reason field.

6. Enter a date for this appointment in the Date From field in mm/dd/yyyy format.

7. Select the preferred time of day for this appointment from the Preferred Time drop-down list.

8. Enter any miscellaneous notes concerning this appointment in the Notes field.

9. Click the Search button.
The Appointment Search Criteria fields are hidden and the Confirm and Book Appointment fields are displayed, allowing users to select the desired appointment time from the open slots that meet the search criteria:

10. Click the Schedule button next to the desired time slot.

The appointment is scheduled as specified and a summary is displayed:

**Note:** Open time slots are found based on the working hours that have been configured in the eClinicalWorks application for the provider that is currently logged in. For more information on configuring working hours for providers, refer to the Front Office Users Guide.

**Note:** Text is added to the Notes section of any appointments created using this process to indicate that they were created from eClinicalMobile. The user that created each appointment is also indicated in this note.
Ordering Labs and Diagnostic Imaging Tests

Labs and diagnostic imaging tests can be ordered directly from the Patient Hub.

**To order labs and diagnostic imaging tests:**

1. From the Patient Hub, click the Order Labs or the Order DI button.
   
   The Lab Favorites or DI Favorites window opens, displaying the tests in your favorites:

   **iPhone:**

   ![iPhone screen with lab favorites]

   **Smartphone:**

   ![Smartphone screen with lab favorites]

   **Note:** Your favorite labs, imaging, and procedures must be configured from within the eClinicalWorks application before they can be ordered from eClinicalMobile.

   For more information on configuring favorite labs, imaging, and procedures, refer to the section titled [Configuring My Favorite Labs, Imaging, and Procedures](#) on page 94.

   2. Check the box(es) next to the desired test(s).

   3. Click the Order Labs or the Order DI button.

   The Order Labs or the Order DI screen displays:
4. To change the facility from the default:
   a. Remove the text in the Facility field.
   b. Begin entering the desired text into the Facility field.
      As text is entered, the facilities that match the text pop up below the Facility field in real time.
   c. Click the desired facility from the pop-up pane.
5. Enter a reason for performing these tests in the Reason field.
6. Select the user you want to assign these tests to using the Assigned To drop-down list.

   **Note:** The users available in the Assigned To drop-down list are determined by your My Favorites list. For more information on configuring favorites, refer to the section titled Configuring My Favorites on page 90.

   These favorites must be synced with eClinicalMobile before they are available. For more information on syncing your favorites, refer to the section titled Synchronizing My Favorites on page 91.

   A one-time process must be performed to enable favorites on eClinicalMobile. For more information on activating favorites, refer to the section titled Activating My Favorites on page 92.

7. Click the Order button.
   The selected tests are now ordered for this patient.
**CHARGE CAPTURE**

The primary use of the Charge Capture screen is to review Out of Office encounters and record billing charges for those encounters.

A discharge date and room number can be selected for encounters from this screen. ICD and CPT® codes can also be selected, as well as be linked and unlinked with each other:

### iPhone:

![Chart of calendar icons]

### Smartphone:

![Chart of calendar icons]

#### Using the Calendar Icons

The calendar icons are used to view encounters in the following manner:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Displays a list of all out of office encounters for all dates.</td>
</tr>
<tr>
<td>Today</td>
<td>Displays a list of all out of office encounters for the current day.</td>
</tr>
<tr>
<td>Yesterday</td>
<td>Displays a list of all out of office encounters for the previous day.</td>
</tr>
</tbody>
</table>

---

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Searching for Out of Office Visits by Date Range

In addition to the calendar icons, the screen also contains date range fields as another option. To open the From and To fields, click the Date Range icon.

The From and To date range fields default to the current date. To search for out of office visits by date range, use the From and To fields on the Schedule window to select a date range, and then click Search:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Last Week Icon" /></td>
<td><strong>Last Week</strong> - Displays a list of all out of office encounters for the previous seven (7) days.</td>
</tr>
<tr>
<td><img src="image2" alt="Last Month Icon" /></td>
<td><strong>Last Month</strong> - Displays a list of all out of office encounters for the previous thirty (30) days.</td>
</tr>
<tr>
<td><img src="image3" alt="Date Range Icon" /></td>
<td><strong>Date Range</strong> - Displays the date range icons at the bottom of the Out of Office Visits screen.</td>
</tr>
</tbody>
</table>

**iPhone Note:** Click the From or To date field to open the keyboard display.
Out of Office Visits List Results

After the encounter search criteria has been selected, the screen refreshes with a list of ten (10) results per page.

**iPhone:**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Service Date</th>
<th>Facility</th>
<th>Room No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able, BRUCE</td>
<td>10/08/2009</td>
<td>St. George Clinic</td>
<td>123</td>
</tr>
<tr>
<td>test, asansik</td>
<td>10/06/2009</td>
<td>St. George Clinic</td>
<td></td>
</tr>
<tr>
<td>test, lab5</td>
<td>09/17/2009</td>
<td>ABCD</td>
<td></td>
</tr>
<tr>
<td>test, lab5</td>
<td>09/17/2009</td>
<td>ABCD</td>
<td></td>
</tr>
<tr>
<td>Smith, Charles</td>
<td>09/16/2009</td>
<td>ABCD</td>
<td></td>
</tr>
<tr>
<td>Able, BRUCE</td>
<td>09/16/2009</td>
<td>ABCD</td>
<td></td>
</tr>
<tr>
<td>Lynes, Robert</td>
<td>09/14/2009</td>
<td>ABCD</td>
<td></td>
</tr>
<tr>
<td>SMITH, BERNARD</td>
<td>09/04/2009</td>
<td>St. George Clinic</td>
<td></td>
</tr>
<tr>
<td>G, ANASTACIO</td>
<td>09/04/2009</td>
<td>St. George Clinic</td>
<td></td>
</tr>
<tr>
<td>Smith, Cindy II</td>
<td>08/31/2009</td>
<td>Childrens Medical Center</td>
<td>2345</td>
</tr>
</tbody>
</table>

Encounters 1 to 10 of 1044

**Smartphone:**

<table>
<thead>
<tr>
<th>Service Date</th>
<th>Patient Name</th>
<th>Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/12/2009</td>
<td>Talha, Syed</td>
<td>Diamond Street Walk-In</td>
</tr>
</tbody>
</table>

The list of out of office encounters is displayed in real-time; synchronization is not required to load the list.

