

ECW Step-by-Step Guide for Making Life a Little Bit Easier

Omar Dughly, 2019

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How to Insert a Template

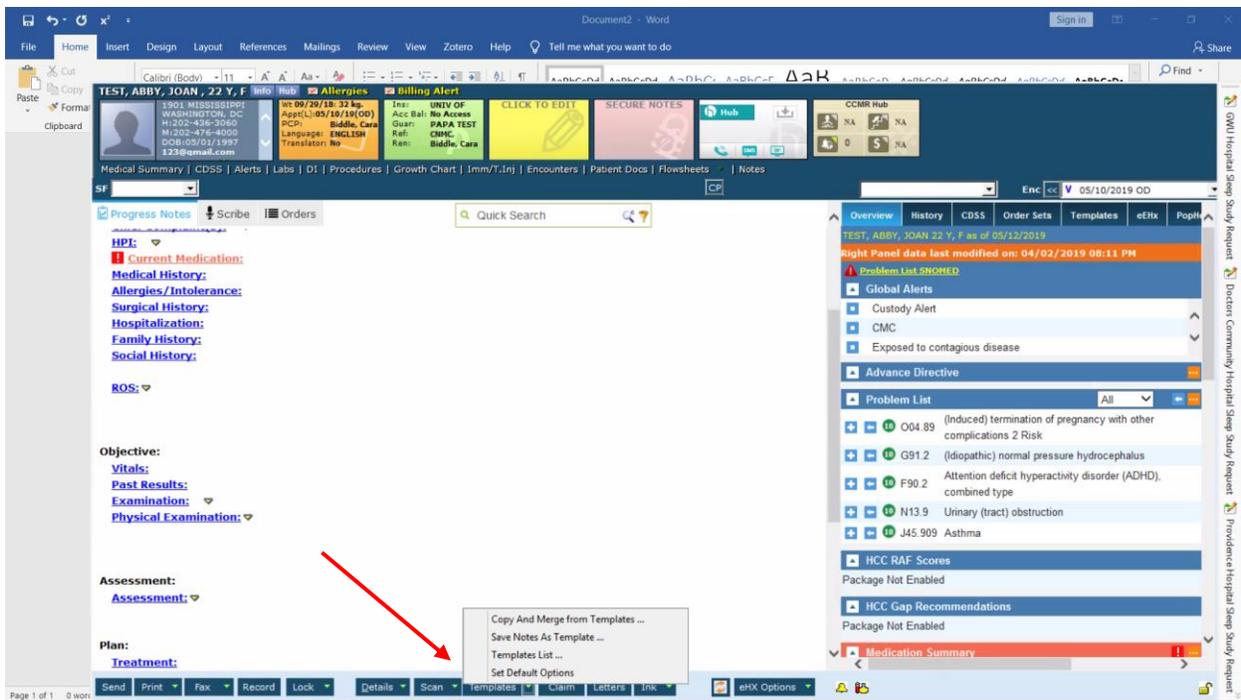
This section will show you a step-by-step guide for inserting a blank template, as well as how to pull in text from past notes into your current progress note

Step 1) Open the patient's progress note that you wish to work on. In this case, the patient is "Abby Test"

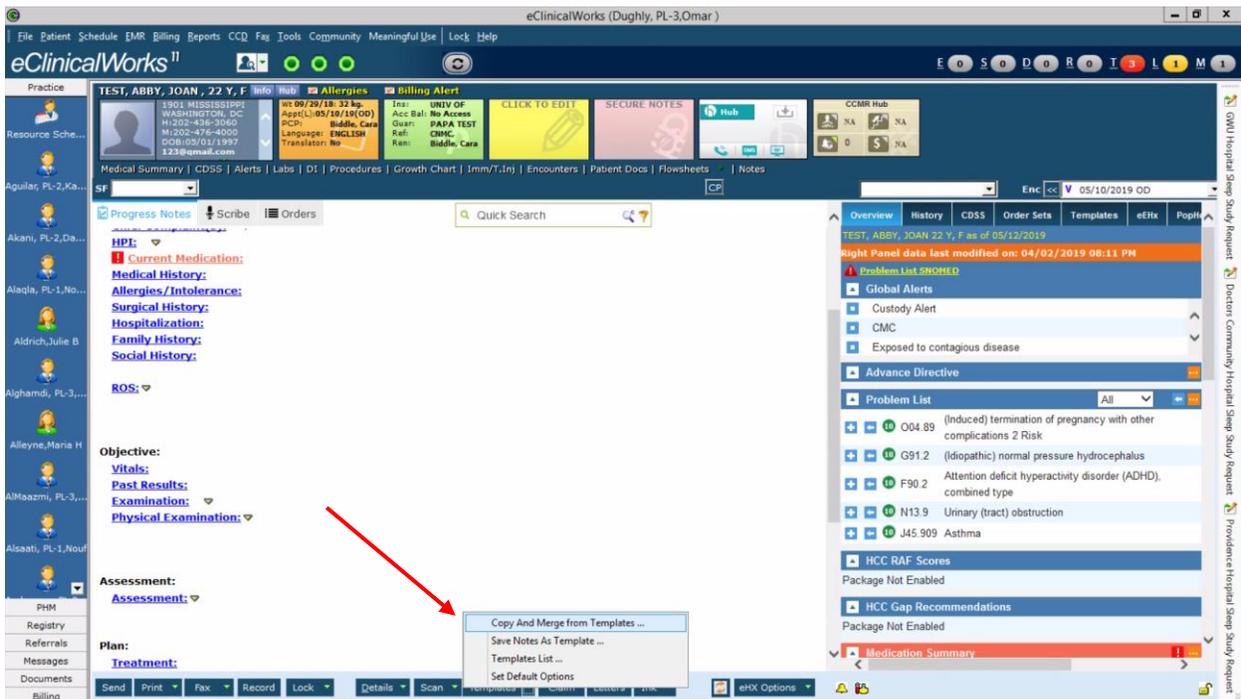
The screenshot displays the eClinicalWorks EMR interface for a patient named TEST, ABBY, JOAN, 22 Y, F. The interface is divided into several sections:

- Top Bar:** eClinicalWorks logo and navigation menu (File, Patient, Schedule, EMR, Billing, Reports, CCD, Fax, Tools, Community, Meaningful Use, Lock, Help).
- Left Sidebar:** Practice navigation menu with icons for various users and roles.
- Header:** Patient information including name, DOB (05/01/1997), Age (22 Y), Sex (Female), and External MRN (021260193). It also shows primary insurance (UNIV OF MARYLAND HEALTH PARTNERS) and payer ID (0).
- Subjective Section:** Includes Chief Complaint(s), HPI, Current Medication, Medical History, Allergies/Intolerance, Surgical History, Hospitalization, Family History, and Social History.
- Right Sidebar:** Navigation menu with options like Overview, History, CDSS, Order Sets, Templates, eRx, and People. It also shows a list of alerts and a medication summary.
- Bottom Bar:** Action buttons for Send, Print, Fax, Record, Lock, Details, Scan, Templates, Claim, Letters, Ink, and eHX Options.

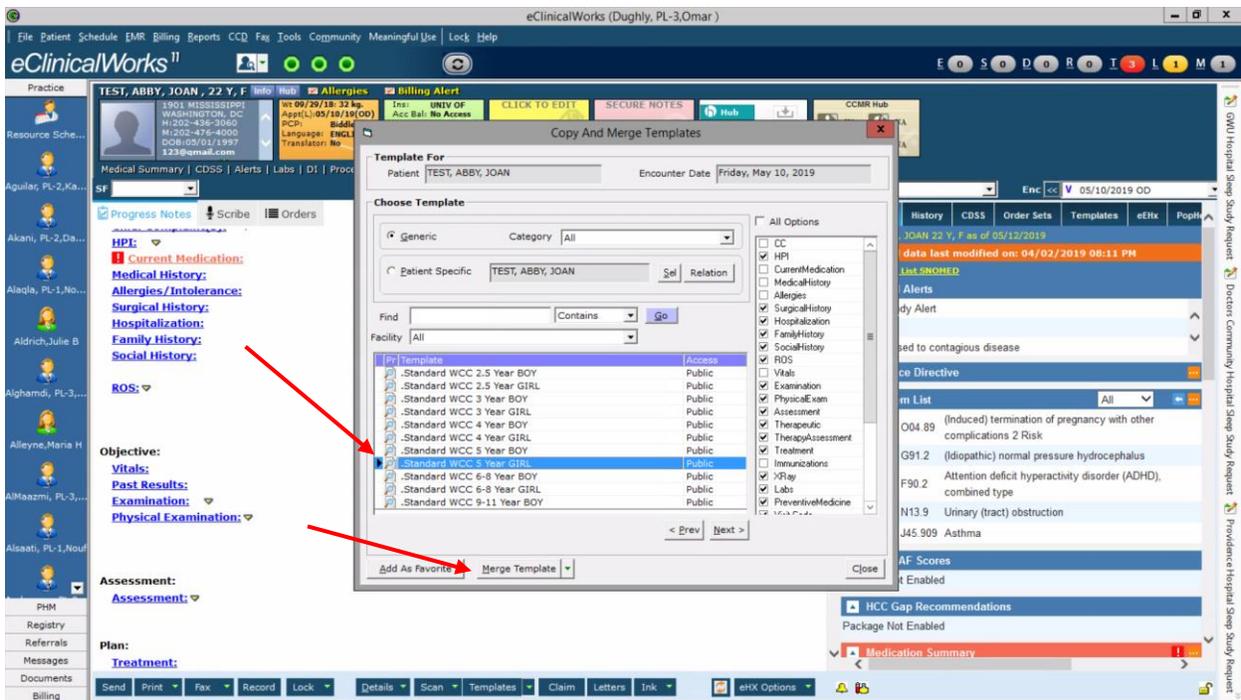
Step 2) On the bottom bar of the page, click on the carat to the right of the "Template" button



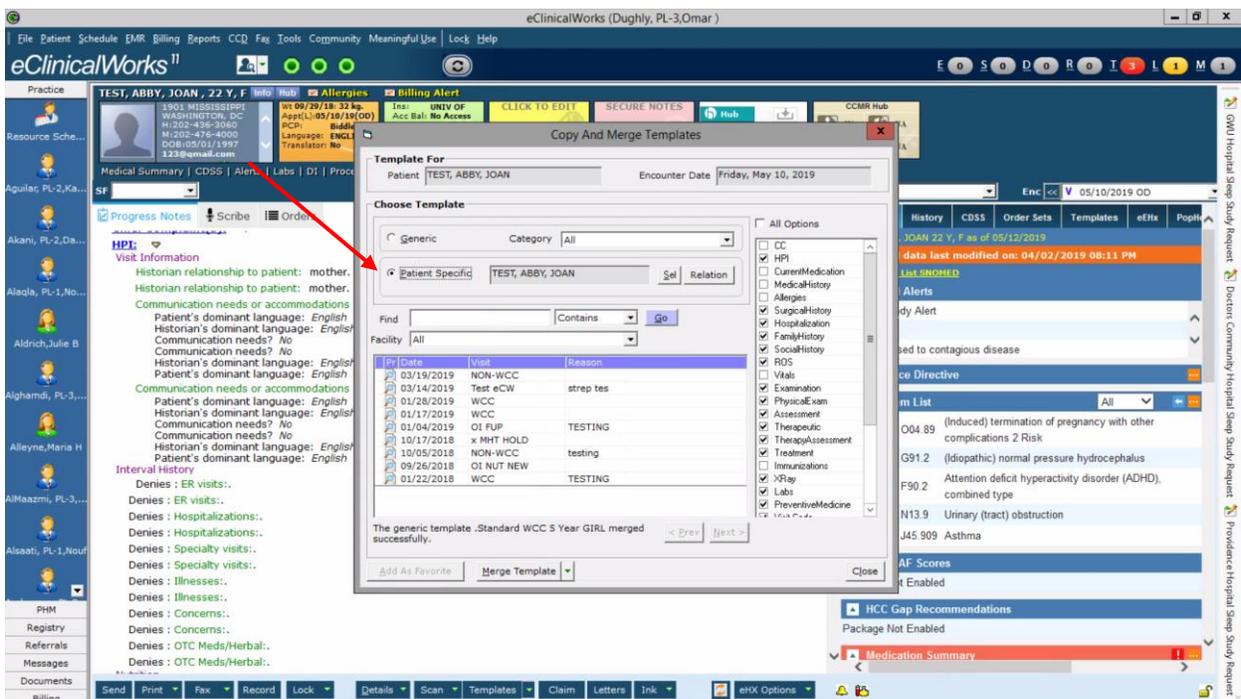
Step 3) Click on the option that says “Copy and Merge from Templates”



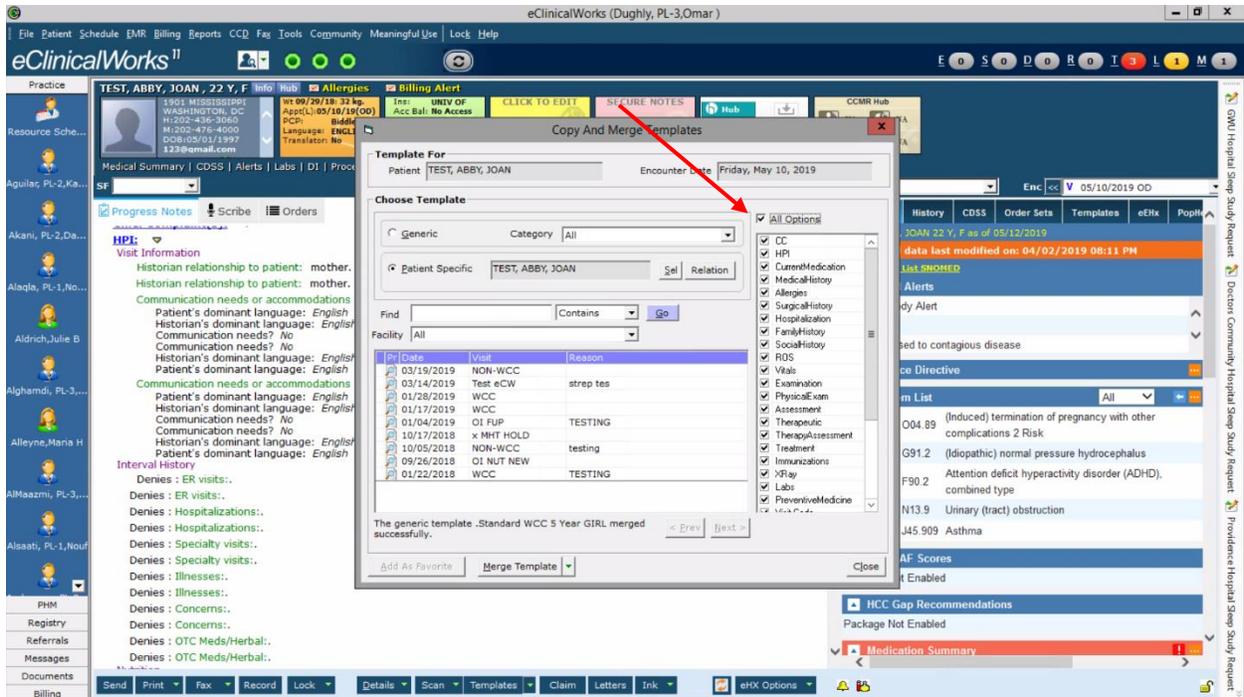
Step 4) When you do that, you’ll see that the Templates box appears. Standard well child check templates are written as “.Standard WCC...” With the age and gender of the patient following. Select the appropriate general template you wish to use by highlighting over it, and then click on the button that says “Merge Template”



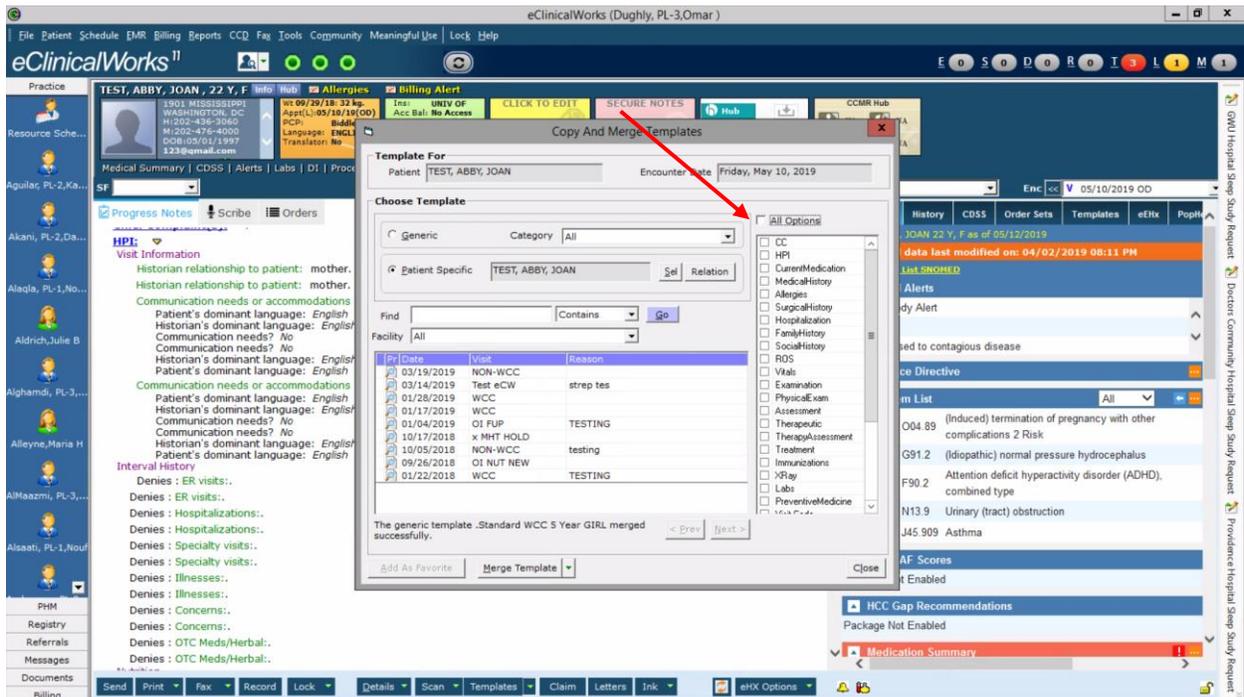
Step 5) Now, if you wish to add in certain histories that have been collected in past visits (such as Hospitalizations, Family hx, Social hx), you can add in texts from past notes using the following steps. First, under the heading that says “Choose Template”, click the button that says “Patient Specific.”



Step 6) When you select Patient Specific templates, you will now see a list of all past progress notes from that patient. However, you first want to select only the parts of the note that you wish to incorporate into your current progress note. Click on the checkbox on the right column that says "All Options" to select all parts of the note



Step 7) Now, click that same checkbox again, in order to clear all selected items



Step 8) Now, find a note that was completed in the past that you wish to pull sections from. In the righthand column of checkboxes, select those parts of the note that you wish to add to your current progress note

The screenshot shows the eClinicalWorks interface for patient TEST, ABBY, JOAN. A 'Copy And Merge Templates' dialog box is open, allowing the user to select content from a previous note to merge into the current one. The dialog box includes a table of past notes and a list of checkboxes for selecting content.

