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 \rightarrow User Support \rightarrow FAQs (bottom of page) \rightarrow 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.

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.

Username	devmi1
Username	devmi1
Username	devmi1
Username	devmi1
A	
Asset Tag	IS1125992
Department	
Location	
Site	
Entity	
Date Time	Sep 27 2011 02:10 PM
Email	Michael.Devera@sharp.com
	<u> </u>
	y
mpt to contac	t you within 24 business hours.
	Location Site Entity Date Time Email Email

User Support PTB Reports

UC Admin Report

UC Intranet Webpage/Accessing BFF online

- Access:
 - TW Vertical Tool Bar
 - <u>http://sharpnet.sharp.com/med</u> <u>Groups/srs/urgentCare/index.c</u> fm

	Urgent Care
Urgent Care	orgene cure
Department Guidelines	
Downtime	Welcome to the Sharp Rees-Stealy Urgent Care Homepage
Forms	
Policies and Procedures	We strive to improve the health of those we serve with a commitment to
Resources	excellence in all that we do.
Training and Education	Our goal is to offer quality care and services that set community
	standards and exceed patients' expectations. These services are
	provided in a caring, convenient, cost-effective and accessible manner.
	The purpose of this site is to provide a centralized location for staff and
	providers to efficiently access Urgent Care information. For additions
	and/or revisions to this site, dick the contact us icon above.

 Purpose: Centralized repository for UC Information



Phil Yphantides, MD Medical Director, Urgent Care 619-446-1538

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!

Contricity	Framework	- Microsoft	Interr	ot Evol	orer provid	død b			
UCClinical	😰 Break Link	Hide VTB	Anten	ес схріс		ueu t	Step 2 "Perso) Click on onalize"	
Charges Patient Schedule Charges	RGTEST, select Patient		EnMRN: Sex: DOB:	Procedu 4103385 F 07/01/1979	SHC: H Phone: Age:	Manar 104-211 (858)49 33 Years	-653 9-2624 5	Oth PCI MART Pri RAILF	
Chart Track pard Call P s Tasks	Encounter Fo Day Date MON 31 Jan 2011 Billing Provide	rm r: Blake,gerare	FRANCIS		<u>Select I</u> Division:	Encounter	Audit Log	Personalize	
tep 1) Click on Charges" from	VTB	r: MUTH,MARGAR	ET (GINNY) • All • All	Billing Area: Location: Pt Ins:	CHULA I URGENT	/ISTA URG CARE D MEDICA	ENT CAR	

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

Tasks, User Support and Defaults

Step 3: Ensure all b	oxes are the same as below	_
General Default menu item for MD Charges:	Encounter Summary	Â
Auto Link of Dx(s) to Charges:	All Dx to All Charges	-
Warning Message on Submit	,	-
Exit Encounter Summary After S	ubmit (PDA only)	-
Hold for More Charges default	**Ensure that this is UNCHECKED**	
Display Diagnosis Codes:	ICD10	
Display When Submit Button is Activ	rated: 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 -	

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	
Procedure Charge Selector Default Selection Method:	Groupings	
box:	Display Name, then Charge Code 🔹	Ξ
Default Sort Order:	Entry Code 👻	
Number of Columns in selector box:	② 2 ③ 3	-
Step 4: Click "OK"	<u>O</u> K <u>C</u> ancel	

Charges	Encounter Form	Diagnosis	Visit Charges	Procedure	Charges	Manage My Groups
Patient Schedule Charges Chart						
Tracking Board Cat ss Tasl Tasl Pati sts	Manage Grou	ips	Defau	View:	CPT4 Mod	difiers
User Options References Lexicomp Sites Reports	Urgent Care Urgent Care Explo	ding Sets	Y	50 Bilat 51 Multi 52 REDI 59 Disti 68 COM 76 Repe	Procedure. U ple Procedure UCED SERVIC nct Procedura PLICATIONS eat Procedure PPPFTEP	Inless otherwise identified in the s. Other than E/M services, CES Il Service. Mod 59 is used to by Same Provider. Indicates a
User Support PTB Reports UC Admin Report	et as Default	<u>R</u> emove		GZ NOT LT LEFT QW CLI. RT RIGH Y2 PURC ZK (ZK	REASONABLI SIDE (IDENT A WAIVED TE HT SIDE (PRO CHASE OR RE PRIMARY SUF	E AND NECESSARY IFY PROCEDURES PERFORMED ON ST C PERF ON THE RT SIDE OF PAIR OF DME ITEMS RGEON) ND TECHNICAL COMPONENT
	All Groups Upper Extremity				FESSIONAL A	ND TECHNICAL COMPONENT
	Upper Extremity Ex Urgent Care Urgent Care Explo Urology Urology Exploding Urology Injectable	cploding S 2 ding Sets Sets Exploding Set	بر چ	 Go to Scrol Urge Click Click) the All (ll down ar nt Care E Add to M Set as Do	Groups component ad select Urgent Care and Exploding Sets My Groups efault