The following actions can be performed on this screen:

- To view the out of office encounters for another provider, select the desired provider from the Provider drop-down list at the top of the window.
- To filter results by facility, begin entering the desired text into the Facility field. As text is entered, the facilities that match the text pop up below the Facility field in real time. Click the desired facility from the pop-up section.
- To view a particular out of office encounter:
  - **iPhone** - Click anywhere in the row of the desired encounter.
  - **Smartphone** - Click the blue Service Date link for the desired encounter.
The following table describes each section of the Edit Charge Capture screen:

<table>
<thead>
<tr>
<th>Field/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="eClinicalMobile" /></td>
<td>Returns the user to the eClinicalMobile home page from any location within the application.</td>
</tr>
<tr>
<td><img src="image" alt="Search Out of Office Visits" /></td>
<td>Returns the user to the main Out of Office Visits search page.</td>
</tr>
<tr>
<td>Patient Name Patient ID</td>
<td>Click the line item to open the selected encounter. The line item displays the patient name, service date, facility, and room number for the encounter.</td>
</tr>
<tr>
<td><img src="image" alt="Thumbs Down" /></td>
<td>Click this icon to display the ICD codes, CPT* codes, and modifiers that have already been selected for this out of office encounter.</td>
</tr>
<tr>
<td><img src="image" alt="Backward" /> <img src="image" alt="Forward" /></td>
<td><strong>iPhone:</strong> Click the back or forward arrow icon to scroll through multiple pages of results. <strong>Smartphone:</strong> Click the &lt;&lt; Back or More &gt;&gt; links to scroll through multiple pages of results.</td>
</tr>
<tr>
<td><img src="image" alt="Encounters 1 to 10 of 1044" /></td>
<td>The total number of search results displays at the bottom of the screen.</td>
</tr>
</tbody>
</table>

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### Using the Edit Charge Capture Screen on the iPhone

Existing Out of Office Encounters created in the eClinicalWorks® EMR application can be edited from the Edit Charge Capture screen.

The following is an example of a typical out of office encounter:
The general message window includes the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>The facility at which this out of office encounter was created is displayed is read-only and is not editable.</td>
</tr>
<tr>
<td>Patient Name</td>
<td>The patient’s name for the encounter. This information is read-only and is not editable.</td>
</tr>
<tr>
<td>Service Date</td>
<td>The date on which service was given for this out of office encounter is displayed here. This information is read-only and is not editable.</td>
</tr>
<tr>
<td>Admission Date</td>
<td>The date on which the patient was admitted for this encounter is displayed here. This information is read-only and is not editable.</td>
</tr>
<tr>
<td>Discharge Date</td>
<td>To select the date on which the patient is discharged, click the calendar icon next to this field to open a pop-up calendar. Select the desired date from the pop-up calendar.</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Room No.</td>
<td>If desired, the room number of the patient can be typed into this field.</td>
</tr>
<tr>
<td>Done</td>
<td>Check this box when this encounter has been completely documented. This indicates to the biller that a claim can be created for this encounter.</td>
</tr>
<tr>
<td>Assessments</td>
<td>Any ICD codes that have already been selected for this out of office encounter displays here. These ICD codes can be removed, and new codes can be added.</td>
</tr>
<tr>
<td></td>
<td><strong>To remove an ICD code:</strong></td>
</tr>
<tr>
<td></td>
<td>1. Click the ICD code you want to delete in the Assessments section.</td>
</tr>
<tr>
<td></td>
<td>2. Click the Remove button.</td>
</tr>
<tr>
<td></td>
<td>The selected code is removed, unless it has already been linked with a CPT* code. ICD codes that have been linked with CPT codes must be unlinked before they can be deleted.</td>
</tr>
<tr>
<td></td>
<td><strong>To add a new ICD code:</strong></td>
</tr>
<tr>
<td></td>
<td>1. Begin entering the desired code into the left-most field in the Assessments section.</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>Begin entering the name of the desired assessment into the right-most field in the Assessments section.</td>
</tr>
<tr>
<td></td>
<td>As text is entered into either of these two fields, the codes that match the text pop up below the Assessments fields.</td>
</tr>
<tr>
<td></td>
<td>2. Click the desired code from the pop-up pane.</td>
</tr>
<tr>
<td></td>
<td>The selected code is added to the Assessments section.</td>
</tr>
</tbody>
</table>
## Procedure Codes

Any CPT codes that have already been selected for this out of office encounter displays here. These CPT codes can be removed, new codes can be added, and details of existing codes can be modified.

### To remove a CPT code:

1. Click the CPT code in the Procedure Codes section that you want to remove.
   - The selected code is highlighted in yellow.
2. Click the Remove button.
   - The selected code is removed.

### To add a CPT code:

1. Begin entering the desired code into the left-most field in the Procedure Codes section.
   - OR
   - Begin entering the name of the desired assessment into the right-most field in the Procedure Codes section.
   - As text is entered into either of these two fields, the codes that match the text pop up below the Procedure Codes fields.
2. Click the desired code from the pop-up pane.
   - The selected code is added to the Procedure Codes section.