Copy And Merge Templates Dialog Box:

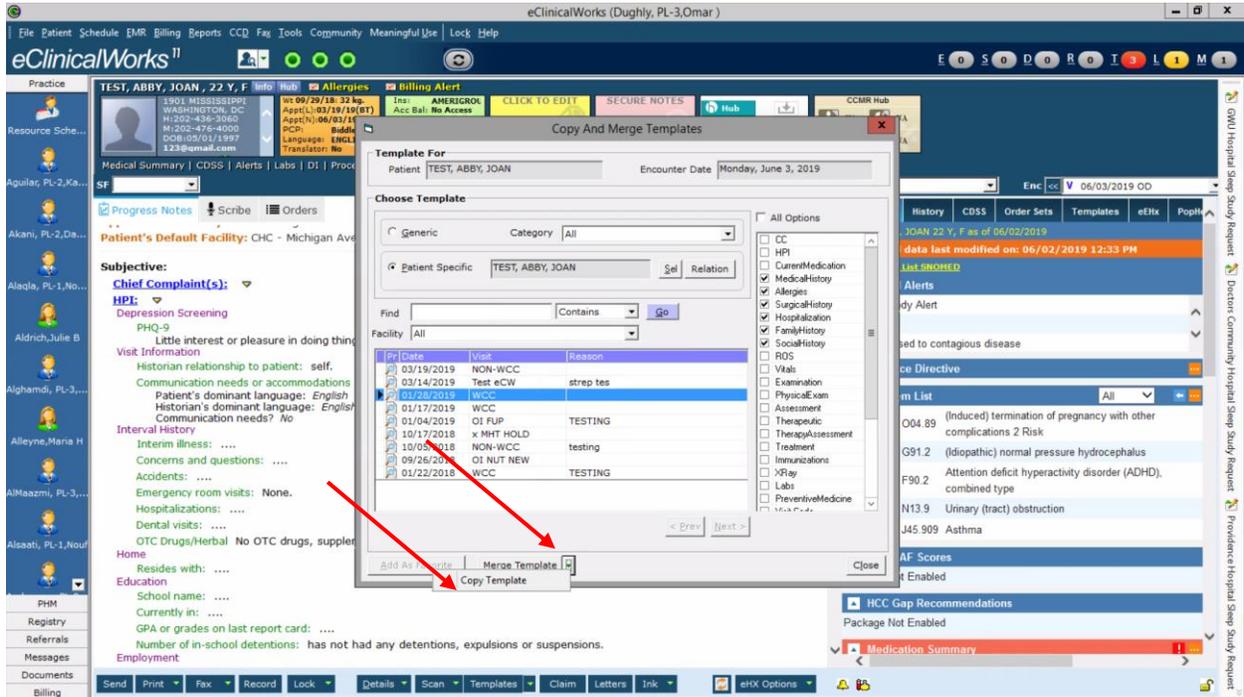
- Patient: TEST, ABBY, JOAN
- Encounter Date: Monday, June 3, 2019
- Choose Template:
 - Generic: Category: All
 - Patient Specific: TEST, ABBY, JOAN
- Find: [] Contains [] Go
- Facility: All
- Table of Past Notes:

Pr	Date	Visit	Reason
	03/19/2019	NON-WCC	
	03/14/2019	Test eCW	strap tes
	03/23/2019	WCC	
	01/17/2019	WCC	
	01/04/2019	OI FUP	TESTING
	10/17/2018	x MHT HOLD	
	10/05/2018	NON-WCC	testing
	09/26/2018	OI NUT NEW	
	01/22/2018	WCC	TESTING
- All Options (checkboxes):
 - CC
 - HPI
 - CurrentMedication
 - MedicalHistory
 - Allergies
 - SurgicalHistory
 - Hospitalization
 - FamilyHistory
 - SocialHistory
 - ROS
 - Vitals
 - Examination
 - PhysicalExam
 - Assessment
 - Therapeutic
 - TherapyAssessment
 - Treatment
 - Immunizations
 - XRay
 - Labs
 - PreventiveMedicine

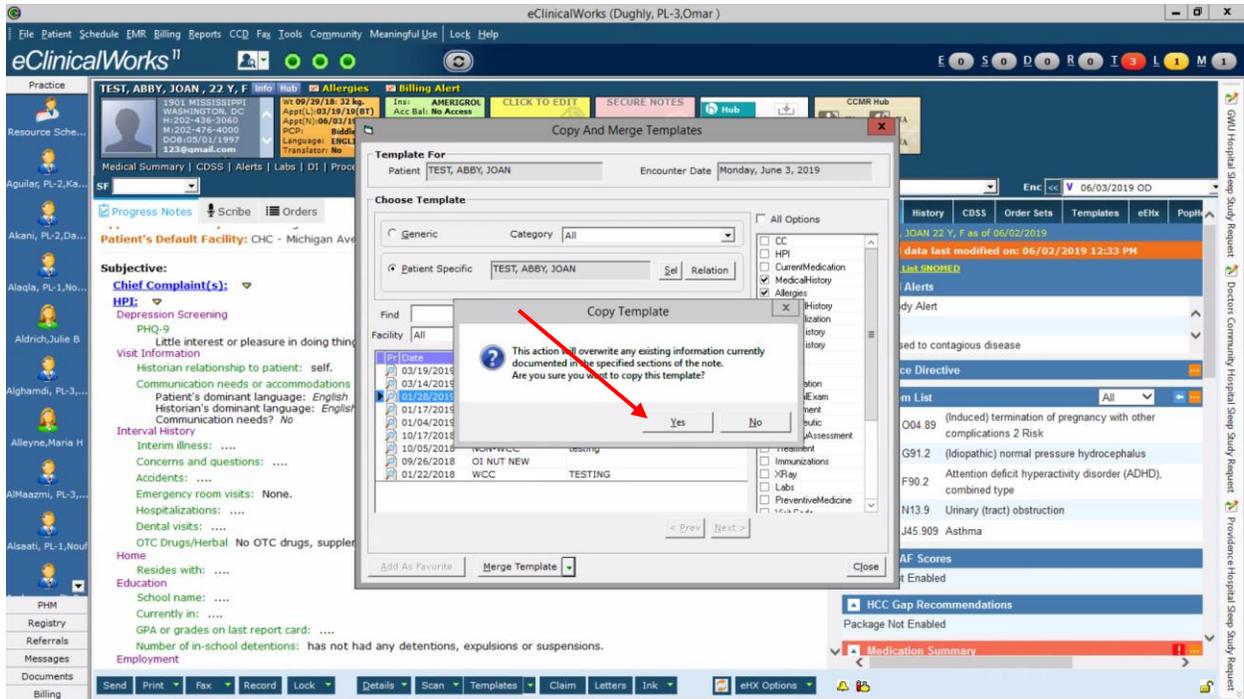
Background patient information includes:

- Appointment Facility: CHC - Michigan Avenue
- Patient's Default Facility: CHC - Michigan Avenue
- Subjective:
 - Chief Complaint(s):
 - HPI: Depression Screening
 - PHQ-9: Little interest or pleasure in doing things
 - Visit Information: Historian relationship to patient: self.
 - Communication needs or accommodations: Patient's dominant language: English
 - Historian's dominant language: English
 - Communication needs? No
 - Interval History: Interim illness: ...
 - Concerns and questions: ...
 - Accidents: ...
 - Emergency room visits: None.
 - Hospitalizations: ...
 - Dental visits: ...
 - OTC Drugs/Herbal: No OTC drugs, supplement
 - Home: Resides with: ...
 - Education: School name: ...
 - Currently in: ...
 - GPA or grades on last report card: ...
 - Number of in-school detentions: has not had any detentions, expulsions or suspensions.

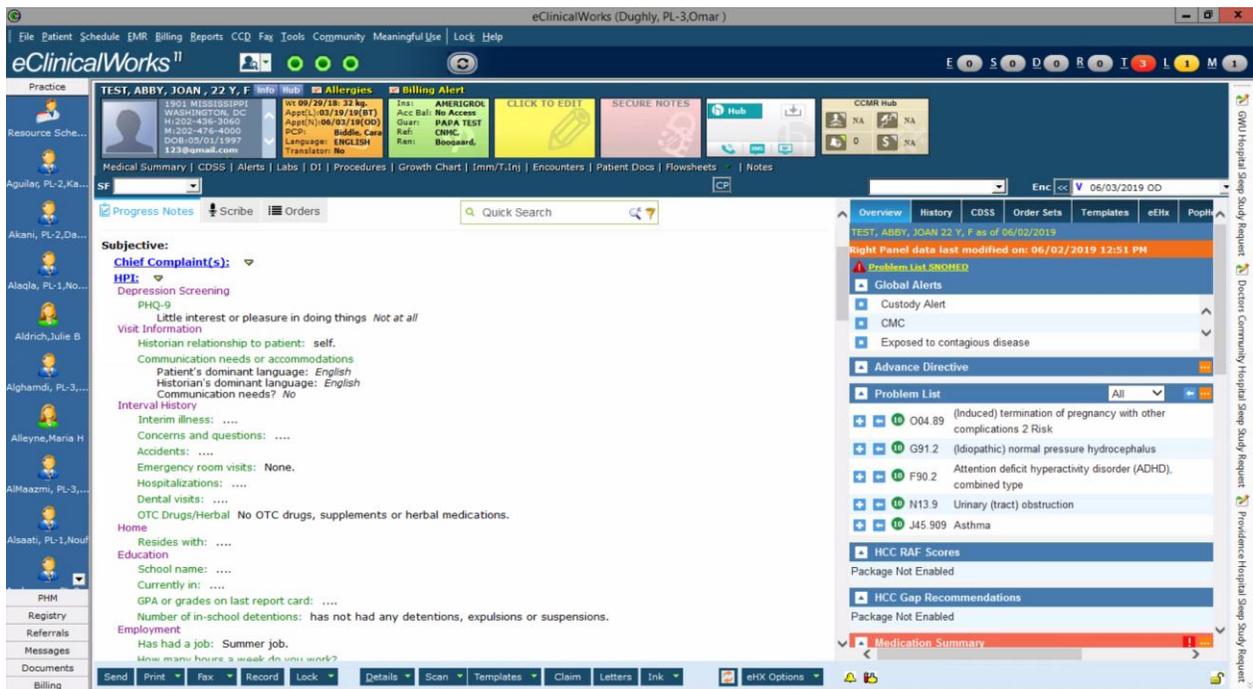
Step 9) To add them to the current note without duplicating sections, click the carat next to the “Merge Template” button in order to see the “Copy Template” option. When you “Copy”, this actually will replace the blank sections that were pulled in from the generic template with the precompleted sections from the past note. If you were to select “Merge”, you would get both a blank section plus the precompleted sections in the progress note. Click “Copy Template”



Step 10) When you click “Copy Template”, you get a message asking if you are ok with overwriting information that is in the current progress note. Click “yes” (because we want the precompleted texts in this case).



Step 11) Great! You’ve now added a blank Well Child Check template and pulled in the past histories. Remember, always verify the histories you’ve pulled in, to make sure they are accurate and updated with each visit.



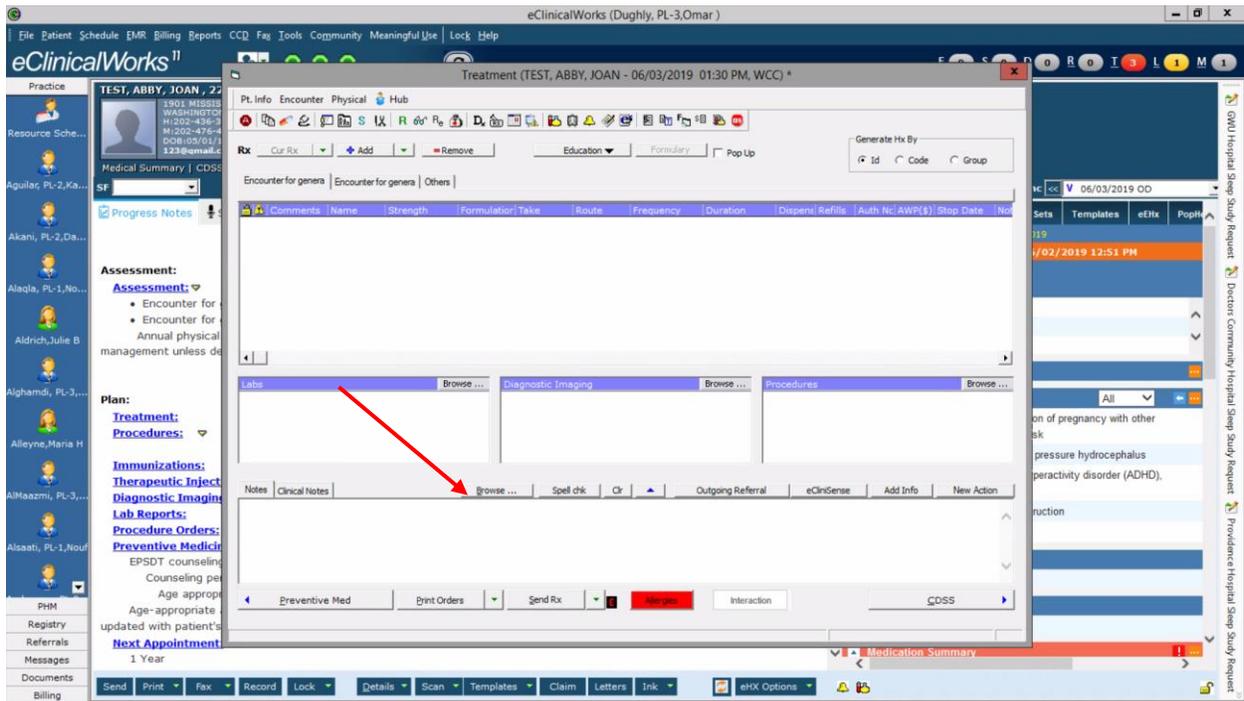
How to search for precompleted text phrases

Precompleted text phrases are sections of text that have been added by an eCW user. They are often used for common anticipatory guidance provided, treatment advice, and return precautions that are given to families. This section will guide you on how to pull previously made text phrases into your own note

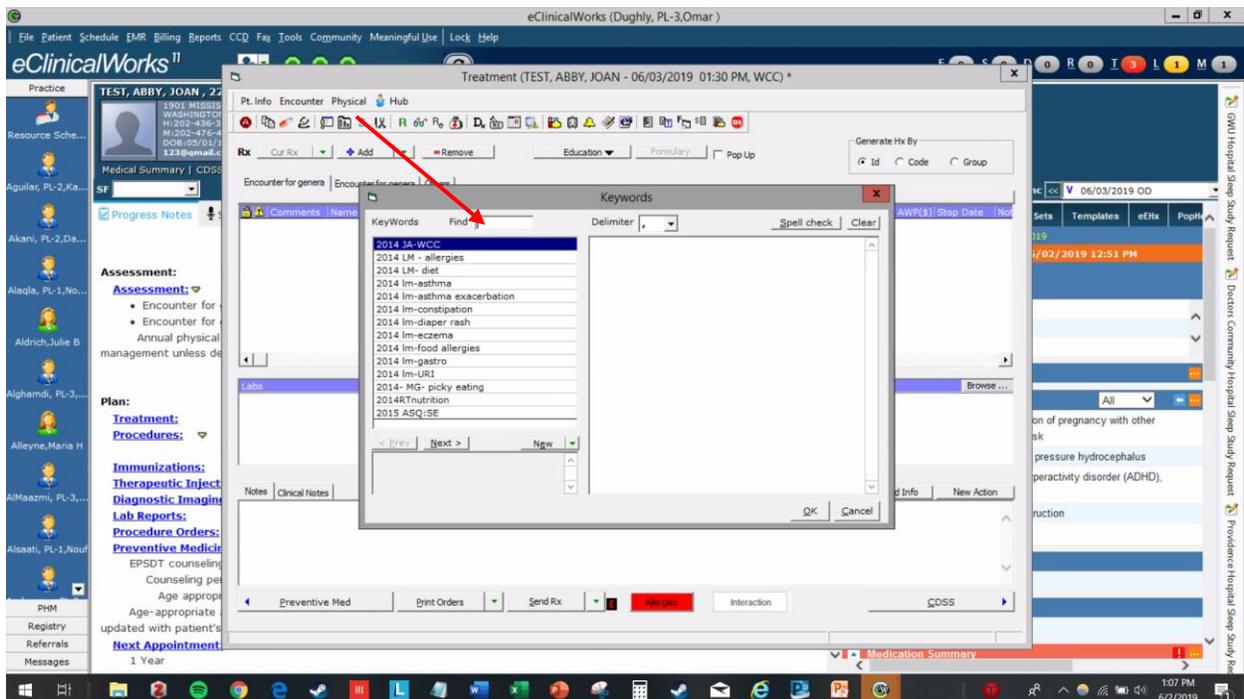
Step 1) Find the section of the progress note in which you want to add a precompleted text phrase. In this example, I'll click on the "Treatment" section. Click to open that section

The screenshot displays the eClinicalWorks interface for a patient named TEST, ABBY, JOAN, 22 Y, F. The interface includes a top navigation bar with options like File, Patient, Schedule, EMR, Billing, Reports, CCD, Fax, Tools, Community, Meaningful Use, Lock, and Help. Below this is a patient information header with fields for Name, Address, Insurance, and Billing Alerts. The main content area shows a progress note with sections for Assessment, Plan, Immunizations, Therapeutic Injections, Diagnostic Imaging, Lab Reports, Procedure Orders, and Preventive Medicine. A red arrow points to the 'Treatment' section under the Plan heading. On the right side, there is a sidebar with various tabs and a list of medical conditions, including O04.89, G91.2, F90.2, N13.9, and J45.909. The bottom of the screen features a toolbar with options like Send, Print, Fax, Record, Lock, Details, Scan, Templates, Claim, Letters, Ink, and eHX Options.

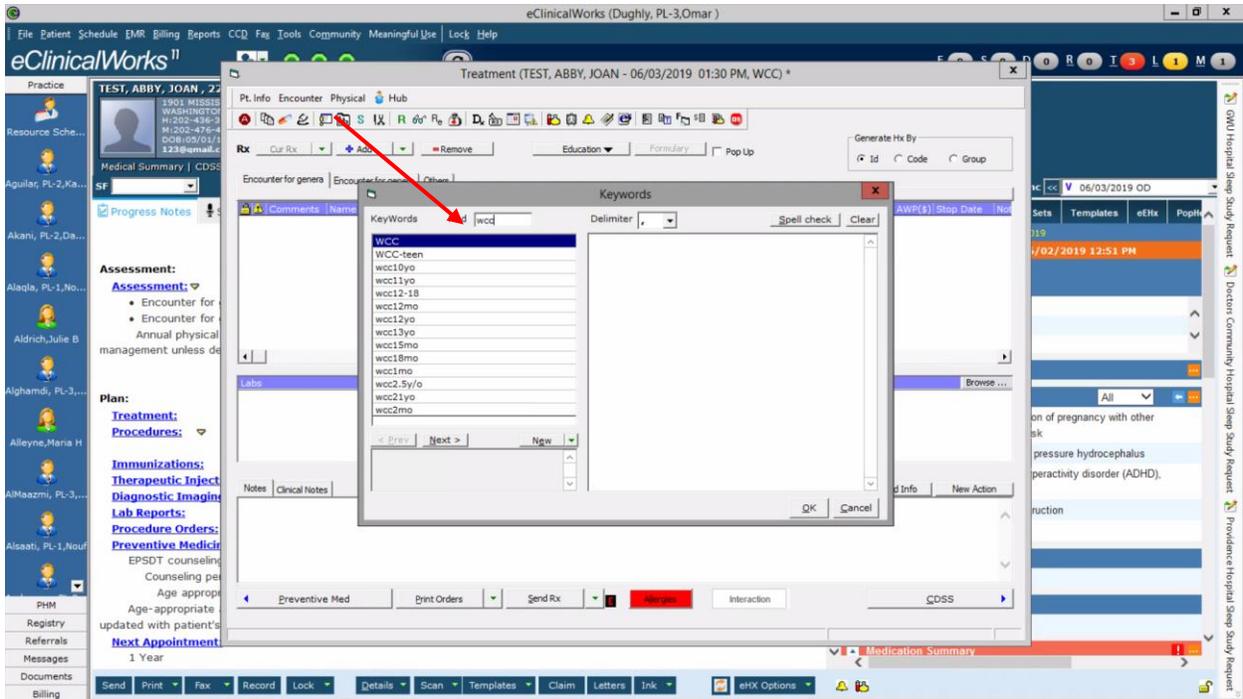
Step 2) Now, the Treatment Box should appear. On the bottom half of the box you'll see the Notes section. There, find the button that says "Browse...", and click on "Browse..."



