

eClinicalWorks Training – Shared Patient Accounts Across Multiple Practices

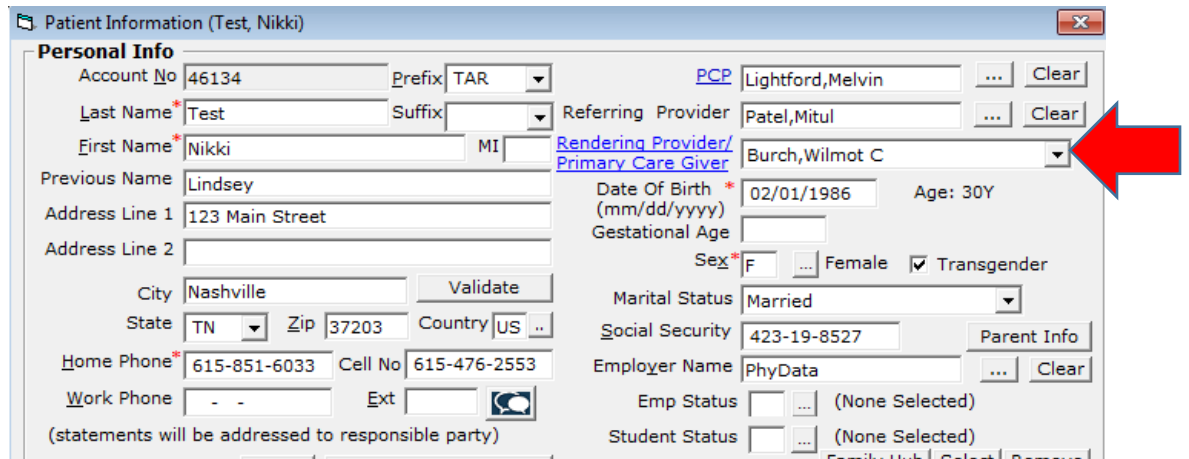
The Advanced Health eClinicalWorks database is shared by multiple practices and specialties under the Advanced Health umbrella. Each patient has a single account that is then utilized by all treating providers within the database. This allows us to maintain a single, up-to-date, and accurate medical record. It's very important that all providers and staff know how to properly handle shared patient accounts to ensure accurate billing and clinical documentation. See the information below regarding how shared patient accounts should be managed.

IDENTIFYING SHARED PATIENT ACCOUNTS:

We currently utilize facility-based security in the AH eClinicalWorks database. This allows us to use one patient account for all encounters but hides aspects of the chart from practice to practice, including Progress Notes, orders, and telephone encounters. There are still ways we can identify shared accounts, though:

- At the time of scheduling the initial appointment, staff should **ALWAYS** search for the patient by name **AND** DOB to ensure the patient does not already have an account in our database. Identifying that the patient already has an account in our eClinicalWorks database is the first indicator that the patient is likely shared between multiple practices. Staff can also use the Rendering Provider field and Default Facility fields to view the additional provider and practice that the patient is associated with. See below. These fields should be reviewed for all patients during check-in to verify accuracy.

- Rendering Provider (Patient Info window)



Patient Information (Test, Nikki)

Personal Info

Account No: 46134 Prefix: TAR PCP: Lightford, Melvin Clear

Last Name*: Test Suffix: Referring Provider: Patel, Mitul Clear

First Name*: Nikki MI: Rendering Provider/Primary Care Giver: Burch, Wilmot C

Previous Name: Lindsey Date Of Birth*: 02/01/1986 Age: 30Y

Address Line 1: 123 Main Street Gestational Age:

