

## Log onto Live TW Environment

## Go to Live environment and choose “RGTEST, \_\_\_” patient

### TASKS

You will learn about TASKS on-site.

Can view from “Tasks” section of vertical toolbar.

FAQ’s can be found: Vertical tool bar → User Support → FAQs (bottom of page) → Task FAQs

### USER / PATIENT CONTEXT ISSUES

Sometimes, the following problems may occur in the system:

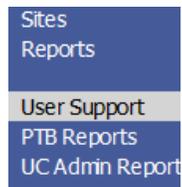
1. A user is logged in to the PC, but TW will show the previous user log in info
2. The incorrect patient displays in the banner bar

The most effective method to recover from user / patient context issues is to press the **F5** key on your keyboard.

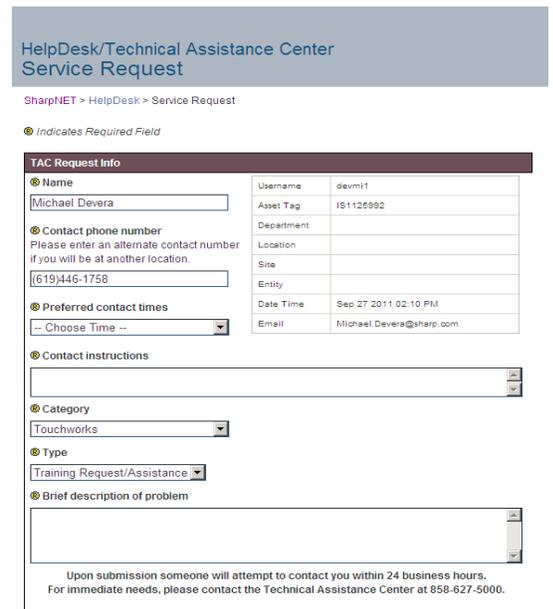
# Tasks, User Support and Defaults

## TECH HELP

The EHR Touchworks team is always happy to help you. To get help quickly, just click on the User Support Option on the vertical tool bar in Touchworks.



1. Click on User Support on the Vertical tool bar
2. This will open this page:

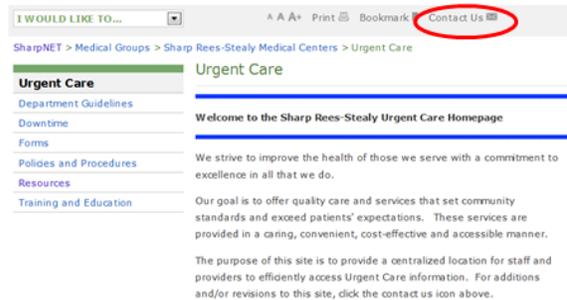


- Click on **Training Help** for ANY TW training related issues. Examples:
  - How to add a task view
  - How to enter an order
- **Tech Help** is for things you know how to do, but are not working correctly. Examples:
  - Hardware issues (i.e. – freezing)
  - Click on a link and it's not working
  - Link to ECG is not working
- Fill in your information and click on the **Submit Request** button.

# Tasks, User Support and Defaults

## UC Intranet Webpage/Accessing BFF online

- Access:
  - TW Vertical Tool Bar 
  - <http://sharpnet.sharp.com/medicalGroups/srs/urgentCare/index.cfm>

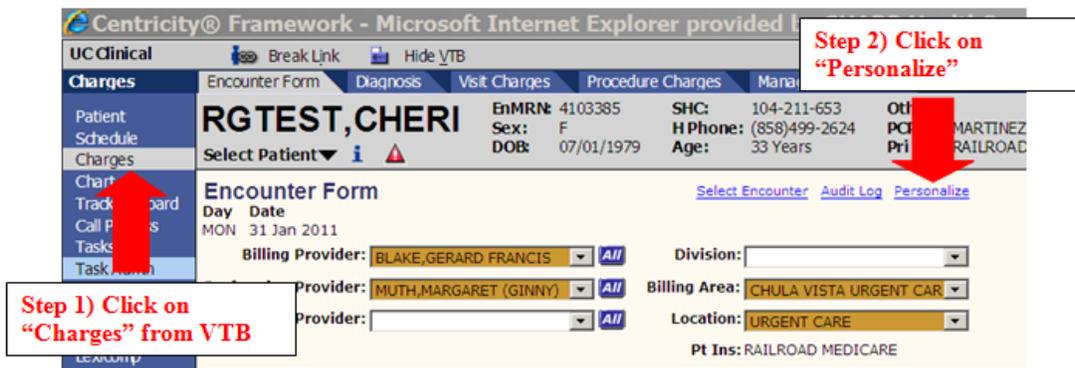


- Purpose: Centralized repository for UC Information



## Setting Charge Defaults

Simply follow the steps & images in the following pages. Don't worry, no need to memorize these steps, you only have to do this once!