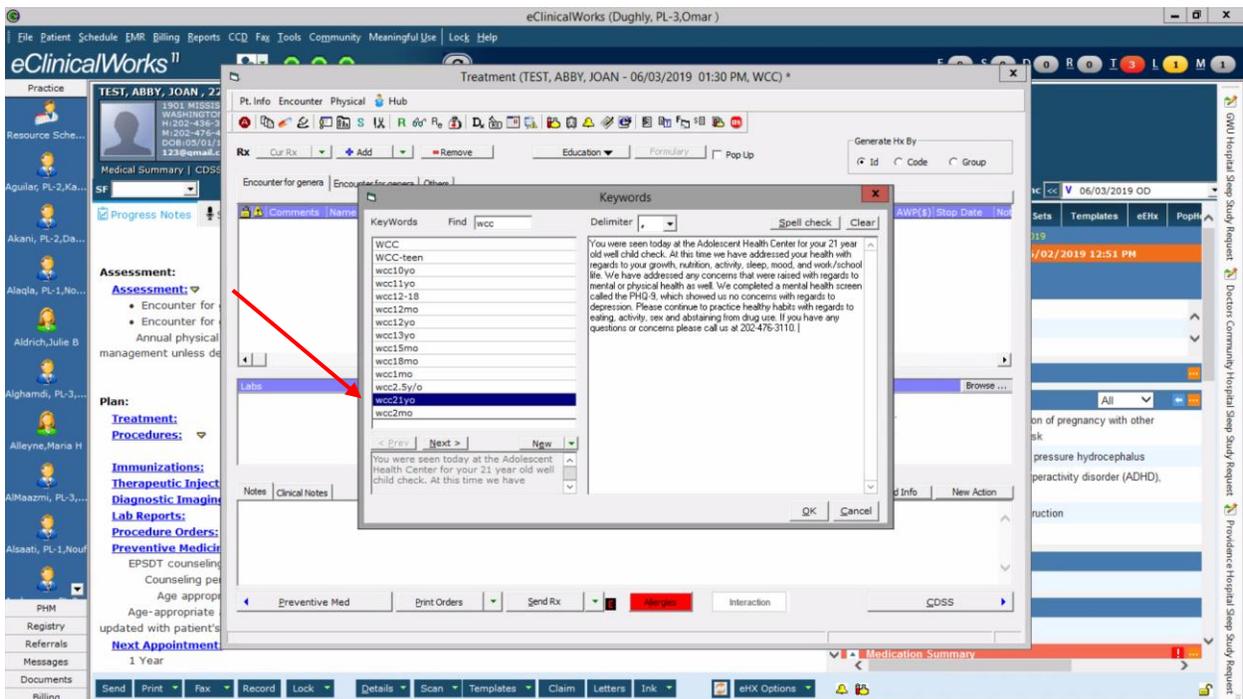
Step 3) When you click "Browse..." you'll be able to search through all precompleted text phrases that have been entered in the Treatment section by other providers. In the next section I'll walk through how to create your own precompleted texts. For now, we will add in a precompleted text phrase for a well child check.



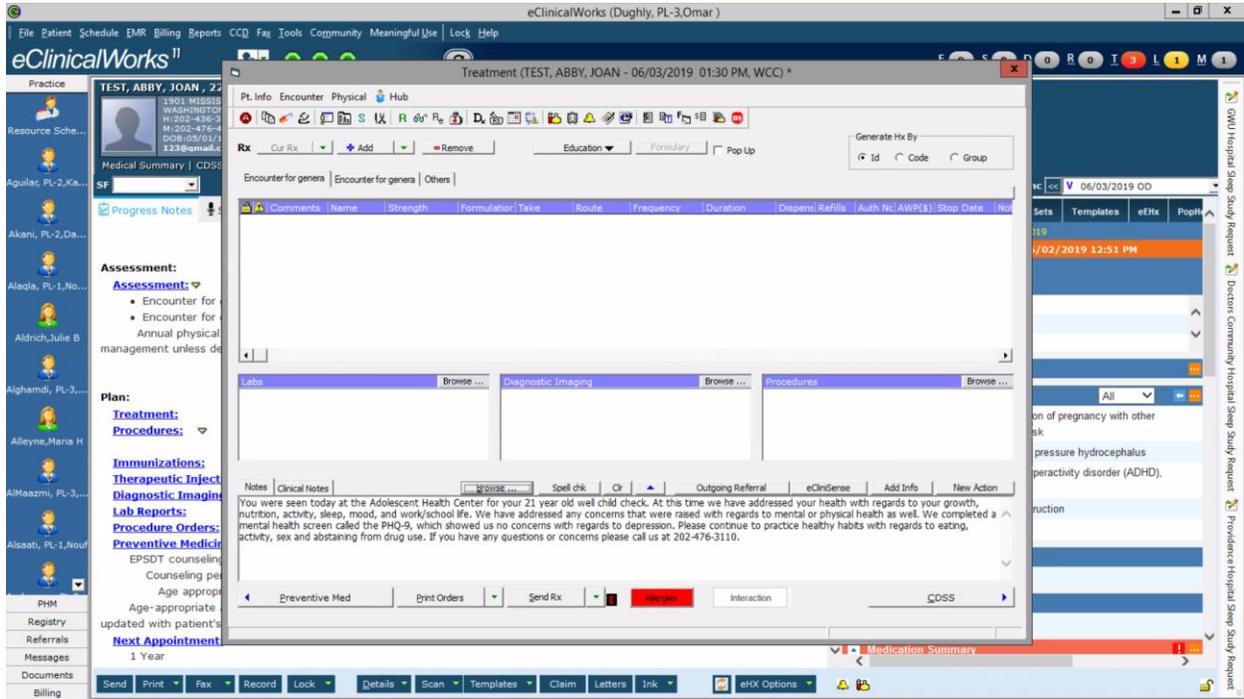
Step 4) Now, in the “Find” box, type in “wcc”. When you do this, you should see entries for well child check information for parents, followed by the corresponding visit type (i.e. for a 2 month well child check, you can pull in the section that says “wcc2mo”).



Step 5) Click on the precompleted text that you wish to view. For this example, we will choose the option that says “wcc21yo”. Review the text on the right side to see a preview of the precompleted text. Click OK if you wish to add this to your progress note.



Step 6) Now that you hit the “OK” button, the precompleted text has been incorporated into your note. CAUTION! All precompleted notes MUST be reviewed for accuracy, especially for the well child check precompleted texts. They often contain notes on what is done and expected in a straightforward patient visit, which may or may not apply to your patient. From this point, you may adjust the text and add your own edits to customize your patient advice accordingly.



EXTRA TIPS!

- search for precompleted texts with the phrase “wcc” for well child check texts
- search for precompleted texts with the phrase “resident” for commonly seen acute care concerns (i.e. constipation, gastroenteritis, URI, obesity)

Making your own precompleted text phrase

It is often helpful for you to create your own precompleted text phrases to stylize your medical guidance/advice based on your own practices. Remember, text phrases you make will be visible by all other eCW users

Step 1)

Step 1) Find the section of the progress note in which you want to add a precompleted text phrase. In this example, I'll click on the "Treatment" section. Click to open that section

The screenshot displays the eClinicalWorks interface for a patient named TEST, ABBY, JOAN, 22 Y, F. The main content area shows the 'Progress Notes' section with the following details:

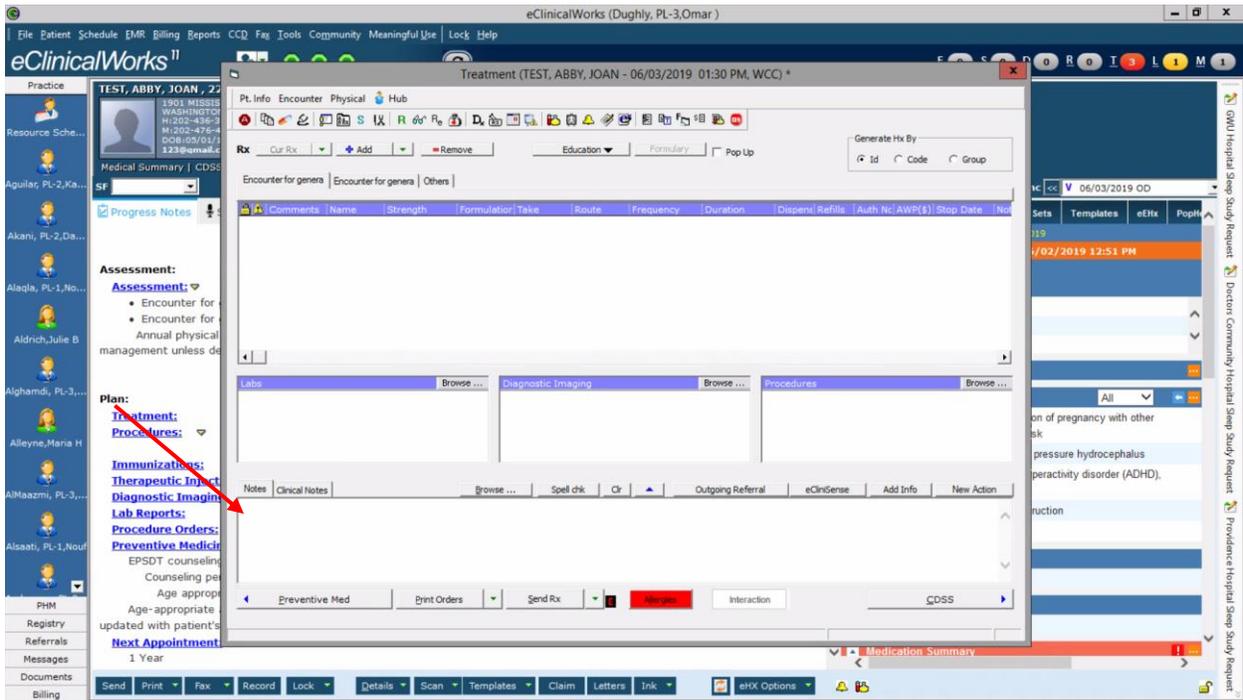
- Assessment:**
 - Assessment:
 - Encounter for general adult medical examination without abnormal findings - Z00.00 (Primary)
 - Encounter for general adult medical examination with abnormal findings - Z00.01
 - Annual physical exam and psycho-social screenings performed. This is a well young adult, not requiring any additional case management unless described below.
- Plan:**
 - Treatment:** (highlighted with a red arrow)
 - Procedures:**
 - Immunizations:**
 - Therapeutic Injections:**
 - Diagnostic Imaging:**
 - Lab Reports:**
 - Procedure Orders:**
 - Preventive Medicines:**
 - EPSDT counseling:
 - Counseling performed and/or handouts given
 - Age appropriate counseling/handouts: Yes, in family's primary language when available Yes
 - Age-appropriate anticipatory wellness guidance given - including nutrition and physical activity. Immunizations reviewed and updated with patient's consent.
 - Next Appointment:**
 - 1 Year

The right-hand sidebar contains a 'Problem List' with the following items:

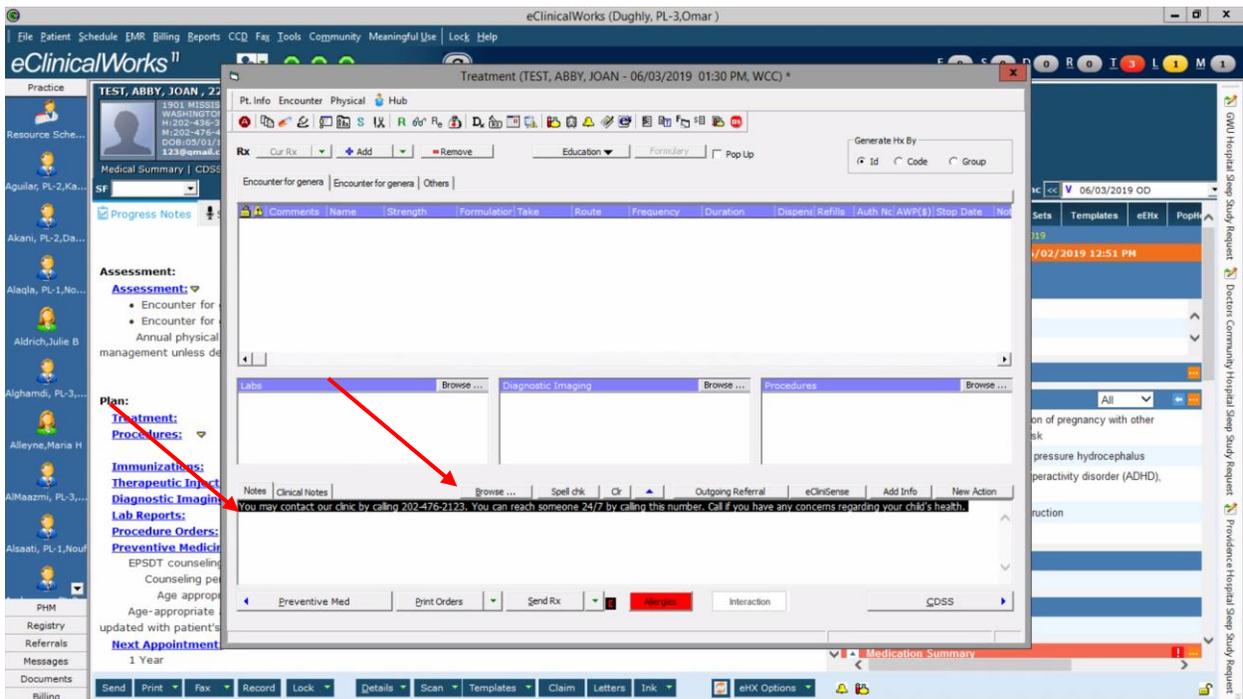
- O04.89 (Induced) termination of pregnancy with other complications 2 Risk
- G91.2 (Idiopathic) normal pressure hydrocephalus
- F90.2 Attention deficit hyperactivity disorder (ADHD), combined type
- N13.9 Urinary (tract) obstruction
- J45.909 Asthma

The bottom of the interface shows a navigation bar with options like Send, Print, Fax, Record, Lock, Details, Scan, Templates, Claim, Letters, Ink, and eHX Options.

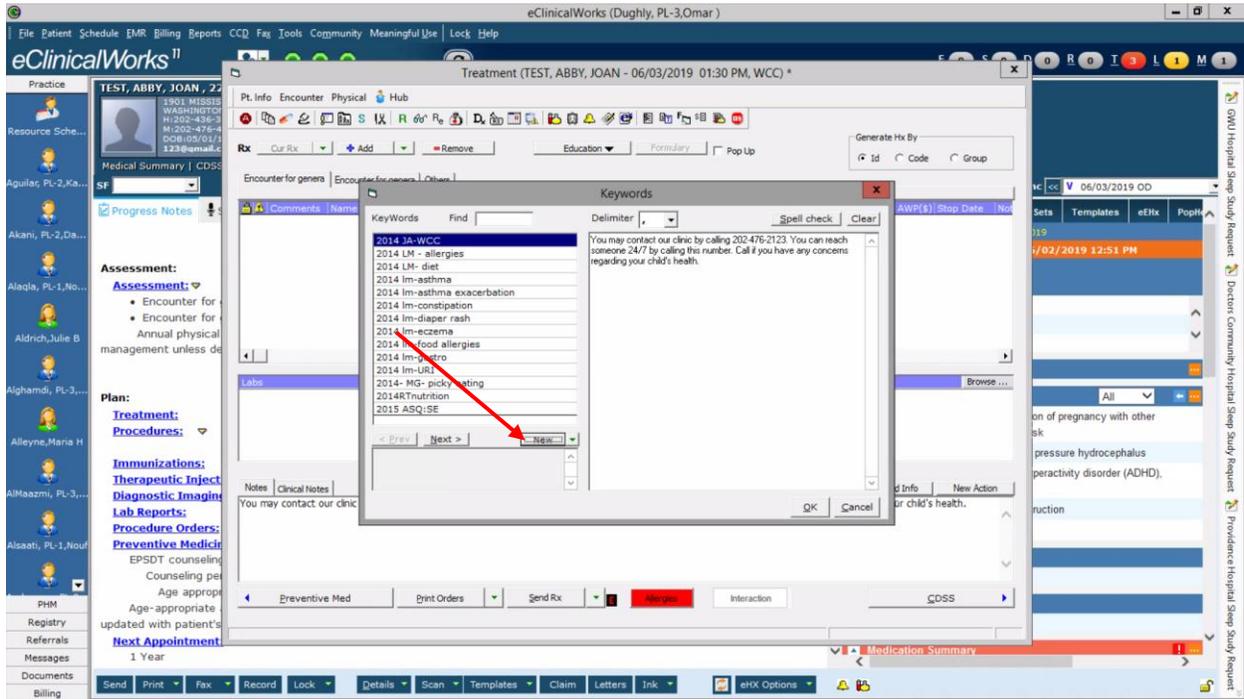
Step 2) Now, the Treatment Box should appear. Lets start writing some information for parents here.



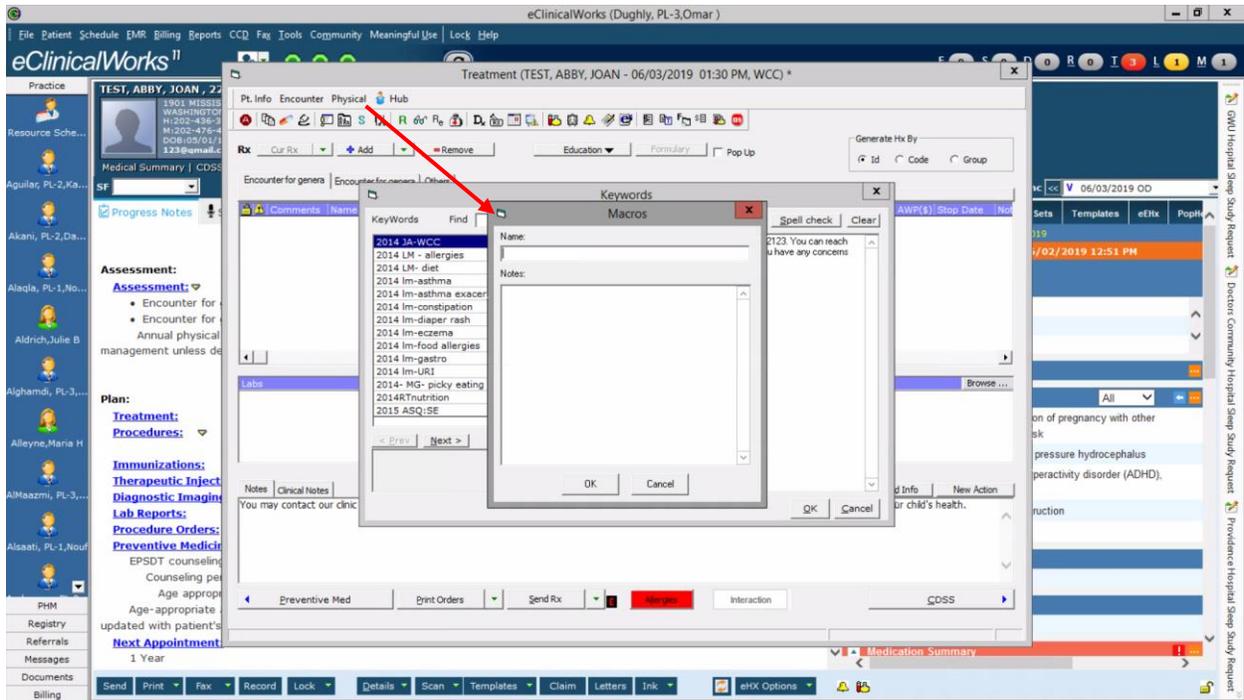
Step 3) Here, I added the contact number for the CHC clinic at CNMC. Highlight the text you wrote that you want to add into a precompleted text phrase, and copy it (using Ctrl+C). Now, click the “Browse...” button



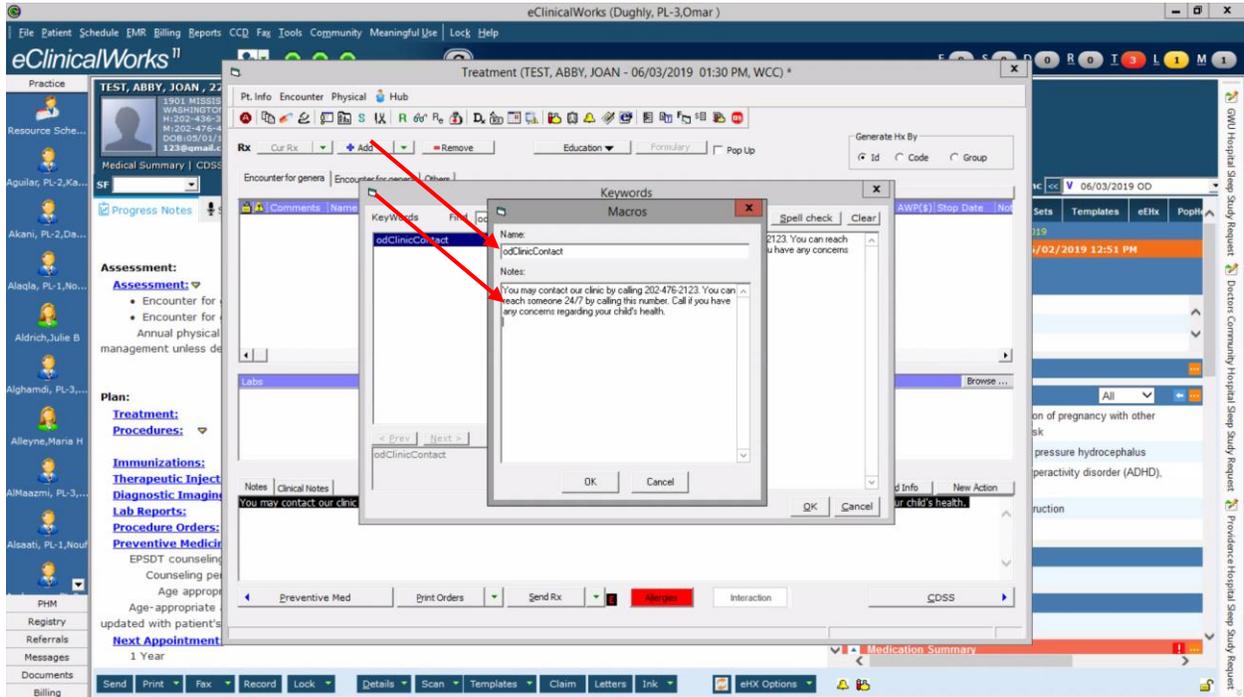
Step 4) The Keywords box appears after you click the “Browse...” button. Now, find the “New” button, and click it