### To modify the details of a CPT code:

1. Click the downward-facing double arrows for the desired code in the Procedure Codes section.
   - A pop-up pane displays:

<table>
<thead>
<tr>
<th>M1</th>
<th>QB</th>
<th>M2</th>
<th>M3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>08/28/2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>08/28/2009</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Enter any applicable modifiers into the M1, M2, and M3 fields.
3. Enter the number of units for this CPT code into the Units field.
4. If desired, modify the start and end dates for this CPT code in the Start Date and End Date fields in mm/dd/yyyy format.
Using the Edit Charge Capture Screen on Smartphones

Existing Out of Office Encounters created in the eClinicalWorks EMR application can be edited from the Edit Charge Capture screen.

### Charge Capture

#### Using the Edit Charge Capture Screen on Smartphones

Existing Out of Office Encounters created in the eClinicalWorks EMR application can be edited from the Edit Charge Capture screen.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
</table>
| Link    | Click this button to link an ICD code to a CPT code.  
**To link an ICD code with a CPT code:**  
1. Click the ICD code(s) you want to link in the Assessments section.  
The selected ICD code(s) are highlighted in yellow.  The order in which you select the ICD codes determines the order in which they are linked with the CPT code (*e.g.*, the first ICD code selected is the primary code).  
2. Click the CPT code you want to link in the Procedure Codes section.  
The selected CPT code is highlighted in yellow.  
3. Click the Link button.  
The selected ICD and CPT codes are now linked together. |
| Clear Link | Click this button to clear the link between an ICD code and a CPT code.  
**To clear the link between an ICD code and a CPT code:**  
1. Click the ICD code you want to unlink in the Assessments section.  
The selected ICD code is highlighted in yellow.  
2. Click the CPT code you want to unlink in the Procedure Codes section.  
The selected CPT code is highlighted in yellow.  
3. Click the Clear Link button.  
The link between the selected ICD and CPT codes is now cleared. |
| OK | Click this button to exit this screen and save any changes you have made to this out of office encounter. |
| Cancel | Click this button to exit this screen without saving any changes you have made to this out of office encounter. |

**IMPORTANT!** Any changes or updates to patient information made on eClinicalMobile display as real-time edits on the smartphone; however, these changes will **NOT** be applied or visible on the main eClinicalWorks application until an information synchronization takes place.  Synchronization typically occurs at short, regularly scheduled intervals, or can be processed on demand by an administrator.

For more information on synchronization, refer to the section titled **Synchronize** on page 114.
To edit charge captures on the smartphone:

1. From the Out of Office Visits window, click the blue Service Date link for the desired out of office visit.

The Edit Assessments screen displays:

<table>
<thead>
<tr>
<th>&lt;&lt; Visit List</th>
<th>Edit Assessments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility: Diamond Street Walk-In</td>
<td></td>
</tr>
<tr>
<td>Patient Name: Talha, Syed</td>
<td></td>
</tr>
<tr>
<td>Service Date: 10/12/2009</td>
<td></td>
</tr>
<tr>
<td>Admission Date:</td>
<td></td>
</tr>
<tr>
<td>Discharge Date:</td>
<td></td>
</tr>
<tr>
<td>Room No:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ICD Code:</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go</td>
<td>Go</td>
</tr>
</tbody>
</table>

   | 250.00 | Diabetes mellitus type II |

   | Next |

2. Enter the date on which the patient is discharged in the Discharge Date field in mm/dd/yyyy format.

3. Enter the room in which this patient is staying in the Room No. field.

4. To add new ICD codes:
   a. Enter the desired code in the ICD Code field.
   OR
   Enter the desired name in the Name field.
   b. Click the Go button next to the field in which text has been entered.
   All codes that match the search criteria are displayed in a pop-up pane beneath the field.
   c. Click the desired code from the pop-up pane.
   OR
   Click the Close row to close the pop-up pane without selecting a code.

5. To remove an ICD code, click the red X icon to the left of the desired code.

6. To select a primary ICD code, click the radio button next to the desired code.

7. Click the Next button.

The Edit Procedure Codes window opens:

<table>
<thead>
<tr>
<th>CPT Code:</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go</td>
<td>Go</td>
</tr>
</tbody>
</table>

   | 99213 | EM Level 3 - 2 |

   | Next |
8. To add new CPT codes:
   a. Enter the desired code in the CPT Code field.
   OR
   Enter the desired name in the Name field.
   b. Click the Go button next to the field in which text has been entered.
   All codes that match the search criteria are displayed in a pop-up pane beneath the field.
   c. Click the desired code from the pop-up pane.
   OR
   Click the Close row to close the pop-up pane without selecting a code.
9. To remove a CPT code, click the red X icon to the left of the desired code.
10. Click the Next button.
    The Edit Charge Capture window opens:

11. To link/unlock ICD codes with CPT Codes:
    a. Check the box next to the desired ICD code.
    b. Check the box next to the desired CPT code.
    c. Click one of the following buttons:
        • Unlink - Clears any links between the selected codes.
        • Link - Links the selected codes together.
12. Enter any desired modifiers in the M1, M2, and M3 fields for each CPT code.
13. Enter the number of units in the Units field for each CPT code.
14. Enter the start date for this encounter in the Start Dt field in mm/dd/yyyy format.
15. Enter the end date for this encounter in the End Dt field in mm/dd/yyyy format.
16. Check the Done box when this encounter is ready to be billed.
17. Click the Next button.
    Billing information for this encounter is now saved.

