

# **Clinical 2010.2 User Manual**

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# **Welcome to SOAPware**



## Welcome to SOAPware

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Thank you for choosing SOAPware as your EMR. SOAPware can streamline nearly every facet in a clinical practice. As with any new piece of equipment, there is a learning curve; we strive to make your learning experience as simple and straightforward as possible.

Before entering actual patient information into SOAPware and using the software “live” in a clinical setting, implementation and setup processes need to be planned and completed. SOAPware's EMR Coaches are available to assist clinicians and other implementation leaders in the clinic environment to successfully complete this critically important process.

# **SOAPware Resources**

## SOAPware Resources

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At SOAPware, we believe that empowering our users is the key to success. We've created three categories to provide comprehensive information and support in a variety of contexts designed to fit your learning style and your busy schedule.

### Training

We offer a number of training options, including our SOAPware Learning Center (SLC). The SOAPware SLC contains a comprehensive series of self-teach and guided learning modules, instructional and interactive videos, and pre-recorded webinar sessions.

### Support

SOAPware Support Team services offer a wide range of experience ranging from providing advice on new hardware to troubleshooting software issues. To view all of the options for contacting Support, visit: <http://www.soapware.com/Support/>

### Online Communities

Join a SOAPware-hosted User Forum collaborate with peers; get the latest industry news and updates from SOAPware; share tips; and give us feedback and suggestions to help improve our product and services. For more information, visit: <http://forums.mysoapware.com/index.php>

# **2010 Terminology**

## Glossary Terms

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### Glossary Terms (A-C)

**About SOAPware** - A menu command under the Help menu that displays information regarding the version of SOAPware that is running.

**Active Background** - Highlighted area showing the cursor is placed in a field that is active and data can now be inserted.

**Active Problems field** - Located in the Summary chart section this field is for documenting all medical problems for which the patient is currently being treated.

**Active Provider**- Located under the SOAPware menu and displays a dialog box of all providers that have a SOAPware license within the practice. The name of the Active also displays at the top of the SOAPware screen.

**Addendum** - Text that is added to a document after it has been finalized.

**Alerts** - Pop-ups or reminders. An automated warning system such a clinical alerts, preventive health maintenance, medication interactions etc.

**Ambulatory Care** - Medical care provided on an outpatient basis.

**AMP** - An acronym for "Amping up your documentation" suggesting that users begin entering structured data within the Assessment, Medications, and Plan fields.

**Allergies field** - Located in the Summary chart section this field is for documenting the patient's allergies.

**All Refill Requests** - A queue under the View menu that houses all pending electronic refill requests for the Active Provider.

**Archiver** - Located under the Chart menu and is a utility that allows the user to remove inactive patient charts from the Chart Rack.

**Assessment field** - Located in the SOAPnote chart section this field is to document the patient's diagnosis related to that days visit.

**Available Document Designs** - An area that lists all available print reports. This area can either be docked, accessed from the Docutainers menu by clicking on Print, or by clicking on the Print button on the common tool bar.

**Billing Statement chart section** - An area where all Billing Statements are created and stored for the patient.

**Bubble Bar** - An optional toolbar located at the bottom of the SOAPware screen that allows the user to access other workspaces within SOAPware. The Bubble Bar can be displayed by selecting it from the View menu.

**CCR (Continuity of Care Records)** - A standardized electronic snapshot of a patient's medical record, demographic and insurance. Data is transmitted in XML enabling a patient's CCR to be shared among any number of providers.

**CCR chart section** - the area in which CCR records will be stored.

**Change Password** - Located under the Tools menu this allows the user to change their SOAPware password.

**Chart Layouts** - Located under the View menu this allows users to create individual chart layouts consisting of tabbed chart sections.

**Chart Navigator** - Located under the Chart menu (or as a Docked Tab) this area houses and allows the user to access all the patients chart sections.

**Chart Rack** - Located under the Chart menu this area houses all patient charts and allows the user to create new charts.

**Chart Section** - Specific areas in the chart to document the patient's medical information. For example: Radiology, SOAPnotes, Demographics etc.

**Chart Section Editor** - An area located under the Tools menu that allows for the creation of new Chart Sections and setting Default Docuplates.

**Clinical Alerts Manager** - Located under the Tools menu, this is an area that allows the user to set prompts or reminders when a defined value is found in a specific location. For example, a Diabetes diagnosis in the Active Problems field or a certain CPT.

**Contacts** - located under the Tools menu, allows you to keep a master list of all referring providers.

**Correspondence In chart section** - An area where correspondence received from outside the clinic can be stored.

**Correspondence Out chart section** - An area where correspondence sent out of the clinic, such as consult letters or work excuses, can be stored.

**CPOE Computerized Provider Order Entry** - CPOE refers to the act of a clinician entering an order for patient services into an information system.

**CPT Current Procedural Terminology** - The purpose of CPT codes is to provide a uniform language that accurately describes medical, surgical, and diagnostic services.

**Custom Demographic Titles** - An area that allows the user to define custom patient information such as, emergency contact or guardian information.

## Glossary Terms (D-H)

**Data conversion** - The conversion of data from one software to another.

**Data Explorer** - Located under the SOAPware menu and is a workspace that allows for specific database searches to be created and performed. For example, all patients with the diagnosis of diabetes.

**Demographics** - A chart section that contains all basic patient demographic information.

**Docked Tabs** - Commonly used tools that can be docked to any of the four edges of the SOAPware screen, float or remain locked open.

**Document Demographics** - Information about the document including a date and time stamp.

**Document Importer** - A workspace that allows the user to drag and drop documents into a patients chart section without the need to open each individual chart.

**Document Management** - Allows the clinic to store the patients X-rays, paper reports, Lab reports etc. Document Management includes scanning, dragging and dropping directly into the patients chart and Document Importer.

**Docutainers** - A hybrid word for Documentation Containers. Most chart sections within SOAPware are docutainers due to the fact that they can contain not only documents but PDFs, video files, images, etc.

**Docuplates** - A hybrid word for Documentation Templates. Docuplates can be created for almost any chart section and consist of pre-built data entry to allow for speedier documentation.

**Document Designer** - An area that allows for documents to be created for printing, faxing or storing in the patients chart.

**Document History** - A history of when a document was created and updated. Also shows by which user and on what computer the document was updated.

**Drug Interactions** - A feature of the Rx manager that can run an interaction check between the contents of the Active Problems, Medication and Allergy fields in the Summary against the medications that are being prescribed within the SOAPnote.

**Eligibility** - Patient insurance eligibility data which can be checked either individually or in batches.

**EM Coder** - Located under the Tools menu, the EM Coder is the utility that helps the provider determine the level of service to be charged based on documentation.

**Encryption** - Process of converting messages or data into a form that cannot be read without decrypting or deciphering it.

**e-Prescribing** - Prescribing medication through an automated data-entry process and transmitting the information to participating pharmacies.

**Export** - Located under the Chart menu and is a tool used to export a SOAPware patient chart in a format that will allow the chart to be imported into another SOAPware database.

**Exit SOAPware** - Located under the SOAPware menu this will allow the user to exit the SOAPware program.

**Facilities** - All clinics that are set up under the Scheduler workspace.

**Family History field** - Located in the Summary chart section this field is for documenting the patient's medical family history.

**Field Header** - The beginning of a SMARTtext data block in a Chart Section.

**Financial chart section** - An area that houses all financial related documents that do not need a provider's signature. For example, letters from insurance companies.

**Flow Sheets** - An area to create, store and monitor patient flow sheets.

**Flow Sheet items** - Located under the Tools menu this allows the user to create and edit flow sheet items.

**Follow up field** - Located in the SOAPnote chart section this field is for the patients follow up instructions.

**Groups** - Located under the Tools menu as "Manage Groups" this allows the user to designate a billing provider. Insurance companies identify the providers by which group they are assigned.

**Growth Charts chart section** - An area that allows users to automatically track growth rates and percentile comparisons for patients over time. The measurements are automatically plotted on a standard, growth chart graph, which can be viewed onscreen or printed out for off line use.

**Handouts** - Located under the Docutainers menu this allows the user to create, edit and delete patient handouts.

**Header (or SMARTtext Header)** - The first word or description of a SMARTtext item, usually in large

dark blue font. For example the name of a medication or diagnosis.

**Health Maintenance chart section** - The area to track preventative and chronic disease health care.

**Health Maintenance Rules and Sets** - Located under the Tools menu this area is for creating, editing and deleting Health Maintenance Rules and Sets.

**Health Maintenance Rules** - Individual items that Health Maintenance can track. An example of this would be an Influenza vaccine or a mammogram.

**Health Maintenance Sets** - A collection/set of rules. It's a way to group a set of related items together, such as sets of vaccines for age groups or sets of items related to preventative health care for diabetes.

**Help** - Located on the menu toolbar this contains company contact information as well as access to documentation material and product version information.

**HIPAA Health Insurance Portability and Accountability Act** - HIPAA seeks to establish standardized mechanisms for electronic data interchange (EDI), security, and confidentiality of all healthcare-related data.

**HIPAA Disclosures chart section** - An area for storing HIPAA documents.

**History and Physicals chart section** - An area to store the patient's History and Physicals.

**HITECH Act (The Health Information Technology for Economic and Clinical Health Act)** -

Legislation created to stimulate the adoption of electronic health records (EHR) and supporting technology in the United States. President Obama signed HITECH into law on February 17, 2009 as part of the American Recovery and Reinvestment Act of 2009 (ARRA), an economic stimulus bill.

## Glossary Terms (I-P)

**ICD-9 or ICD-10 International Classification of Diseases** - ICD is the classification and coding of diseases and injuries.

**Import** - Located under the Chart menu, and is a tool to import a previously exported SOAPware chart into a SOAPware database.

**Inactive Problems field** - Located in the Summary chart section this field is for documenting the patients past medical history.

**Insurance Companies** - Located under the Tools menu this is a master list of all insurance companies and related information.

**Item Bundles**- A SMARText item in which several separate SMARText items can be “bundled” together to be displayed when the Bundle is selected.

**Item Clusters** - A SMARText item in which several separate SMARText items can be “clustered” together. A cluster is different than a bundle in that clusters have no header to be selected.

**Item Groupers** - A SMARText item in which several different items can be combined and inserted at the same time with one shortcut code.

**Intervention field** - Located in the Summary chart section, this field is to record miscellaneous information.

**In Use**- Located under the Docutainers menu this will show what user is in a locked section of a chart, what computer they are on and the date and time they were in the chart.

**Keywords** - Provide a method for searching in areas of SOAPware such as Docuplates and



**SMARText.** Keywords are assigned when creating an item or can be added or edited later.

**Labs chart section** - An area to store in-house labs results or labs done at other facilities.

**Lab Tests** - Located under the Tools menu and allows for the creation, editing and deletion of specific lab tests and their parameters.

**List Options** - A section of SOAPware located under the Tools menu that controls what options are available for selection in various drop down locations in SOAPware. Here, you can modify existing lists or remove unused lists or list items.

**Lock Layout** - Located under the View menu, this removes the ability to X out of a chart section.

**Log Out** - Located under the SOAPware menu, this will log the user out of SOAPware.

**Macro** - A SMARText shortcut code that enters a SMARText item or block of text quickly when typed in field and the spacebar is pressed.

**Meaningful Use** - A set of standards enforced by the American Recovery and Reinvestment Act in addition to HIPAA standards and regulations.

**Memo chart section** - An area that can hold sensitive patient information for which access can be limited through security settings.

**Merger** - A utility that allows users to merge duplicate charts.

**Messages chart section** - An area in which messages such as phone calls, can be documented.

**Misc chart section** - An area to store miscellaneous documents.

**NDC (National Drug Code)** - A medical code set maintained by the FDA that contains codes for drugs that are FDA approved. A medication must have an NDC number to be sent via Rx Manager.

**Objective Field** - Located in the SOAPnote, the Objective field is for documenting the patient's physical exam.

**OCR** - Optical Character Recognition is the translation of documents into text. OCR works better with simple documents that do not contain images or special characters.

**Options** - Located under the Tools menu the Options area is where user specific settings are designated.

**Order Entry** - A utility in which the user can order labs/tests and fax to outside facilities.

**Order Manager** - Another component of Order Entry in which the user can define specific sub- items before ordering the labs/tests.

**Pathology chart section** - An area in which to store pathology reports.

**Pharmacies** - Located under the Tools menu this area is used to search for and download pharmacies that will except electronic prescriptions and manually add pharmacies that accept faxed prescriptions.

**Pick List** - A type of SMARText item in which a macro or shortcut code has a list of SMARText items associated with it. For example a medication pick list could display a list of commonly prescribed medications for the provider to choose from.

**Print** - Located under the Docutainers menu this selection will bring up a list of Available Document Designs.

**Printed Encounter chart section** - An area in which printed patient encounter notes can be stored.

**Plan field** - Located in the SOAPnote this field is for documenting any CPTs and care plans associated with the patients visit.

**PMS** - Practice Management System.

**Provider Manager** - Located under the Tools menu this area houses provider demographic information such as DEA, NPI numbers, and can also store the provider's electronic signature to be imported onto document designs.

**Physical field** - Located in the Summary section this is a legacy field from earlier versions of SOAPware in which the most recent patient objective exam can be stored.

## Glossary Terms (R-Z)

**Radiology chart section** - An area in which radiology reports can be stored.

**Reference Library** - Located under the SOAPware menu, this is an area that providers can store reference material.

**Re-file-** This button, located on the Common Toolbar and under the Chart menu, re-files the chart back into the Chart Rack. **CAUTION:** Due to CCHIT certification criteria it is possible to re-file a chart that contains unsigned documents. The ability to do this can be restricted through Security settings.

**Remove Unused Items** - Located under the Edit menu and available by right clicking over any field header, this command allows you to remove any unused SMARText item.

**ROS (Review of Systems) field** - Located in the Summary section this is another legacy field from an earlier version of SOAPware in which the patients most recent Review of Systems can be stored.

**Rx Hub** - The ability (in SOAPware 2010.1 and later versions) to check the patient's prescription insurance eligibility.

**Rx Manager** - The tool used by which prescriptions can be sent electronically, faxed, or printed. A history of medications prescribed and discontinued is kept here as well.

**Scheduler** - A workspace that manages patient appointments, holiday closings, provider and clinic schedules.

**Security** - The security system in SOAPware has been set up to help ensure only authorized users are able to access patients' information. Once a user has logged into the system, the security system will track everything the user views and it logs all changes the user makes.

**Security Manager** - A workspace which allows the user to track users actions within SOAPware. The user must have their own login ID and password to be tracked.

**Share Charts** - A workspace which allows the user to export all or portions of a medical record to a PDF file.

**Signature Password** - Signature Password, when enabled, will require passwords to sign off documents and to have multiple providers co-sign on the same documents.

**SMARText** - A tool to create, edit and use structured documentation that is both searchable and reportable. There are several different types of SMARText items such as diagnosis, CPTs, Medications and pick lists.

**SMARText Builder** - An advanced workspace which will allow the user to create SMARText Item Clusters and SMARText Item Groupers.

**SMARText Color Coding** - A setting located under the Tools menu which allows the user to color code specific SMARText items such as pick lists, field headers, and the active background.