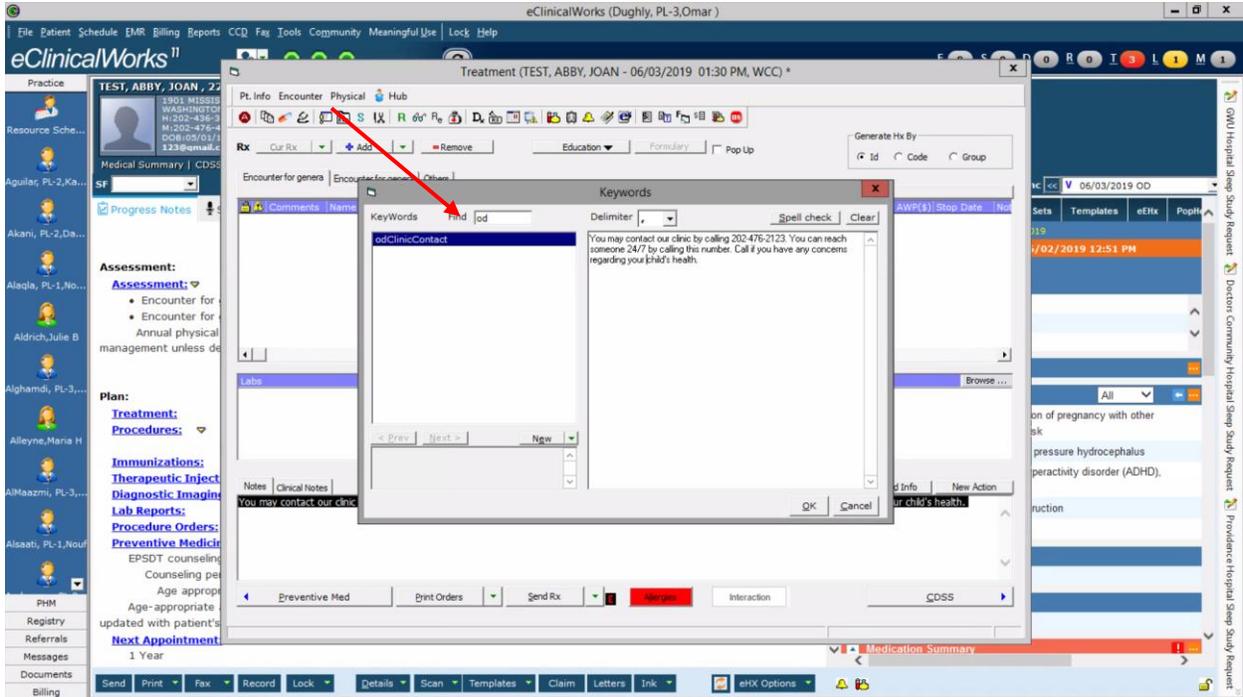
Step 5) A new box appears called the Macros box. Here, we will type out our macro that we want to create



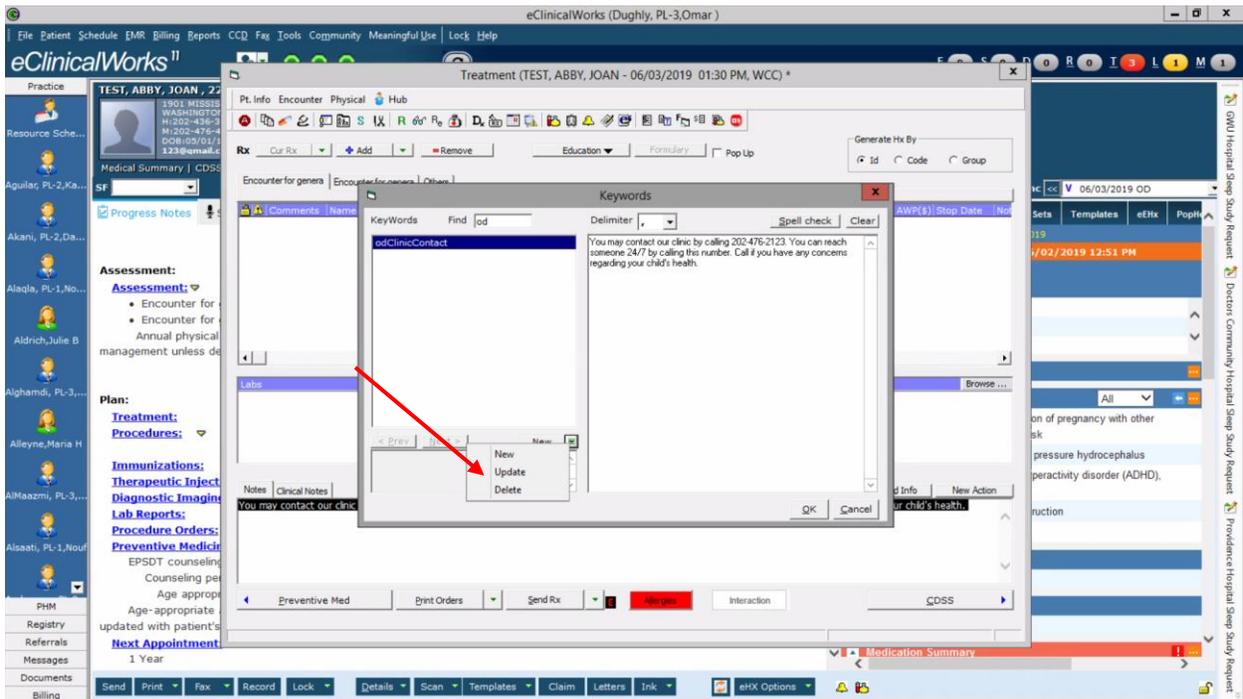
Step 6) In the “Name” section, type in your initials + however you want to name your precompleted text phrase. In this example, I will type out “odClinicContact” because my initials are OD, and this precompleted text phrase has the clinic contact information on it. In the “Notes” section, paste the text you typed out in the original treatment section. Alternatively, you can type out the same phrase here. When finished, click “OK”



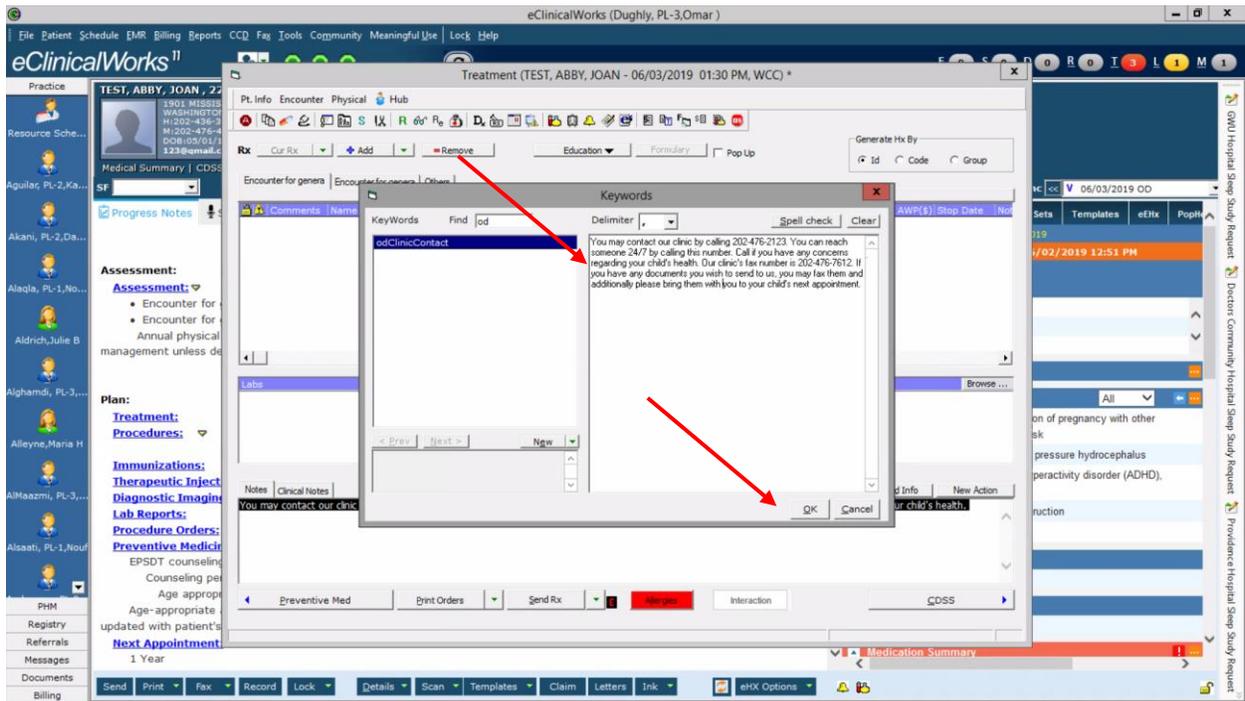
Step 7) Now, say I want to update/change the precompleted text phrase I just created. For this, now type in the name of the precompleted text phrase you just made in the “Find” box. Your text phrase should appear when you do this.



Step 8) Next to the “New” button you’ll find a carat symbol. Click on this to reveal other options for this precompleted text phrase. Since we want to update the phrase, we will click “Update”



Step 9) Now, in the box, you may make changes to the text phrase you created. I'll change mine by adding in the clinic fax number. Click "OK" when finished updating your precompleted text phrase.



That's it! You can make precompleted text phrases in other parts of the EMR as well, including in portions of the history, physical exam, and assessment. The most useful precompleted text phrases are for commonly encountered patient visits, anticipatory guidance, and management plans. Remember to keep them general to minimize the amount of time you have to adjust them in the future.

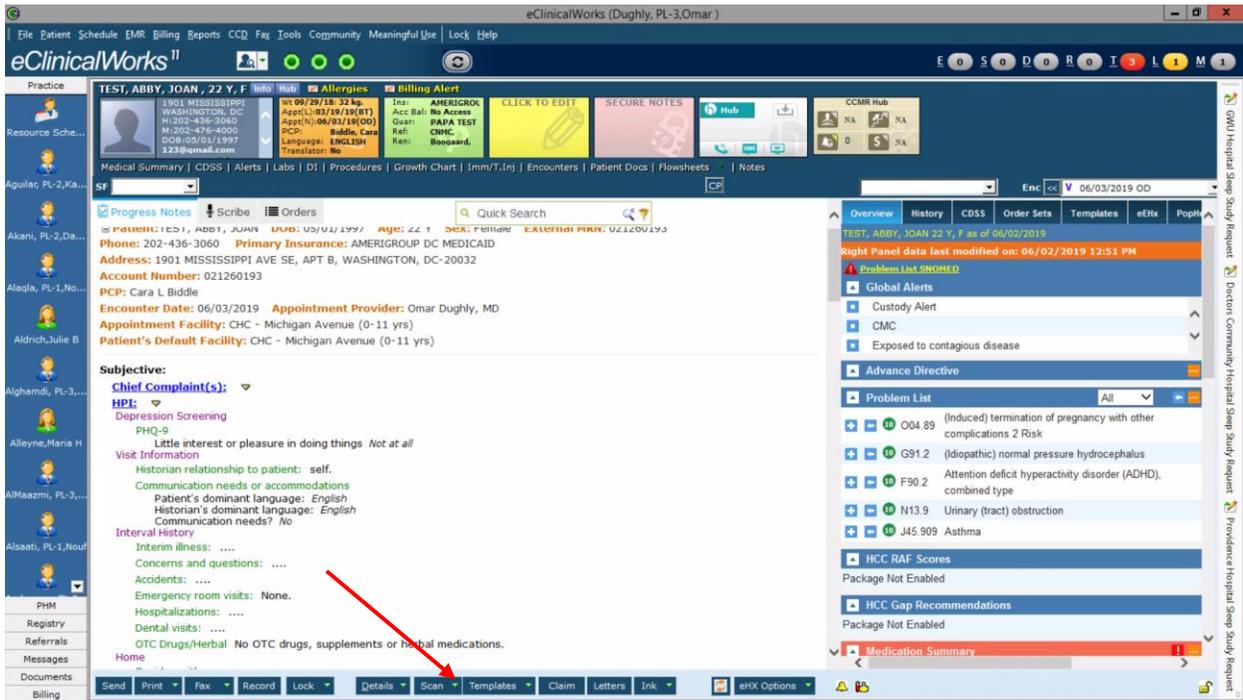
Clearing a progress note

Sometimes, you may need to clear out a section of the note that you pulled in (ex you accidentally pulled in the wrong template, and need to put a new one in). Follow the steps below to clear out a portion or all of a note

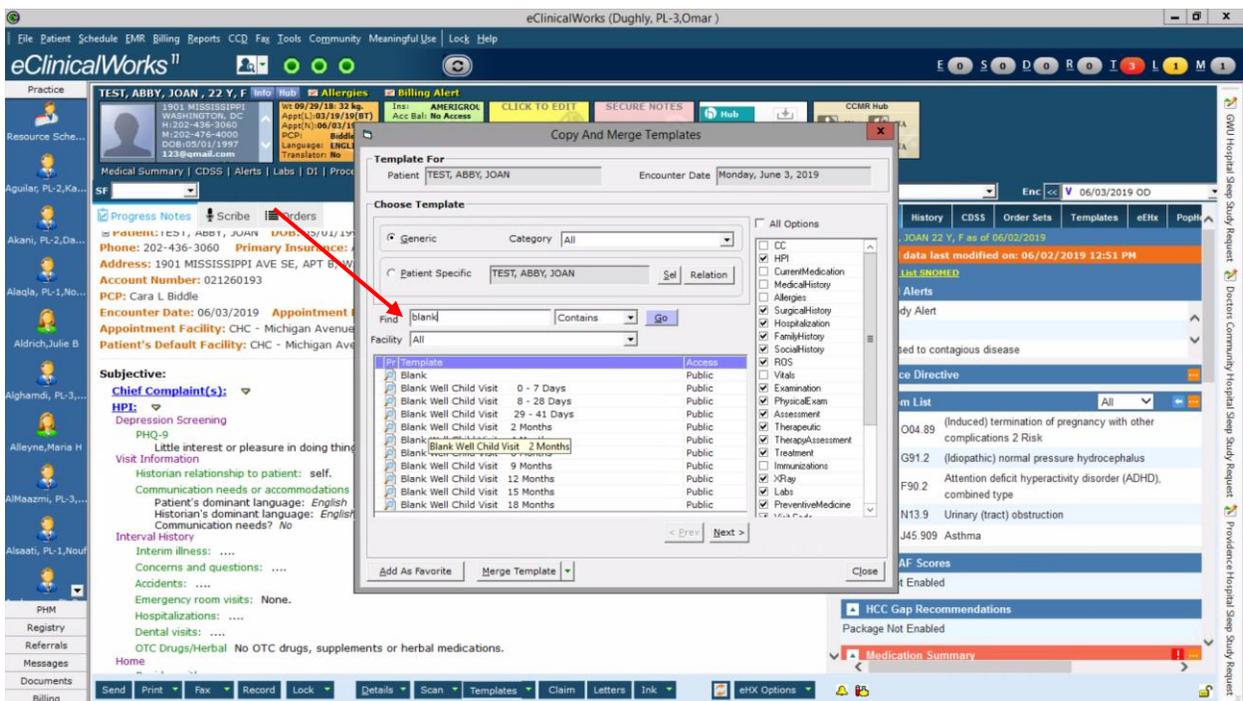
Step 1) Have your screen open to the progress note you want to work on

The screenshot displays the eClinicalWorks EMR interface for a patient named TEST, ABBY, JOAN, 22 Y, F. The interface includes a top navigation bar with menu items like File, Patient, Schedule, EMR, Billing, Reports, CCD, Fax, Tools, Community, Meaningful Use, Lock, and Help. A left sidebar lists various practice locations. The main content area shows the patient's medical summary, including contact information, insurance details, and a list of problems. The 'Subjective' section is expanded, showing HPI, PHQ-9, and visit information. The right sidebar contains a navigation pane with tabs for Overview, History, CDSS, Order Sets, Templates, eFix, and PopIt. The 'Problem List' is visible, listing conditions such as (Induced) termination of pregnancy with other complications 2 Risk, (Idiopathic) normal pressure hydrocephalus, Attention deficit hyperactivity disorder (ADHD), combined type, Urinary (tract) obstruction, and Asthma. The 'Medication Summary' tab is also visible at the bottom of the right sidebar.

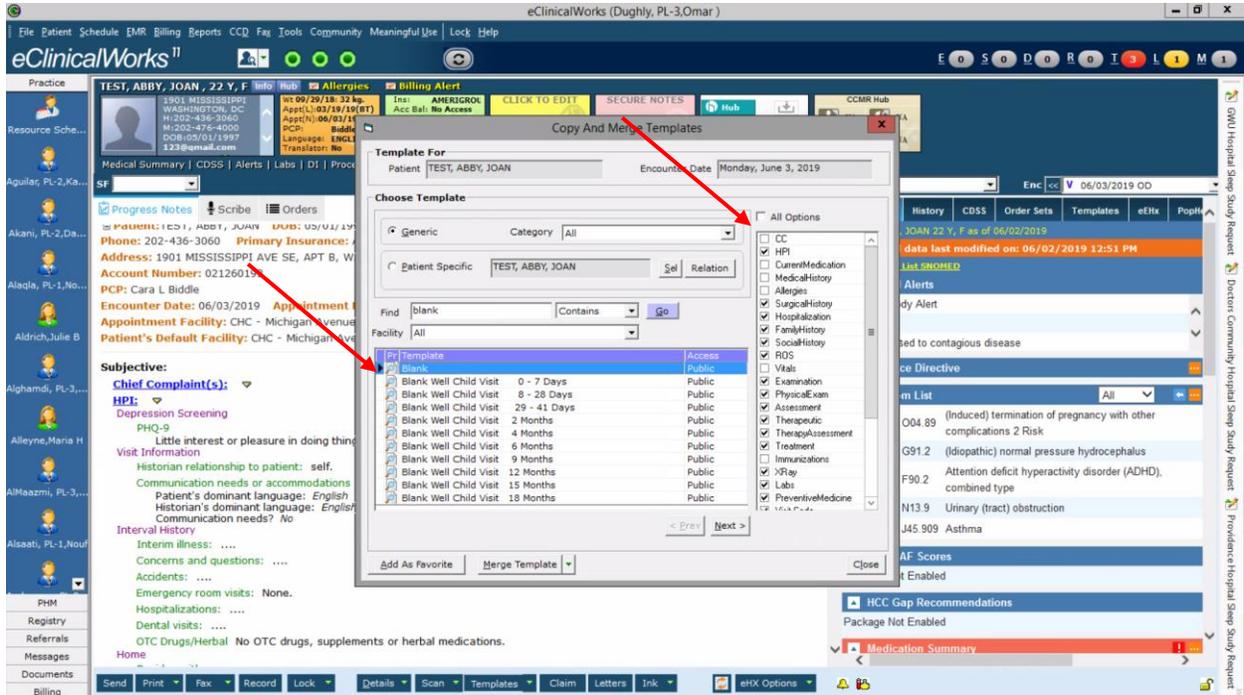
Step 2) Click on the “Templates” button on the bottom bar of the screen



