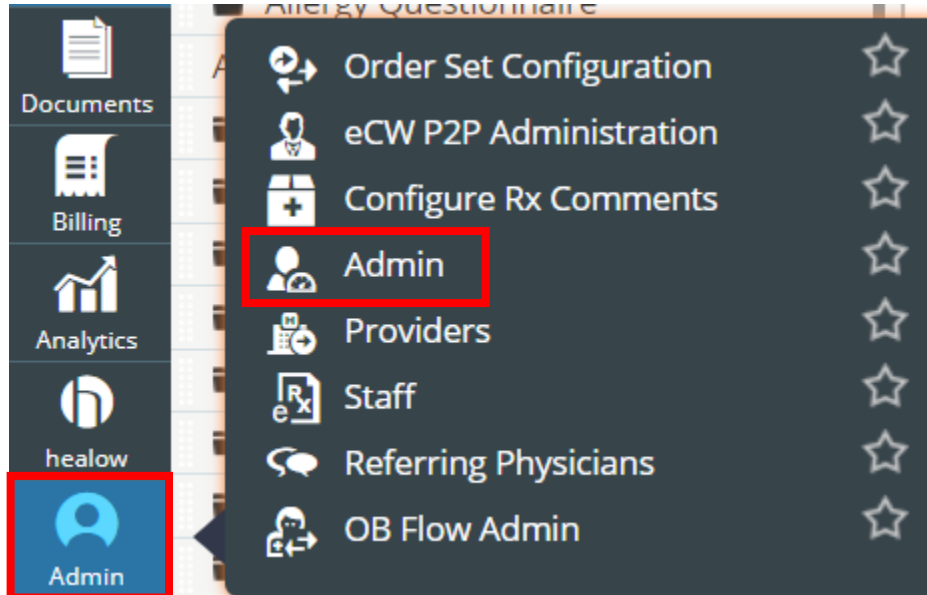


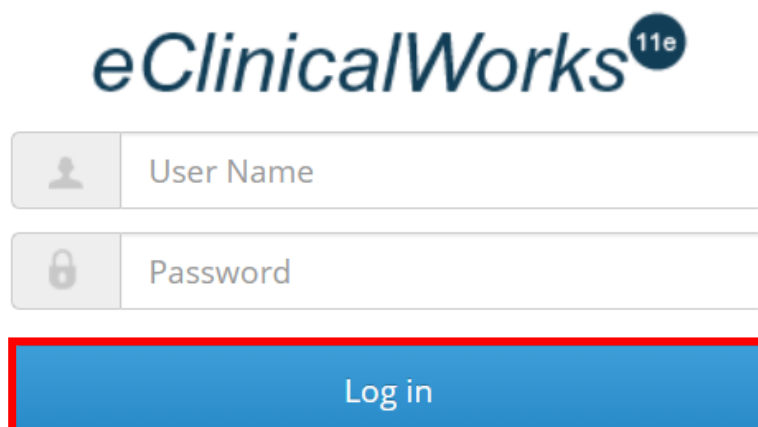
## Documenting Virtual Visits in ECW via Resource Schedule

\*There is setup required, but this option will allow you to document in your EMR as you would a regular office visit. Billing/claim creation would also work the same.

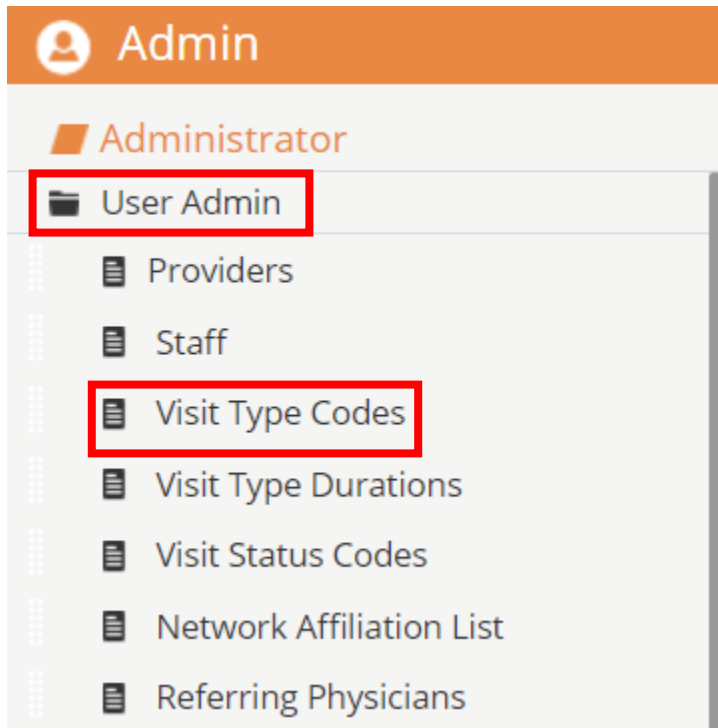
**Step 1:** Go to “Admin” from left menu, and then click “Admin”