**SMARText Designer** - The area in which a SMARText item is created or the original SMARText item is

edited.

**SMARTText Location Pick List** - A user-specific pick list that will display previously used SMARTText items in the SMARTText Quick Access depending on what field the cursor is active in.

**SMARTText Manager** - Located under the Docutainers menu, this area is for searching for SMARTText items and opening the SMARTText Designer to create or edit a SMARTText item.

**SMARTText Quick Access** - Located under the Tools menu, this dialog box is used in conjunction with pick lists, SMARTText location pick lists, and SMARTText sub-items. It can be docked for easier access.

**SNOMED CT® - Systematized Nomenclature of Medicine – Clinical Terms** - SNOMED CT® is a clinical, health care terminology and infrastructure. SNOMED CT® contains over 366,170 health care concepts with unique meanings and formal logic-based definitions organized into hierarchies.

**SOAPnote** - A documentation or progress note format that consists of Subjective, Objective, Assessment and Plan fields. In SOAPware, the Plan field has been further divided to include the Medication Field and the Follow up Field.

**SOAPnote chart section** - An area in which to document all patient visits and communication.

**SOAPnote Medication field** - Located in the SOAPnote chart section, the Medication field is used to document and prescribe all the patients medications.

**Social History field** - Located in the Summary chart section the Social History field is for documenting social issues such as living situation, support systems etc.

**Splitter Bar** - Located in almost all chart sections, the splitter bars (located above or below a section) can open or close to reveal the document date and stamp as well as other action buttons used to manage the document.

**Subjective field** - Located in the SOAPnote chart section, this field is for documenting the patient's Chief Complaint, History of Present Illness and Review of Systems. This area is also used to document patient phone calls.

**Structured Data** - Structured data is managed by technology that allows for querying and reporting against predetermined data types and understood relationships.

**Structured CPT-** A SMARTText item used to document level of service or procedures in the Plan field.

**Structured Dx** - A SMARTText item used to document the patient's diagnosis.

**Structured Order Entry** - A SMARTText item that is used in the Order Manager or with Order Entry.

**Structured Rx** - A SMARTText medication item that can be e-Prescribed.

**Summary chart section** - An area to record the patients past medical, family and social history.

**Summary to SOAP** - An option that can be set under the Tools-Options menu that will copy specified areas of the Summary chart section into the SOAPnote chart section.

**Summary Medication field** - This medication field located in the summary chart section is for documenting *all* medications the patient is currently taking.

**Surgeries field** - Located in the summary chart section, this field is for documenting the patients past surgeries and procedures.

**Tasks-** A reminder located on the user's task list that needs to be completed.

**Task Manager-** An area in which each user can manage and complete patient related tasks such as refill requests, lab results etc.

**Tobacco Field** - Located in the summary chart section, this field is for documenting the patient's

tobacco use history.

**Unfiled chart section** - An area in which documents that do not belong in other chart section can be kept. For example, scanned documents from paper charts.

**View Previous Encounters** - Located under the Tools menu, this utility allows the user to view the patients previous encounters while also viewing the current one. A previous encounter, or part of it, can also be added to the new encounter if desired.

**View Signatures** - A right-click menu option that displays when a document was signed off, by whom and at what computer.

**Vital Signs chart section** - An area for documenting and graphing the patient's vital signs.

**Workspaces** - Areas within SOAPware to manage and record patient care.

# Setup

## SOAPware Set-up

---

Many of the SOAPware setup tasks involve simple data entry, however, there are several areas that require clinician input and direction. The many customizable settings and options available in SOAPware mean virtually any Individual preferences and needs related to workflow can be accommodated.

### First Things First - Planning Clinical and Office Work Environments

Establishing productive workflows is dependent upon many factors, including the physical layout of computer workstations, printers, scanners and faxing equipment in clinical and office spaces.

#### 1. Printers

Printers should be placed in a location that is convenient to providers and staff members needing to retrieve letters, forms and prescriptions printed out for patients.

Example: Printers placed at the nursing desk, in each exam room and/or at the front desk. A combination of any of these locations may be required, including a centrally-located printing station connected to the clinic network.

#### 2. Scanners

Scanner(s) should be placed in a location that is convenient for use by staff members authorized to scan documents, images, etc. into patient charts.

#### 3. Fax Machines

Like printers, fax machines should be placed in areas accessible to all who will be using this equipment during the normal clinic workflow. Multi-function machines such as a printer/fax/copier are sometimes beneficial to improving workflow.

#### 4. Fax Software

Fax software can be used to fax prescriptions and/or notes and information directly from SOAPware to outside providers. The fax software is displayed as a print option from within SOAPware. When selecting fax software, care should be taken to acquire software that meets HIPAA encryption requirements for protecting patient confidentiality.

## Beginning the Set-up Process

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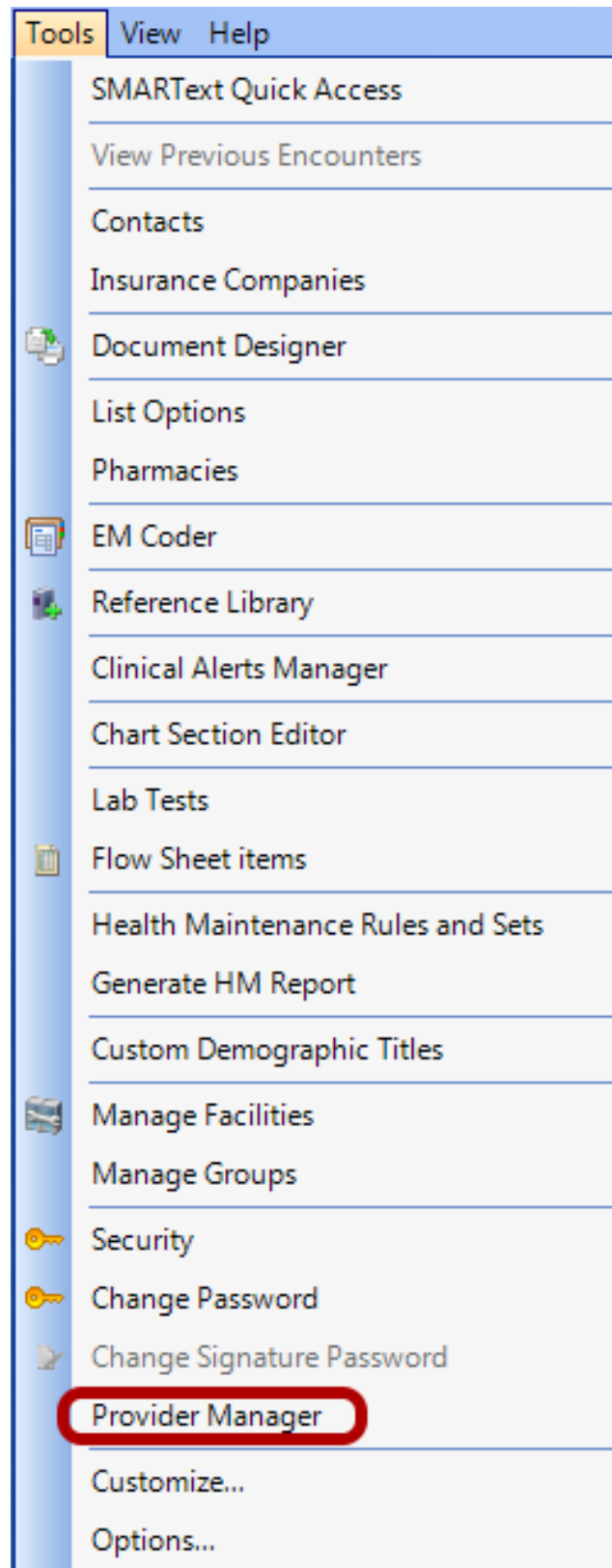
### Activate Licenses

Clinic provider licenses are normally activated during the installation process. If this is not the case, please consult the SOAPware Installation Guide for instructions.

### e-Prescribing

e-Prescribing requires entry of a DEA number and a fax number for each provider. This is done in Provider Manager.

**NOTE: A Nurse Practitioner without a DEA number must enter their NPI number.**



To enter this information, first open Provider Manager. Click Tools in the menu bar and Click the Provider Manager menu item.



## Update Provider Information

**Providers**

Kaye L. Yocham  
Krista L. Laningham  
Rena O'Dell  
Rita Pense  
Shannon Shores

**General** Misc Codes Signature

**Name**  
Title First M Last Suffix  
 Kaye L Yocham

**Address**  
Clinic SOAPware 2008 - Traini  
Street 4220 N. Crossover Rd.  
City Fayetteville State AR Zip Code 72703-

**Contact Information**  
Phone # 8004557627500  
Fax # ( ) -  
Email kaye.yocham@soapware.com

**Physician Numbers**  
DEA #  State ID   
NPI#  UPIN#

1

2 Update

1. Enter in the provider(s) information (including DEA and NPI numbers)
2. Click Update.

## Update Provider Information - Register Provider

Once this information is entered, SOAPware Support will register the provider(s) with the SureScripts network and you will receive an email confirmation with your registration information within 1-2 business days.

## **SOAPwareXchange (additional enhancement)**

SOAPwareXchange is an enhancement that integrates SOAPware with other systems. Most often, this is a billing or PMS system. SOAPwareXchange only needs to run on one computer in your office.

If you have X-Link or Link Runner, SOAPwareXchange needs to run on the same computer as these. This also needs to be running at all times in order for data to transfer across SOAPware and another system. Someone in the office should be designated to ensure this is open and running each day.

## **SOAPwareXchange Setup**

If desired, SOAPwareXchange can be added to the Startup folder in Windows. This will open SOAPwareXChange when the computer starts, but someone will still need to log in to start the interface. SOAPwareXchange continually scans the In folder which is inside a specified directory.

Typically, this is C:\Program Files\SOAPware\SOAPwareXChange\In\, but can be changed during the installation of SOAPwareXChange. Direct the billing system output to this folder. If you want SOAPware to transmit data TO your billing or PMS system, then SOAPwareXChange will send this data to the Out folder which is in the same directory as the In folder. Set the billing system to accept input from this folder.

## **SOAPwareXchange Options**

Once SOAPwareXChange is installed, there are a few configuration options that should always be considered:

1. With SOAPwareXChange open, Click Outbox Settings. If you are going to be posting Superbills from SOAPware to your billing system, Click the Post Superbill checkbox.
2. If you want to send demographics from SOAPware to your billing or PMS system, then Click the Send General Demographic Changes checkbox.
3. Under the Settings menu, there is an option to Auto Create Charts. When your billing or PMS system sends demographics over to SOAPwareXchange, if it does not find a match of the chart based on name, birthdate and either social security, chart number or gender, then it will think this is a new chart. If you check the Auto Create Charts button, it will automatically create a new chart. If you leave it unchecked, then it will place these charts it can't find a match for in the Queue Manager. Go to Start, Programs, SOAPware, Queue Manager. From here you can set whether you want a chart to be a new chart or you can map it to a chart in SOAPware if it already exists.

## SOAPwareXchange HL7 (additional enhancement)

SOAPwareXchangeHL7 v2008.0.497.0

Mappings Settings Tools

Status:

- Checking for mapped messages
- Checking for remote commands
- Checking for mapped messages
- Checking for text files
- Checking for remote commands
- Checking for mapped messages

Start

Status

Messages queued for unmatched patients:  
NO

Messages queued for unmatched physicians:  
NO

Messages Received:  
12

File-based Settings

Source: C:\HL7

Scan Interval: 30

Browse

TCP/IP Settings

IP Address: 0

Port: 0

SOAPwareXchangeHL7 is an HL7 interface between SOAPware and most commonly a lab company. It allows for downloading of lab results directly into SOAPware for review & comparison. Some of the most popular labs are as follows: Labcorp, Quest, Spectrum, Bio-reference, 4medica, etc...

This program also needs to be installed on one computer, and can be any computer in the office. Lab companies typically designate one of your computers to receive the files. SOAPwareXchangeHL7 is usually installed on the same computer. This program also needs to be open constantly in order for it to import labs into SOAPware. Someone at the office should be assigned to ensure the program is open each day and to take care of Unmatched Patients which is explained below. Take note of several things in the SOAPwareXchangeHL7 window.

## Running SOAPwareXchange HL7

The Start button must always be clicked when SOAPwareXchangeHL7 is opened. Lab importing will not start until it is clicked.

There is a Browse button near the bottom. This lets you select the folder to receive the HL7 labs results. The lab company should let you know where your labs will be going. Then we just point the SOAPwareXchangeHL7 to this folder. If you're not sure what folder this is, ask your lab company representative.

There are two areas that contain the word NO. These fields indicate whether or not there are any unmatched patients or physicians. When you first start using SOAPwareXchangeHL7, you will get Unmatched Physicians. It will say YES under Messages queued for unmatched physicians. You need to Go to Mappings -> Edit/View -> Unmatched Physicians. Then, Click a provider's name, and click Map. Click the provider's name that matches, and Click OK. Do this for each physician listed in Unmatched Physicians. When labs come in, SOAPware tries to match the lab's patient demographics to patient demographics in SOAPware. If a match is found, the lab will automatically go to the chart. If it doesn't find a match, it puts it into a queue known as Unmatched Patients. Whenever you see a YES under Unmatched Patients, then you need to map a lab(s) to patient(s) in SOAPware. Go to Mappings -> Edit/View -> Unmatched Patients. Click a patient, and Click Map. The Chart Rack viewer will pop-up. Match the chart in the list to the chart in the Chart Rack by double clicking the chart. Do this until you've mapped all the labs. From then on, labs for these patients you have mapped will automatically go to the chart matched. Someone should check SOAPwareXchangeHL7 once a day or so to see if there is any more Unmatched Patients.

## Scanning and Document Management (Standard & Professional Versions)

SOAPware allows you to scan directly into patient charts. Any scanner you purchase MUST have TWAIN drivers to be able to work with SOAPware. If you already own a scanner, contact your scanner manufacturer to be sure your model has TWAIN drivers. Brother scanners should not be purchased for use with SOAPware because of the problems that these scanners often have with SOAPware. HP's, Fujitsu's and Canon's all usually work well with SOAPware.

Keep in mind that your scanner preferences when scanning will determine the size of the image stored in the SOAPware database. It will give you options for Black and White, Grayscale or Color. Color takes the most memory, then grayscale, then black and white using the least amount of memory. Unless you need color, use black and white to refrain from using unnecessary amounts of space in your database. DPI or Resolution is another component of scanning that will affect the image size in the database. 150 or 200 DPI is normally recommended. The higher the DPI or resolution, the higher quality image it will be, but it will also take up more space in your database. Testing should be done to find a happy medium to find a low DPI, but one that still creates an acceptable quality of the image/document.

## **Welch-Allyn Vital Integration (Professional Version Only)**

This integration only works with the Welch-Allyn Vitals device. Make sure the Welch-Allyn device is attached to the computer, then open a chart and go to Vital Signs (Chart > Sections > Vital Signs). When you have taken the reading on the device, in the Vital Signs section of SOAPware, Click the Take Vitals button on the far right of the Vitals toolbar. This should be active when you have the Welch-Allyn device connected. If the button is grayed-out, then it does not detect the Welch-Allyn device.