**Step 1) Click on "Charges" from VTB**

**Step 2) Click on "Personalize"**

UC Clinical | Break Link | Hide VTB

**Charges** | Encounter Form | Diagnosis | Visit Charges | Procedure Charges | Manage

Patient: **RGTEST, CHERI** | EnMRN: 4103385 | SHC: 104-211-653 | Other: **PCP MARTINEZ**  
Sex: F | H Phone: (858)499-2624 | Pri: **RAILROAD**  
DOB: 07/01/1979 | Age: 33 Years

Encounter Form | Select Encounter | Audit Log | Personalize

Day Date: MON 31 Jan 2011

Billing Provider: **BLAKE, GERARD FRANCIS** | All | Division: | Billing Area: **CHULA VISTA URGENT CAR** | Location: **URGENT CARE** | Pt Ins: RAILROAD MEDICARE

Provider: **MUTH, MARGARET (GINNY)** | All

The personalize dialog box will appear. Please make sure that every box has the following information:

# Tasks, User Support and Defaults

**Personalize** Step 3: Ensure all boxes are the same as below

**General**

Default menu item for MD Charges: Encounter Summary

Auto Link of Dx(s) to Charges: All Dx to All Charges

Warning Message on Submit

Exit Encounter Summary After Submit (PDA only)

Hold for More Charges default **\*\*Ensure that this is UNCHECKED\*\***

Display Diagnosis Codes: ICD10

Display When Submit Button is Activated: Clinical Desktop

**Diagnosis Selector**

Default Selection Method: Groupings

Display Patient Past Diagnoses if Present

Display ICD Codes in selector box: Display Name, then ICD Code

Default Sort Order: Display Name

Number of Columns in selector box:  1  2

**Personalize**

**Visit Charge Selector**

Default Selection Method: Groupings

Display Charge Codes in selector box: Display Name, then Charge Code

Default Sort Order: Entry Code

Number of Columns in selector box:  2  3

**Procedure Charge Selector**

Default Selection Method: Groupings

Display Charge Codes in selector box: Display Name, then Charge Code

Default Sort Order: Entry Code

Number of Columns in selector box:  2  3

Step 4: Click "OK"

OK Cancel

# Tasks, User Support and Defaults

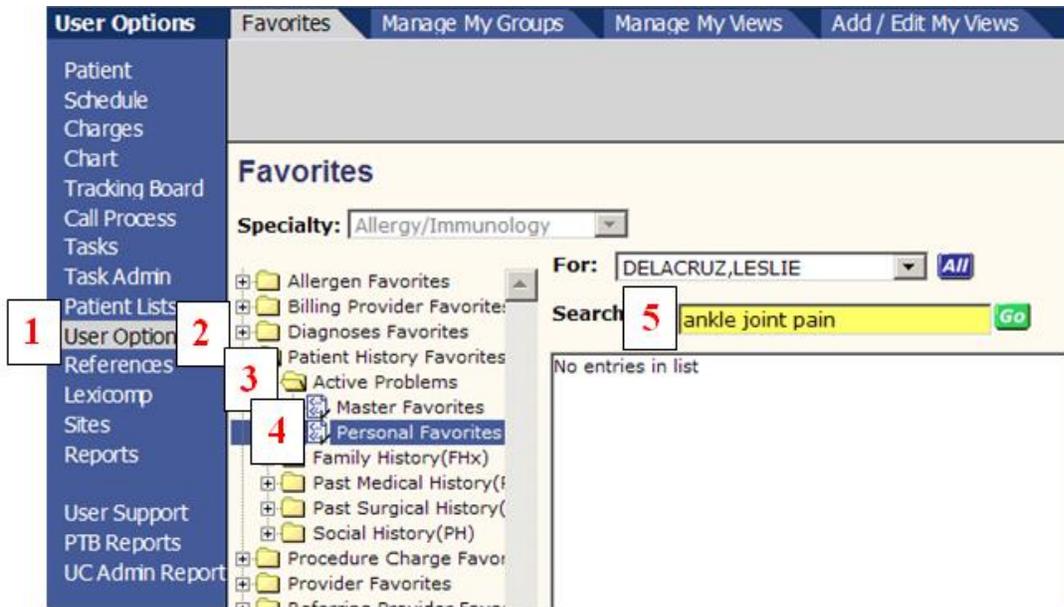
The screenshot shows the 'Manage My Groups' interface. A red arrow points to the 'Manage My Groups' tab in the top navigation bar, labeled with a '1' in a thought bubble. On the left sidebar, a red arrow points to the 'Charges' menu item, labeled with a '4' in a thought bubble. Below the 'Manage My Groups' header, there is a 'View:' dropdown menu set to 'CPT4 Modifiers'. A table lists various groups, with 'Urgent Care' and 'Urgent Care Exploding Sets' highlighted in blue. A red box highlights these two rows, labeled with a '2' in a thought bubble. Below the table, there are 'Set as Default' and 'Remove' buttons. The 'Set as Default' button is highlighted with a red box and labeled with a '4' in a thought bubble. Below the table, there is an 'All Groups' section with a scrollable list of groups. 'Urgent Care' and 'Urgent Care Exploding Sets' are selected in this list, labeled with a '2' in a thought bubble. Below the list, there is an 'Add to My Groups' button, labeled with a '3' in a thought bubble. A yellow box on the right contains the following instructions:

1. Go to the All Groups component
2. Scroll down and select Urgent Care and Urgent Care Exploding Sets
3. Click Add to My Groups
4. Click Set as Default

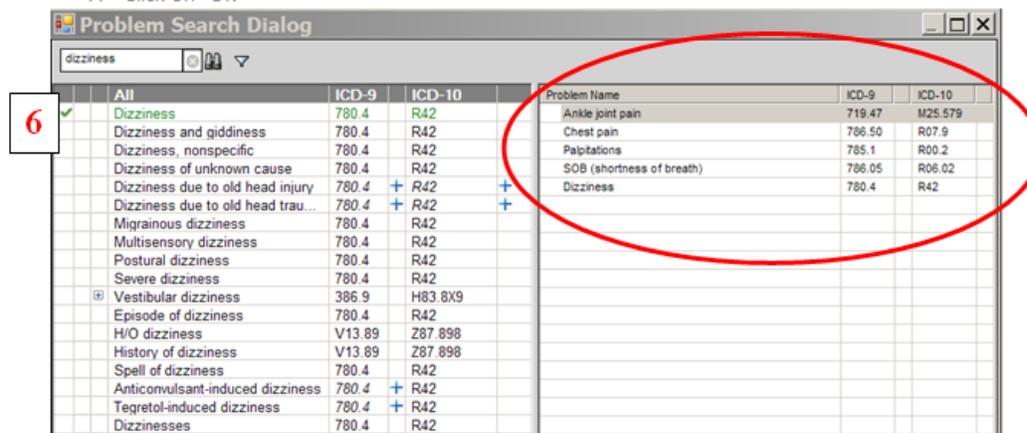
# Tasks, User Support and Defaults

## Making Problems Acute

1. Click on User Options on the Vertical Tool Bar
2. Click on Pt Hx Favorites folder
3. Click on Active Problems folder
4. Click on Personal Favorites
5. Search for the problem by Dx code or type in the problem description into the search field (in this case I used 719.47 Ankle Joint Pain). Click on "Go".