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 SETTINGS

Some eClinicalMobile settings are configured from the eClinicalMobile Website, while others require access to the eClinicalWorks application.

 eClinicalMobile Account

eClinicalMobile accounts must be enabled and configured within the eClinicalWorks application before they can be used.

 Enabling New eClinicalMobile Users

New eClinicalMobile users must be enabled from the Provider Info window by an administrator.

To enable a new eClinicalMobile user:
1. In the eClinicalWorks application, click the Admin band.
   The Admin icons are displayed.
2. Click the Providers icon.
   The Providers window opens.
3. Click the name of the desired provider.
   The Provider Info window opens.
4. Check the Enable eClinicalMobile Access box:
5. Click the Save button.
   This provider is now enabled for the eClinicalMobile portal.
   This eClinicalMobile account must be configured before it can be used. For more
   information, refer to the section titled Configuring Your eClinicalMobile Account
   on page 85.

---

Configuring Your eClinicalMobile Account

The password and e-mail address for your account can be configured from the My Settings
window.

To configure your eClinicalMobile™ account:

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click the My Settings option.
   The My Settings window opens.
3. Click the eClinicalMobile tab.
   The eClinicalMobile options display:

   ![eClinicalMobile Options](image)

4. Click the Password Settings link.
   The Manage eClinicalMobile Account options display:
5. To change your eClinicalMobile password:
   a. Enter your current password for the eClinicalMobile Portal in the Old Password field.
   b. Enter your desired password for the eClinicalMobile Portal in the New Password field.
   c. Re-enter your desired new password in the Confirm Password field.
   d. Enter the e-mail address where you want notifications to be sent into the E-Mail Address field.
   e. Click the Update button.
      Your eClinicalMobile account is now configured.

6. If you have forgotten your eClinicalMobile password:
   a. Click the Forgot eClinicalMobile Password? link.
      The Manage eClinicalMobile Account options display:
      b. Enter your current password for the eClinicalWorks® EMR application in the eCW EMR Password field.
      c. Enter your desired password for the eClinicalMobile Portal in the New Password field.
      d. Re-enter your desired new password in the Confirm Password field.
      e. Enter the e-mail address where you want notifications to be sent into the E-Mail Address field.
      f. Click the Update button.
         Your eClinicalMobile account is now configured.

For more information on configuring your e-mail settings, refer to the section titled Configuring Your E-mail Settings on page 112.
On-Call Providers

Providers outside of a practice can be specified as on-call providers from the eClinicalWorks application. On-call providers are given limited access to eClinicalMobile in place of a provider when that provider is out of the office.

Creating On-Call Providers

Outside providers that you want to use as on-call providers must be entered into the eClinicalWorks application as staff members before they can be used.

To create an on-call provider:

1. In the eClinicalWorks application, click the Admin band.
   The Admin icons are displayed.
2. Click the Staff icon.
   The Staff window opens.
3. Click the Add button.
   The Staff Info window opens:

4. Enter the information for this staff member in the Personal Info and Login Info sections as appropriate.
5. Check the Enable eClinicalMobile Access and On-Call Provider boxes.
6. Click the Save button.
   This on-call provider is now created.
Linking a Provider with an On-Call Provider

Once an on-call provider is created within the system, they can be linked with a provider at your practice. A date range is selected during this process, and the on-call provider is granted limited access to eClinicalMobile during the selected date range.

To link a provider with an on-call provider:

1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click My Settings.
The provider-specific Settings window opens.
3. Click the eClinicalMobile tab.
The eClinicalMobile options display:

4. Click the On-Call Provider Settings link.
The On-Call Provider Settings options display:
5. Select the desired on-call provider from the On-Call Staff drop-down list.

If this provider has not been used before, or if the Use Old Password box is unchecked, the New Password and Confirm Password fields display beneath the Username field.

If this provider has been used before, their username is automatically populated in the Username field and is not editable.

6. If this provider has not been used before, enter their desired eClinicalMobile username in the Username field.

7. If this provider has been used before, leave the Use Old Password box checked to continue using the same password.

OR

Uncheck the Use Old Password box to enter a new password for this on-call provider.

8. To enter a new password for this user:
   a. Enter the desired password in the New Password field.
   b. Re-enter the desired password in the Confirm Password field.

9. To select the date range in which this provider needs access to eClinicalMobile:
   a. Click the left-most More (...) button to open a drop-down calendar.
   b. Select the beginning date for this date range from the drop-down calendar.
      The selected date is populated in the left Date Range field.
   a. Click the right-most More (...) button to open a drop-down calendar.
   b. Select the ending date for this date range from the drop-down calendar.
      The selected date is populated in the right Date Range field.

10. To determine which provider or staff member encounters or labs are assigned to in eClinicalMobile by default for this on-call provider, select the desired provider or staff member from the Default Assigned To drop-down list.
11. Click the Save button.

This on-call provider is now configured. This user can access the eClinicalMobile during the specified date range with the username and password configured here. On-call providers can only access the schedule and items for the provider with which they are linked.

My Favorites

My Favorites list can be enabled and populated for use with eClinicalMobile.

My Favorite Staff Members

When selecting providers from various drop-down lists within eClinicalMobile, users have the option to display the entire list of providers or a smaller set of favorites.

Configuring My Favorites

Your favorite staff members can be configured in the eClinicalWorks application.

To configure your favorite staff members:
1. From the File menu, hover over the Settings option to open a drop-down list.
2. From the drop-down list, click My Settings.
   The provider-specific Settings window opens.
3. Click the My Providers tab.
   The My Providers options are displayed.
4. Click the Configure My Assigned Favorites button at the bottom of the window:
The Configure My Favorites window displays:

5. Select the role of the users to add from the Role drop-down list, or leave the Role field blank to view all staff members.