## **Instant Medical History Integration (Professional Version Only)**

Instant Medical History must be installed on any computer you wish to use SOAPware with Instant Medical History. SOAPware, Inc. does not sell Instant Medical History, but does provide an integration that is included in the SOAPware Professional version.

To setup the integration, once Instant Medical History is installed on a computer, open SOAPware 2010.

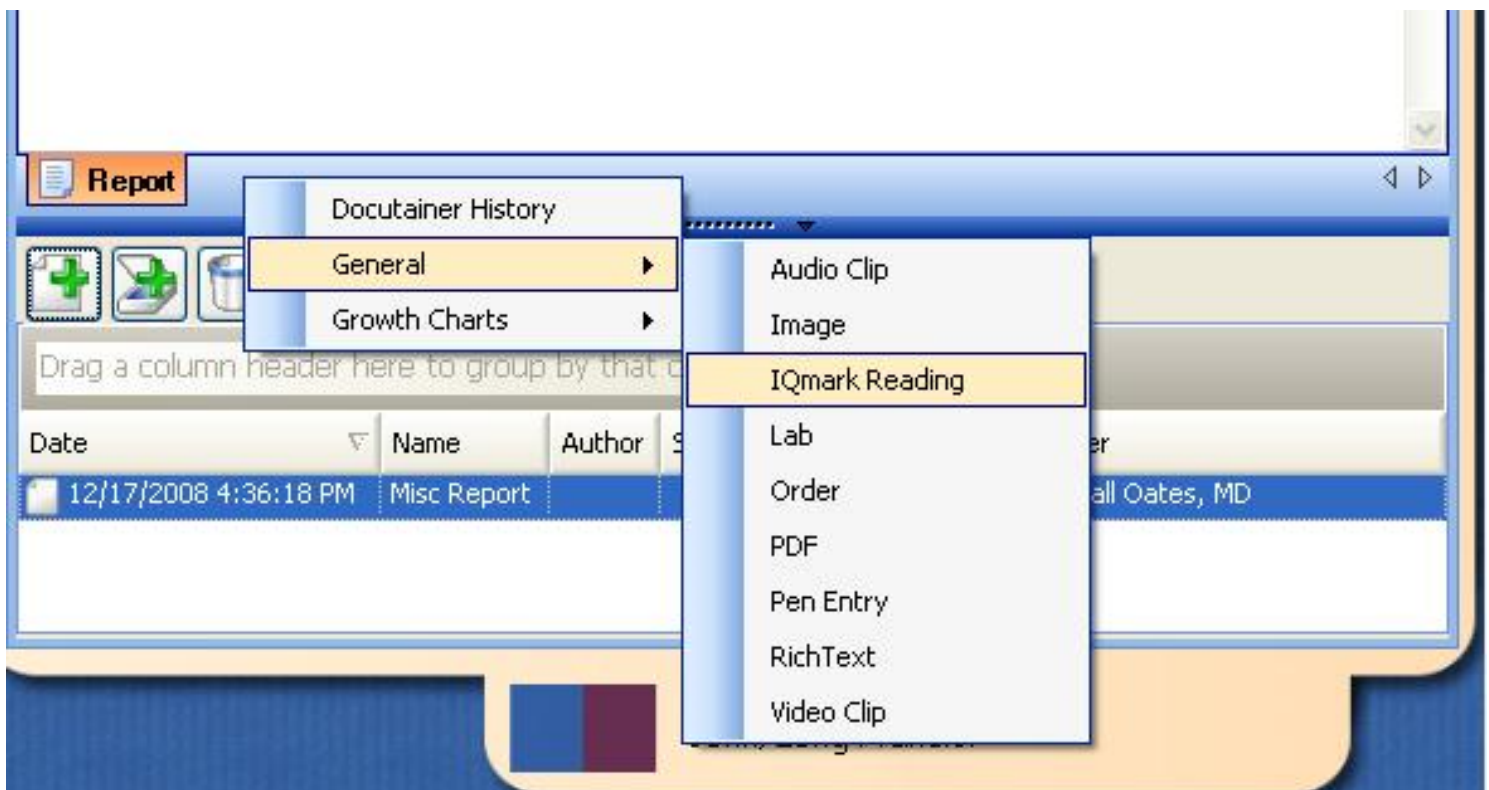
1. Open an unsigned SOAPnote in a chart.
2. Right click on the Subjective header.
3. Go to History Present Illness > Settings.
4. You can make sure that the install location for Instant Medical History is set to the correct install location for Instant Medical History. You can also change the display format for results to Rich Text Format or E/M Coding Compatible format.

You can test the interface by:

1. Right clicking on the Subjective header again
2. Go to History Present Illness > Import Medical History and/or Take Medical History.

Import Medical History will let you import Instant Medical History results that have already been saved from that program. Take Medical History will open the program Instant Medical History and will allow for patient history to be taken at this point. When done, there is a Transfer to SOAPware button that will send it back into the SOAPnote. Make sure the interface is working and the workflow is understood.

## IQMark ECG, Holter, Spirometry Integrations (Professional Version only)



It is not necessary to install IQMark. Simply start using it by plugging the device into a USB port on the computer that is in use and SOAPware's built in drivers will enable the device.

SOAPware integrates with IQMark hardware including ECG, Holter and Spirometry machines. When you have one of these machines connected to the computer, create a new document in the SOAPware chart in the section you want to store the ECG, holtograph or spirometry. You could create a new chart section under Tools > Chart > Section Editor just for these types of reports or you could use an existing chart section.

Once you've created a new document in the section you want it in, Right-click on the lower tab bar, click the General menu item, then click IQMark Reading menu item as you see above.

Next, choose whether it's an ECG, Spirometry or Holter report by clicking the appropriate button. At that point it will start taking readings. You can later return to view these readings in the document.

## SOAPware Faxing Service (additional enhancement)

After you have downloaded your SOAPware license(s) in Provider Manager, you will want to set up all of the contacts to which you will be sending faxes. This is located under the Tools menu. When you need to fax a document in a chart, click Docutainers in the menu bar, and click Print. Click the document design to use, and click the Fax button. Then, click the contact who will be receiving the fax.

Click the Fax button again to send the document.

**NOTE: SOAPware Faxing Service only lets you send electronic faxes out of SOAPware. You cannot currently receive incoming faxes electronically into SOAPware. If you are interested in being completely paperless and storing even your incoming faxes and distributing them to the appropriate patient's chart, you will need to make sure that you have a faxing software, i.e. Snappy Fax, WinFax, etc, installed on the computer attached to your fax machine. The fax will be stored on one of your local drives and could then be dragged and dropped into any patient's chart from there.**

#### **SOAPware Offsite Backup Service (additional enhancement)**

You will be contacted shortly after your sale in order to get the Offsite Backup Service running. If you have not purchased this and are interested, contact [Sales@soapware.com](mailto:Sales@soapware.com) or call 800-455-7627 ext. 200.

#### **Dragon Naturally Speaking (additional product)**

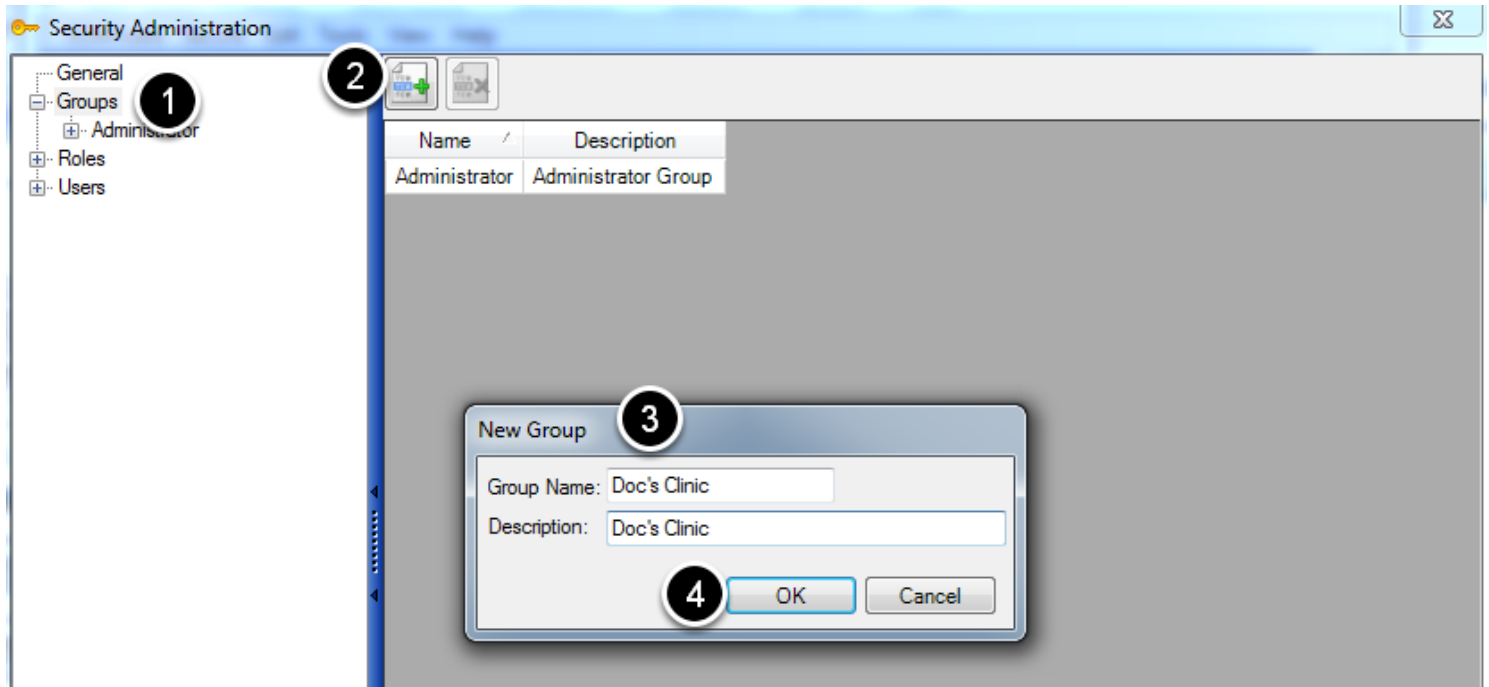
Dragon Naturally Speaking must be installed in order to use it with SOAPware. SOAPware, Inc. does not provide Dragon Naturally Speaking, but it does allow you to use Dragon Naturally Speaking with SOAPware. To use it, open the Dragon Naturally Speaking first, then open SOAPware. Open up SOAPware, go to a section where you want to speak to type, and enable the mic/recording on the Dragon toolbar. Start speaking, and it will start typing text at the cursor.



## Set Up Groups

A group refers to different clinics in a multi-clinic installation with a listing of the responsibilities and limitations of members of that group. Users can belong to any number of groups simultaneously.

### Creating a New Group



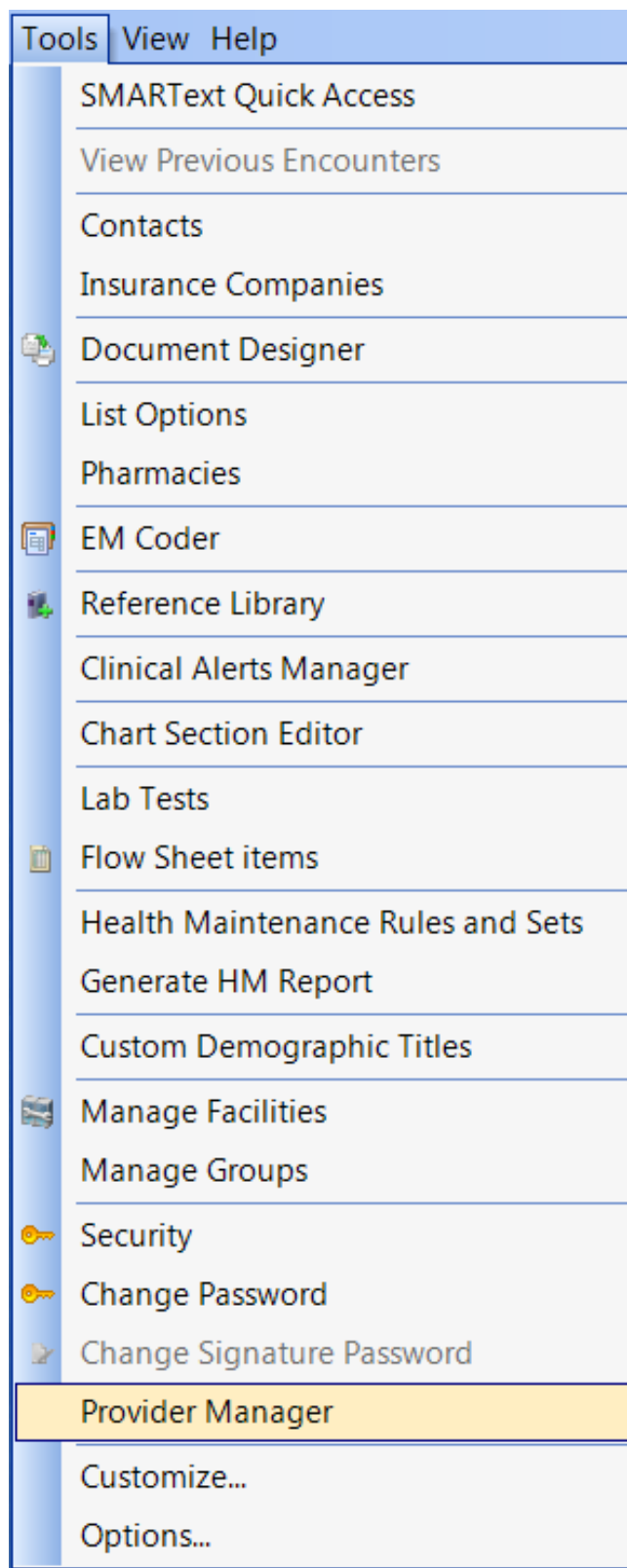
1. Click to highlight Groups
2. Click on the Create Group button
3. Type in the Group Name and Description
4. Click on OK

**NOTE:** SOAPware has a default Administrator Group that cannot be edited



## Provider Manager

### Accessing Provider Manager



To open Provider Manager, click Tools in the menu bar and select Provider Manager.

## General Tab

The screenshot shows a software window titled "Providers" with a close button (X) in the top right corner. On the left is a list of providers: Kaye L. Yocham (highlighted), Krista L. Laningham, Rena O'Dell, Rita Pense, and Shannon Shores. On the right is a form for the selected provider, Kaye L. Yocham. The form has tabs for "General", "Misc", "Codes", and "Signature", with "General" being the active tab. The form fields are organized into sections: Name (Title, First, Middle, Last, Suffix), Address (Clinic, Street, City, State, Zip Code), Contact Information (Phone, Fax, Email), and Physician Numbers (DEA #, State ID, NPI#, UPIN#). There is also a checkbox for "Is Supervisor" which is checked. An "Update" button is located at the bottom right of the form.