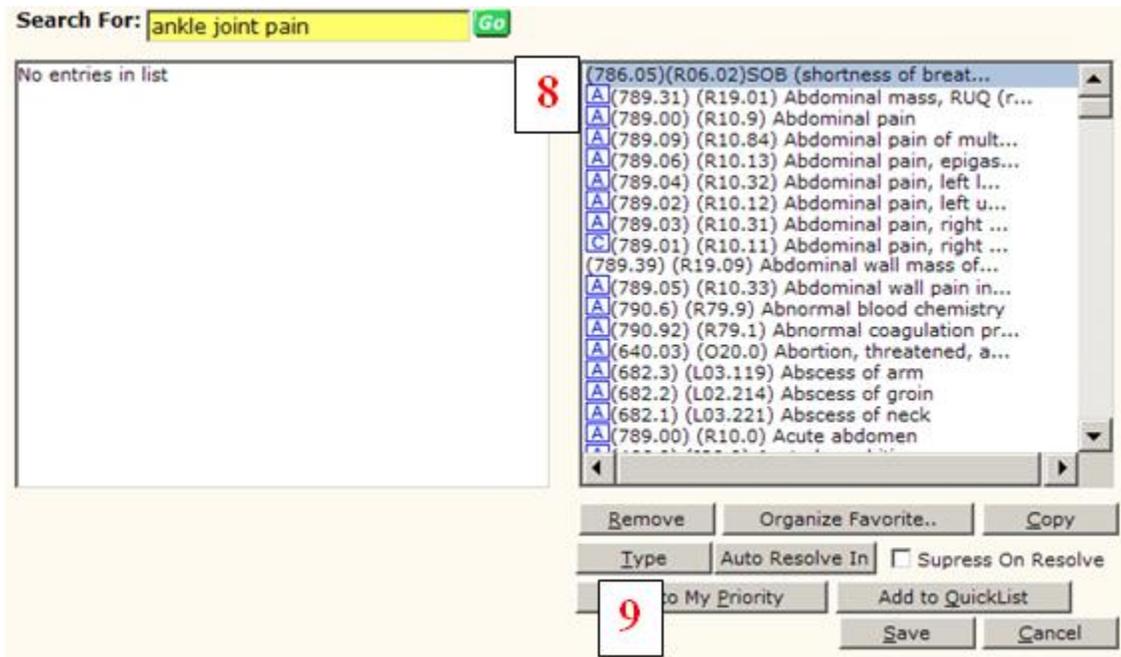


6. This will bring up the "Problem Search Dialog" box. Check mark the problem by **Left-clicking**. This will populate the "Problem Name" section on the RIGHT.
7. Click on "OK" after adding all of the problems from the list.

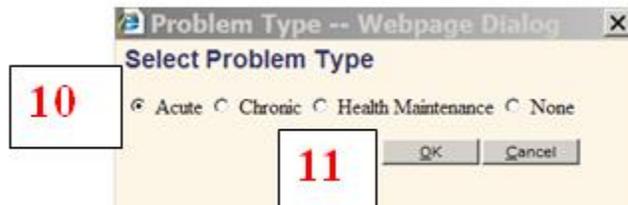


## Tasks, User Support and Defaults

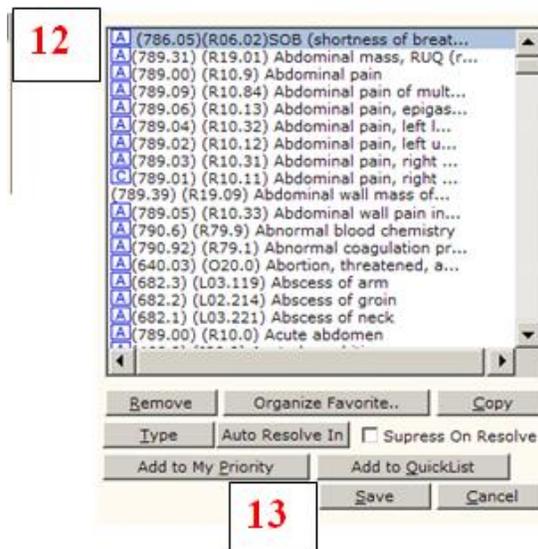
- Highlight the new problem on the right side (you may hold down the “shift” button to **do max of 5** at a time). Doing more than 5 at a time may crash your computer.
- Click on **Type**



- Click on the “Acute” radio button
- Click on **OK**



- An “A” in a blue box will appear next ...
- Click on **Save**
- Repeat steps 8-13 to add additional problems
- You do not need to enter duplicate complaints from the following table more than once.



## Tasks, User Support and Defaults

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### Approved ICD-10 Codes for UC Standardized Procedure Tests