6. Select a facility from the Location drop-down list, or leave the blank selection to view all facilities.

7. Click the row containing the name of a user to add to highlight it.

8. Click the => button to move the name into the My Favorites list.

   To remove names from the My Favorites list, highlight a name in the My Favorites list and click the <= button to remove the name.

9. Click the Save button to complete the selection of Assigned To favorites.

   Repeat Steps 6 - 10 to select names for Assigned To favorites from additional roles.

**Copying My Favorites from Another User**

My Favorites lists can be copied from other users at your practice.

To copy My Favorites from another user:

1. To copy favorites from another user, select the name of that user in the Copy from drop-down list.

   The names of that user’s favorites are copied to the My Favorites list of the logged-in user. The My Favorites list may be compiled from multiple user lists.

2. Click Save when complete.

**Synchronizing My Favorites**

After a My Favorites subset of providers and staff has been created for the eClinicalMobile user, the favorites list information must be uploaded to the smartphone through the synchronization process.
To upload the My Favorites list:

1. From the Admin band, click the eClinicalMobile Portal Settings icon. The eClinicalMobile Portal Settings window opens.

2. Under the Synchronize heading in the left navigation pane, click Run. The right pane refreshes and displays the eClinicalMobile Portal Tasks Schedule.

3. Check the Upload Updated Provider/Staff Information option:

4. Schedule the synchronization for this task as described in Configuring and Using the Run Synchronization Window on page 115.

Activating My Favorites

After synchronization has taken place between eClinicalMobile and the host eCW application, the user can choose to activate the My Favorites list or deactivate it to see the entire list of providers.

The My Favorites list is recommended for users who belong to large groups or practices since the concise list will be easier to navigate. These lists will be used to populate a number of fields within eClinicalMobile, including the Assign To field that appears on a number of screens.

To activate My Favorites for eClinicalMobile on the iPhone:

1. From eClinicalMobile Home Page, click the Settings button.

The Configure Personal Settings screen displays:
2. Click the red X button next to *Activate Favorites* to display a green button with a check mark:

3. Click the Save button.

   The My Favorites list displays in the Assigned To drop-down lists throughout eClinicalMobile.

**To activate My Favorites for eClinicalMobile on smartphones:**

1. From eClinicalMobile Home Page, click the *Settings link*.

   The Configure Personal Settings screen displays:
2. Check the Activate Favorites box.

3. Click the Save button.

   The My Favorites list displays in the Assigned To drop-down lists throughout eClinicalMobile.

My Favorite Labs, Imaging, and Procedures

When selecting labs, diagnostic imaging tests, and procedures from various drop-down lists within eClinicalMobile, users have the option to display a list of their favorites.

Configuring My Favorite Labs, Imaging, and Procedures

Before labs and diagnostic imaging tests can be ordered from eClinicalMobile, they must be added to your favorites list from within the eClinicalWorks application.

To configure favorite labs, imaging, and procedures:

1. From the EMR menu within the eClinicalWorks application, hover over the Labs, DI & Procedures option to open a drop-down list.

2. From this drop-down list, click the My Labs, DI & Procedures Favorites option.

   The My Labs, DI & Procedures Favorites window opens:
3. Select the type of favorites list you want to configure from the *My Favorite* drop-down list.

4. To add items from the selected favorites list:
   a. Click the Add button.
      The Labs, Diagnostic Imaging, or Procedures window opens.
   b. Highlight the item you want to add to your favorites list.
   c. Click OK.
      The selected item is now added to your favorites list.
   d. Repeat steps 4a - 4c until all desired items have been added.

5. To remove items from the selected favorites list:
   a. Check the box(es) next to the item(s) you want to remove from your favorites list.
   b. Click the Remove button.
      A confirmation window opens.
   c. Click Yes.
      The selected items are removed from your favorites list.

   **Note:** Once this favorites list has been configured, the new information must be uploaded to eClinicalMobile by running the *Upload Updated Provider/Staff Information* and *Upload Web Enabled Physicians to eClinicalMobile* tasks.

   For more information on uploading information to eClinicalMobile, refer to the section titled *Configuring and Using the Run Synchronization Window* on page 115.

---

**Notifications**

Various notifications can be activated for eClinicalMobile. If the right criteria are met, an e-mail is sent to the user to notify them.
Activating New Tel/Web Encounter Notifications

Users can configure eClinicalMobile to send them an e-mail whenever a Telephone/Web Encounter has been assigned to them through eClinicalMobile.

This e-mail is sent to the e-mail address configured in the eClinicalWorks application. For more information on configuring your eClinicalMobile account in the eClinicalWorks application, refer to the section titled Configuring Your eClinicalMobile Account on page 85.

This notification must also be enabled and configured from the eClinicalWorks application. For more information on enabling this feature and configuring the text in this notification, refer to the section titled Configuring E-mail Settings on page 111.

To activate new Tel/Web Encounter notifications for eClinicalMobile on the iPhone:

1. From eClinicalMobile Home Page, click the Settings button.

   The Configure Personal Settings screen displays:

```
[Image of the Configure Personal Settings screen]
```

2. Click the red X button next to New Tel/Web Encounter Notification to display a green button with a check mark:
3. Click the Save button.
   New Tel/Web Encounter notifications are now activated.

To activate new Tel/Web Encounter notifications for eClinicalMobile on smartphones:

1. From eClinicalMobile Home Page, click the Settings link.
   The Configure Personal Settings screen displays:

2. Check the New Tel/Web Encounter Notification box.
3. Click the Save button.
   New Tel/Web Encounter notifications are now activated.