**Step 2:** Log in using your eCW username and password

A screenshot of the eClinicalWorks login page. The logo 'eClinicalWorks' is displayed at the top, with a '11e' badge. Below the logo are two input fields: 'User Name' and 'Password'. The 'User Name' field has a person icon on the left, and the 'Password' field has a lock icon on the left. Below these fields is a blue 'Log in' button, which is highlighted with a red box.

**Step 3:** Click on “User Admin” and then select “Visit Type Codes”



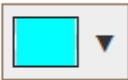
**Step 4:** Click “add” in the top right corner to add a new visit type code

Select: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Add

Name	Description	Visit Type	OBGYN	Status	Color	Display	
ANN VISIT	Annual Visit	Physical Visit	Yes	Active	Grey	on	
care co in	care notes using intervention	Interventions	No	Active	Green	on	
Care Cord.	Care coordination team communication	Regular Visit	No	Active	Green	on	
CON	Consult	Physical Visit	No	Active	Green	on	
eBO BROKEN	network changes required	Regular Visit	No	Active	Yellow	on	
ESTPT	Established Patient	Physical Visit	Yes	Active	Brown	on	
F/U	Follow Up Visit	Physical Visit	No	Active	Yellow	on	
FU Hosp	Visit within 30 days of hospitalization	Physical Visit	No	Active	Grey	on	
INJ	Injection	Regular Visit	No	Active	Grey	on	
NP	New Patient	Physical Visit	Yes	Active	Pink	on	
NV	Nurse Visit	Interventions	No	Active	Red	on	
OPENACCESS	Online	Regular Visit	No	Active	Grey	on	

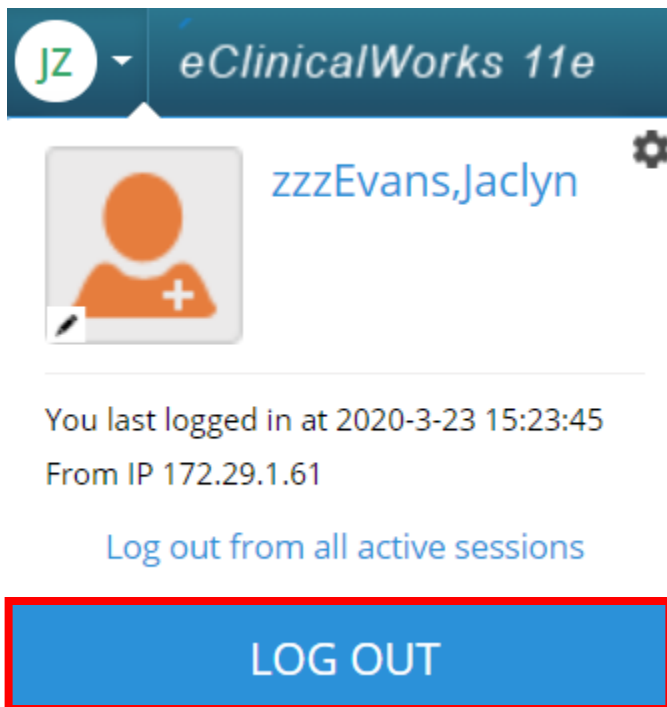
**Step 5:** Enter information (Name, description, visit type duration, visit type, and choose options at bottom)