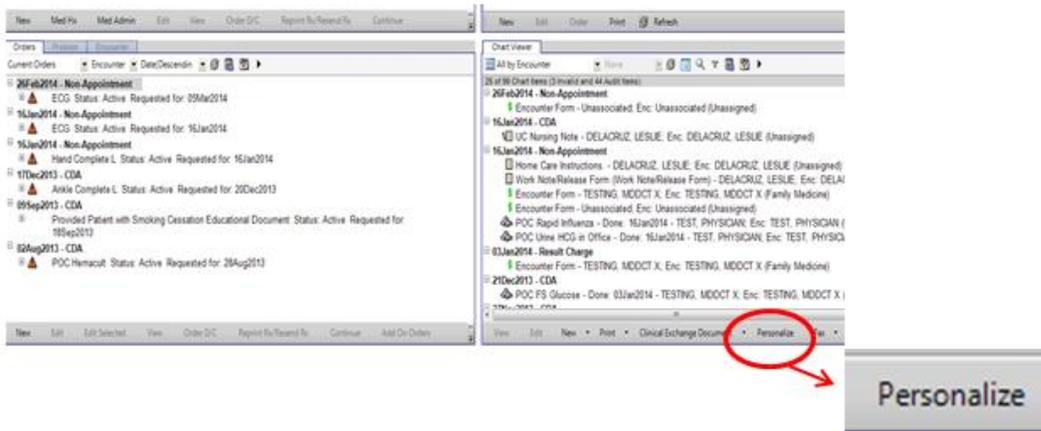
| DIAGNOSTIC TEST            | COMPLAINT                              | ICD-10   |
|----------------------------|--|----------|
| <b>EKG</b>                 |  |          |
|                            | CHEST PAIN                             | R07.9    |
|                            | DIZZINESS                              | R42      |
|                            | PALPITATIONS                           | R00.2    |
|                            | SOB                                    | R06.02   |
|                            | SYNCOPE                                | R55      |
| <b>XRAYs</b>               |  |          |
|                            | ANKLE INJURY                           | S99.919A |
|                            | ELBOW INJURY                           | S59.909A |
|                            | FINGER INJURY                          | S69.90XA |
|                            | FOOT INJURY                            | S99.29A  |
|                            | HAND INJURY                            | S69.90XA |
|                            | INJURY OF CLAVICLE                     | S49.90XA |
|                            | TOE INJURY                             | S99.929A |
|                            | WRIST INJURY                           | S69.90XA |
| <b>URINE MACRO</b>         |  |          |
|                            | ABDOMINAL PAIN                         | R10.9    |
|                            | ACUTE PAIN IN FEMALE PELVIS            | R10.2    |
|                            | BACK PAIN                              | M54.9    |
|                            | DYSURIA                                | R30.0    |
|                            | FREQUENCY                              | R35.0    |
|                            | HEMATURIA                              | R31.9    |
|                            | NAUSEA                                 | R11.0    |
|                            | NAUSEA AND VOMITING                    | R11.2    |
|                            | URGENCY OF URINATION / URINARY URGENCY | R39.15   |
| <b>URINE HCG</b>           |  |          |
|                            | ABDOMINAL PAIN                         | R10.9    |
|                            | ACUTE PAIN IN FEMALE PELVIS            | R10.2    |
|                            | BACK PAIN                              | M54.9    |
|                            | DYSURIA                                | R30.0    |
|                            | FREQUENCY                              | R35.0    |
|                            | HEMATURIA                              | R31.9    |
|                            | MISSED PERIOD                          | N92.6    |
|                            | NAUSEA                                 | R11.0    |
|                            | NAUSEA AND VOMITING                    | R11.2    |
|                            | UNCONFIRMED PREGNANCY                  | Z32.00   |
|                            | URGENCY OF URINATION / URINARY URGENCY | R39.15   |
|                            | VAGINAL BLEEDING                       | N93.9    |
| <b>RAPID STREP</b>         |  |          |
|                            | FEVER                                  | R50.9    |
|                            | SORE THROAT                            | J02.9    |
| <b>FINGERSTICK GLUCOSE</b> |  |          |
|                            | ALTERED MENTAL STATUS                  | R41.82   |
|                            | DIABETES MELLITUS                      | E11.9    |
|                            | EXCESSIVE THIRST                       | R63.1    |
|                            | FATIGUE                                | R53.83   |

# Tasks, User Support and Defaults

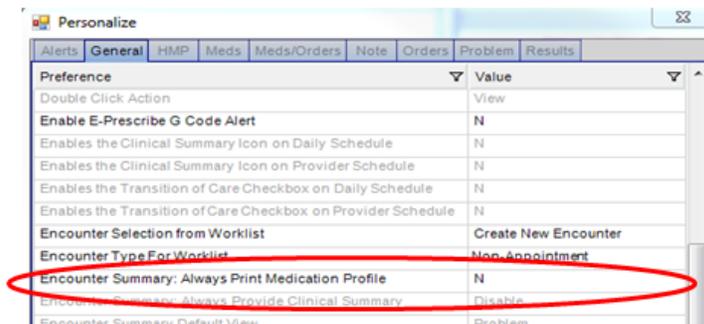
|  |                        |              |
|--|------------------------|--------------|
|  | <b>HYPERGLYCEMIA</b>   | <b>R73.9</b> |
|  | <b>LIGHTHEADEDNESS</b> | <b>R42</b>   |
|  | <b>POLYURIA</b>        | <b>R35.8</b> |

## Default Toolbar

1. Go to the RGTEST selected patient's chart and click on "Personalize" on the bottom right hand side of the "Chart Viewer."