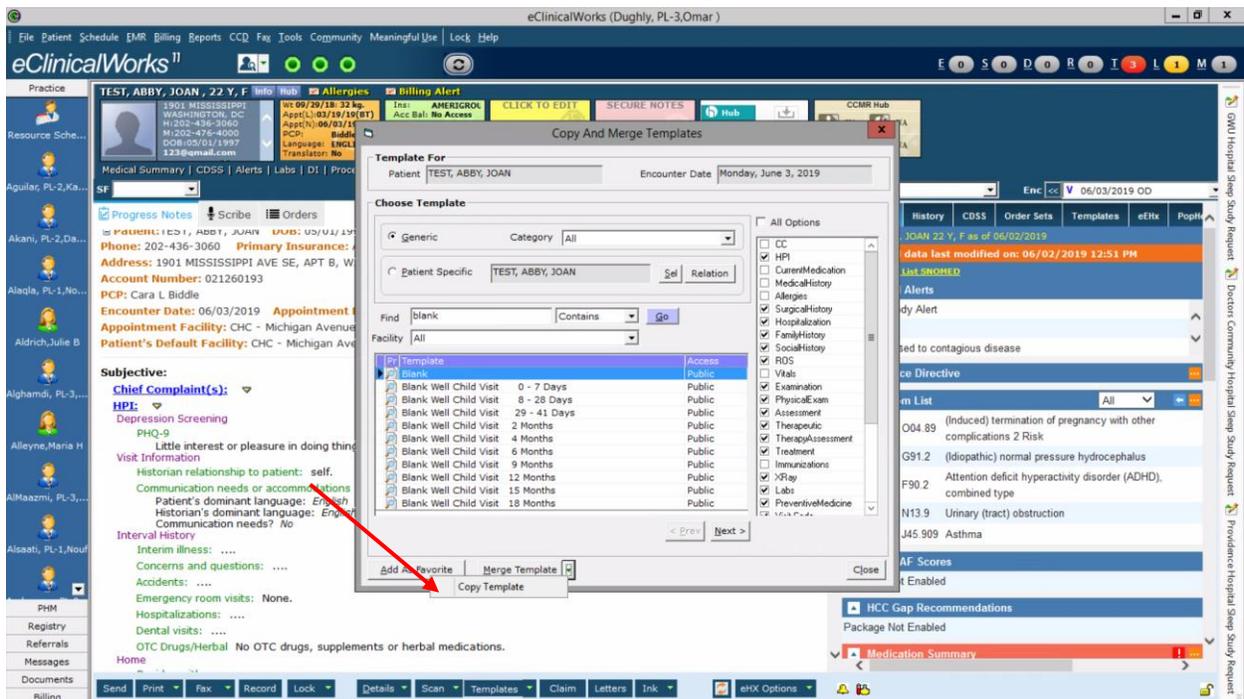
Step 3) The Templates box should appear after you click the “Templates” button. In this demonstration, I want to remove everything that was added before. First, I'll type in the word “blank” in the “Find” section



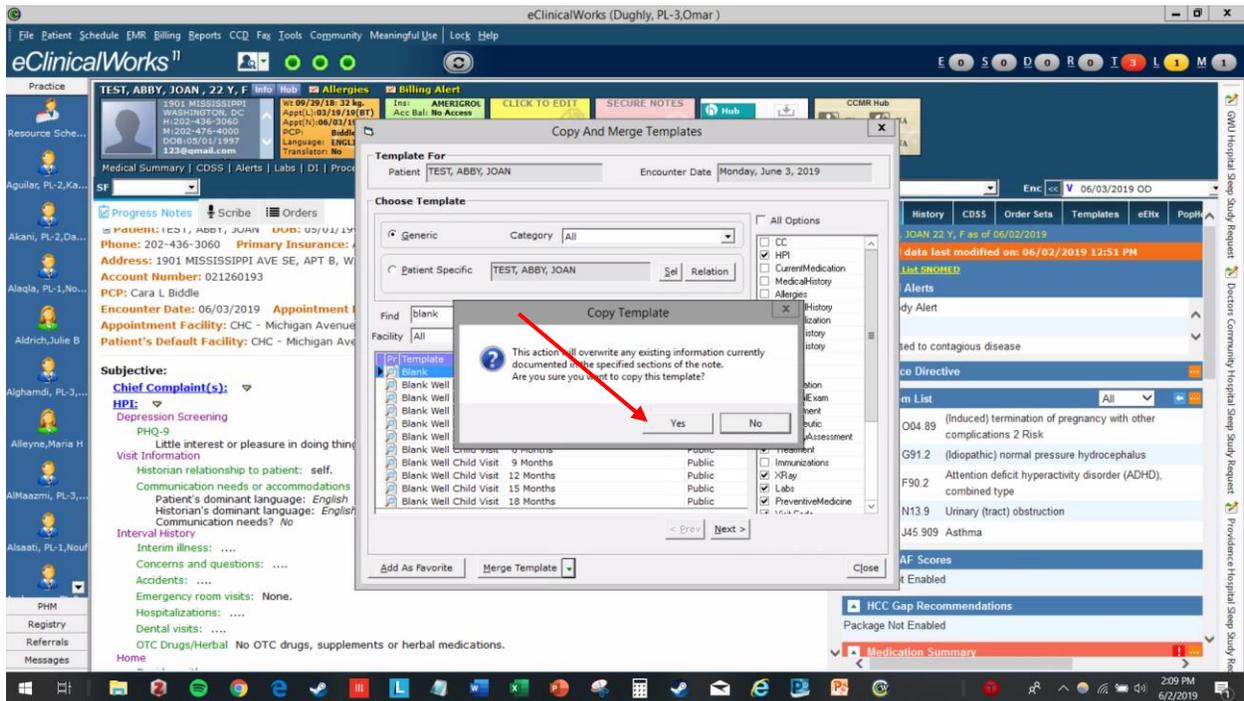
Step 4) Select the option that says “Blank” in the list of templates that appears. At this time, if you want to adjust what gets removed, you can do so by clicking the checkbox on the right that says “All Options”, clicking it again, and then clicking the specific sections you wish to remove. I’ll stick with the checkboxes that are already highlighted in this example.



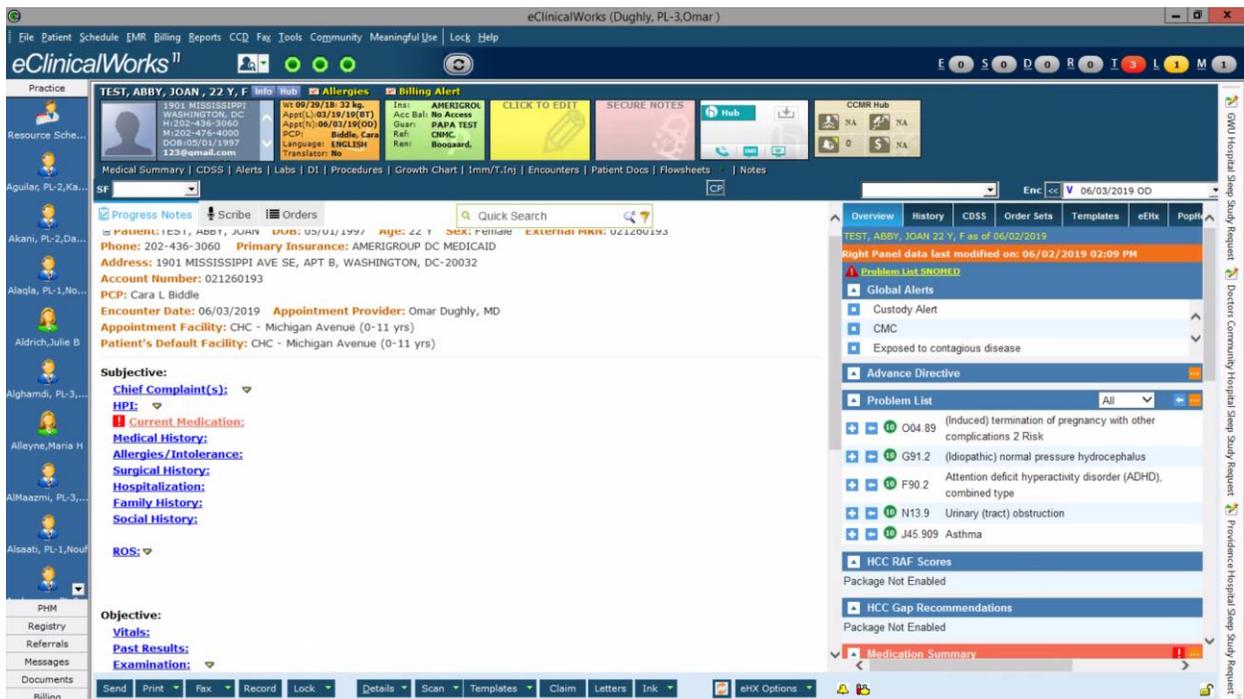
Step 5) Now, click on the carat to the right of the “Merge Template” option to reveal more choices. Click on the option that says “Copy Template”



Step 6) This is the final warning from the EMR that you'll be removing anything that was typed in the note. If you want to proceed, then click "Yes"



Step 7) You'll see that all the text that was in the note prior is gone! The note should be clear at this point. If there is a section you wanted to remove that did not get removed, repeat the same process but this time click on the checkbox that says "All Options" and make sure every portion of the note is checked off before copying the blank template into the note



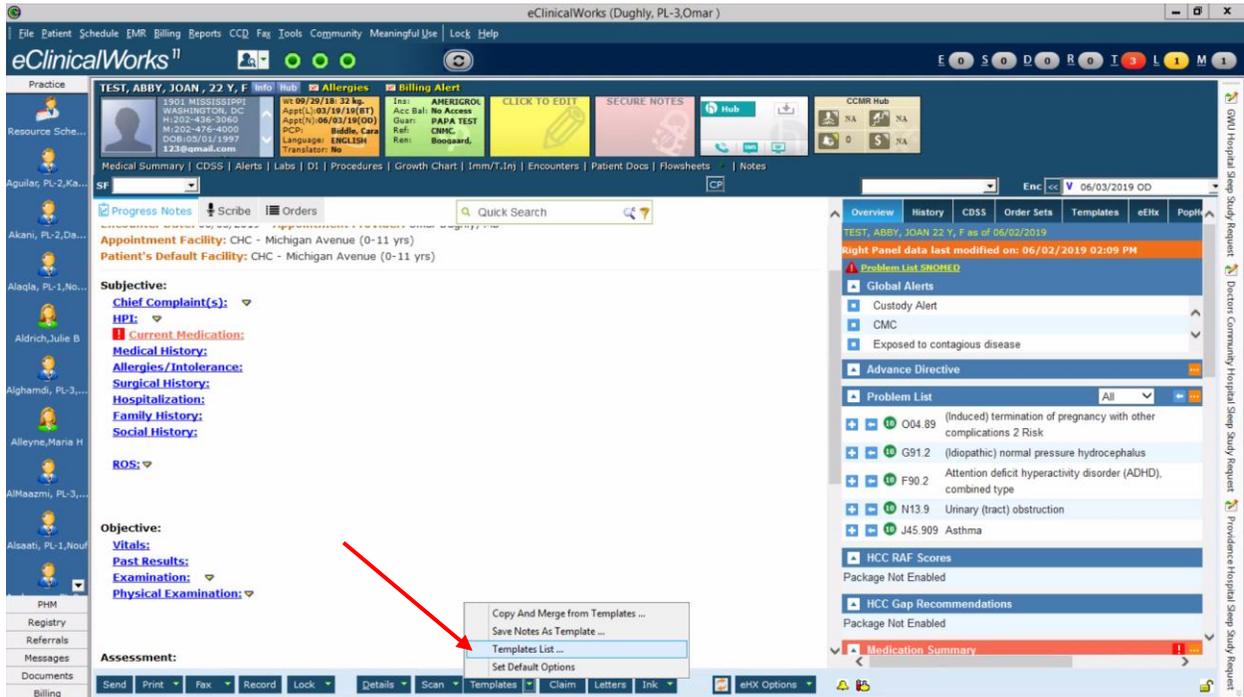
Creating a list of favorite premade Templates

You may find it helpful to have a list of your favorite template notes that you can use for commonly encountered patient visits or patient concerns. In this section I'll show you how to search through templates that others have created, and to add them to your favorites list for easier access in the future.

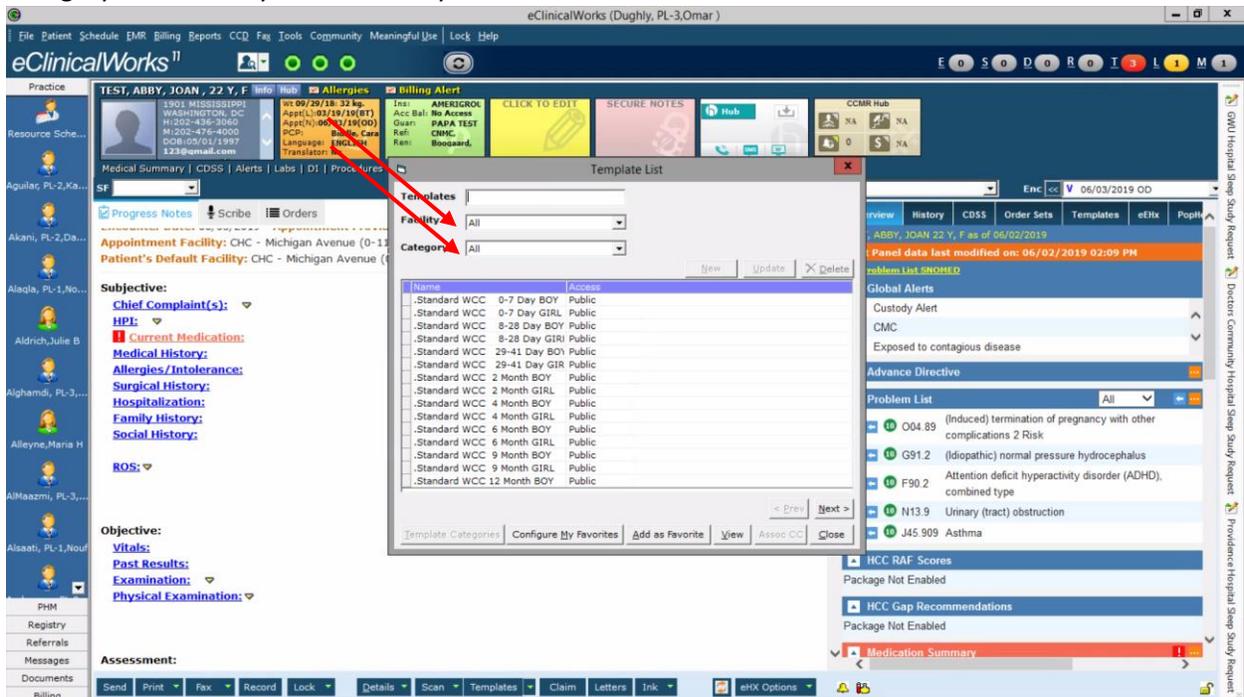
Step 1) Go to the patient's progress note that you want to work on

The screenshot displays the eClinicalWorks EMR interface for a patient named Abby Joan Test. The patient's information includes: TEST, ABBY, JOAN, 22 Y, F; 17001 MISSISSIPPI WASHINGTON, DC; HI: 202-436-3060; N: 202-475-4000; DOB: 05/01/1997; 223@gmail.com. The interface shows various tabs such as Progress Notes, Scribe, and Orders. The main content area displays the patient's medical history, including Chief Complaint(s), HPI, Current Medication, Medical History, Allergies/Intolerance, Surgical History, Hospitalization, Family History, and Social History. The right-hand panel shows a list of problems, including (Induced) termination of pregnancy with other complications 2 Risk, (Idiopathic) normal pressure hydrocephalus, Attention deficit hyperactivity disorder (ADHD), combined type, Urinary (tract) obstruction, and Asthma. The bottom of the screen features a navigation bar with options like Send, Print, Fax, Record, Lock, Details, Scan, Templates, Claim, Letters, Ink, and eHX Options.

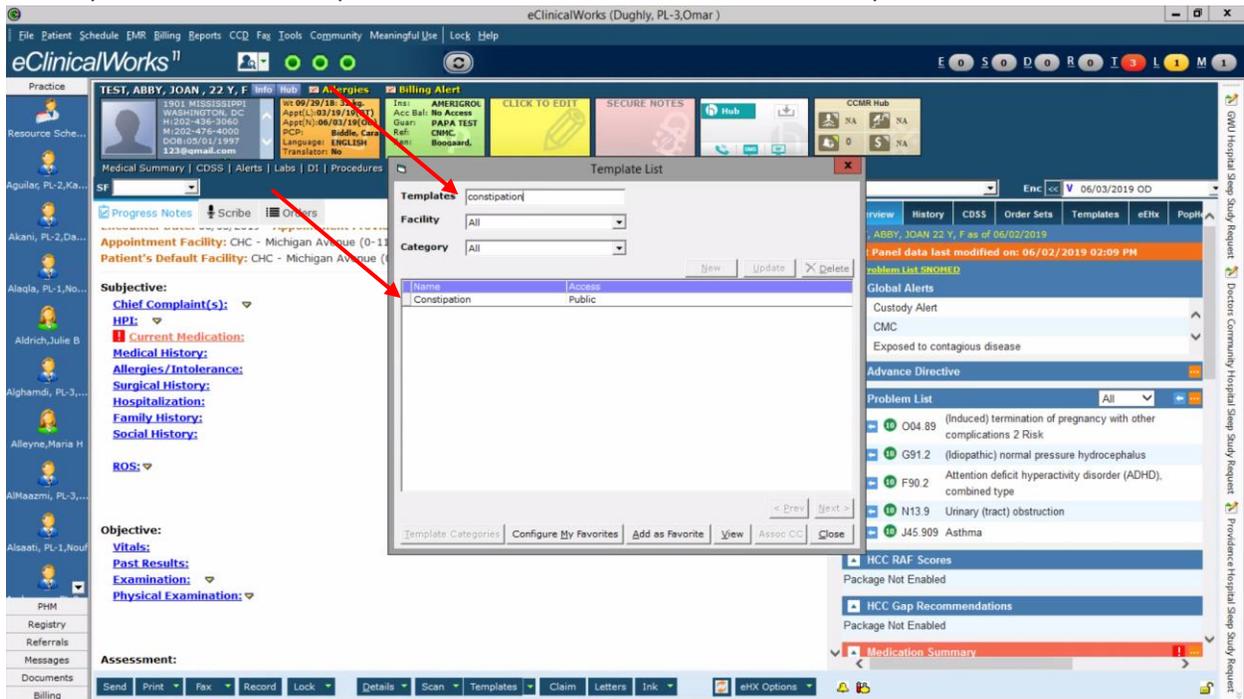
Step 2) Click on the carat to the right of the “Templates” button to reveal more choices. From there, select the option that says “Template List...”



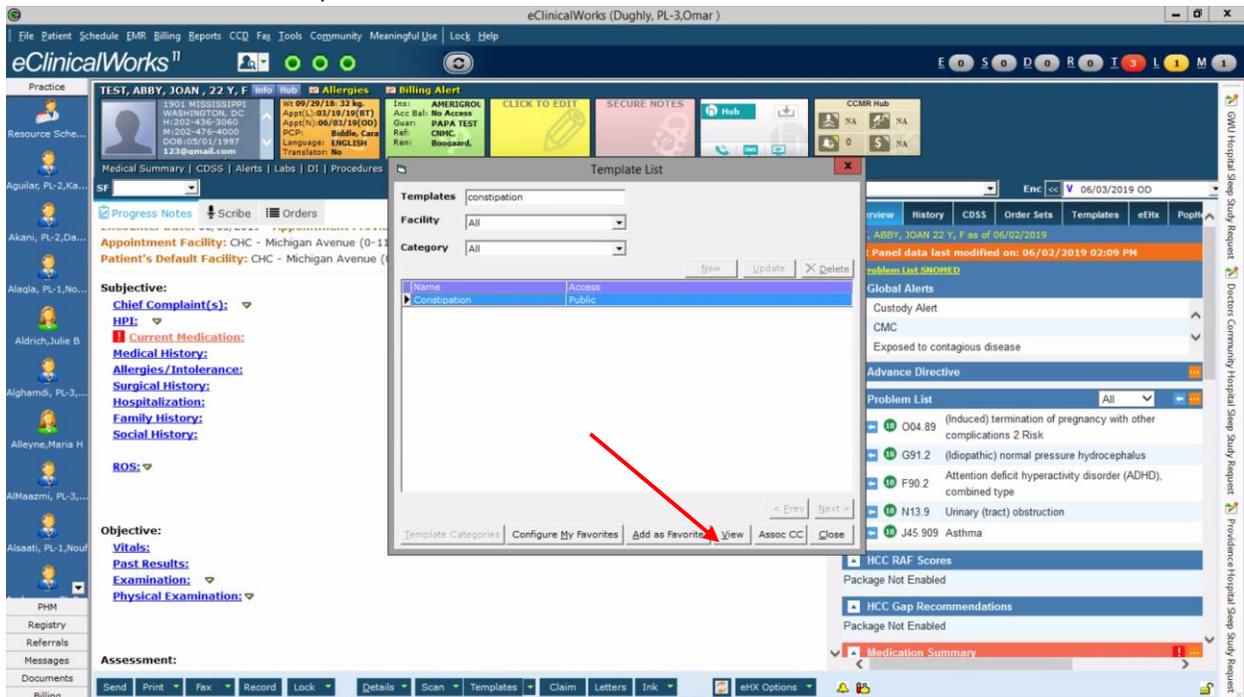
Step 3) Now, the Templates List box should appear. Make sure the Facility selection says “All” and the Category selection says “All” before you continue.