Providers				
Kaye L. Yocham				
Krista L. Laningham				
Rena O'Dell				
Rita Pense				
Shannon Shores				

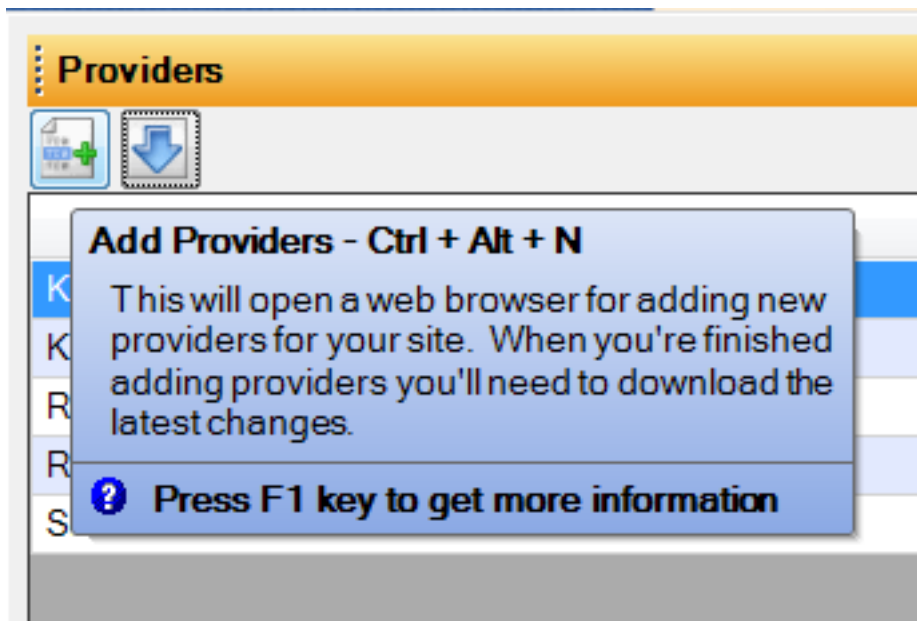
General				
Name				
Title	Firs	M	Las	Suffi
	Kaye	L	Yocham	
Address				
Clini	SOAPware 2008 - Tr			
Stre	4220 N. Crossover Rd.			
City	Stat	Zip Cod		
Fayetteville	AR	72703-		
Contact Information				
Phone	800455762750			
Fax #	( ) -			
Email	kaye.yocham@soapware.com			
Physician Numbers				
DEA #	State ID			
NPI#	UPIN#			
<input checked="" type="checkbox"/> Is Supervisor				
Update				

The General tab will display the providers demographic information including Name, Address, Contact information (phone, fax and email address) and Physician numbers (DEA, NPI, State ID, UPIN)

If the provider displayed is a supervising clinician in the practice, a check needs to be placed in the box next to Is Supervisor. For more information on Is Supervisor, see: [Co-Signatures](#)

After making any changes, click Update at the bottom of the window.

## Adding a Provider



The Provider Manager can also be used to add new providers and edit existing providers. When you first purchase SOAPware, the licenses you purchase will be entered for you as a part of the setup. However, if you add additional providers at a later date, you will need to use provider manager to add these providers.

Click the Add Provider button.



# Provider Administration

Save/Add New Save & Close Cancel

## Add Provider

\* Items in red are required.

### Step 1: Provider Demographics

Title:			
First:	First Name	MI	Last Name
Suffix:			
DEA Number:			
NPI Number:			
<input type="checkbox"/> I would like to add this provider without a DEA number. This will disable E-Prescribing.			
SPI Number			
Email:			
Clinic Name:	SOAPware 2008 - Training		
Phone Number:	800	- 455	- 7627 ext: 500
Fax Number:		-	
Address:	4220 N. Crossover Rd.		
City:	Fayetteville	State:	AR Zip: 72703

### Custom Fields

Custom 1:	
Custom 2:	
Custom 3:	
Custom 4:	
Custom 5:	
Custom 6:	

### Current Registered Providers

- Katie Rogers
- Linda Wagner
- Jennifer Berg
- Kaye L. Yocham
- Krista L. Laningham
- Shannon Shores
- Rena O'Dell
- Rita Pense
- Shannon Shores [Inactive]

Fill in the required information for that provider (a license must be available for the provider to be added).

## Assign Licenses

### Step 2: Assign Licenses

**Choose Licenses**

<input type="checkbox"/> <b>ALL</b>	
<input type="checkbox"/> IQmark ECG	<input type="checkbox"/> FlowSheets
<input type="checkbox"/> IQmark Holter	<input type="checkbox"/> Spell Checking
<input type="checkbox"/> IQmark Spirometry	<input type="checkbox"/> Health Maintenance
<input type="checkbox"/> Welch Allyn® Vitals Device Integration	<input type="checkbox"/> Document Management
<input type="checkbox"/> Instant Medical History Integration	<input type="checkbox"/> OCR
<input type="checkbox"/> Dragon Naturally Speaking Integration	<input type="checkbox"/> SOAPwareXchange
<input type="checkbox"/> Tablet PC Enhancements	<input type="checkbox"/> E&M coder
<input type="checkbox"/> Clinical Knowledge Module	<input type="checkbox"/> Chart Searcher
<input type="checkbox"/> SOAPwareXchange HL7 Integration	<input type="checkbox"/> Lab Forms
<input type="checkbox"/> SOAPware Faxing Services	<input type="checkbox"/> ePrescribing
<input type="checkbox"/> Flash Code	<input type="checkbox"/> ChartPortal
<input type="checkbox"/> Scheduling	<input type="checkbox"/> SOAPware Billing

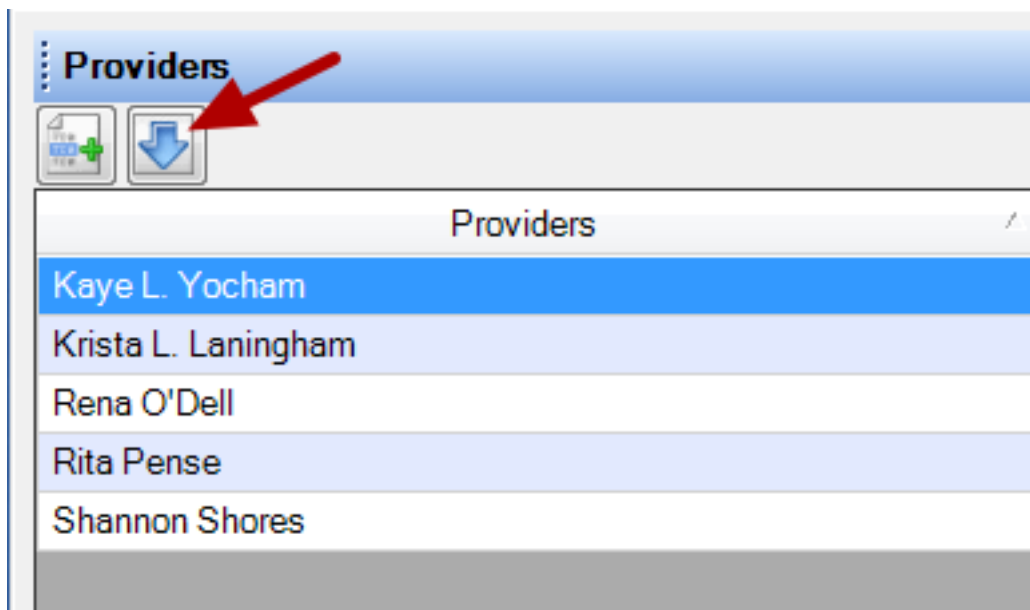
Assign the licenses.

## Save and Close



Click Save & Close.

## Download New Provider



Click the Download Providers button to add the new provider information from Site Administration to your local network.

## Misc Tab

The screenshot shows the "Misc" tab of the Provider window. It has four tabs: "General", "Misc" (selected), "Codes", and "Signature". Under the "Associated User" section, there are two fields: "LoginID" with the value "kayeyocham" and "Name" with the value "Kaye L. Yocham". Below these is a "Group" dropdown menu with the text "<No Group Selected>".

The Misc tab will display the Associated User which includes the LoginID and Providers name.

The Group option is for Insurance billing purposes. Prior to assigning this Provider to a group, the Add Groups/Billing Information must be completed.

1. When a provider is associated with a Group and the Group is contracted with Insurance Carriers/Payers as the Billing/Pay To source:

Using the drop down arrow, Click the Group with which the Provider is associated. The group name will populate the field and link the active provider to that group.

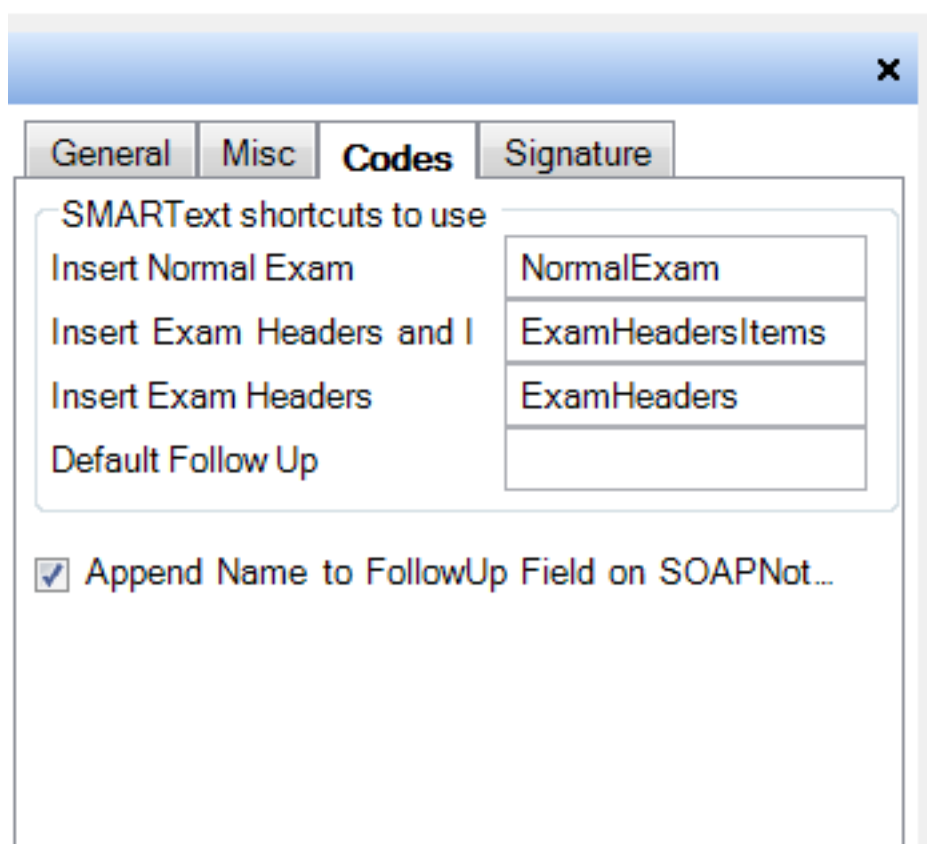
2. If a provider is not associated with a Group:

Using the drop down arrow, Click the Provider's name in the drop down list. For more information on setting up groups, see: [Set Up Groups](#)

After making any changes, click Update at the bottom of the window.

**NOTE: All services rendered by this clinician will be paid to the individual or group selected here by all Payers.**

## Codes Tab



The screenshot shows a window titled "Codes Tab" with a close button (X) in the top right corner. The window has four tabs: "General", "Misc", "Codes" (which is selected and highlighted), and "Signature". Inside the "Codes" tab, there is a section titled "SMARText shortcuts to use" with a list of four items: "Insert Normal Exam", "Insert Exam Headers and I", "Insert Exam Headers", and "Default Follow Up". To the right of this list is a table with three rows and one column. The first row contains "NormalExam", the second row contains "ExamHeadersItems", and the third row contains "ExamHeaders". Below this table, there is a checkbox labeled "Append Name to FollowUp Field on SOAPNot..." which is checked.

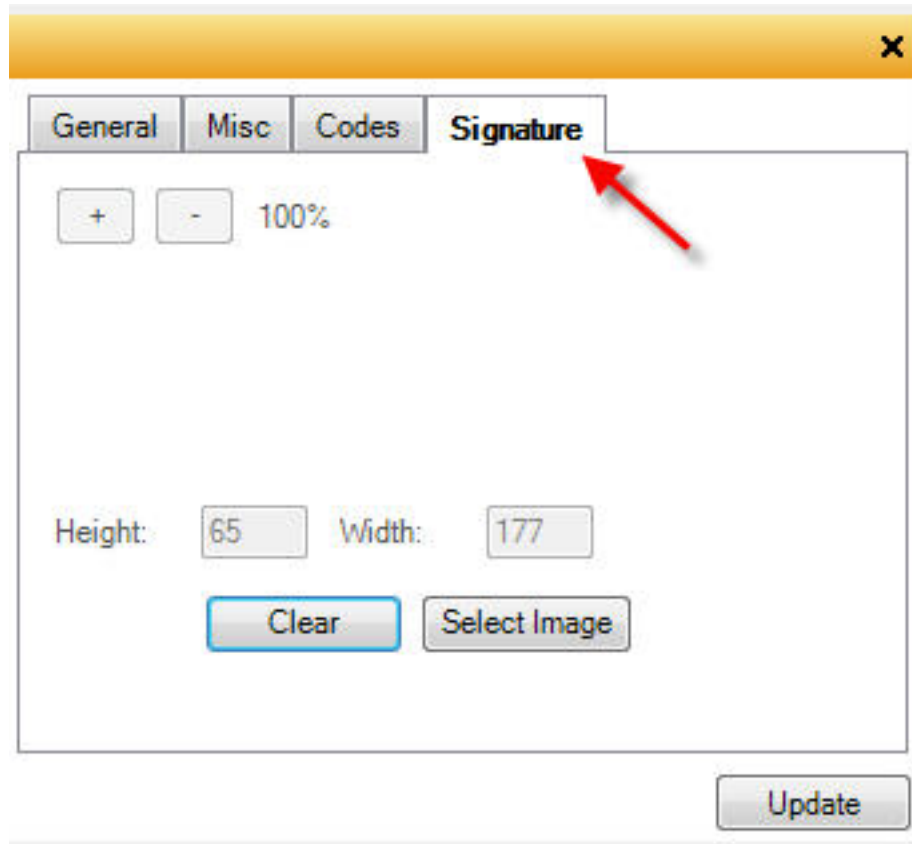
The Codes Tab in Provider Manager allows you to set default menu items for the Objective field menu, a default follow up statement for your encounter note, as well as giving you the option to have the provider's name appear in every new encounter that is created.

By typing in the SMARText code for the common exams that you use, they will appear as selections in

the Objective field menu.

After making any changes, click Update at the bottom of the window.