Address Line 2: City: Nashville Validate Sex*: F Female Transgender

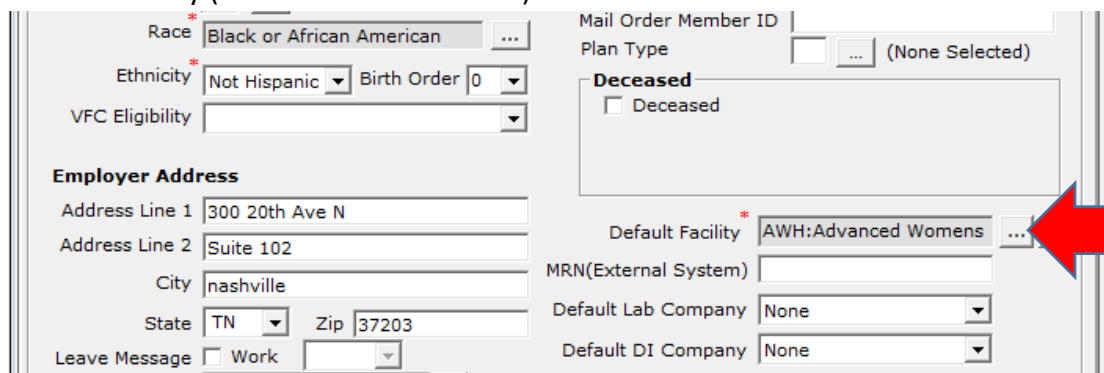
State: TN Zip: 37203 Country: US Marital Status: Married

Home Phone*: 615-851-6033 Cell No: 615-476-2553 Social Security: 423-19-8527 Parent Info

Work Phone: - - Ext: Employer Name: PhyData Clear

(statements will be addressed to responsible party) Emp Status: (None Selected) Student Status: (None Selected)

- Default Facility (Additional Info window)



Race*: Black or African American Mail Order Member ID:

Ethnicity*: Not Hispanic Birth Order: 0 Plan Type: (None Selected)

VFC Eligibility: Deceased: Deceased

Employer Address

Address Line 1: 300 20th Ave N Default Facility*: AWH:Advanced Womens

Address Line 2: Suite 102 MRN(External System):

City: nashville Default Lab Company: None

State: TN Zip: 37203 Default DI Company: None

Leave Message: Work

The Patient HUB window will also show the next and last appointment facilities.


Patient Hub (Test, Nikki)


Labs	DI	Procedures	Imm/T.Inj	Referrals	Allergies	CDSS	Alerts	Notes(2)
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Test, Nikki Info


5045 Old Hickory Blvd.
Suite #102
Goodlettsville, TN-37076
DOB: **11/16/1954**
Age: **63 Y** Sex: **F**
Advance Directive:
WebEnabled: **Yes**
Messenger Enabled: **Yes**
Last vMsg: **01/11/2018 15:21:53**
Account No: **46134**




Home: **615-239-2048**
Work:
Cell: **615-428-2839**
Email: **nikki.trusty@phydata.c**
Insurance: **Medicare**
PCP: **Mauras, Noridia**
Rendering Pr: **Mauras, Noridia**
Default Facility: **Gallatin Fami...**



Share 

CBO Account Balance	Labs	3	Tel Enc	2
	DI	4	Web Enc	-
	Referrals	-	Documents	1
				-

Last Appt: 02/07/2018 08:15 AM Facility: SB:Sally Burbank, MD
 Next Appt: **02/19/2018 10:45 AM** Facility: **AHP:Advanced Health Partners**
 Bumped Appts: **NONE** Case Manager Hx: 

New Appt	New Tel Enc	Print Label(s) ▾	 Billing Alert	 Patient Docs
Letters	Encounters	Medical Summ. ▾	Rx	Progress Notes
eCliniForms	Devices ▾	Problem List	Medical Record	Send eMsg
Account Inquiry ▾	Guarantor Bal.	 Consult Notes	Letter Logs	Fax Logs
Action ▾	New Web Enc	Flowsheets	Messenger ▾	Billing Logs
ePrescription Logs	PL 9 to 10	PHM Hub ▾		

LABELING SHARED PATIENT ACCOUNTS:

Once a shared patient account is identified, staff should **ALWAYS** create a Global Alert to help easily notify/remind other staff and providers.

To apply the Global Alert from the Patient Info Screen, click “Alert” at the bottom of the window.

A screenshot of a patient information screen. At the bottom, there is a row of buttons: "Additional Info", "Alert", "Misc Info", "Options", and "P.S.A.C". A large red arrow points to the "Alert" button.

S	WC GALLAGHER BASSETT	FL	ZEB123456789	2	Test, Dad M
T	ALLIED NATIONAL GLOBAL	GA	213545	1	Test, Nikki
	Cisco Government Services	TN	007054321	1	Test, Nikki

Release of Information Y
Rx History Consent Y Scan
Signature Date 01/2013
Advance Directive

In the Global Alerts tab, first select “Show Global Alerts”. Then click “Set Global Alerts”.