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.

dizzine	\$\$							
	All	ICD-9		ICD-10		Problem Name	ICD-9	ICD-10
I	Dizziness	780.4		R42		Ankle joint pain	719.47	M25.579
	Dizziness and giddiness	780.4		R42	1	Chest pain	786.50	R07.9
	Dizziness, nonspecific	780.4		R42		Palpitations	785.1	R00.2
	Dizziness of unknown cause	780.4		R42		SOB (shortness of breath)	786.05	R06.02
	Dizziness due to old head injury	780.4	+	R42	+	Dizziness	780.4	R42
	Dizziness due to old head trau	780.4	+	R42	+			
	Migrainous dizziness	780.4		R42				
	Multisensory dizziness	780.4		R42				
	Postural dizziness	780.4		R42				
	Severe dizziness	780.4		R42				
Œ	Vestibular dizziness	386.9		H83.8X9				
	Episode of dizziness	780.4		R42				
	H/O dizziness	V13.89		Z87.898				
	History of dizziness	V13.89		Z87.898				
	Spell of dizziness	780.4		R42				
	Anticonvulsant-induced dizziness	780.4	+	R42				
	Tegretol-induced dizziness	780.4	+	R42				
	Dizzinesses	780.4		R42				

- 8. 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.
- 9. Click on Type

No entries in list	(786.))5)(R06.02)S	OB (shortness	of breat.	
	8 A(78 A(78 A(78 A(78 A(78 A(78 C(78) A(78 A(78 A(78 A(78) A(64 A(68 A(68 A(68 A(68) A(64) A(78)	9.31) (R19.0 9.00) (R10.9 9.09) (R10.8 9.06) (R10.1 9.02) (R10.1 9.02) (R10.1 9.03) (R10.3 9.01) (R10.1 9) (R19.09) 9.05) (R19.09) 9.05) (R19.09) 9.05) (R19.09) 0.92) (R79.9) 0.92) (R79.9) 0.92) (R79.9) 0.93) (D20.0 2.3) (L03.11 2.2) (L02.21 2.1) (L03.22 9.00) (R10.0	1) Abdominal p 4) Abdominal p 4) Abdominal p 3) Abdominal 2) Abdominal 2) Abdominal 1) Abdominal Abdominal wa 3) Abdominal wa 3) Abdominal wa 3) Abdominal wa 4) Abnormal bloc 0) Abnormal bloc 0) Abnormal co 0) Abortion, thr 9) Abscess of f 1) Abscess of f 1) Abscess of f 1) Abscess of f	mass, RUG ain pain of mu pain, left i pain, left i pain, left i pain, right Il mass of wall pain i od chemisi agulation eatened, arm groin neck nen	Q (r as u t t t t try pr a
	Ber	nove	Organize Favo	orite	Copy
	<u>I</u>	/pe Auto	Resolve In	C Supres	s On Resolv
	- 9	to My Prior	nty A	dd to Quid	Canad
				10 10 0	CONCEL
Click on the "Acute" radio button	10	Proble Select Pr C Acute C	m Type \ oblem Type Chronic [©] Hea	Webpag e alth Mainten	e Dialog
Click on the "Acute" radio button Click on QK	10	Proble Select Pr Acute C	m Type \ oblem Type Chronic C Her 11	Webpag e alth Mainten	ance C Non
Click on the "Acute" radio button Click on QK An "A" in a blue box will appear next	10	2 Proble Select Pr Acute C	m Type \ oblem Type Chronic C Hes 11	Webpag e alth Mainten <u>QK</u> 8 (shortness	e Dialog aance C Non Cancel
Click on the "Acute" radio button Click on \underline{OK} An "A" in a blue box will appear next Click on Save	10	Proble Select Pr Acute C Acute C	m Type \ oblem Type Chronic C Her 11	Webpag e alth Mainten <u>QK</u> B (shortness dominal ma	s of breat