## Signature Tab

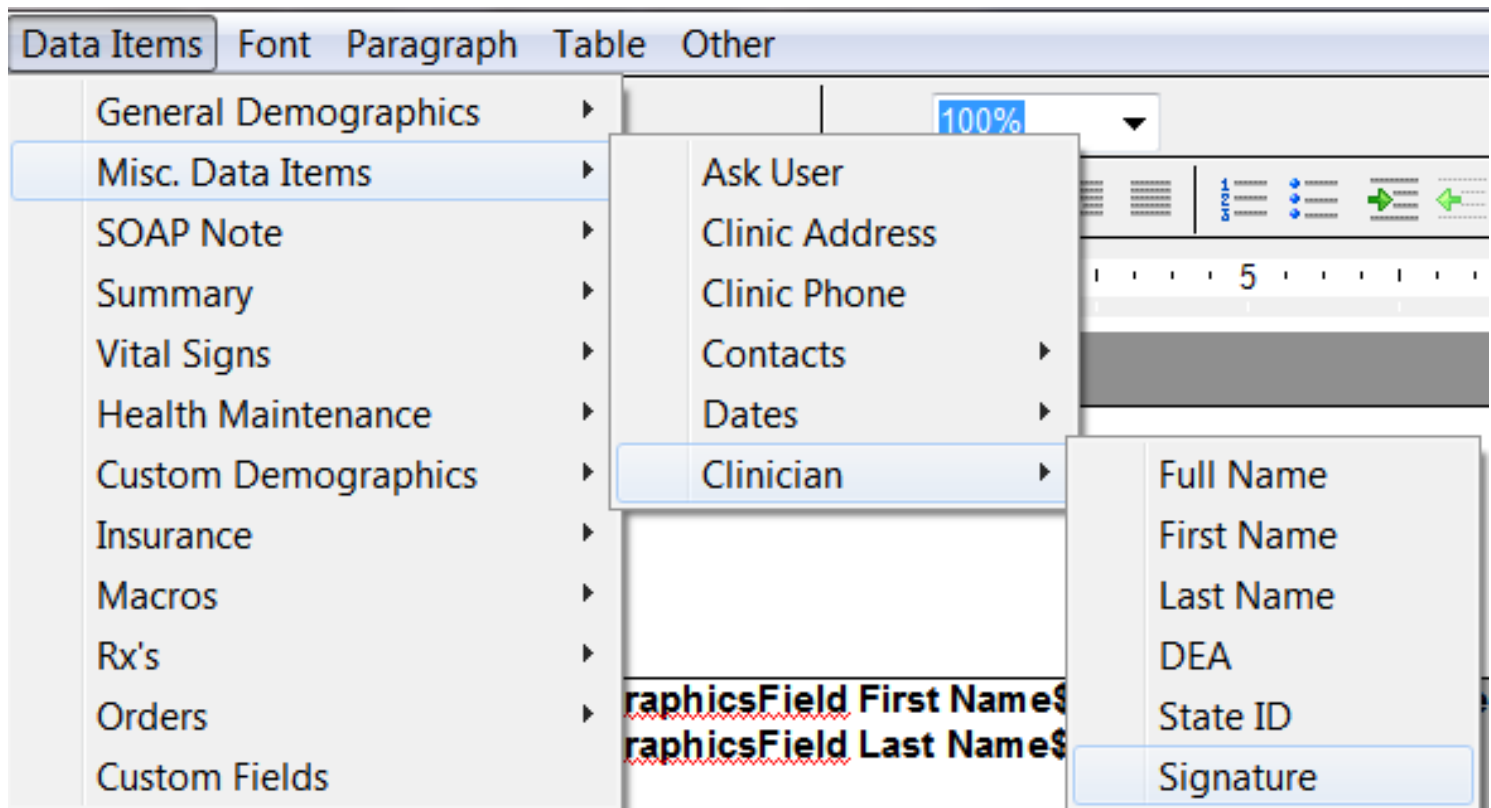


1. Click on the Select Image button.
2. Once the image has been located, double click to insert.
3. The image will not immediately be in view. Click on the button with the "-" sign repeated to resize the image and bring it into view. Note that the size percentage changes as the image is resized.
4. To save, Click the Update Button in the lower right hand corner.

To remove the image, simply Click on the Clear button.



## Signatures & Document Design



To insert a physician's signature on a document design, click Data Items > Misc. Data Items > Clinician > Signature

For more information on using Document Designer, see: [About Document Designer](#)

## Set Up Clinician(s)

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### 1. Preferred Chart Layout

There are hundreds of different options when it comes to possible chart layouts. Primarily, the chart layouts deal with the arrangement of tabbed chart sections. Layout preferences are saved per user. This means that anywhere you log in on a network, your default layout preference will follow you. Please look at a couple of the layouts that are available in SOAPware. Eventually, it is likely that each user will customize their own layouts to best meet their preferences. Different layouts are often used for different types of patient encounters.

#### **The Default Layout:**

Notice that for this layout, the Summary, Vital Signs, and Demographics tabs are on the top left. On the top right are tabs for the SOAPnotes, Labs and Radiology tabbed chart sections.

#### **The 4.X Layout:**

This layout is one of the simplest options for a chart layout. The Summary section tab is the only one on the left and the SOAPnotes section tab is the single one on the right.

#### **The DOCS Clinic Layout:**

This layout is the one preferred in the DOCS-clinic. For this layout, the Summary, Vital Signs, Demographics, Printed Encounters and Health Maintenance tabbed chart sections are on the top left. On the right are SOAPnotes, Labs, Radiology, Correspondence In and Flow Sheets tabbed chart sections.

#### **The Multi Layout:**

This layout splits the chart workspace into 3 panes. On the left side, are both Summary and Demographics in view, consecutively. Summary is above Demographics. On the right is a single viewer for the SOAPnote chart section.

For instructions on how to customize Layouts, see: [Chart Layouts](#)

### 2. Select Data Entry Methods

The way in which you actually enter data and document your patient's visits will be one of the most important issues you will address. You do not want to just jump in and make a decision on this without first doing an analysis.

Questions to ask yourself include:

What are you doing now?

What are your resources?

What is reasonable and feasible?

Below is a set of questions that are designed to help you narrow down the options. Based on your

answers, we offer some suggestions.

Do you desire to participate in "Meaningful Use" and "Pay for Performance" Initiatives, and to engage in practice quality improvements, and/or electronic prescribing?

If No, then it is an option to use free text.

It is not mandatory that you enter structured documentation for your patients. However, while using free text may be familiar and seem easier, it would greatly be to your advantage to investigate how you can start structuring more of your documentation. It will not only make you more efficient, but it will also be more likely to allow you to receive greater reimbursement in the near future. In fact, it appears those not participating in meaningful use and P4P initiatives will likely be penalized.

If Yes, the key to being able to participate with the new initiatives is to ensure that your Assessment, Plan and Medications sections within encountered notes are structured. Other sections of encounter documentation (i.e. Subjective, Objective) have less need for structured data entry at this point in time.

There are a number of different charting methods available in SOAPware offering great flexibility in how information can be entered. Most use a combination of data entry methods. You have a choice with each section of the encounter and with each patient. More than likely, one solution will not be sufficient for all chart sections. Just as one shoe does not fit all, one charting method does not fit every type of visit or patient.

Choices of methods for data entry include:

- \* Free Text (Typing or dictation)
- \* SMARTText Pick Lists and Docuplates/Templates
- \* Speech Recognition (Dragon Naturally Speaking)
- \* Scan in paper encounter forms
- \* Dictate and have transcriptionist type into electronic notes
- \* Scan in your handwritten documentation
- \* Use a Tablet-PC and record the "digital ink"

### **3. Define "Top 20" Usage Lists**

- a. Diagnosis Codes
- b. CPT Codes
- c. Medications
- d. Orders
- e. Patient Handouts

#### f. Reason for Encounters or Chief Complaints

Defining the above usage lists, you will have a great head start to downloading or creating customized templates or "docuplates" to use for encounters. As well as your Top 20, consider looking at the clinic superbill for more items frequently used.

### 4. CPT-Coded Item Setup

During initial set up, it is important to take all the procedure codes on the clinic's Superbill and confirm they are downloaded locally. These are SMARText items of the Plan item type.

Have each clinician that will be entering procedure codes, look at each downloaded term from the Superbill list, and indicate how they would do a search for that term. If the clinician's choice of search words is not in the description, check to see if it is included as a keyword. If not, then we suggest contacting SOAPware, so that we can add it for all SOAPware users. Send an email message of suggestions to [fsanford@SOAPware.com](mailto:fsanford@SOAPware.com).

Over time, create docuplates that include pick lists having procedure items that only include those preferred and with verbiage the clinicians prefer.

SMARText is a toolkit containing all the tools (i.e. all the CPT codes). But, it is important for clinicians to realize that the descriptions that accompany the codes are often not the ones that are familiar.

For example, searching for x-ray only retrieves those items that SOAPware has added x-ray as a keyword. This is because the CPT descriptions use the terms radiological exam instead of x-ray.

Sometime after initially going live with SOAPware, start introducing order entry items in addition to the plan items that contain CPT codes.

### 5. Diagnosis Item Setup

It usually comes as a shock to most physicians how much inconsistency is present as to the selection of diagnoses among different physicians in different specialties and localities. It also typically comes as a shock to learn how varied are the terms that individual physicians prefer to utilize to describe the same diagnosis.

The library includes the ICD-9 codes within SMARText items of the Structured Dx type. But, it is important for clinicians to realize that the descriptions that accompany ICD-9 codes are often not the ones that are familiar.

No EMR, out of the box, is going to be able to generate a simple list such as this that is going to reflect what any individual clinician expects and using the wording any individual clinician prefers.

The ICD-9 terms/descriptions, in original form are very limited. Each word in the description is a keyword that can be searched. And, SOAPware is in the process of adding thousands of keywords on a monthly basis. Again, when SOAPware users need a keyword added, we invite them to send an email message of suggestions to [fsanford@SOAPware.com](mailto:fsanford@SOAPware.com).

### **Shortcuts:**

A few clinicians strongly prefer to enter common diagnoses using the shortcut entry method. Notice that the diagnosis items that have been edited (i.e. descriptions enclosed in double-quotes), often have tentative shortcuts added as well. The shortcuts can also be changed to meet user preferences. Several considerations have led to the shortcuts that are included within edited diagnosis items in the library. These are simply included for convenience, and clinicians are encouraged to edit them to create ones they prefer and can remember.

## **6. Default Docuplate Setup**

**NOTE: The default SOAPnote docuplate when SOAPware is installed is for getting started/introduction purposes only. It needs replacement once users have completed the initial Introduction to SOAPware.**

Docuplates allow common sets of document items for various chart sections to be saved and reused later. This capability is particularly useful for documenting common conditions seen repeatedly. They are also great tools for implementing Best Practice Guidelines and more consistency in documentation.

You will want to have a docuplate set up as your default as well as docuplates for specific visit types.

For information on downloading, using, and creating docuplates, see [Docuplates](#)

## **7. Order Entry Setup**

Searches within the Order Manager will not search the online library, but are limited to order entry items that are local. It is necessary to first go to the SMARText items Manager and download the order entry items.

In order to download the Order Entry items needed in your practice:

1. Make a list of the most frequent orders in your practice.
2. Search the SOAPware online library for these Order Entry items and download the appropriate ones.
3. Customize the downloaded orders. Rarely should you need to create new ones.

If you are not ready to identify and download the items you need, but want to explore the use of Order Entry, here is an alternative means to get started. In order to obtain a set of the generally most common

starting order entry items, search and download the order entry items containing the keywords---- (i.e. s and 4 dashes).

Understand that the need to first download order entry items is a unique characteristic of the Order Entry SMARTText item type. Again, this is because the Order Manager does not search in the online library. SOAPware allows for searching in the online library in almost every other setting where SMARTText is searched.

To download these items, Click Docutainers in the menu bar, and Click the SMARTText Items menu item (or Press F10 key). In the Type column, the Order Entry can be identified. (Clicking on the Type column header will group together the items). Select/Highlight the items to download and Click the Download button. You can download them one by one, or select multiple items at once by holding the control or shift button.

For orders that are not available on the online library, you can create custom order entry items. You can also modify existing order entry items to include the subitems you want to include with the order.

For instructions on downloading and creating orders, see: [Download Most Common Coded SMARTText Items](#)

## **8. Patient Handouts**

Paper-based patient education handouts can be used in SOAPware and printed automatically from the patient's chart. Now is the time to decide what handouts you would like to include. There are many available on the online library and you can edit these to customize them as well as create your own. To learn how to download, edit, and create handouts, see: [Handouts](#)

## **9. Structured Text Data Entry**

SMARTText is a type of data entry that is unique to SOAPware. It was created by associating hidden information to the words and phrases used in documentation. This results in the documentation being able to be identified electronically and read by computers. Simply put, SMARTText is a Lego set for medical information. Just like the Lego's of your youth, SMARTText has many different pieces that can be put together in almost limitless ways. The "pieces" in SMARTText are called items and they are of many differing types. The Type defines what the SMARTText item may contain, represent, and do.

For example, within SOAPware, all the CPT/HCPCS items, ICD-9 items, and medications have each been associated with specific SMARTText items for immediate use when creating documentation.

You will see that with SMARTText, you will be able to

\* quickly and easily associate information that needs to be grouped together (i.e. a SMARTText item

of the appropriate type)

- \* do it all in one location (i.e. a SMARTText item of the appropriate type)
- \* save it for reuse in the future (save it in the SMARTText library)

## 10. More Data Entry Options

### Pick Lists

SMARTText items (except for Order Entry) can be arranged into pick lists, and be selected by simple clicking. So, they function much like a paper superbill, where you either circle or check boxes. Customized pick lists are one of the most efficient data entry methods. Create custom pick lists containing the items that you commonly-repeatedly utilize. Pick lists allow you to perform data entry via a click for an item you desire to insert into documentation.

### Docuplates

Docuplates are simply stored templates for encounter notes, procedure notes or just about any section of the chart. You can have docuplates for not only SOAPnotes (encounters), but also for Flow Sheets, Labs, Patient Summary, Drawings, etc. In regards to documenting a SOAPnote, you can have a docuplate that has some free text in one section, some SMARTText items defaulted in another, and several different pick lists inserted.

In general, there are 2 main approaches to use docuplates.

1. Set up a docuplate for each of the most common appointment types or chief complaints.
2. Set up a generic or "general" docuplate that is used for all types of visits. Typically, these generic docuplates/templates require a little more data entry at the time of the encounter than those designed for particular types of encounters.

### Customize Wording, Appearance, Order, and Spacing of SMARTText

It is not usually apparent, when starting, that almost any clinician can use SMARTText items and have the final appearance of the documentation appear exactly as they prefer. For example, the Chief Complaint SMARTText item could be changed to CC if preferred.

### Free or Unstructured Text

Free-text or unstructured data entry involves nothing more than clicking into a field and typing away. So, free-text is the same as simple typing into Microsoft Word or other word-processing document. Obviously, free text typing can be by the clinicians, assistants or transcriptionists, and should be minimal by the clinicians. There are some considerations when working with free-text in SOAPware 2010.

### Dictate and Use Transcriptionist

Some doctors choose to dictate, and have their transcriptionist document directly into the electronic SOAPnote. This is not very efficient for the long term, but can be a transitional workflow when trying to migrate towards more modern-efficient documentation.