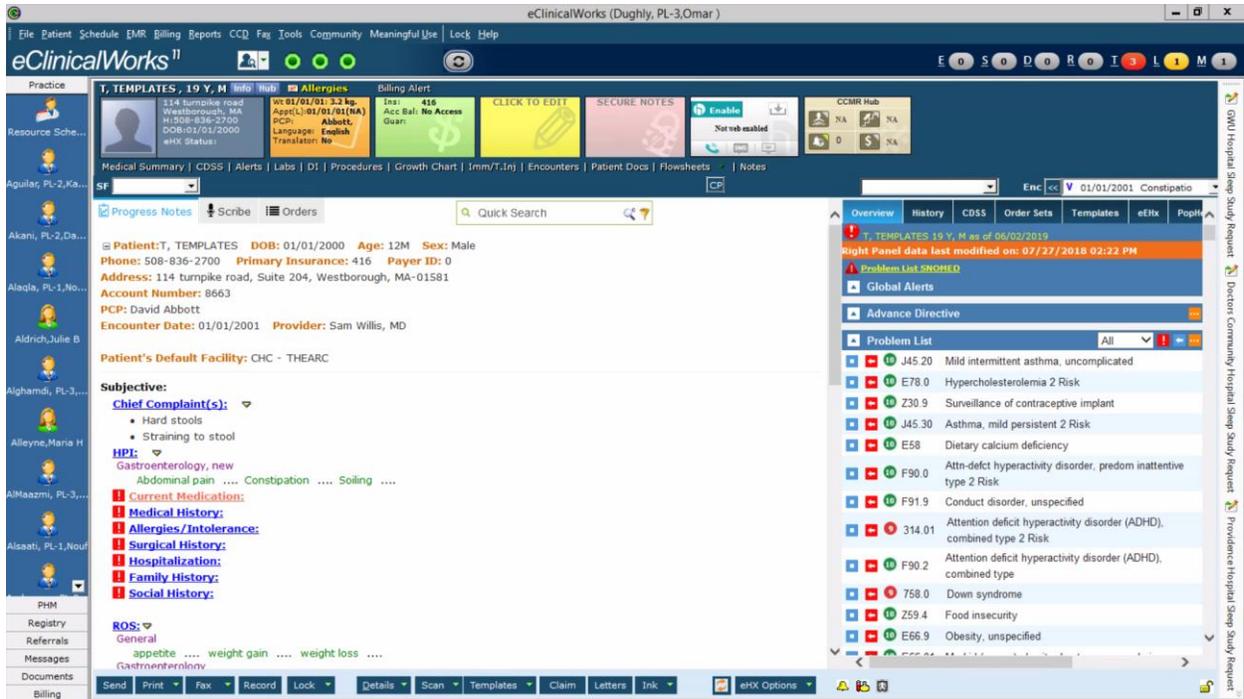
Step 4) To search for a template, try typing a common patient chief complaint. As an example, I'll type in "constipation" into the Templates field. You should see the available templates in the list below



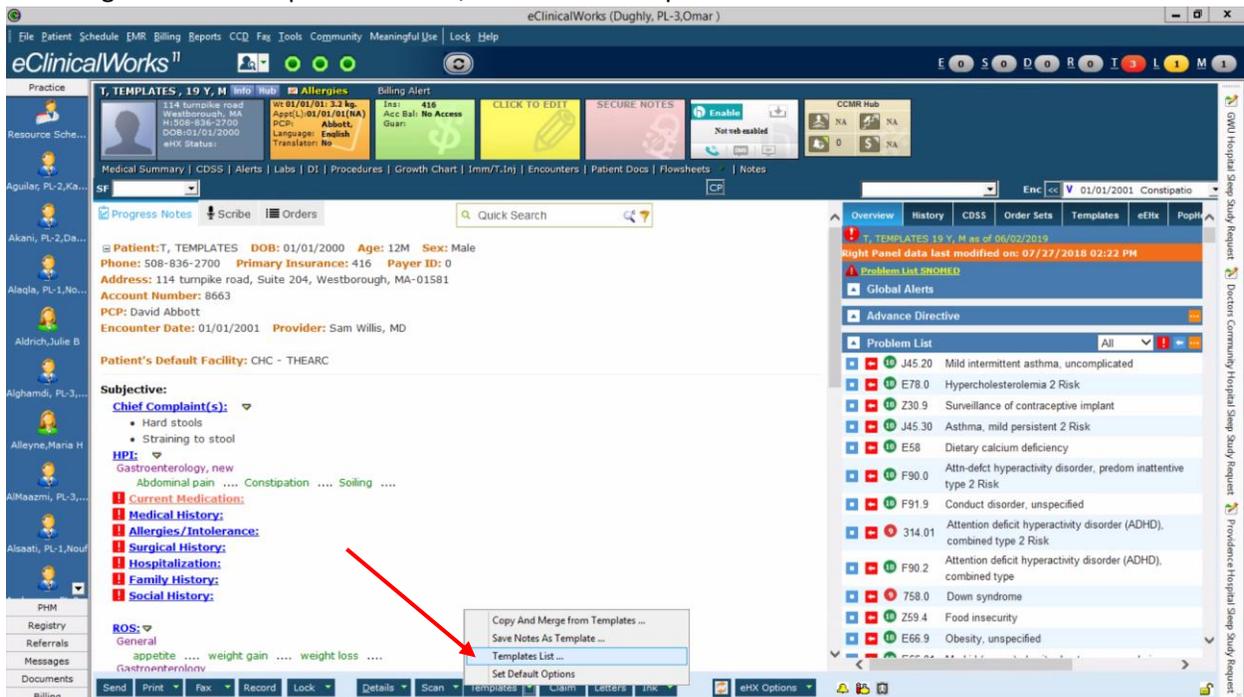
Step 5) If you wish to preview this template to see what it contains you can do so by clicking the "View" button on the bottom left portion of the box



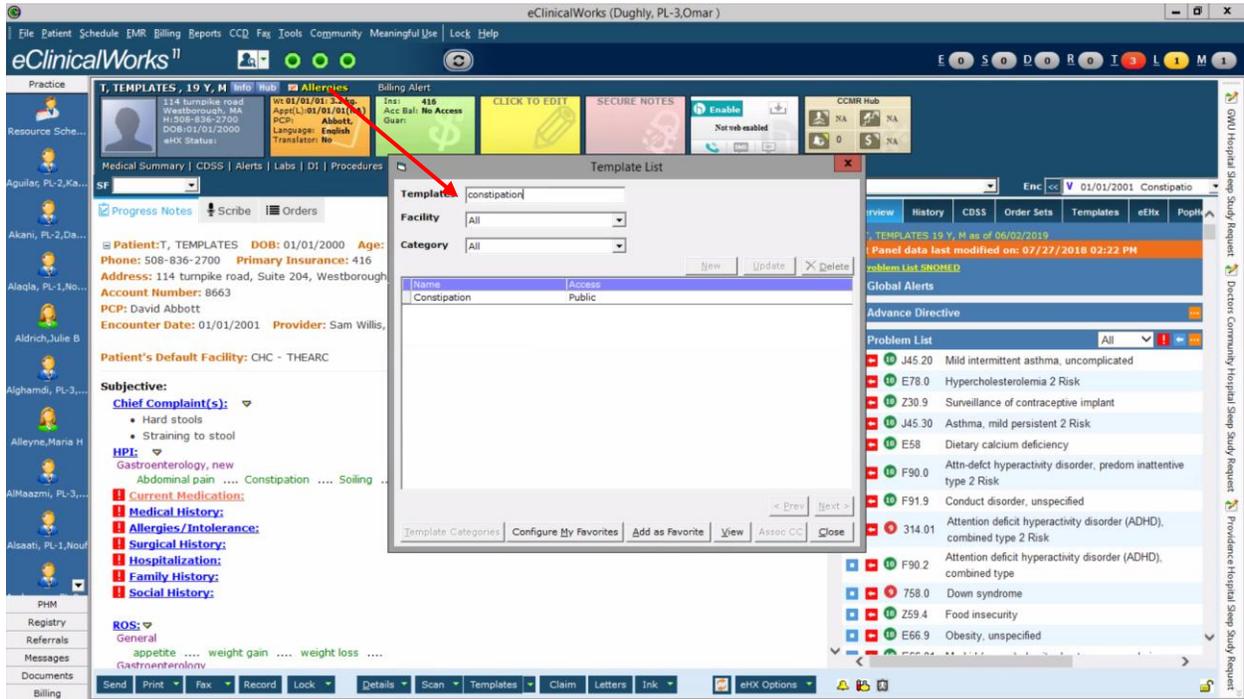
Step 6) If you click “View”, you’ll be taken to the Template note as if you were to add it to your current patient’s note. You will see that the note no longer has your patient’s name on it, and you cannot make changes to this template note.



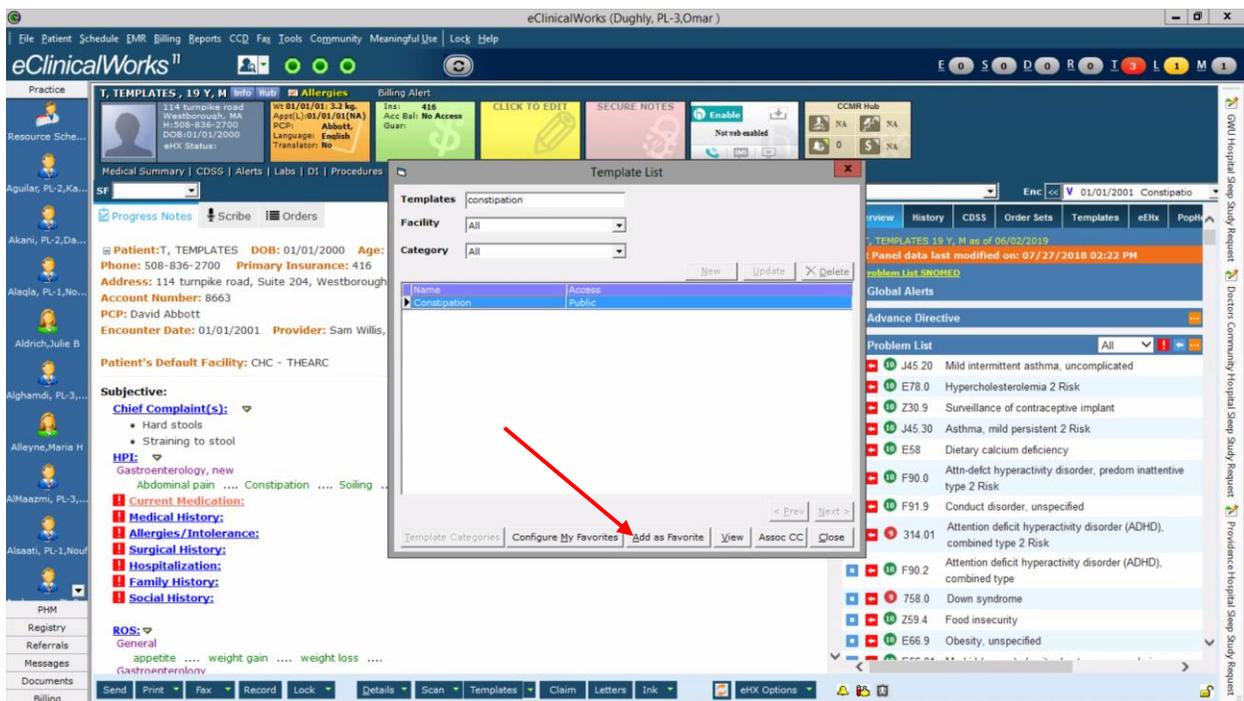
Step 7) If you like this template after reviewing it, you can add it to your favorites list. Click on the carat to the right of the “Templates” button, and select “Templates List”



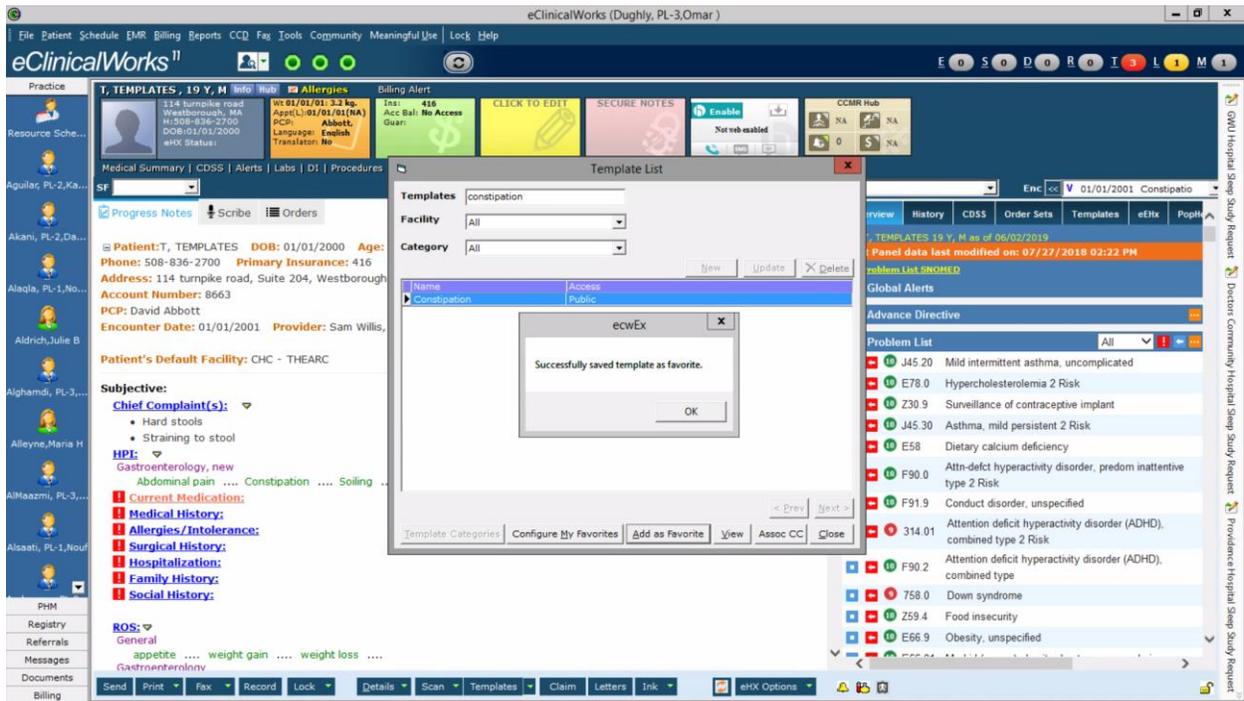
Step 8) Type the name of the template you wanted to add in the “Templates” field. In this case we’re adding the constipation template.



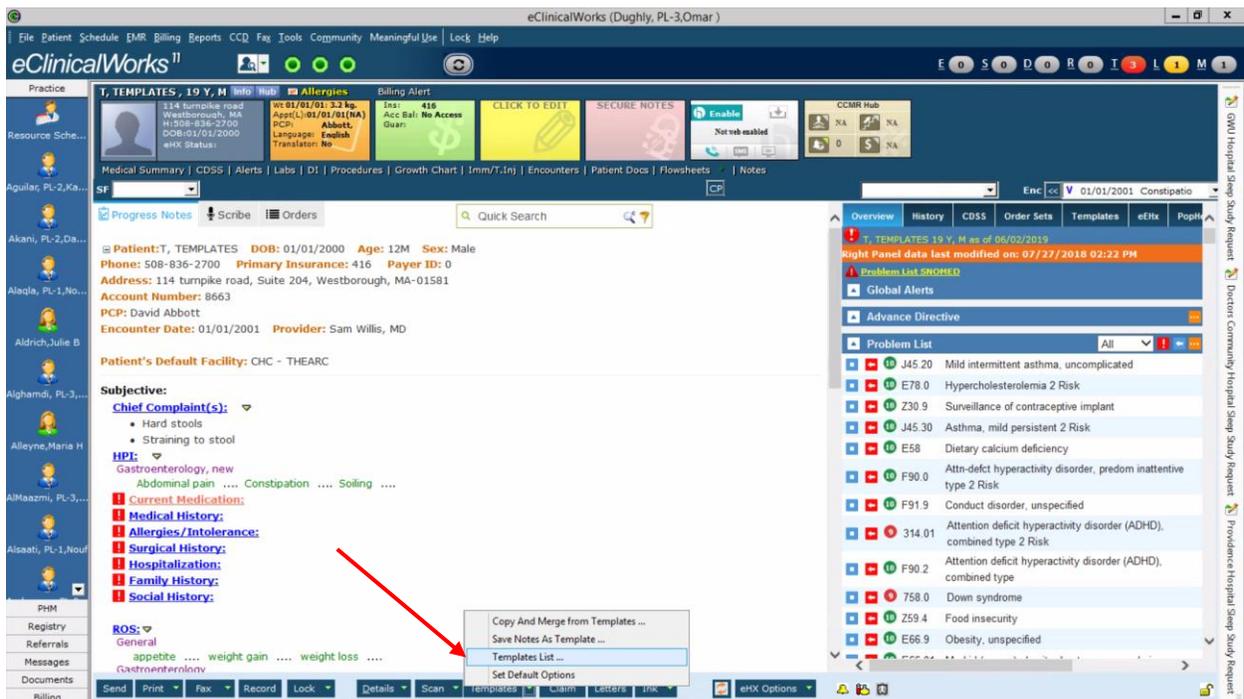
Step 9) This time, click on the template that appears in the list, and click the bottom button that says “Add as favorite”



Step 10) When you do this, you should see a popup box that says that you successfully saved the template.



Step 11) Say you want to look at all the templates that you've added as favorites. You can do so by following the steps below. First, click on the carat to the right of the "Templates" button to reveal more options. Click on "Template List..."



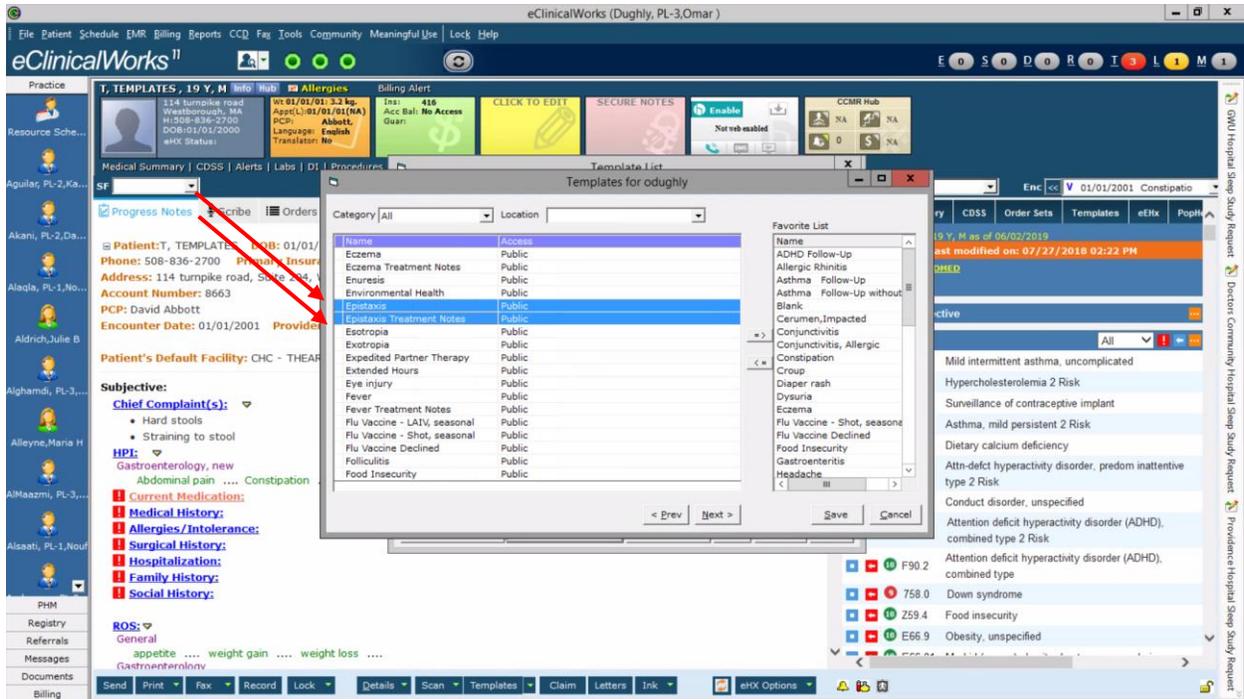
Step 12) Click the button on the bottom that says “Configure My Favorites”

The screenshot shows the eClinicalWorks interface for a patient named T, TEMPLATES, 19 Y, M. The patient's information includes DOB: 01/01/2000, PCP: David Abbott, and Primary Insurance: 416. A 'Template List' dialog box is open, showing a table of templates. The table has two columns: 'Name' and 'Access'. The templates listed include various 'Standard WCC' codes for different ages and genders (e.g., 0-7 Day BOY, 0-7 Day GIRL, 8-28 Day BOY, etc.). A red arrow points to the 'Configure My Favorites' button at the bottom of the dialog box.