**User Admin** ▸ **Visit Type Codes** ▸ Add New

<b>Name*</b>	Virtual	x	Status	<input checked="" type="radio"/> Active
<b>Description</b>	Virtual Visit	x	<input type="checkbox"/> Exclude from Me	
Chart Title			<input type="checkbox"/> Do not display A	
<b>Visit Type Duration (In Mins)</b>	15	x	<input type="checkbox"/> Synchronize this	
Color			<input type="checkbox"/> Medication reco	
<b>Visit Type</b>	Physical Visit	▼	<input type="checkbox"/> Collect UB data	
		Customize...		
Insurance Plan Type		...		
<input type="checkbox"/> OBGYN History	<input type="checkbox"/> PhysicalTherapy			
<input checked="" type="checkbox"/> Requires Claim	<input type="checkbox"/> Requires Copay			
<input type="checkbox"/> Pregnancy Visit	<input type="checkbox"/> Vision Visit			
<input type="checkbox"/> Orthopaedic Visit	<input type="checkbox"/> Patient Housing			
<input type="checkbox"/> Care Mgmt Visit	<input type="checkbox"/> Care Plan Visit			
<input type="checkbox"/> Referral Required	<input type="checkbox"/> Dermatology Visit			
<input type="checkbox"/> Worksheet Visit	<input type="checkbox"/> CCMR Visit			

---

**Step 6:** Log out and log back in for the changes to take effect



JZ eClinicalWorks 11e

zzzEvans, Jaclyn

You last logged in at 2020-3-23 15:23:45  
From IP 172.29.1.61

[Log out from all active sessions](#)

**LOG OUT**

**\*\*You only have to complete steps 1-6 once (the administrator of the EMR should complete these steps)**

**Step 7:** Schedule appointment on the resource schedule

Appointment on Tuesday, March 31, 2020

Patient\*  Name    New PT.

ZZZTEST, ACO | 29 Jun 1947 | 555-555-5555 | karen.oduwole@utsouthwestern.edu | eEHX Status

**Appointment**

Facility\*  POS 11 Provider\* Willis,Amy AW  
 Date\* 03/31/2020 Claim Provider Resource\* Willis,Amy AW  
 Time\* 02:00 pm 02:15 pm Email karen.oduwole@utsouthwes

**Visit**

Visit Type\*  Virtual (Virtual Visit) Reason Cough  
 Visit Status  PEN (Pending) Diagnosis

**Billing**

Open Cases  Claim Data  
 Referral  ... N  
 Billing Notes  ...  
 General Notes

**Co-Pay/ Claim changes for this visit only**

Change co-pay for this visit 0.00  
 Non-billable visit

**Step 8:** Proceed with normal documentation and billing practices as you would for any other visit. You can also utilize your resource schedule and the 'S' jellybean as you normally would for in office visits.

JZ eClinicalWorks 11e

Office Visits 03/31/2020

Provider  Appt Time All Day  
 Facility  View All  
 Sort by Appt Time

	VISIT TYPE	APPT TIME	PATIENT NAME	P/R	REASON	SEX	AGE	VISIT STATUS
<input type="checkbox"/>	Virtual	02:00 PM	ZZZTEST, ACO		Cough	F	72 Y	PEN

## Documenting Patient Consent in Progress Note

\*Be sure to document that the patient gave consent to the video conference call for treatment.

One recommendation is to create a built in consent option under the HPI section. See steps below:

**Step 1:** Open the HPI section

The screenshot shows a patient record interface with a blue header bar containing navigation tabs: Medical Summary, CDSS, Labs, DI, Procedures, Growth Chart, Imm, and T.Inj. Below the header are three buttons: Progress Note, Scribe, and Orders. The patient information section includes: Patient: ZZZTEST, ACO; DOB: 06/29/1947; Age: 72 Y; Sex: Female; Phone: 555-555-5555; Primary Insurance: Self Pay; Address: 123 ANY STREET, DALLAS, TX-75253; Account Number: 36666; Encounter Date: 03/31/2020; Provider: Amy Willis TEST; Appointment Facility: UT Southwestern Medical Center. The Subjective section is expanded to show Chief Complaint(s) with a dropdown arrow, listing 'Cough'. Below this, the 'HPI:' label is highlighted with a red box, and a dropdown arrow is visible next to it.