### **Dragon Naturally Speaking**

Dragon Naturally Speaking is a speech recognition software that allows you to dictate into a microphone at your computer, and the software translates your spoken words to text in real time. You are able to dictate directly into SOAPware 2010 in order to make data entry easier and more efficient. Dragon Naturally Speaking is a separate program that works in conjunction with SOAPware 2010. Contact the SOAPware Sales dept at 800.455.7627 for pricing and details. See the links below for illustrations of Dragon and SOAPware:

<http://www.nuance.com/naturallyspeaking/>

<http://www.youtube.com/watch?v=q8qlt5YMMh0>

### **Getting Started with Creating your Documentation**

Consider creating a docuplate for each of the 10 most common encounter types or reason for encounters in your practice. When creating these docuplates, go through each section and determine if you want to just have defaulted text for that section or would like to pick from a list, etc. Again, the Assessment, Plan and Medications fields are most benefited by structured information. Particularly, in the beginning, you may want to mostly use free-text into the Subjective and Objective fields. This is especially the case for those converting from other free-text based EMR's. When you get to the Assessment field, plan to start transitioning to structured entry. For example, you might want to default a pick list of SMARText items Structured Dx/Assessment items containing the ICD codes needed for billing. Similarly, consider the same for the Plan field, and for the Medications field. Electronic prescribing results in the use of Structured Rx/Medications, by default.

Another tool most use, to some degree, is to have particular SMARText items that you almost always use and rarely change already entered into starting docuplate/templates.

Once you've created these docuplates/templates for your 10 most common types of visits, just insert them into future encounter notes and edit as needed. You can create as many or as few docuplates as needed. It is all up to you and your preferences. You could start with 5 or with 20.



## 11. Schedule Set-Up

This section is designed to help you set up your schedule, and plan for the days to block off for various reasons (ie. vacation, conferences, catch up days, etc.) If you have numerous clinics amongst which you travel, you will want to make sure your clinic rotation is accurately reflected on your various facility schedules.

There are three main sections here: Provider/Resource Management, Business Hours Management, and Facility Closings.

### **Provider/Resource Management**

In this area, should be a list of licensed providers for your site. If your provider is not already in this list, the provider likely does not have a license to the Scheduler. This area is the location to actually activate the providers/resources that will be using the Facility.

### **Working Hours Management**

This section allows the working hours for the Provider/Resource to be set for the facility. If you have multiple facilities, among which a Providers/Resource travel, set the days and hours that each will be working at each facility each week. These times that are set up will then be available for scheduling for each Provider/Resource.

### **Recurrence Management**

This allows the set up of regular blocks for a provider at the facility. For instance, if the provider regularly takes lunch from 1pm-2pm on the days she/he is at the facility, set that time from this section.

### **Business Hours Management**

Set the overall operating business hours for the facility in this section, regardless of the provider that is there. Changing this section will be identical to setting the hours for a provider in the Working Hours Management section. This should be relatively simple to update and edit.

### **Facility Closings**

Block off the days the clinic will not be open to see patients, or is closed entirely for holidays, etc. Notice this section applies to the overall facility regardless of the provider.

## 12. Tools - Options

When SOAPware is installed, it includes certain defaults and settings that can be changed whenever needed. The Options dialog contains numerous, miscellaneous options to allow SOAPware to best match your preferred needs and work-flows.

To see all of the options settings, see: [Tools - Options](#)

## Set Up Facilities

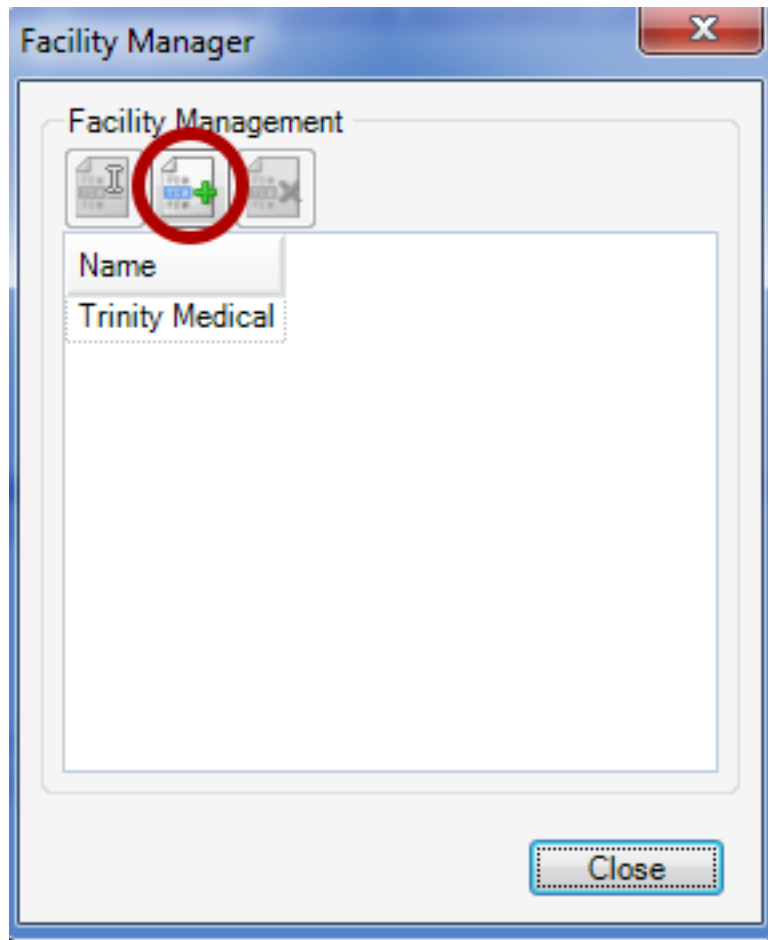
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This section is designed to inform you about all that is available in regards to setting up your facilities. You may not want to set up all of the sections related to your facilities (and that are discussed here), at this time. However, it is very important, to address these 3 areas:

(1) Facility Name, (2) Provider/Resource Management section on Scheduler Tab, and (3) Business Hours Management section on Scheduler Tab.

**NOTE: Your Facilities represent the places in which your providers provide services including all Hospitals or Clinics at which the provider will be performing services. Facilities will be used in several areas of SOAPware including the POS (Place Of Service) section of health claims to be filed with insurance, and in the Scheduler (available in both SOAPware Standard and SOAPware Professional).**

### Facility



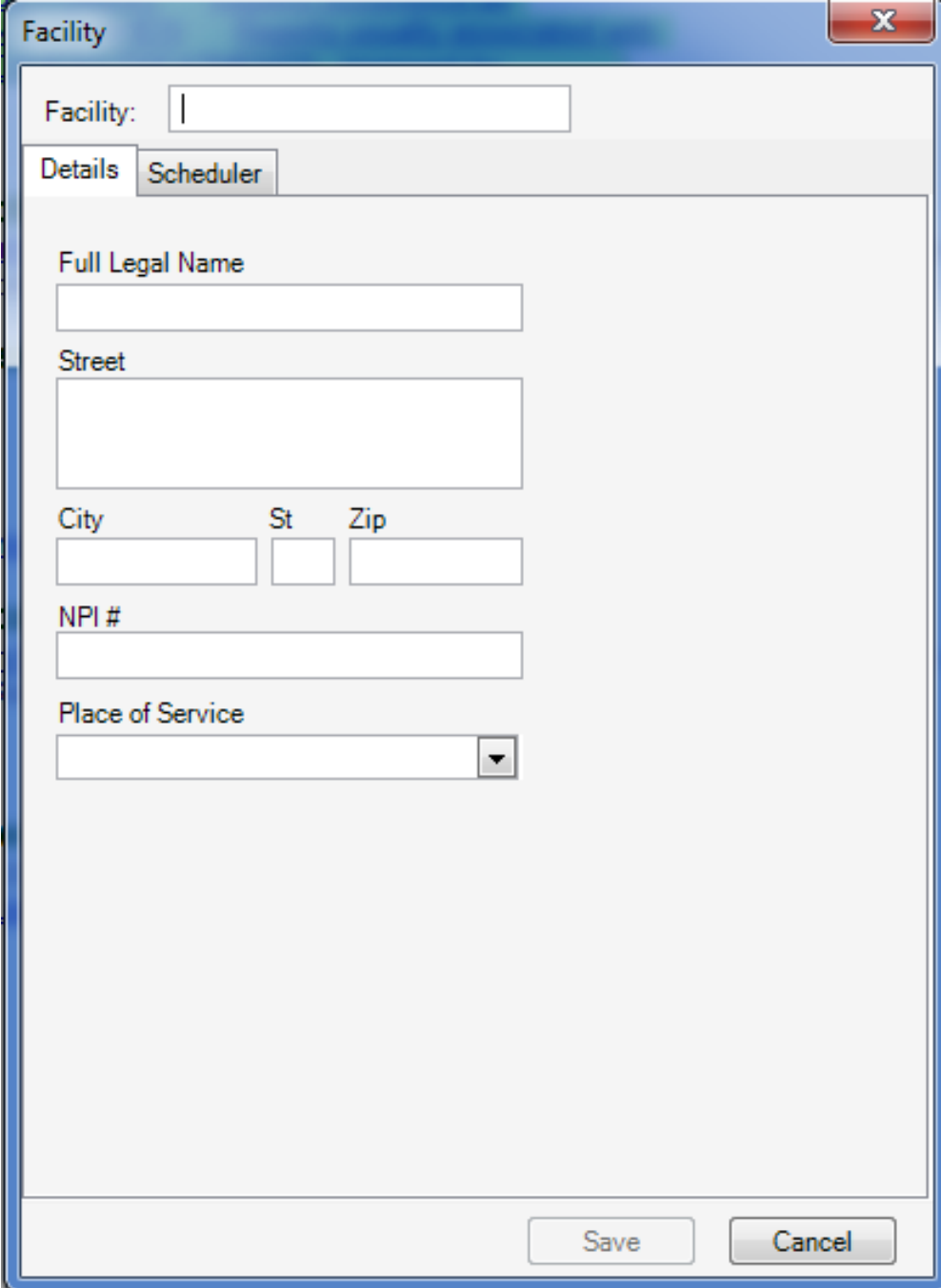
The Facility Manager provides the backbone to the overall set-up and workflow of your clinic(s) and provider(s). This will be the general name for your facility that will need to be easily recognizable by your staff. The name entered here will also be the one that is displayed on your Scheduler.

To begin, Click Tools on the menu bar, and Click the Manage Facilities menu item.

In the Facility Manager dialog, to add a facility, Click the Create New Facility button (with the green plus sign).

The Facility dialog presents containing the Details and Scheduler tabs.

## 1. Details Tab



The screenshot shows a window titled "Facility" with a close button (X) in the top right corner. Below the title bar is a text field labeled "Facility:" followed by a single-character input field containing the letter "I". Below this is a tabbed interface with two tabs: "Details" (which is selected and highlighted) and "Scheduler". The "Details" tab contains several input fields: "Full Legal Name" (a single-line text box), "Street" (a multi-line text box), "City" (a single-line text box), "St" (a single-line text box), "Zip" (a single-line text box), "NPI #" (a single-line text box), and "Place of Service" (a dropdown menu with a downward arrow). At the bottom right of the dialog are two buttons: "Save" and "Cancel".

This is the location of basic demographic information for the facility.

**a. Full Legal Name**

The name entered here will be the official legal name for the Facility, if different than the general name in the field above.

**b. Street Address**

This is the address for the Facility.

**c. City, State, Zip**

This is the address for the Facility.

**d. NPI Number**

This will be the National Provider Identifier number that has been designated by CMS (Centers for Medicare and Medicaid Services) for the Facility (NOT for the provider). This will be particularly useful once the SOAPware Billing system is available.

**e. Place of Service**

This is the general code that is assigned to describe the type of Facility. This will also be particularly important for billing purposes.

## 2. Scheduler Tab


Facility

Facility:

Details Scheduler



Provider/Resource Management

Providers Resources







Name	Visible
Kaye L. Yocham	No
Krista L. Laningham	No

Business Hours Management



Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes
Friday	8:00 AM	5:00 PM	Yes
Saturday	8:00 AM	5:00 PM	No
Sunday	8:00 AM	5:00 PM	No

Facility Closings



Closings	Start Time	End Time
----------	------------	----------

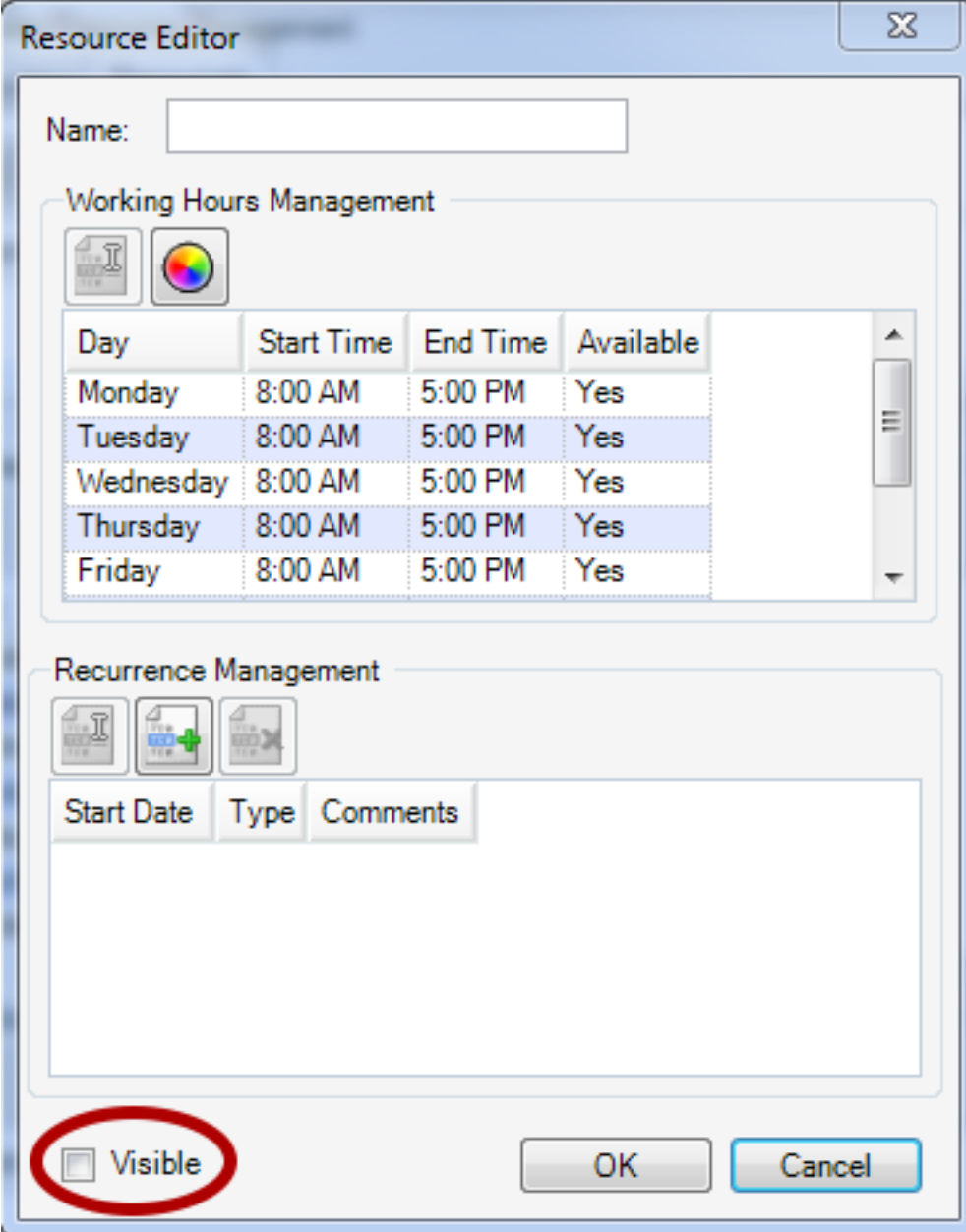
Save Cancel

This is the location for the functional details of your facilities in the Scheduler. Three main sections here: Provider/Resource Management, Business Hours Management, and Facility Closings.