A screenshot of a "Billing Alert for (Test, Nikki)" window. The "Global Alerts" tab is selected. The "Show Global Alerts" checkbox is checked. A red arrow points to the "Set Global Alerts" button at the bottom right.

*Billing Alert **Global Alerts** Insurance Alert *MU Alert

Show Global Alerts

Name	No
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View Notes Set Global Alerts Close

Select the “Both” category option and then choose the alert labeled “MULTIPLE PROVIDERS W/IN ECW” (second page).

A screenshot of a "Set Global Alert Detail for (Test, Nikki)" window. The "Both" radio button is selected. The "Selected List of Global Alerts" table shows the "MULTIPLE PROVIDERS W/IN ECW" alert selected. A red arrow points to the "MULTIPLE PROVIDERS W/IN ECW" alert in the list.

Global Alerts Selected List of Global Alerts

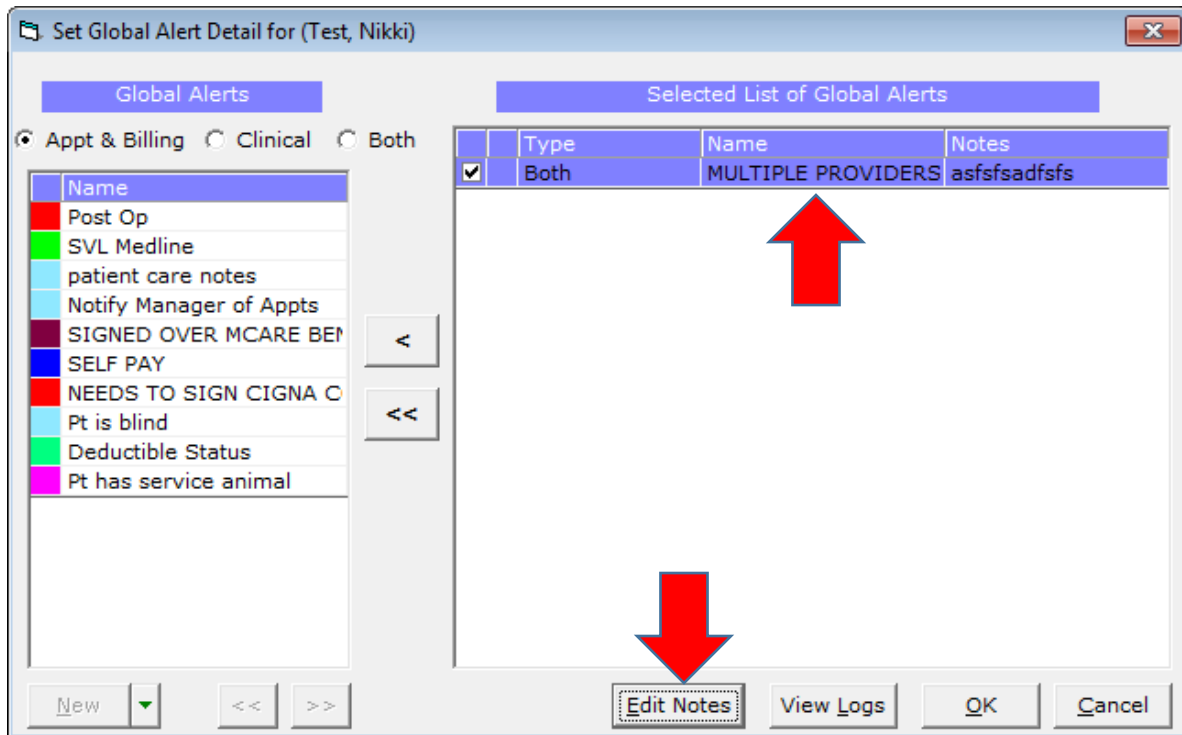
Appt & Billing Clinical Both

Type	Name	Notes
<input checked="" type="checkbox"/>	MULTIPLE PROVIDERS	