**Step 2:** Click on “Interim History”

The screenshot shows the 'Interim History' section of the patient record. The header bar is blue and contains the text 'HPI (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual)'. Below the header are tabs for Pt. Info, Encounter, Physical, and Hub. A row of icons is visible, including a magnifying glass, a clipboard, a stethoscope, a pulse oximeter, a video camera, a calendar, a scale, a pair of scissors, a hand, a pill, a bottle, a test tube, a flask, a microscope, and a bell. The 'Interim History' section is highlighted in blue. Below this, a search bar contains the text 'Find in Interim History'. A table with four columns is displayed: c/o, Denies, Symptom, and Duration. The table contains several rows of data, with the 'Interim History' section highlighted in red.

c/o	Denies	Symptom	Duration
		*	
		Tests/Studies pe...	
		Had consultatio...	
		Was hospitalized	
		Emergency roo...	

**Step 3: Click “custom”**

**Interim History**

HPI

- Travel/Exposure Screen
- Medicare Annual Wellness
- ⊕ Depression Screening
- Upper respiratory
- ⊕ General surgical symptoms
- Constitutional
- **Interim History**
- New symptom(s)
- \*\*\*\*\*
- ⊕ Behavioral Health
- ⊕ Breast surgery consultations
- ⊕ Cardiology
- ⊕ Cardiothoracic surgery consultations
- ⊕ Case Management
- ⊕ Dermatology

Interim History

Find in Interim History

c/o	Denies	Symptom	Duration
		*	
		Tests/Studies pe...	
		Had consultatio...	
		Was hospitalized	
		Emergency roo...	
S		Transition of Car...	
S		Transition of Car...	
		Patient Consent ...	

**Step 4: Click “add”**

HPI > Items: Interim History (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual)

Struct	Name
	*
	Tests/Studies performed was
	Had consultation(s)
	Was hospitalized
	Emergency room visits
✓	Transition of Care Visit from Hospital
✓	Transition of Care visit from other inpatient facility
	Patient Consent for Virtual Visit

Add

**Step 5:** Enter the property name and add an observation (see suggestion below):

HPI ▸ Items: Interim History ▸ HPI Properties (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual)

Property Name :	Patient Consent for Virtual Visit
-----------------	-----------------------------------

Observation
Patient gave consent to virtual visit for treatment
Add Property

**Step 6:** Click “OK” in the bottom right corner

HPI ▸ Items: Interim History ▸ HPI Properties (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual)

Property Name :

Observation	Color	B	U	
Patient gave consent to virtual visit for treatment		<input type="checkbox"/>	<input type="checkbox"/>	
Add Property		<input type="checkbox"/>	<input type="checkbox"/>	<input data-bbox="1393 1087 1425 1113" type="button" value="+"/>



**Step 7:** Click “OK” again

HPI ▾ Items: Interim History (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual)

Struct	Name	Options
	*	
	Tests/Studies performed was	
	Had consultation(s)	
	Was hospitalized	
	Emergency room visits	
✓	Transition of Care Visit from Hospital	
✓	Transition of Care visit from other inpatient facility	
	Patient Consent for Virtual Visit	

Add Save Structured Flag OK Cancel

**Step 8:** The patient consent option has been created. You can now choose this option when documenting in a progress note.

HPI (ZZZTEST, ACO -03/31/2020 02:00 pm, Virtual) [X]