Activating New Lab Notifications

Users can configure eClinicalMobile to send them an e-mail whenever a lab or diagnostic imaging test has been assigned to them through eClinicalMobile.
This e-mail is sent to the e-mail address configured in the eClinicalWorks application. For more information on configuring your eClinicalMobile account in the eClinicalWorks application, refer to the section titled Configuring Your eClinicalMobile Account on page 85.

This notification must also be enabled and configured from the eClinicalWorks application. For more information on enabling this feature and configuring the text in this notification, refer to the section titled Configuring E-mail Settings on page 111.

To activate new lab notifications for eClinicalMobile on the iPhone:

1. From eClinicalMobile Home Page, click the Settings button.
   
   The Configure Personal Settings screen displays:

   ![Configure Personal Settings Screen](image)

   2. Click the red X button next to New Lab Notification to display a green button with a check mark:
3. Click the Save button.
   New lab notifications are now activated.

To activate new lab notifications for eClinicalMobile on smartphones:
1. From eClinicalMobile Home Page, click the Settings link.
   The Configure Personal Settings screen displays:

   ![](image)

2. Check the New Lab Notification box.
   3. Click the Save button.
      New lab notifications are now activated.

---

**Activating New Message Notifications**

Users can configure eClinicalMobile to send them an e-mail whenever a new message has been sent to them through eClinicalMobile.
This e-mail is sent to the e-mail address configured in the eClinicalWorks application. For more information on configuring your eClinicalMobile account in the eClinicalWorks application, refer to the section titled Configuring Your eClinicalMobile Account on page 85.

This notification must also be enabled and configured from the eClinicalWorks application. For more information on enabling this feature and configuring the text in this notification, refer to the section titled Configuring E-mail Settings on page 111.

To activate new message notifications for eClinicalMobile on the iPhone:

1. From eClinicalMobile Home Page, click the Settings button.

   The Configure Personal Settings screen displays:

2. Click the red X button next to New Message Notification to display a green button with a check mark:
3. Click the Save button.
New message notifications are now activated.

**To activate new message notifications for eClinicalMobile on smartphones:**

1. From eClinicalMobile Home Page, click the *Settings* link.
   
The Configure Personal Settings screen displays:

2. Check the New Message Notification box.
3. Click the Save button.
   
   New message notifications are now activated.
Automatically Linking ICD and CPT Codes on Charge Captures

Users can configure eClinicalMobile to automatically link any CPT® codes added to a charge capture with all ICD codes already contained on that charge capture.

To automatically link ICD and CPT codes on charge captures on the iPhone:

1. From eClinicalMobile Home Page, click the Settings button.

   The Configure Personal Settings screen displays:

2. Click the red X button next to Auto Link ICD to CPT to display a green button with a check mark:

   1. CPT only © 2008 American Medical Association. All rights reserved.
3. Click the Save button.

Automatic linking of CPT¹ and ICD codes on charge captures is now enabled. Whenever a new CPT code is added to a charge capture, it is now automatically linked with all ICD codes already contained on the charge capture.

To automatically link ICD and CPT codes on charge captures on smartphones:

1. From eClinicalMobile Home Page, click the Settings link.

   The Configure Personal Settings screen displays:

2. Check the Auto Link ICD to CPT box.

3. Click the Save button.

¹ CPT only © 2008 American Medical Association. All rights reserved.
Automatic linking of CPT and ICD codes on charge captures is now enabled. Whenever a new CPT code is added to a charge capture, it is now automatically linked with all ICD codes already contained on the charge capture.

### Activating and Populating the CPT Favorites List

A CPT Favorites list can be activated and populated with CPT codes from the eClinicalMobile Settings window. This list is used to quickly select commonly used CPT codes when creating charge captures.

**To activate and populate the CPT Favorites list on the iPhone:**

1. From eClinicalMobile Home Page, click the *Settings button*.

   The Configure Personal Settings screen displays:

   ![Configure Personal Settings](image)

2. Click the red X button next to *Activate CPT Favorites* to display a green button with a check mark:

   ![Activate CPT Favorites](image)

---

1. CPT only © 2008 American Medical Association. All rights reserved.
The Procedure Codes screen displays:

3. To add a new CPT1 code to this list:

   a. Begin entering the desired code in the left search field at the top of the window

   OR

   Begin entering the name of the desired code in the right search field at the top of
   the window.

   As text is entered, the codes that match the text pop up below the Procedure Codes
   field in real time.

   b. Click the desired code in the pop-up pane.

   The selected code is added to the bottom of the Procedure Codes list and can now
   be selected as a CPT Favorite.

---

1. CPT only © 2008 American Medical Association. All rights reserved.
4. To remove a code from the list, click the red X to the left of the desired code.
5. Click the Save button.
   A confirmation window opens.
6. Click OK.
   The Settings screen displays.
7. Click the Save button.
   The CPT\textsuperscript{1} Favorites list is now activated and populated for eClinicalMobile. When creating charge captures, a CPT Favorites drop-down list is displayed.

To activate the CPT Favorites list on smartphones:

1. From eClinicalMobile Home Page, click the Settings link.
   The Configure Personal Settings screen displays:

2. Check the Activate CPT Favorites box.
3. Click the Save button.
   The CPT Favorites list is now activated for eClinicalMobile. When creating charge captures, a CPT Favorites drop-down list is displayed.

Portal Setup and Configuration

The eClinicalMobile Portal is a location where information is transferred between the main eClinicalWorks application and the eClinicalMobile site.

eClinicalMobile relies upon a synchronization process to perform this exchange of information. This synchronization occurs at regularly scheduled intervals, or if needed, the synchronization can be run on demand by an administrator.