## a. Provider/Resource Management

In this area, should be a list of licensed providers for your site. If your provider is not already in this list, the provider likely does not have a license to the Scheduler. This area is the location to actually activate the providers/resources that will be using the Facility.

## b. Adding a Resource



The Resource Editor dialog box is shown. It has a title bar with a close button. The main area is divided into two sections: Working Hours Management and Recurrence Management. The Working Hours Management section has a table with columns Day, Start Time, End Time, and Available. The Recurrence Management section has a table with columns Start Date, Type, and Comments. At the bottom, there is a checkbox labeled 'Visible' which is circled in red, and buttons for 'OK' and 'Cancel'.

Name:

Working Hours Management

Day	Start Time	End Time	Available
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes
Friday	8:00 AM	5:00 PM	Yes

Recurrence Management

Start Date	Type	Comments
------------	------	----------

☒ Visible

OK Cancel

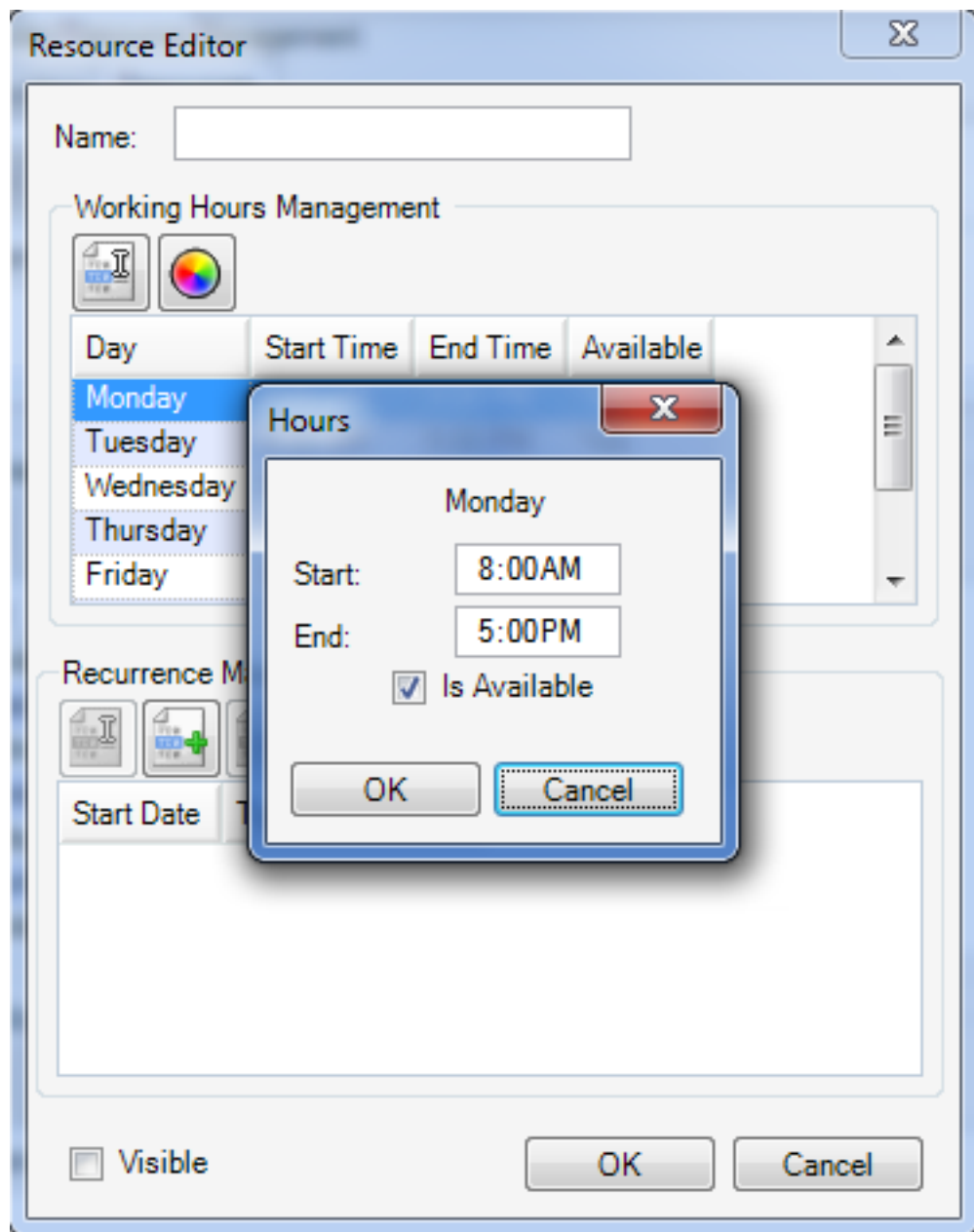
Note: This is available only in SOAPware Professional.

Add Resources to be scheduled, in addition to Providers. Resources are anything for which patient times are scheduled. For instance, this could be an R.N., an exam room or even a device, such as x-ray. These are completely determined by you, and are designed to more efficiently schedule and manage resources for patient visits.

To add a new Resource, Click the Resources tab. Click the Add Resource button (with the green plus sign). The Resource Editor dialog is displayed. Type a Name for the Resource. This dialog manages the time for both Providers and Resources.

To activate the Provider or Resource selected, Click the Visible checkbox. Every Facility has to have at least 1 Provider visible to be able to schedule appointments for that facility.

### c. Working Hours Management



This section allows the working hours for the Provider/Resource to be set for the facility. If you have multiple facilities, among which a Providers/Resource travel, set the days and hours that each will be working at each facility each week. These times that are set up will then be available for scheduling for each Provider/Resource.

To edit each day's working hours, Double-click a time, or Select a line, and Click the Edit button.

Click OK when done, and repeat with following days.

To set the Provider/Resource's coloring for their open scheduling time, Click the Color Wheel button and Click the color to change as preferred.

Click Save.



#### d. Recurrence Management

The image shows a screenshot of the 'Resource Editor' window and a 'Recurrence Pattern' dialog box. The 'Resource Editor' window has a 'Name' field, a 'Working Hours Management' section with a color wheel icon, and a table of working hours. The 'Recurrence Pattern' dialog box is overlaid on top, showing options for appointment time, recurrence pattern, range of recurrence, and comments.

**Resource Editor**




Name:

**Working Hours Management**

Day	Start Time
Monday	8:00 AM
Tuesday	8:00 AM
Wednesday	8:00 AM
Thursday	8:00 AM
Friday	8:00 AM

**Recurrence Management**

Start Date	Type	Comments
------------	------	----------

☐ Visible

**Recurrence Pattern**

Appointment Time

Start Time:  End Time:

Recurrence Pattern


☒ Daily ☒ Every  day(s)


☐ Weekly ☐ Every Weekday

☐ Monthly

☐ Yearly

Range of Recurrence

Start By:  

☒ End after:  occurrences ☐ End by:  

Comments

This allows the set up of regular blocks for a provider at the facility. For instance, if the provider regularly takes lunch from 1pm-2pm on the days she/he is at the facility, set that time from this section.

Go to the Tools menu>Manage Facilities. Click on your facility and click on the Edit button and then click on the Schedule tab.



Click to highlight the provider's name and then click on the Edit button.

Click on the Button with the green plus under Recurrence Management

#### **e. Appointment Time**

Type Start Time and End Time for the blocked time.

#### **f. Recurrence Pattern**

Click the Recurrence Pattern radio button to designate whether the time block will be Daily (or every weekday), Weekly, Monthly or Yearly.

#### **g. Range of Recurrence**

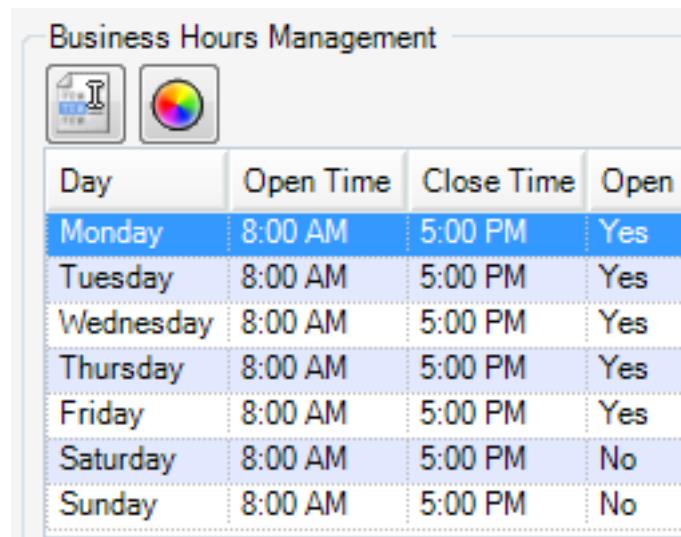
This allows the blocks to start on a set date, and have them reoccur a certain number of occurrences, or end by a certain date. If this is set to end after 0 occurrences, the block will not have an end date.

#### **h. Comments**

For example, Type the name of the blocked time, and it will show up for the facility on the scheduler.

Click Save when finished setting the block, and the display returns to the Facility dialog's Scheduler tab.

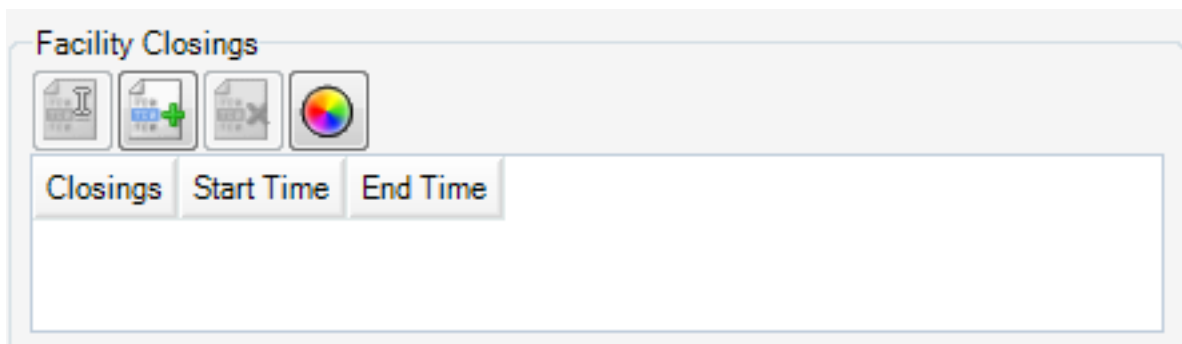
#### **i. Business Hours Management**

The image shows a dialog box titled "Business Hours Management". It contains two icons at the top: a document with a pencil and a color wheel. Below the icons is a table with four columns: "Day", "Open Time", "Close Time", and "Open". The table lists the days of the week from Monday to Sunday. Monday through Friday are marked as "Open" with times from 8:00 AM to 5:00 PM. Saturday and Sunday are marked as "No".

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes
Friday	8:00 AM	5:00 PM	Yes
Saturday	8:00 AM	5:00 PM	No
Sunday	8:00 AM	5:00 PM	No

Set the overall operating business hours for the facility in this section, regardless of the provider that is there. Changing this section will be identical to setting the hours for a provider in the Working Hours Management section. This should be relatively simple to update and edit.

## j. Facility Closings



The image shows a software dialog box titled "Facility Closings". At the top, there are four icons: a document with a vertical line, a document with a green plus sign, a document with a red X, and a color wheel. Below these icons are three tabs labeled "Closings", "Start Time", and "End Time". The "Closings" tab is currently selected. The main area of the dialog is a large empty rectangular box for text input.

Block off the days the clinic will not be open to see patients, or is closed entirely for holidays, etc. Notice this section applies to the overall facility regardless of the provider. To set up a new closing, Click the Add Closing button (with the green plus sign).

Type the Name for the closing as well as the Start Date and End Date. Click OK when finished.

## Tools - Options

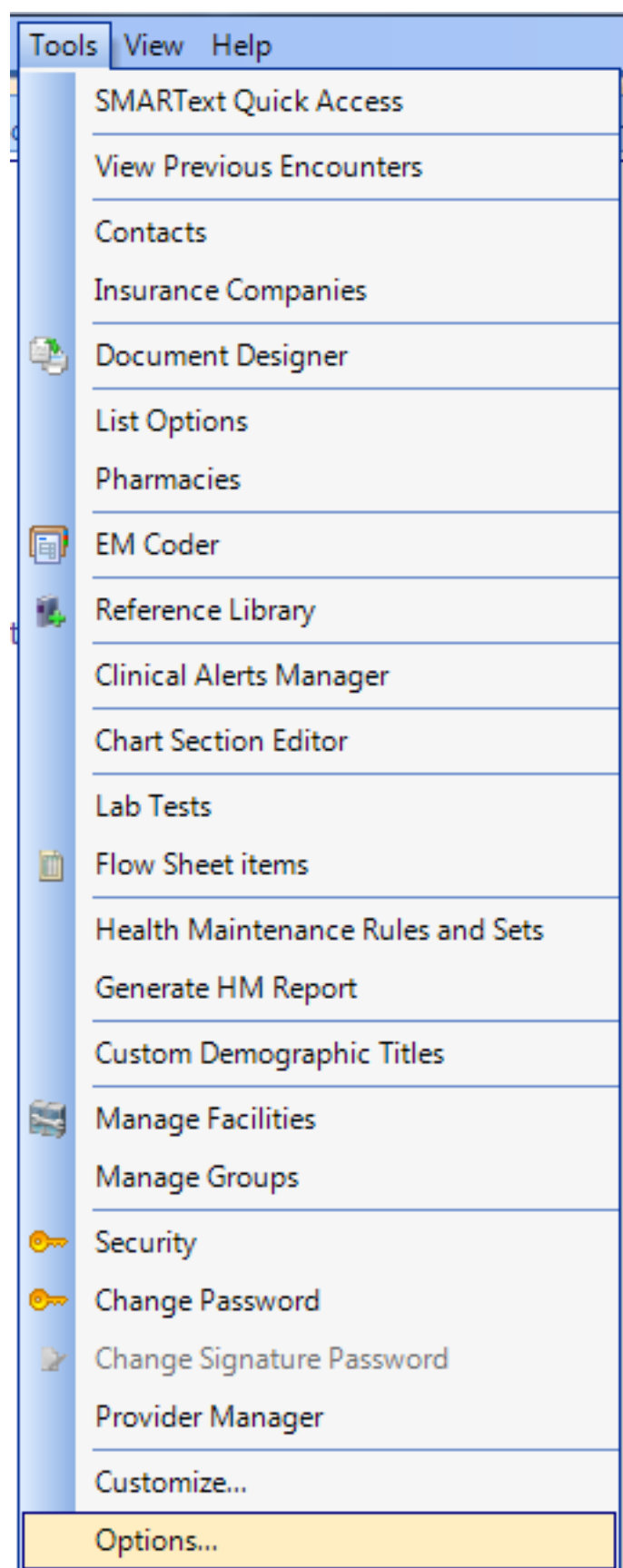
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When SOAPware is installed, it includes certain defaults and settings that can be changed whenever needed. The Options dialog contains numerous, miscellaneous options to allow SOAPware to best match your preferred needs and work-flows.