Pt. Info Encounter Physical Hub

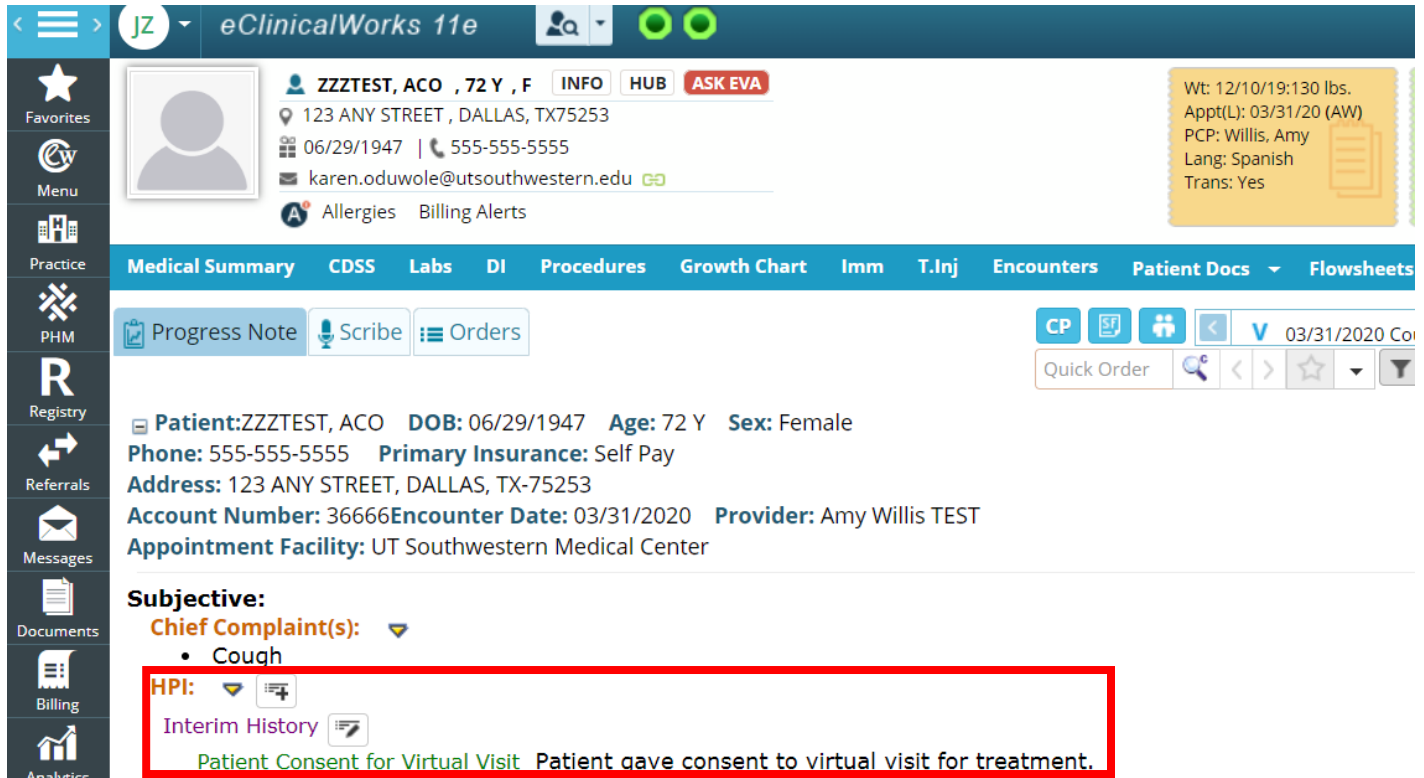
Interim History ☑ Show pop-up for c/o Order

HPI

- Travel/Exposure Screen
- Medicare Annual Wellness
- ▣ Depression Screening
- Upper respiratory
- ▣ General surgical symptoms
- Constitutional
- Interim History
- New symptom(s)
- \*\*\*\*\*
- ▣ Behavioral Health
- ▣ Breast surgery consultations
- ▣ Cardiology
- ▣ Cardiothoracic surgery consultations

c/o	Denies	Symptom	Duration	Notes
		*		
		Tests/Studies pe...		
		Had consultatio...		
		Was hospitalized		
		Emergency roo...		
S		Transition of Car...		
S		Transition of Car...		
		Patient Consent ...		Patient gave consent to virtual visit for trea... [X]

**Step 9:** Progress note documentation example



**Progress Note** | Scribe | Orders

**Medical Summary** | CDSS | Labs | DI | Procedures | Growth Chart | Imm | T.Inj | Encounters | Patient Docs | Flowsheets

**CP** | **SF** | **+** | **V** 03/31/2020 Co | Quick Order

**Patient:** ZZZTEST, ACO **DOB:** 06/29/1947 **Age:** 72 Y **Sex:** Female  
**Phone:** 555-555-5555 **Primary Insurance:** Self Pay  
**Address:** 123 ANY STREET, DALLAS, TX-75253  
**Account Number:** 36666 **Encounter Date:** 03/31/2020 **Provider:** Amy Willis TEST  
**Appointment Facility:** UT Southwestern Medical Center

**Subjective:**  
**Chief Complaint(s):**  
• Cough

**HPI:**  
Interim History  
Patient Consent for Virtual Visit Patient gave consent to virtual visit for treatment.