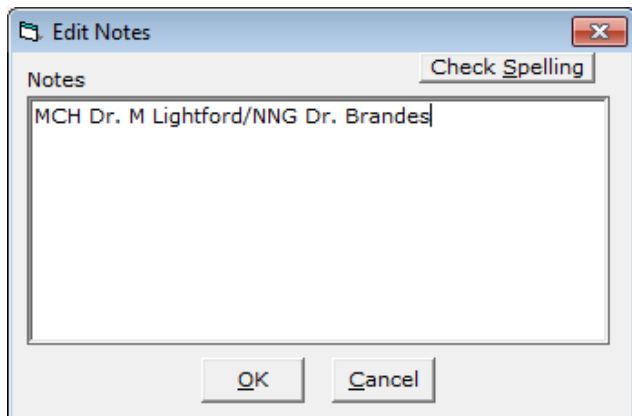
Verify DOB
BIRTHDAY CARD
SELF PAY
HIPPA
GLOBAL
IME
HIV/AIDS
HIPAA
ILLITERATE
Deceased
MULTIPLE PROVIDERS W/IN ECW
WC Note
NO REMINDER CALLS
NO EMAIL

New << >> Edit Notes View Logs OK Cancel

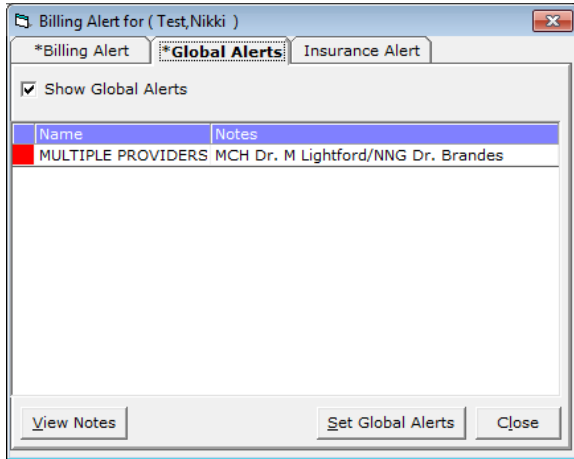
Highlight the selected alert and click the “Edit Notes” button to add the specific provider information.



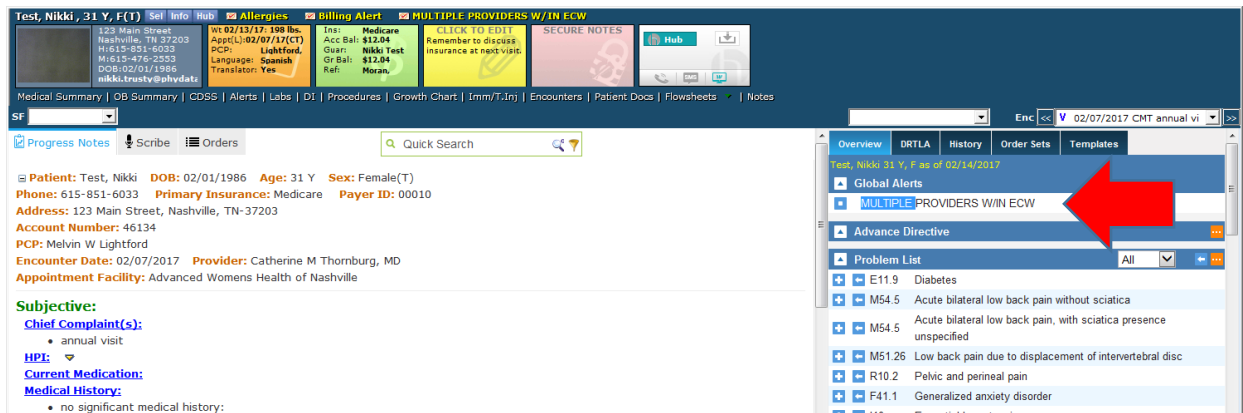
Add both known providers or practices and click “Ok”. Close the Global Alert window.



Adding this alert will ensure that all staff who schedule and/or open the patient appointment window will be notified that this patient is shared between practices.



Staff and providers will also see this alert in the right side car of the Patient HUB and Progress Note views.



Additionally, practices may choose to enter “multiple providers” information in the note section of the Patient Info screen and/or the Sticky Note in the Progress Note view.