Some screens within eClinicalMobile, such as the Patient Hub screen, contain large amounts of information that would be too system-intensive to reload continually. For these screens, a Refresh icon has been included, since the information displayed initially is a cached version of most recent view. It is considered good practice to refresh these windows prior

\textsuperscript{1} CPT only © 2008 American Medical Association. All rights reserved.
Settings

eClinicalMobile Settings are accessed from the Admin band in the eClinicalWorks application.

Enabling/Disabling Providers in Batches

A list of those providers that have been enabled, as well as those that have not been enabled, can be viewed from the eClinicalMobile Settings window. Providers can be enabled or disabled from this window in batches.

To enable/disable providers in batches:

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

   The eClinicalMobile Portal Settings window opens.

2. Under Settings, click the Enable Providers link.

   The right pane refreshes with the Enable Providers options:

   ![Enable Providers](image)

3. To enable a provider:
   
   a. Highlight the desired provider in the left pane.
   
   b. Click the > button.

   The selected provider is now enabled.
4. To disable a provider:
   a. Highlight the desired provider in the right pane.
   b. Click the < button.
      The selected provider is now disabled.
5. Click the Save button.
   The selected providers are now configured.

---

**Configuring New Patient Demographics Field**

One of the more common tasks for physicians on the go is documenting new patients. This task often occurs while in a clinic, or while on rounds at the hospital. The New Patient feature in eClinicalMobile provides a quick, streamlined user interface to capture the critical demographics fields needed by eClinicalWorks.

The New Patient Demographics Field window in eClinicalMobile Portal Settings gives the physician the flexibility to choose which demographics fields are needed on the New Patient feature. This settings window also allows the physician to configure mandatory fields to meet their needs.

**To configure New Patient Demographic fields:**

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

   ![eClinicalMobile Portal Settings](image)

   The eClinicalMobile Portal Settings window opens.

2. Under Settings, click the *New Pt Demographics Field* link.

   The right pane refreshes with the eClinicalMobile Demographic fields:

   ![Demographic Fields](image)
3. Use the check boxes on the New Patient Demographics Field to determine the patient demographics information fields to display on eClinicalMobile.

Shaded fields are set by default and cannot be edited.

4. To mark a field as mandatory, check the Mandatory Field box next to the Field Name.

5. When the selections are complete, click the Save button at the bottom of the window.

The configured fields display on the New Patient screen after synchronization:

Mandatory fields are indicated by a red asterisk (*). Use the down arrows to show or hide more information within a section.

---

**Configuring Keywords Setup**

The Keywords Setup window allows physicians and staff to enter commonly used words and phrases into the eClinicalMobile application to help reduce typing when working from a smartphone. The list of keywords and phrases is triggered when the physician enters the first letters into the related field.
To configure favorite keywords or phrases:

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

The eClinicalMobile Portal Settings window opens.

2. Under Settings, click Keywords Setup.

The right pane refreshes with the Keywords Setup fields:

<table>
<thead>
<tr>
<th>Keyword Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Keywords</strong></td>
</tr>
<tr>
<td>**should be separated by a vertical bar</td>
</tr>
</tbody>
</table>

3. Choose one of the three (3) fields to populate with keywords:
   - Tel/Web Encounters
   - Lab Internal Notes
   - Lab Notes

4. Enter the keyword or phrase into the field using free text or copy/paste.

5. Continue to add keywords and phrases, making sure to use the vertical bar (|) character (sometimes referred to as the "pipe" character) between keywords or phrases:
6. When complete, click the Save button at the bottom of the window.

After synchronization has taken place, the keywords will display on eClinicalMobile in a real-time search manner as the user begins to type or enter letters of a word:

7. Click the desired keyword or phrase to add it to the field, and continue documenting the information.

---

**Configuring E-mail Settings**

**Configuring Message Text**

Use the E-Mail Settings window to configure the text of the messages sent to users when new Telephone Encounters, labs, and/or messages are assigned to them. These notifications must be activated from My Settings before they are sent.

For more information on activating notifications, refer to the section titled [Configuring Your E-mail Settings](#) on page 112.
To configure message text:

1. From the Admin band, click the eClinicalMobile Portal Settings icon:
   
   ![eClinicalMobile Portal Settings](image)
   
   The eClinicalMobile Portal Settings window opens.

2. Under Settings, click E-mail Settings.
   
   The right pane refreshes with the E-mail Settings fields:

<table>
<thead>
<tr>
<th>E-mail Text Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Default E-mail messages sent to providers</strong></td>
</tr>
<tr>
<td>Note: Please incorporate complete message you want the providers to receive in the E-mail, including link to your mobile portal website. [Please do not exceed 200 characters in each message setting]</td>
</tr>
<tr>
<td><strong>New Assigned Telephone Encounters Info</strong></td>
</tr>
<tr>
<td>New TelWeb Encounters: You have received a new TelWeb Encounter from the practice. Please log into mobile portal to read your message.</td>
</tr>
<tr>
<td>Link to Portal: <a href="https://mygov2.eclinicalweb.com/mobileportal/login.jsp">https://mygov2.eclinicalweb.com/mobileportal/login.jsp</a></td>
</tr>
<tr>
<td><strong>New Assigned Labs Info</strong></td>
</tr>
<tr>
<td>Labs: You have received new Labs from the practice. Please log into mobile to review the lab.</td>
</tr>
<tr>
<td>Link to Portal: <a href="https://mygov2.eclinicalweb.com/mobileportal/login.jsp">https://mygov2.eclinicalweb.com/mobileportal/login.jsp</a></td>
</tr>
<tr>
<td><strong>New Message Info</strong></td>
</tr>
<tr>
<td>New Message: You have received a new message from the practice. Please log into mobile portal to read your message.</td>
</tr>
<tr>
<td>Link to Portal: <a href="https://mygov2.eclinicalweb.com/mobileportal/login.jsp">https://mygov2.eclinicalweb.com/mobileportal/login.jsp</a></td>
</tr>
</tbody>
</table>

3. Enter the text of the message you want to be sent to users when a new Telephone Encounter is assigned to them through eClinicalMobile in the New Assigned Telephone Encounters Info.