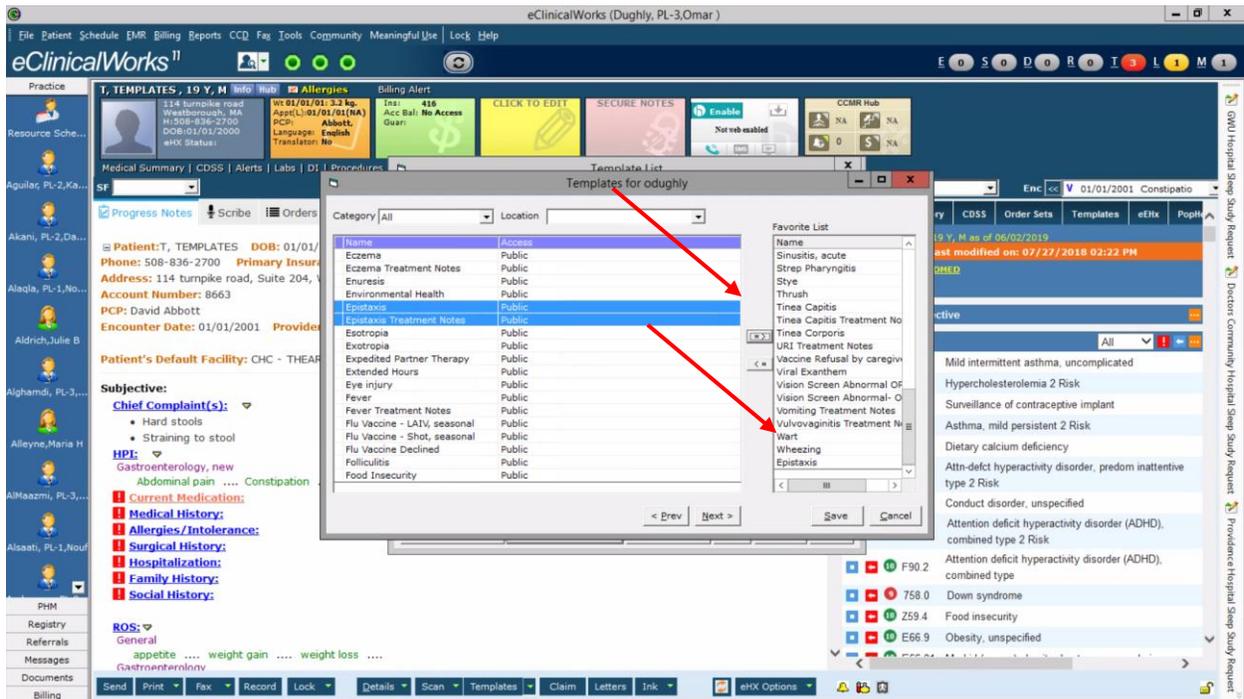
Step 13) Notice the box that pops up says Templates for (USERNAME). On the left is a list of all the templates available, and on the right is your favorite template list. This is a quicker way to search through all available templates, however you cannot type in a specific search phrase here. Make sure the Category is listed as “All” and the Location section is left blank. Let’s find another template we want to add. Click the “Next >” button to look at more available templates

The screenshot shows the eClinicalWorks interface for the same patient. The 'Template List' dialog box is now titled 'Templates for odughly'. The 'Category' dropdown is set to 'All' and the 'Location' dropdown is blank. The table of templates is the same as in the previous screenshot. On the right side of the dialog, there is a 'Favorite List' with a scrollable list of templates. A red arrow points to the 'Next >' button at the bottom of the dialog box.

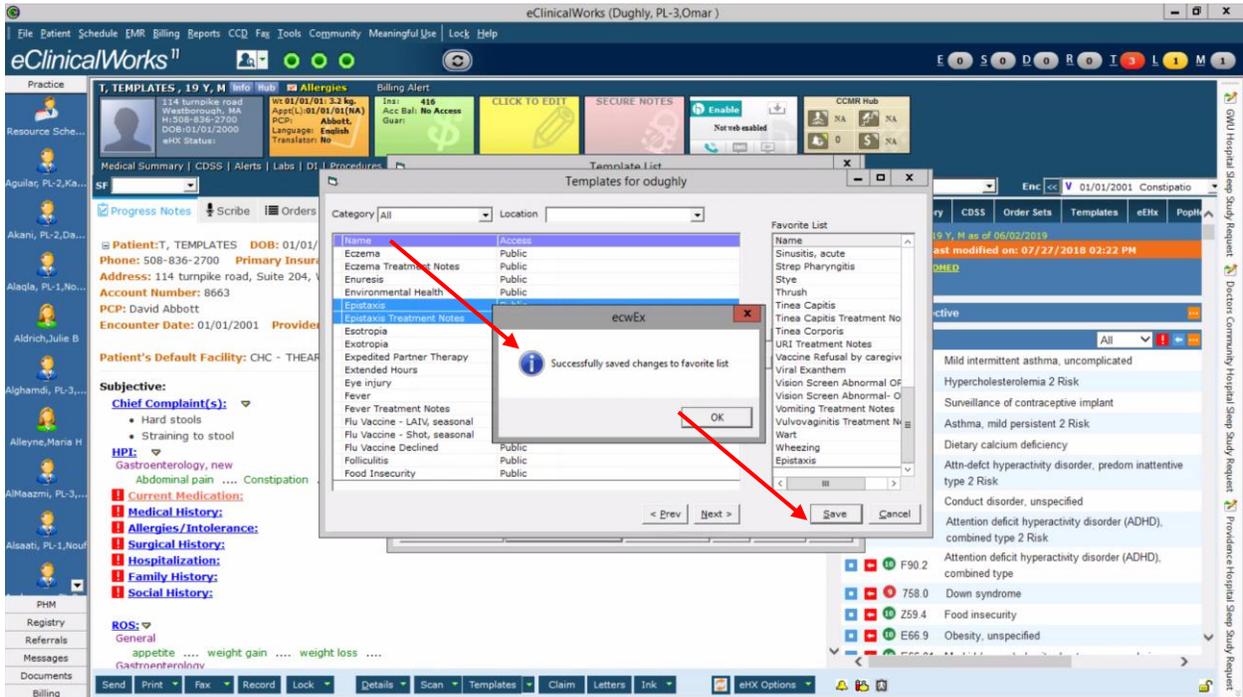
Step 14) I find a template I want to add to my favorites, in this case I'll add the "Epistaxis" template as well as the "Epistaxis" treatment notes. Highlight the template you want to select (hint: you can highlight more than one by holding Ctrl while you select templates)



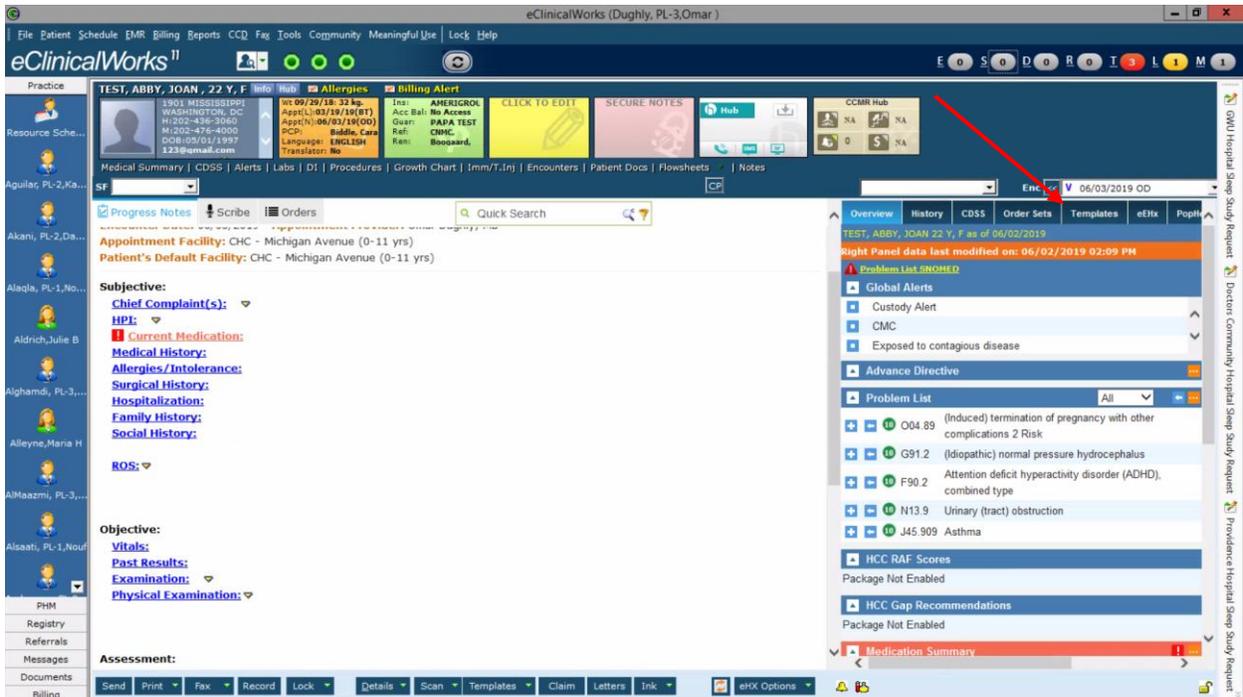
Step 15) Now click on the "=>" button in between the two sections to add the selected notes to your favorites list. Strangely, this puts the note at the bottom of your list so you may need to scroll down to see it listed



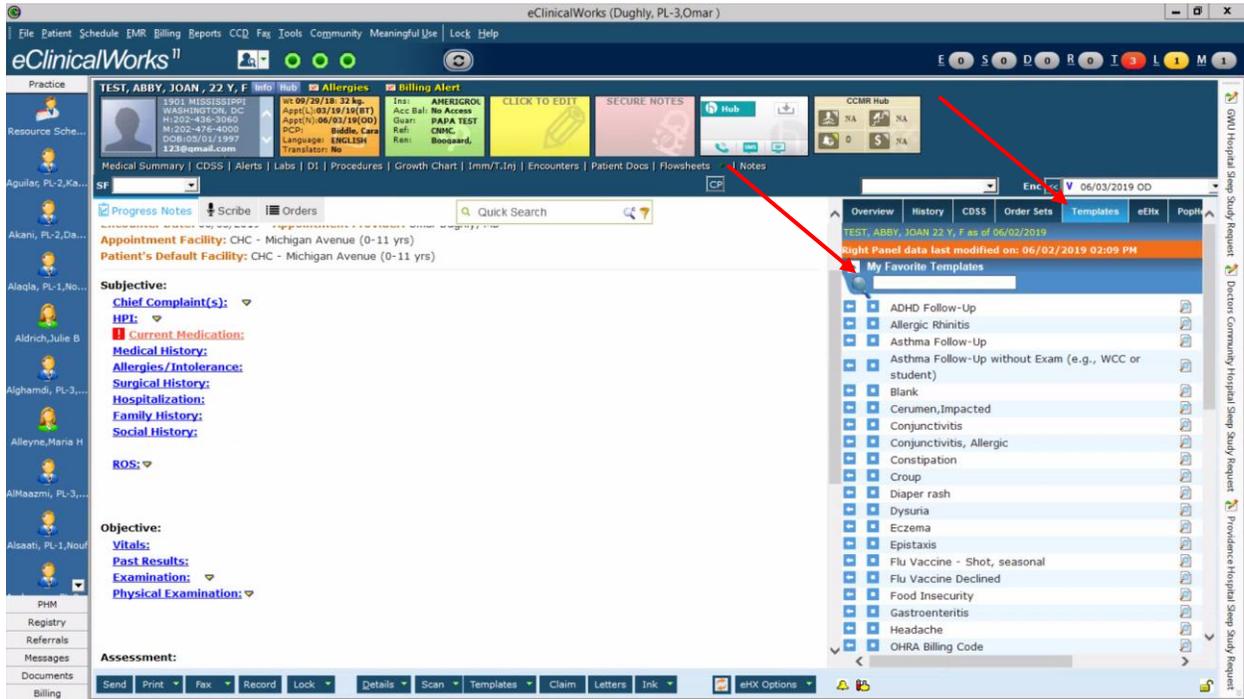
Step 16) Hit the “Save” button and you should see a message saying that you saved changes to your favorite list.



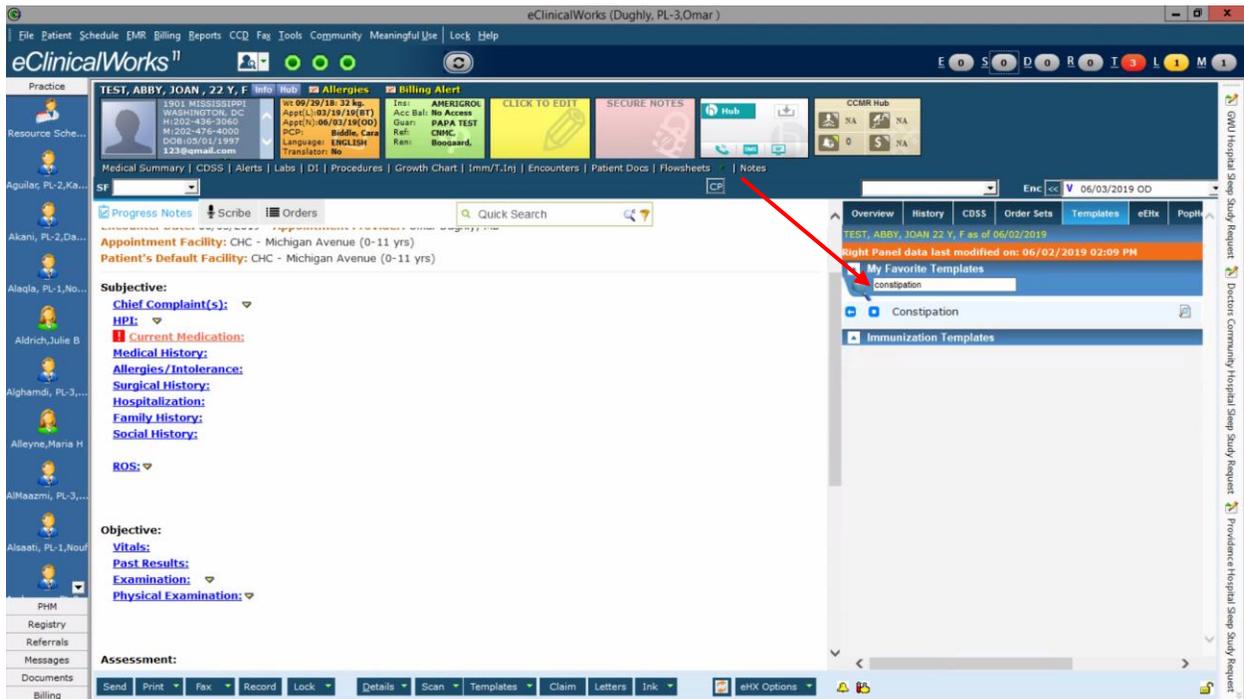
Step 17) Now, let's see your favorite templates list a little more easily. Go back to the progress note you want to work on. Look at the section on the right for a panel button that says “Templates”



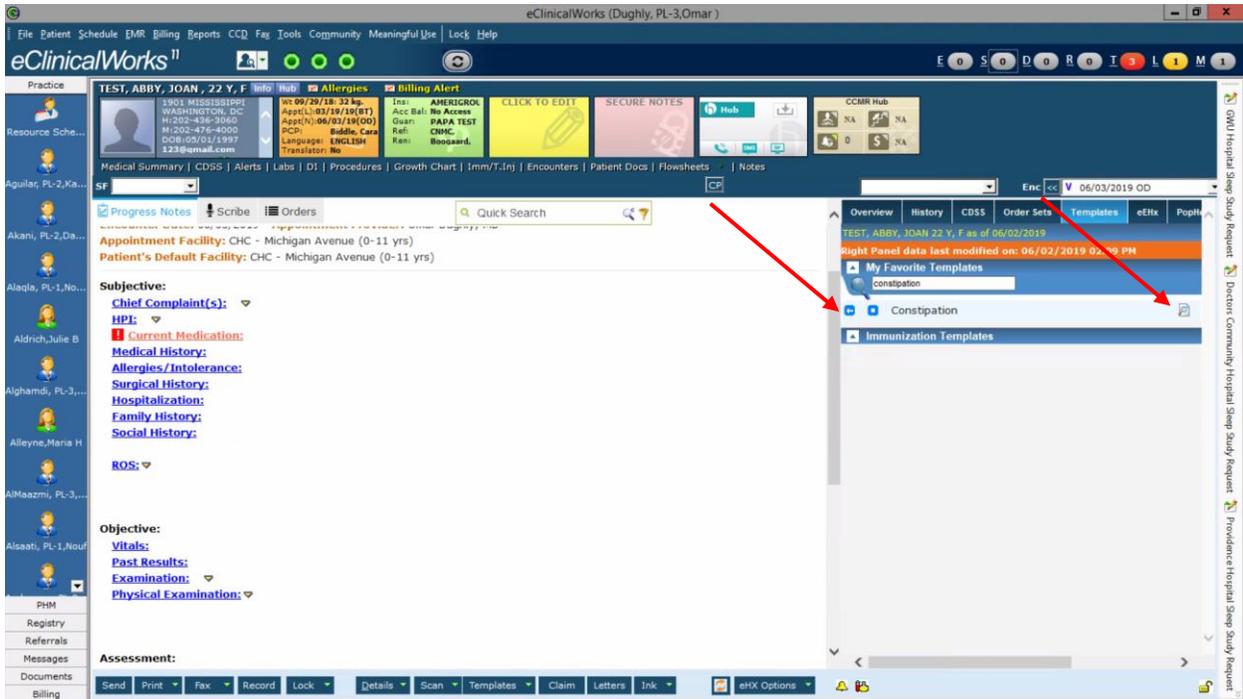
Step 18) Click on the “Templates” panel button on the right side. When you do this, you’ll now see the panel has changed to show your favorite templates.



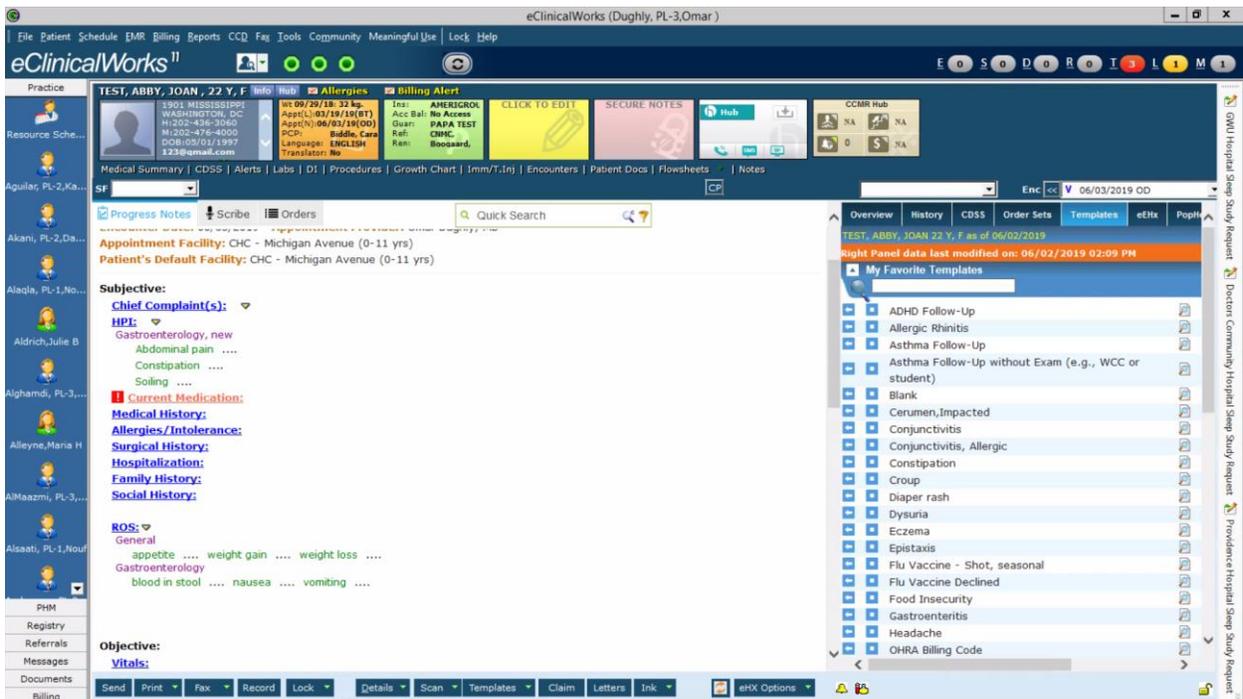
Step 19) If you want to easily add one of your favorite templates to the current progress note, you can do so through this section too. Search for the template you want to add to the note. Let’s stick with constipation. You’ll see this template will be listed below



Step 20) Click the “<” arrow to the right of the template on the list to pull it into the note. If you want to preview the note before you add it, you can do so by click on the button with the magnifying glass on the right of the template



Step 21) After clicking the “<” arrow, you’ll see the progress note has the template pulled in.