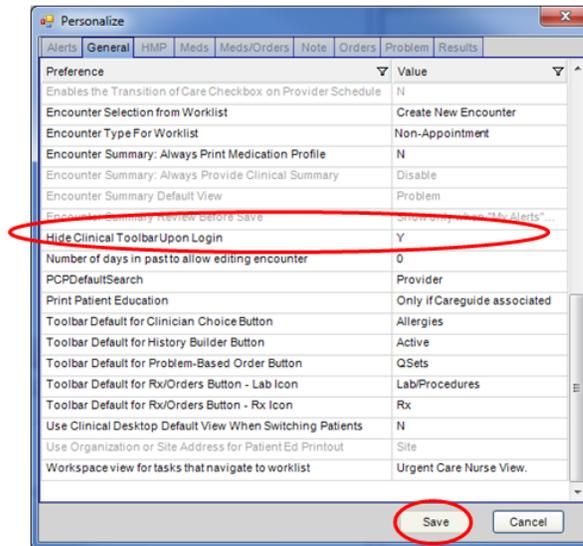


2. Scroll down to "Encounter Summary: Always Print Medication Profile". Make sure value = "N".

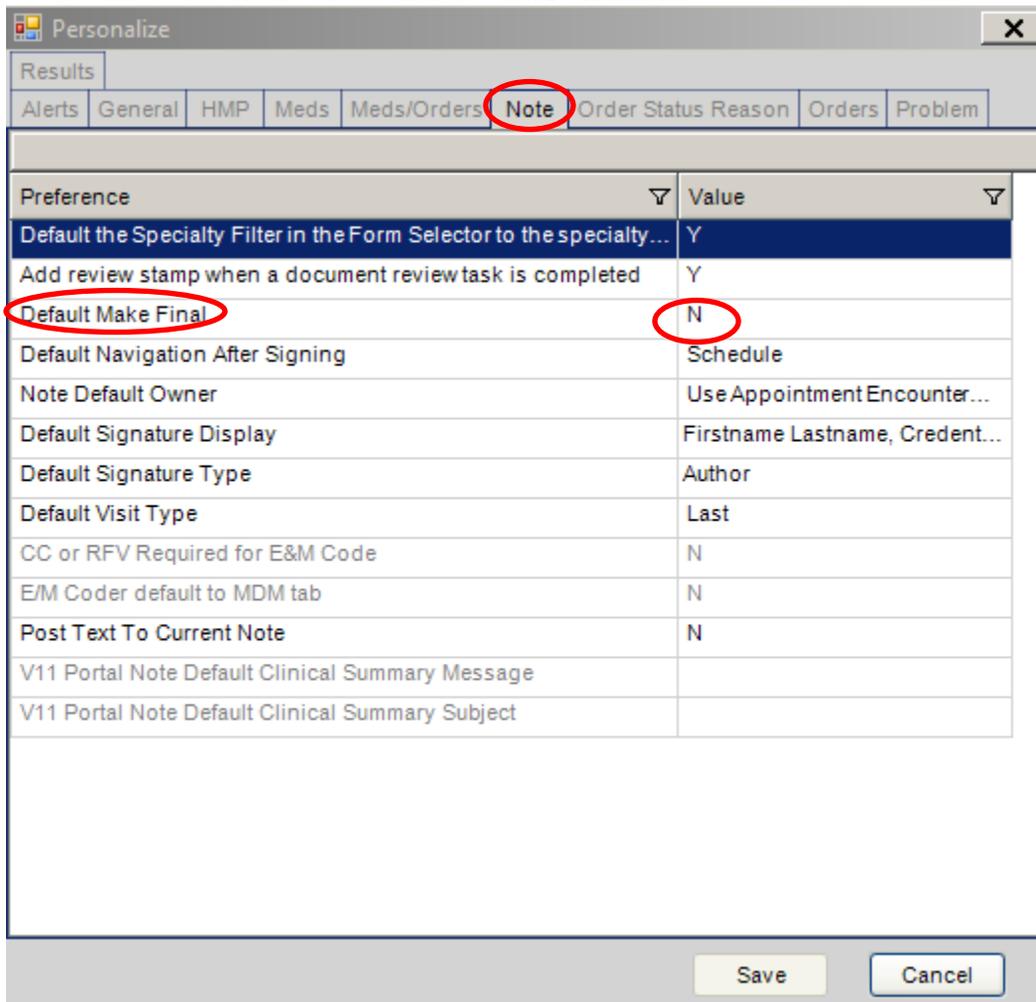


3. Scroll down to "Hide Clinical Toolbar Upon Login"
4. Change value on the RIGHT column to "Y"