Approved ICD-10 Codes for UC Standardized Procedure Tests

DIAGNOSTIC TEST	COMPLAINT	ICD-10
EKG		
	CHEST PAIN	R07.9
	DIZZINESS	R42
	PALPITATIONS	R00.2
	SOB	R06.02
	SYNCOPE	R55
XRAYS		
	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
URINE MACRO		
	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
URINE HCG		
	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
RAPID STREP		
	FEVER	R50.9
	SORE THROAT	J02.9
FINGERSTICK GLUCOSE		
	ALTERED MENTAL STATUS	R41.82
	DIABETES MELLITUS	E11.9
	EXCESSIVE THIRST	R63.1
	FATIGUE	R53.83

HYPERGLYCEMIA	R73.9
LIGHTHEADEDNESS	R42
POLYURIA	R35.8

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

	HMP Meds	Meds/Orders N	Note Orders	Problem R	esults
Preference			7	Value	
Enables the Trans	ition of Care C	heckbox on Prov	rider Schedule	N	
Encounter Selecti	on from Workl	ist		Create Ne	ew Encounter
Encounter Type F	or Worklist			Non-App	pintment
Encounter Summ	ary: Always Pri	nt Medication Pro	ofile	N	
Encounter Summ	ary: Always Pro	ovide Clinical Su	mmary	Disable	
Encounter Summ	ary Default View	W		Problem	
Encounter Summ	HY REVIEW BEI	ore Save		Show on	y when "My Alerts"
Hide Clinical Too	bar Upon Logi	n		Y	
Number of days in	past to allow	editing encounter	r	0	
PCPDefaultSearch	1			Provider	
Print Patient Educ	ation			Only if Ca	areguide associated
Toolbar Default fo	r Clinician Ch	oice Button		Allergies	
Toolbar Default fo	r History Build	ler Button		Active	
Toolbar Default fo	r Problem-Bas	ed Order Button		QSets	
Toolbar Default fo	r Rx/Orders B	utton - Lab Icon		Lab/Proce	edures
Toolbar Default fo	r Rx/Orders B	utton - Rx Icon		Rx	
Use Clinical Desk	top Default Vie	w When Switchir	ng Patients	N	
	or Site Addres	ss for Patient Ed P	Printout	Site	
Use Organization					

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

esults	
lerts General HMP Meds Meds/Orders Note Order Sta	tus Reason Orders Problem
reference V	Value V
efault the Specialty Filter in the Form Selector to the specialty	Y
dd review stamp when a document review task is completed	Y
efault Make Final	N
efault Navigation After Signing	Schedule
lote Default Owner	Use Appointment Encounter
lefault Signature Display	Firstname Lastname, Credent
lefault Signature Type	Author
lefault Visit Type	Last
C or RFV Required for E&M Code	Ν
/M Coder default to MDM tab	N
ost Text To Current Note	N
'11 Portal Note Default Clinical Summary Message	
'11 Portal Note Default Clinical Summary Subject	

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

Preference	Value V			
Allscripts Prenatal Default Navigation After Closing	Schedule			
Default Signature Type for Scan Document	Author			
Default Signature Type for Structured Notes and Admin Forms	Author			
Default Signature Type for Unstructured Note	Author			
Default the Specialty Filter in the Form Selector with the select.	Default Note Specialty			
Add review stamp when a document review task is completed	Υ			
Default Make Final	Ν			
Default Navigation After Signing	MD Charges			
Note Default Owner	MD Charges			
Default Navigation After Signing Note Default Owner Default Signature Display	MD Charges Use Appointment Encounter Firstname Lastname, Credent			
Default Navigation After Signing Note Default Owner Default Signature Display Default Visit Type	MD Charges Use Appointment Encounter Firstname Lastname, Credent Last			
Default Navigation After Signing Note Default Owner Default Signature Display Default Visit Type Submit Buttons in Charge Summary Bypass Encounter Form	MD Charges Use Appointment Encounter Firstname Lastname, Credent Last N			
Default Navigation After Signing Note Default Owner Default Signature Display Default Visit Type Submit Buttons in Charge Summary Bypass Encounter Form CC or RFV Required for E&M Code	MD Charges Use Appointment Encounter Firstname Lastname, Credent Last N N			
Default Navigation After Signing Note Default Owner Default Signature Display Default Visit Type Submit Buttons in Charge Summary Bypass Encounter Form CC or RFV Required for E&M Code E/M Coder default to MDM tab	MD Charges Use Appointment Encounter Firstname Lastname, Credent Last N N N			
Default Navigation After Signing Note Default Owner Default Signature Display Default Visit Type Submit Buttons in Charge Summary Bypass Encounter Form CC or RFV Required for E&M Code E/M Coder default to MDM tab V11 Portal Note Default Clinical Summary Message	MD Charges Use Appointment Encounter Firstname Lastname, Credent Last N N N			