Congratulations! You've added a favorite template to your note. It may take time to go through the list of all available templates, but once you have them in, it will make life much easier for you (especially on your acute care block!)

Making your own favorite Template

If you find that you want to make your own template, there is a way to do so. Follow the steps below to find out how

Step 1) Go to the patient's progress note that you wish to work on.

The screenshot shows the eClinicalWorks interface for a patient named TEST, ABBY, JOAN. The patient's information is displayed at the top, including their name, age (22 Y, F), DOB (05/01/1997), sex (Female), and external MRN (021260193). The patient's address is 1901 MISSISSIPPI AVE SE, APT B, WASHINGTON, DC 20032. The PCP is Cara L Biddle, and the appointment date is 06/03/2019. The appointment provider is Omar Dughly, MD, at the CHC - Michigan Avenue (0-11 yrs) facility.

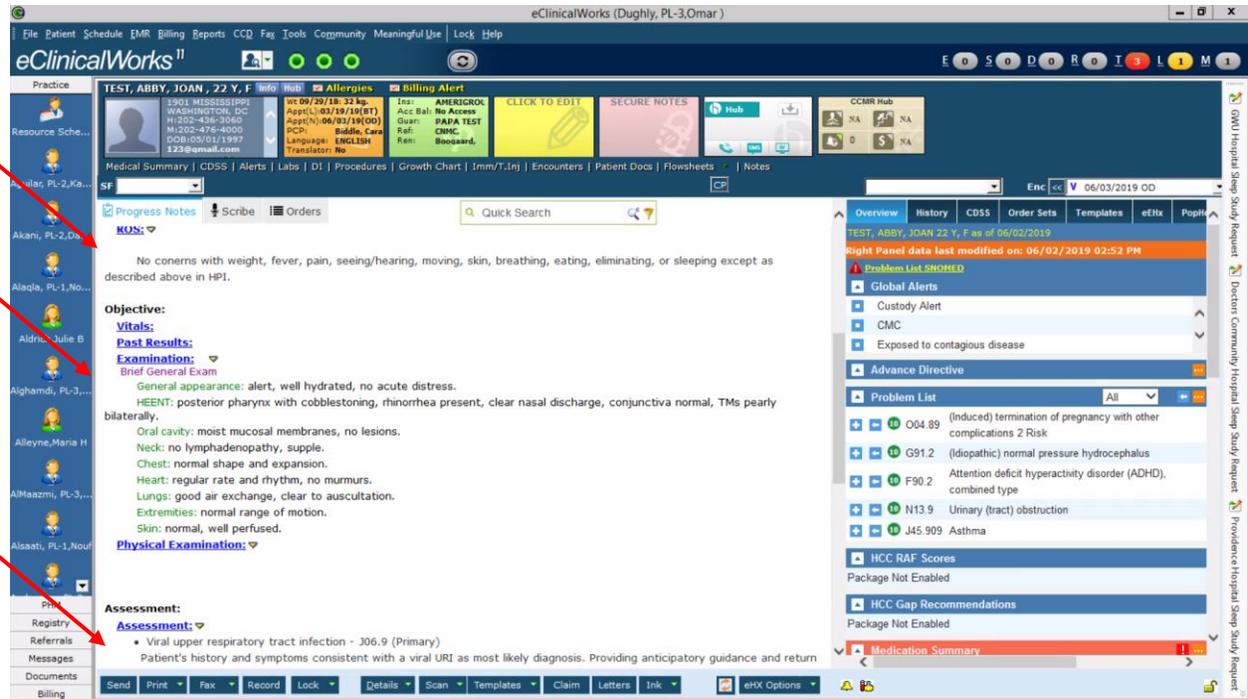
The main content area shows the patient's progress notes. The subject line is "Chief Complaint(s):". The HPI is "Current Medication:". The medical history includes "Allergies/Intolerance:", "Surgical History:", "Hospitalization:", "Family History:", and "Social History:". The ROS is also visible.

The right sidebar contains a navigation menu with tabs for Overview, History, CDSS, Order Sets, Templates, eHx, and PopH. The Overview tab is selected, showing a list of problems and alerts. The problem list includes:

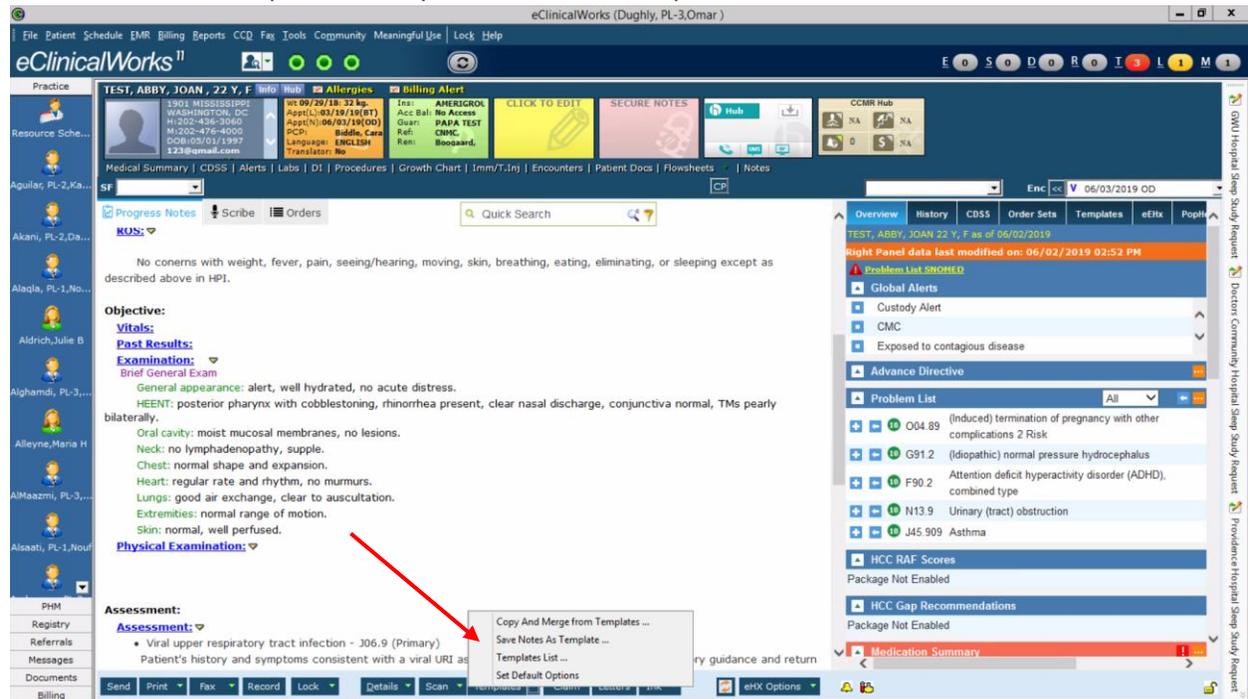
- O04.89 (Induced) termination of pregnancy with other complications 2 Risk
- G91.2 (Idiopathic) normal pressure hydrocephalus
- F90.2 Attention deficit hyperactivity disorder (ADHD), combined type
- N13.9 Urinary (tract) obstruction
- J45.909 Asthma

The bottom of the screen shows a navigation bar with buttons for Send, Print, Fax, Record, Lock, Details, Scan, Templates, Claim, Letters, Ink, and eHx Options.

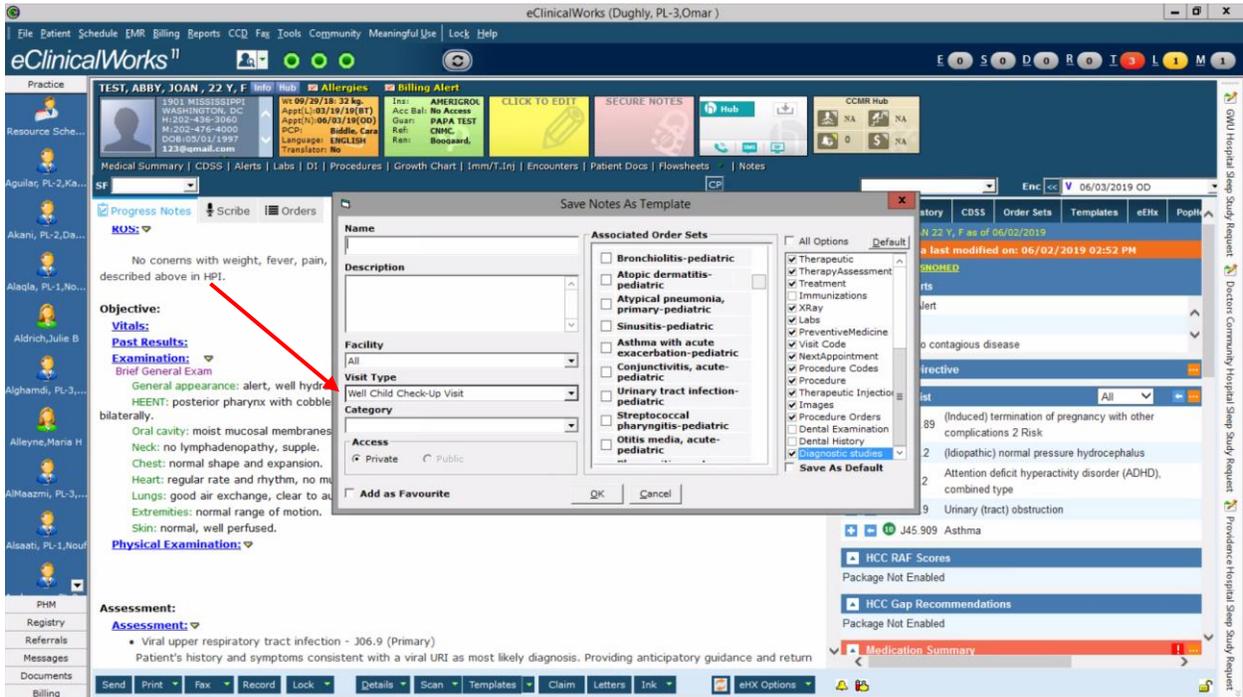
Step 2) Add portions of the note that you wish to have included in your Template note. In this case, I decided to make a template for a viral URI with an otherwise normal exam and well appearing child (ADVICE: keep your template note minimal, in order to avoid having to remove parts of it every time you use the note)



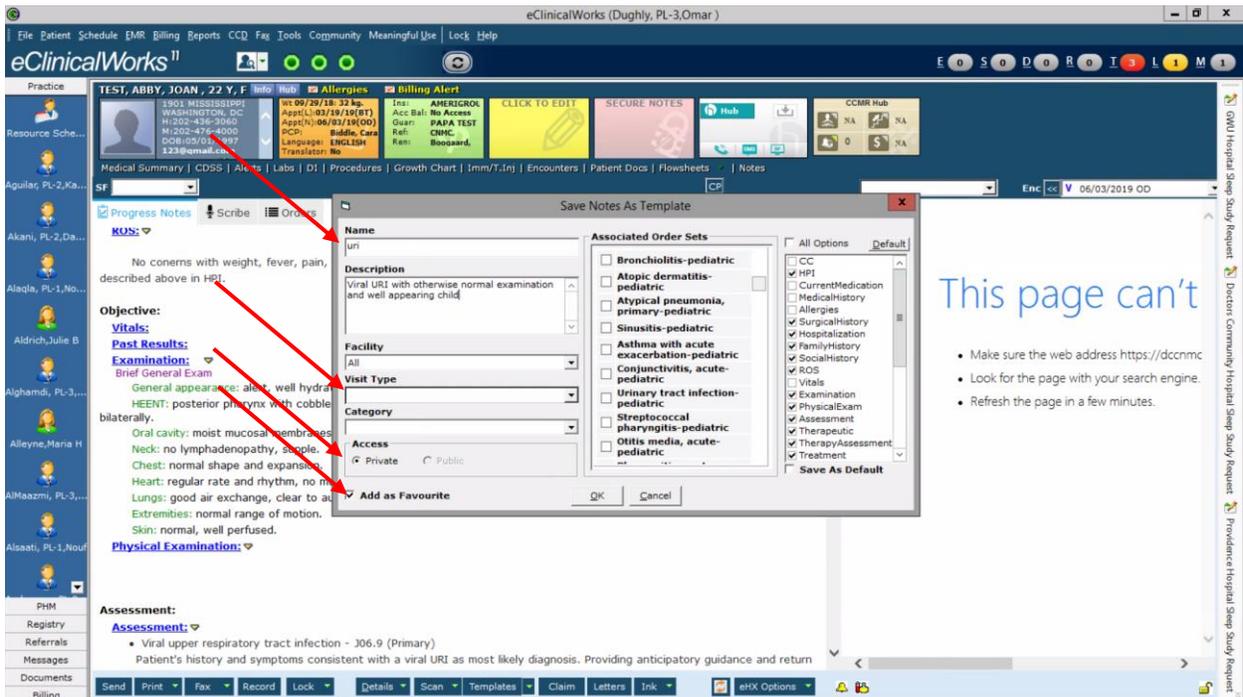
Step 3) When finished making the template note, click on the carat to the right of the “Templates” button and click the option that says “Save Note as Template...”



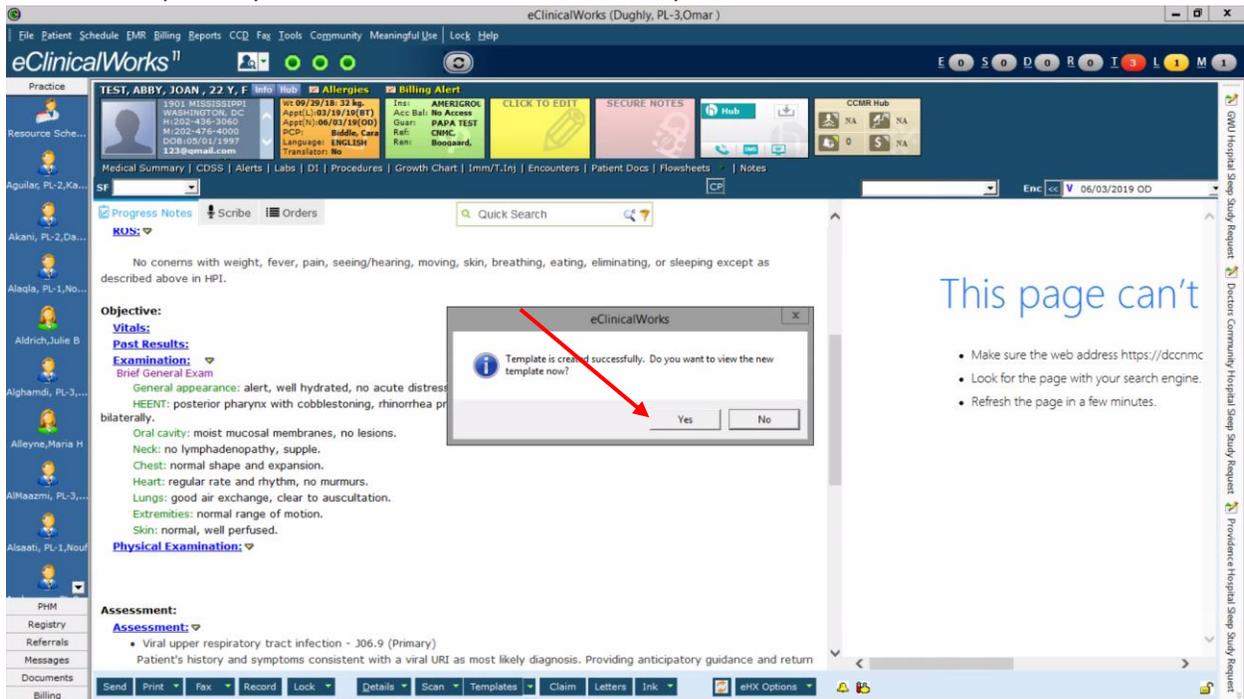
Step 4) A box appears titled “Save Notes as Template”. First, change the “Visit Type” on the left to make that field blank



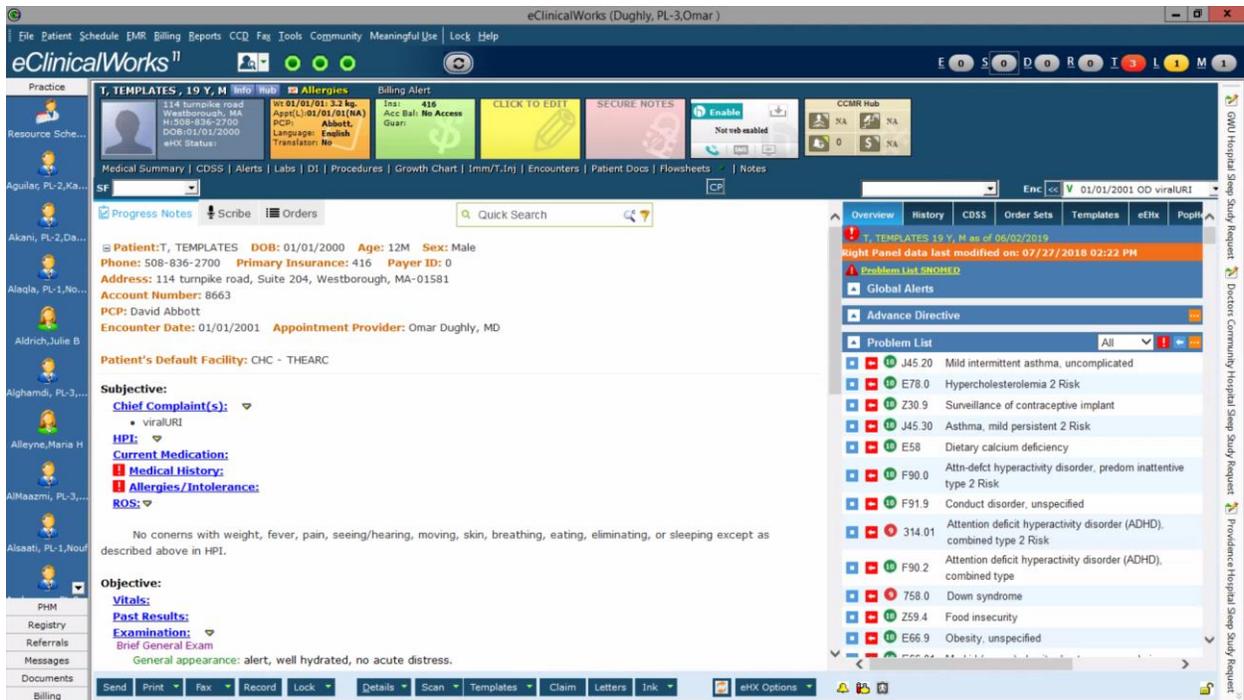
Step 5) Type in a name for your template. I'll type in mine as “viralURI”. If you want to write a description of the note, you may do so in the Description section. Note that the access button only says “Private” meaning that your template cannot be shared with others. Finally click the checkbox that says “Add as favorite”. When finished, click “OK”



Step 6) When you click “OK”, you’ll see a box that says the template was created. You can choose to view the template if you would like to make sure it is as you intended.



Step 7) Choosing to view the template you made sends you to the T, TEMPLATES patient.



Congrats! You’ve made your own template at this point. Remember, less is more when it comes to templates, use them as a way to get a head’s start on a patient visit but don’t add too much in there that will cause you to have to go back and make changes for each encounter.