Insurances **IE** **New Case**

Fee Schedule: Master Fee Schedule Self Pay Add Update Remove

Name	State	Subscriber No	Rel	Insured	Co Pay	Group No
P Medicare	IN	999999999A	1	Test, Jennifer (Training)		

Release of Information* Y Rx History Consent* Y Scan Signature Date: 04/28/2016

PATIENT SEES MULTIPLE PROVIDERS WITHIN ADI

Jennifer (Training), 48 Y, F Sel Info Hub Allergies

123 Main Street Hermitage, TN 37076 H:910-303-2370 M:910-303-2370 DOB:01/01/1970 jennifer.humphrey@i	Wt 01/25/18: 175 lbs. Appt(L):02/06/18(MJ) PCP: DeMoville, Language: English Translator: No	Ins: Medicare Acc Bal: \$200.00 Guar: Jennifer Gr Bal: (\$3,164.00 Ref: Johnson, Ren: Gurley,	<div style="border: 2px solid red; padding: 5px; width: fit-content;"><p>CLICK TO EDIT PATIENT SEES MULTIPLE PROVIDERS WITHIN ADI</p></div>
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Summary | OB Summary | CDSS | Alerts | Labs | DI | Procedures | Enc

SCHEDULING AND CHECKING IN SHARED PATIENTS:

Check-in staff should **ALWAYS** verify the following fields for patients **AT EACH VISIT**:

1. Rendering Provider (Patient Info window)
2. Default Facility (Additional Info window)
3. Insurance (Patient Info window)/Case Manager (Appointment Window)

A large portion of the shared patients in our database utilize separate insurances for their different treating providers. For example, a common scenario is a patient who uses health insurance for office visits with their PCP and OB/GYN but may use WC or MVA coverage for office visits with their surgeon. It's important for **ALL** offices to keep this information in mind when scheduling and checking in these patients.

1. When insurances are identified on the patient account that are current but not used for today's appointment, do **NOT** terminate or delete those plans! Instead use the Case Manager feature to accurately apply the correct coverage to each visit (see separate Case Manager instructions).
2. Once a case has been created through the Case Manager function in eClinicalWorks, the check-in staff with **ALL** offices in our database will see the Case Manager button highlighted in yellow in the appointment window. Any time a check-in staff member sees a yellow Case Manager button, they should immediately:
 - a. Review the insurance(s) currently loaded into the patient's demographics window.
 - b. Identify which insurance should be utilized for today's visit.
 - c. Apply the appropriate case to today's visit to ensure proper billing. **DO NOT DELETE OR TERMINATE ACTIVE INSURANCES UTILIZED BY OTHER PRACTICES.**
 - d. Always name your cases starting with the practice initials followed by the insurance and body part information. This will make case selection easier for staff at all offices.

The screenshot displays the eClinicalWorks appointment window for a patient named Jennifer Humphrey. The window includes fields for Start Time (7:30 AM), End Time (8:00 AM), and a checkbox for New Pt. Patient information includes Name (Test, Jennifer (Training)), DOB (01/01/1970), Tel (910-303-2370), and E-mail (jennifer.humphrey@phydata.com). The Visit Type is set to MSE HATEST (MSE Hear), and the Visit Status is PEN (Pending). The Reason field is empty, and there is a checkbox for Transition of care. The Open Cases section shows a dropdown menu with 'AH BCBS elbow' selected, and a yellow 'Case Manager' button is visible next to it. The Billing Notes section shows 'AH WC knee' and 'AH BCBS elbow'. The Co-pay / Claim changes for this visit only field is empty.

REVIEWING MEDICAL HISTORY FOR SHARED PATIENTS:

Since each shared patient within our eClinicalWorks database has a single patient account, this means there is also a single patient chart with one list of current medications, medical history, allergies, etc. Each office should work to maintain an accurate and complete medical record by doing the following:

1. Verify current medications at each visit, utilizing the External RX History option whenever possible. Never delete a medication unless the patient has actually never taken that med. Otherwise use the “not taking” and “discontinued” buttons in the Current Medications window.
2. Add, edit, and verify medical history, OB/GYN history, surgical history, social history, and family history as necessary. It’s important that practices consistently document these details in the same areas in order to avoid confusion (i.e. “tonsillectomy” should be loaded into surgical history and never medical history).
3. Review and update information included in each patient’s CDSS rules as it pertains to your practice and specialty. If a CDSS rule does not apply to your scope of care, ignore it rather than marking it as “suppress”.
4. Review and update the Problem List as it pertains to your practice. Note that the Problem List should be maintained as a list of **ALL** current problems for the patient, regardless of what diagnosis codes are added to individual notes.
5. It is **NEVER** appropriate to delete accurate historical data because it doesn’t apply to your practice’s scope of care. Doing so will remove the information from the patient’s chart for all future encounters, regardless of provider or practice.