5. Go to "Workspace view for tasks..." & change drop down to, "Urgent Care Nurse View"
6. Click "Save"

## Tasks, User Support and Defaults



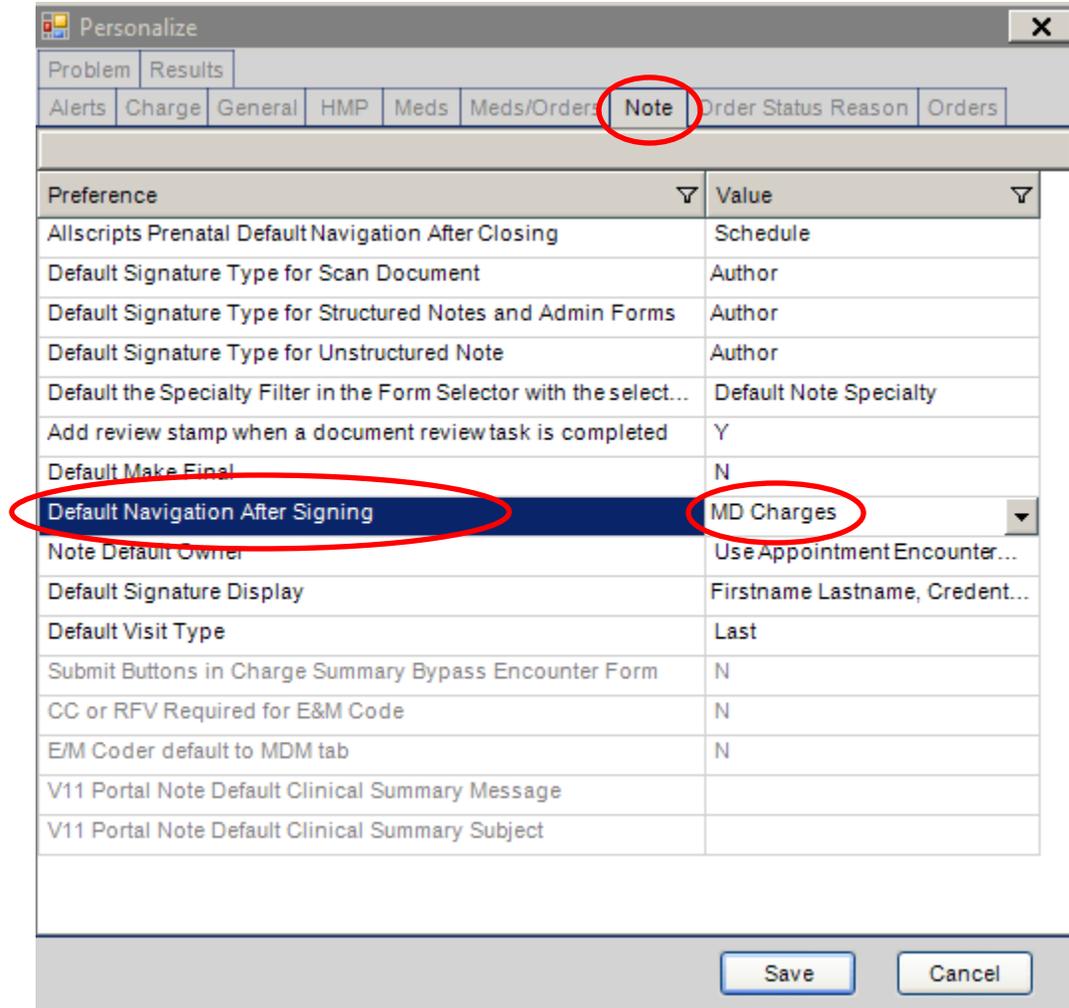
8. Go to the "Note" Tab of the Personalize Window.