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

Alerts General HMP Meds Meds/Orders Note Order Sta	tus Reason Orders Problem			
Preference V	Value 7			
Always Present Print Dialog When Printing Rx	Y			
Always Present Site Selector for User	N			
CareGuide Default Opening Section	Orders			
Clinical Data Refresh Interval (In Seconds)	60			
Create Overdue Reminder Task				
Sets the default structured note section to pull comments into	Chief Complaint			
Sets the default structured note section to pull comments into	Plan			
Default Entering For Provider ID				
Default section within Patient Profile Dialog	Pharmacy			
Default Specialty ID	Family Medicine			
Default Supervising Provider ID				
Default to QuickList Favorites	N			
Method to derive the Default Entering for provider ID preference	Entering For Preference Only			
Double Click Action	ew			
Enable E-Prescribe G Code Alert	N			
Enables the Clinical Summary Icon on Daily Schedu	Y			
Enables the Clinical Summary Icon on Provider Schedule	N			
Enables the Transition of Care Checkbox on Daily Schedule	Y			

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"

Patient Schedule Charges							
Chart Tracking Board Call Process	Manage My Views My Views						
Tasks	Name Default Description						
Datient Liste	My Active Tasks- Y My active tasks that are delegated and undelegated.						
User Options	Current PatientAll(New on This is the same as "Current Patient All' except it puts the						
References IV Med Guides Lexicomp	My Active Tasks						
Sites	You should have three different						
Reports	views available						
User Support PTB Reports	Enterprise Views Set as Default Remove Use						
UC Admin Report	name Description						
	Current PatientAll(New on Top) This is the same as "Current Patient All' except it puts the	100					
	Current Pt - Active (last 30 days) Show only Active tasks for the Current Patient within the last						
	Current Pt - Active (last 6 months) Show only Active tasks for the Current Patient within the last	Show only Active tasks for the Current Patient within the last Show All tasks for the Current Patient within the last 30 Days					
	Current Pt - All (last 30 days) Show All tasks for the Current Patient within the last 30 Days						
	Current Pt - All (last 6 months) Show All tasks for the Current Patient within the last 6 Month	hs					
	CVUC BSR View	*					

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.

New	Med Hann Med Admin	Edit	View Or	der D/C	Reprint Rx/Resend Rx	Continue	Completed Today
Orters	Problem hcounter						
All	Problem List	• 🖯 🖥	🕎 V 🕨				
	Name		ICD-9	ICD-10	Managed By		Last Assessed
Ξ	Active						
1 /	Chest pain		786.50	R07.9			
	Health Maintenance		V70.0	Z00.00			

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

🔛 Add Clinical Item									
TRAINDE Niro, Bobby 66 YO M DOB: 23Dec1943									
History Builder	<u>R</u> x/Orders	Problem-based Orders							
ſ	Activ	/e PMH PSH	Fam Hx	C Social Hx Allergi	es Med Hx Imm <mark>un</mark> Hx				
Social History Alpha There are no items to show	w in this view	11 ()		Urgent Care	• Q				
		urrent Every Day Smoker (305.1) urrent Some Day Smoker (305.1)	L						

- 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

RGTEST, LAVENDER 48 YO M DOB: 10	Dec1965						
	Reset 🛃 🔺	History Builder	<u>R</u> x/Order	Urgent Care)		
* Problems		Active PRH	PSH	Fam Hx	Social Hx	Allergies	Med Hx
Social History Vy Priority	▼ ▶	snu		Ay Favorites		•	Off
Name		interview in the second s	avorites				ICD
My Priority		Uses s	snuff	Eavorit	o Itom		
Other Problems							