4. Enter the text of the message you want to be sent to users when a new lab is assigned to them through eClinicalMobile in the New Assigned Labs Info.

5. Enter the text of the message you want to be sent to users when a new message is sent to them through eClinicalMobile in the New Message Info.

6. Click Save.
   
   The message text is now saved.

Configuring Your E-mail Settings

The password and e-mail address for your account can be configured from the My Settings window.

To configure your eClinicalMobile account:

1. From the File menu, hover over the Settings option to open a drop-down list.

2. From the drop-down list, click the My Settings option.
   
   The My Settings window opens.

3. Click the eClinicalMobile tab.
   
   The eClinicalMobile options display.

4. Click the *E-mail Settings* link.
   
   The Settings window displays:
5. To receive e-mail notifications of new telephone encounters, select Yes from the *E-mail New Telephone Encounters Information* drop-down list.

6. To receive e-mail notifications of new labs, select Yes from the *E-mail New Labs Information* drop-down list.

7. To receive e-mail notifications of new telephone encounters, select Yes from the *E-mail New Message Information* drop-down list.

8. Click Save.
   
   Your e-mail settings are now configured.

---

### Syncing Data

Data must be synced between the eClinicalWorks application and the eClinicalMobile Portal during setup, as well as when any data has changed.

**IMPORTANT!** Syncing data is a time- and resource-intensive process that may slow down the system. It is recommended that this process be performed outside of normal working hours, and only during setup or when information has changed.

**To sync data:**

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

   ![eClinicalMobile Portal Settings](image)

   The eClinicalMobile Portal Settings window opens.

2. Under Settings, click Sync Data.
   
   The eClinicalMobile Portal Data Synchronization window opens:
3. Check the box(es) next to the data you want to synchronize.

4. To sync data overnight:
   a. Check the box(es) next to the type(s) of data you want to synchronize.
   b. Click the Re-Sync button.
      
      A confirmation window opens, notifying the user that the selected data has been scheduled for synchronization. If eClinicalMobile is currently running, then the selected jobs will be synced overnight to reduce the impact on users.

5. To sync data immediately:
   a. Check the box(es) next to the type(s) of data you want to synchronize.
      
      Data that has not been synchronized recently display the text To be synchronized in red in the Upload Status column.
   b. Click the Start Synchronization Process button.
      
      The synchronization process for the selected data begins. While the synchronization is being processed, the text Synchronization in process displays in orange in the Upload Status column.
      
      Once the synchronization process is completed, the text Completed displays in green in the Upload Status column.

**Synchronize**

To enable any new or modified eClinicalMobile settings, the practice must run the synchronization process. Synchronization exchanges information between the host eCW application and eClinicalMobile. The synchronization process can be scheduled to run at regular intervals, or it can be run on demand, if needed.
Configuring and Using the Run Synchronization Window

Information must be periodically synchronized between the eClinicalWorks application and the eClinicalMobile Portal. Tasks can be scheduled to run automatically so that this information is synchronized regularly. It is recommended to run all tasks once every three (3) minutes.

The Tasks Schedule window displays:
- an initial check box column used to select the tasks to be run
- a Task column in which each of the synchronization tasks is named
- a Status column that displays the status of running or scheduled synchronization for each task
- an Interval column showing the frequency of scheduled synchronizations by task

Configuring the Run Synchronize Window

To configure the Run window:

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

   ![eClinicalMobile Portal Settings](image)

   The eClinicalMobile Portal Settings window opens.

2. Under Synchronize, click Run.

   The right pane refreshes with the eClinicalMobile Portal Tasks Schedule:

   ![eClinicalMobile Portal Tasks Schedule](image)

3. If desired, click the Stop Schedule button to stop any currently scheduled tasks from running.
4. Check the box(es) next to the task(s) to be scheduled.
   OR
   Check the box at the top of the window to select all of the tasks at once.
5. Enter the number of minutes between each automatic synchronization in the Minutes field.

   Note: It is recommended that most tasks are scheduled to run every three (3) minutes.

6. Click the Schedule button.
   The selected tasks are now run automatically at their assigned intervals.

   Note: Click the Refresh button to refresh the Status of any tasks that have been run.

Running Synchronization on Demand

The synchronization process for any or all of the tasks can be run immediately at any time.

To run synchronization tasks on demand:
1. Check the box(es) next to the task(s) that you want to run.
2. Click the Run Now button.
   All of the selected tasks run immediately upon the staff member’s clicking the button; the system displays Running in the Status column until the synchronization is complete.

   Note: Click the Refresh button to refresh the Status of any tasks that have been run.

Scheduling Cron Jobs

Cron jobs (portal maintenance tasks that are automatically run at pre-determined intervals) can be stopped and restarted from eClinicalMobile Settings.

To schedule cron jobs:
1. From the Admin band, click the eClinicalMobile Portal Settings icon:

   ![eClinicalMobile Portal Settings](image)

   The eClinicalMobile Portal Settings window opens.

2. Under Synchronize, click Schedule Cron Jobs.
   The eClinicalMobile Cron Job Scheduler window opens:
3. To restart an individual job, click the Restart button next to the desired job.
4. To stop a job, click the Stop button next to the desired job.
5. To restart all jobs at once, or to restart a job that has been previously stopped, click the *Restart All Jobs* button.
APPENDIX A: NOTICES

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