9. Go to "Default Make Final" line and change the value to "N".

## Tasks, User Support and Defaults

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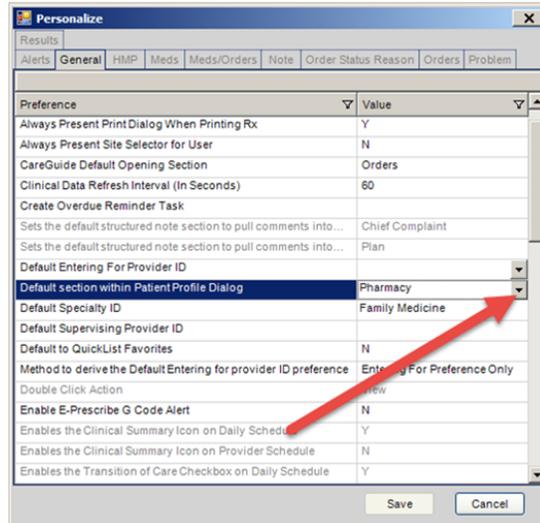


10. Go to "Default Navigation After Signing" and choose "MD Charges"
11. Click "save" button

### Default Pharmacy

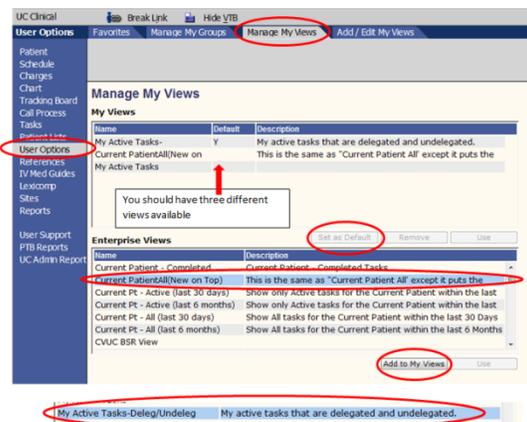
You can default the patient demographics window to Pharmacy by using the "Personalize Option" in Touchworks. Change the setting listed under "Default section within Patient Profile Dialog" to Pharmacy. Now it will open right to the section you need to see with less scrolling!

# Tasks, User Support and Defaults



## Default Tasks

1. Click on "User Options" from the vertical tool bar
2. Click on "Manage my Views" tab on the top
3. Highlight "Current Patient (New on Top)- This is the same as "Current Patient All" except it puts the newest task at the top of the list.
4. Click on "Add to My Views"
5. Scroll down and highlight "My Active Tasks-My active tasks that are delegated and undelegated"
6. Click on "Add to My Views"
7. Scroll up to "My Views section" and highlight "My Active Tasks-My active tasks that are delegated and undelegated" then click on "Set as Default button"



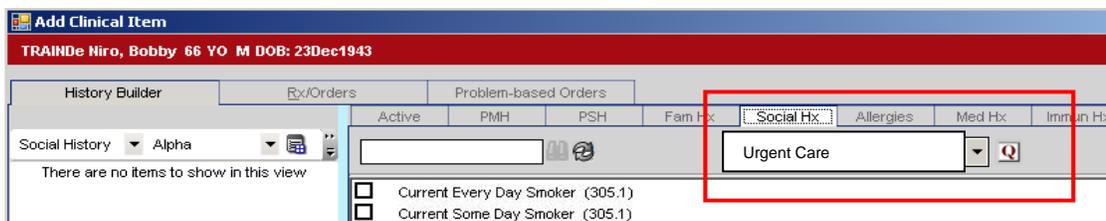
# Tasks, User Support and Defaults

## Default Smoking Status

1. On the RGTEST selected patient in the LIVE mode go to “Problem” tab and then click on “New” on the bottom.



The pop-up box below should appear and you need to click on “Social Hx”:



2. Under “My Favorites” view you will need to add the following smoking defaults:
  - a. Current every day smoker
  - b. Current some day smoker
  - c. Former smoker
  - d. Never a smoker
  - e. Use of cannabis
  - f. Use of nicotine containing substance in combustion-free vaporization device
3. To add to your “My Favorites”:
  - a. Type in each smoking default in the search box, then highlight and right click on default to select as “favorite item.”
  - b. Do this for all nine smoking defaults
  - c. You do not need to press okay once finished