To access and go through this list of options, Click Tools in the menu bar, and Click the Options menu item. Below are brief descriptions of each item in this dialog.

**\*Note:** any menu options which are grayed out are options currently turned off or unavailable.

## Accessing Tools - Options



To open Tools - Options, go to the Tools Menu and choose Options from the bottom of the list.

## Billing Statements

Options

**Billing Statements**

- Chart Layouts
- Chart Rack
- Document Designer
- Docuplates
- Drug Interactions
- OCR
- Pulled Charts
- Scanning
- SMARText
- SMARText Color Coding
- Structured Billing
- Structured CPT
- Structured Dx
- Structured Order Entry
- Structured Rx
- Summary To SOAP
- Toolbars
- Vital Signs
- Workflow

☒ Accept Assignment Yes

**CMS 1500 Options**

☐ Print Full CMS Form

Default Printer: Microsoft XPS Document Writer

**837p Options**

Base Export Path

Browse

Office Contact Name:  Office Contact Phone:  ( ) -

☐ Send Files as Test

Close

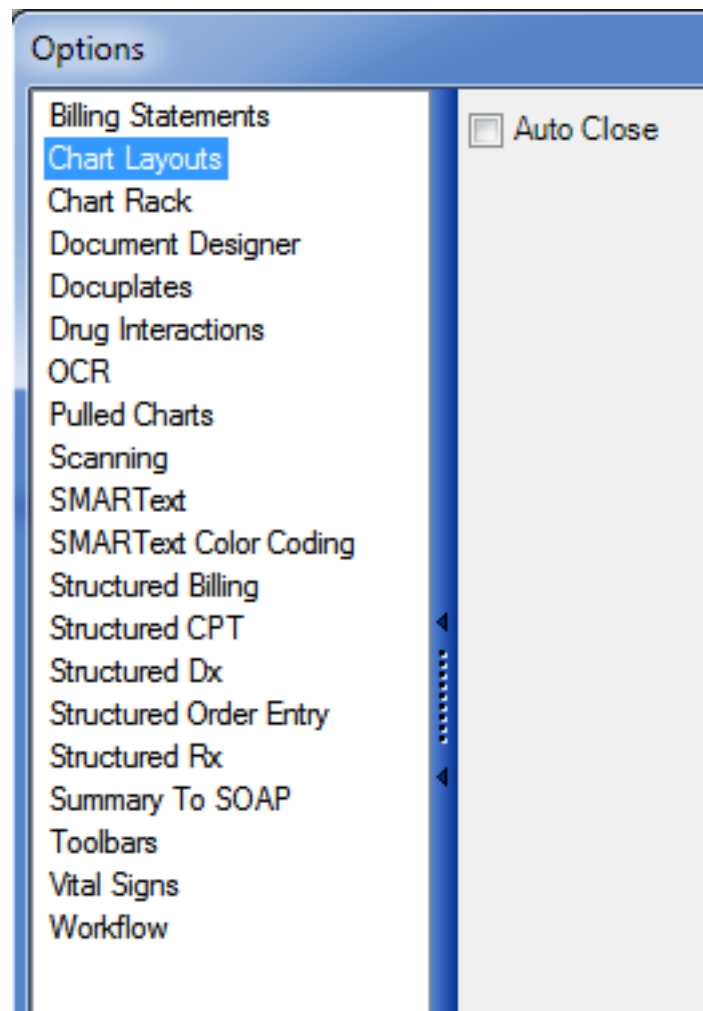
The Billing Statements Option allows the user to designate a default printer when printing CMS 1500 forms, set Accept Assignment to default to Yes or No on claims and the option to use Pre-printed CMS 1500 forms or print the Full CMS form on plain paper.

**Accept Assignment Yes:** When this box is checked, block 27 on the CMS 1500 form will print with a checkmark in the Yes box to accept assignment when sent to a payer. If the box is not checked, a checkmark will print in the No box.

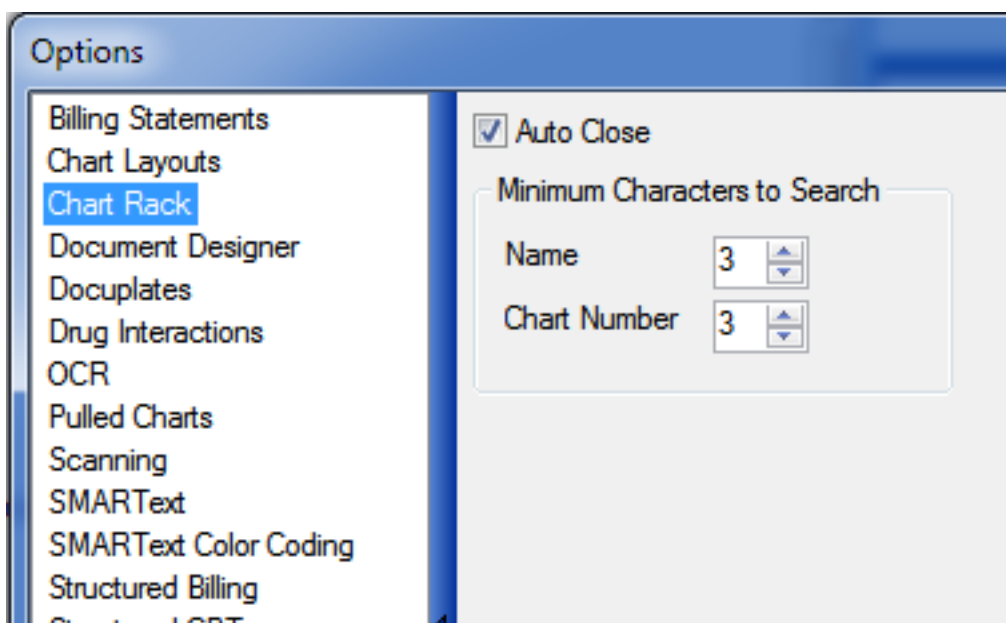
**Print Full CMS Form:** To print both the data and the CMS 1500 form on plain paper, Click to place a checkmark in this box. If using pre-printed CMS 1500 forms, leave the box blank.

**Default Printer:** Use the Drop-down option and Click on a printer from the list to set as a Default printer when printing CMS 1500 forms. Claim forms will always print on the selected printer shown in this field.

## Chart Layouts



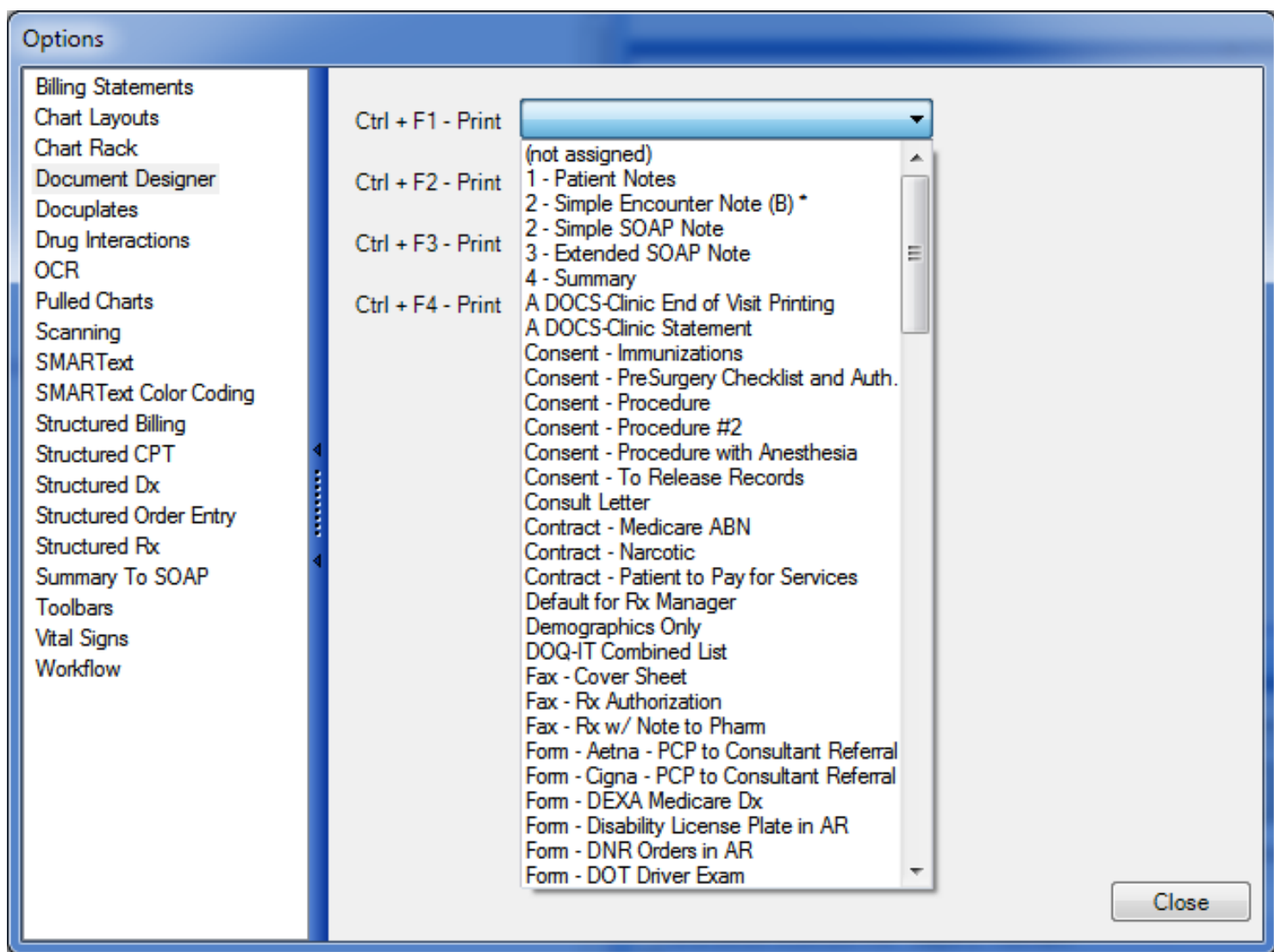
**Auto Close:** If checked, the Chart Layouts display will close as soon as an option is selected. If it is not checked, the window will stay open even after a selection is made. To close, you will have to manually close it.



**Auto Close:** If checked, this option closes the Chart Rack after a patient has been selected.

**Minimum Characters to Search:** These settings determine how many characters you have to type in for matching patients to show up. These settings are applied when searching by Name or Chart Number.

## Document Designer



When in a chart, you can default particular documents to be created off of the active SOAPnote, by using one of the keyboard shortcuts listed. To select a report to be printed when the shortcut key is pressed, use the drop-down box next to the appropriate key. You will be able to set these shortcuts for any document that is setup in Document Designer.

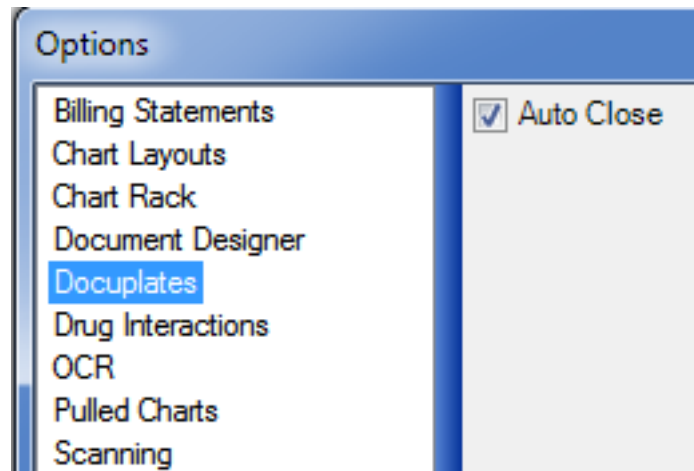
To save time when printing the most commonly used document designs in a practice, it is wise to set up some key-command for quick printing of the 4 most commonly printed documents. The following key-commands can be designated to directly print a document type (i.e. document design) without having to scroll through the print menus.

- \* CTRL + F1
- \* CTRL + F2
- \* CTRL + F3
- \* CTRL + F4



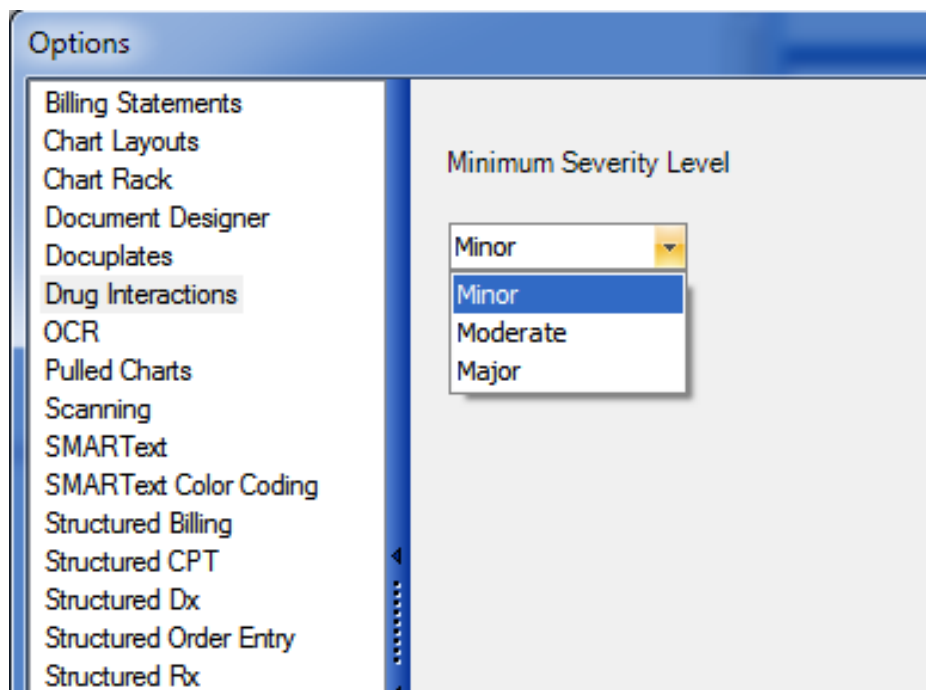
**\*\*IMPORTANT:** Do not set up printing of a prescription as a Quick Print Key Command. Print prescriptions from Rx Manager. This is because printing prescriptions otherwise through the Print option does not store the prescription under the Rx history tab in Rx Manager. By always printing prescriptions from Rx Manager, all of the printed prescriptions are together in one place.

## Docuplates

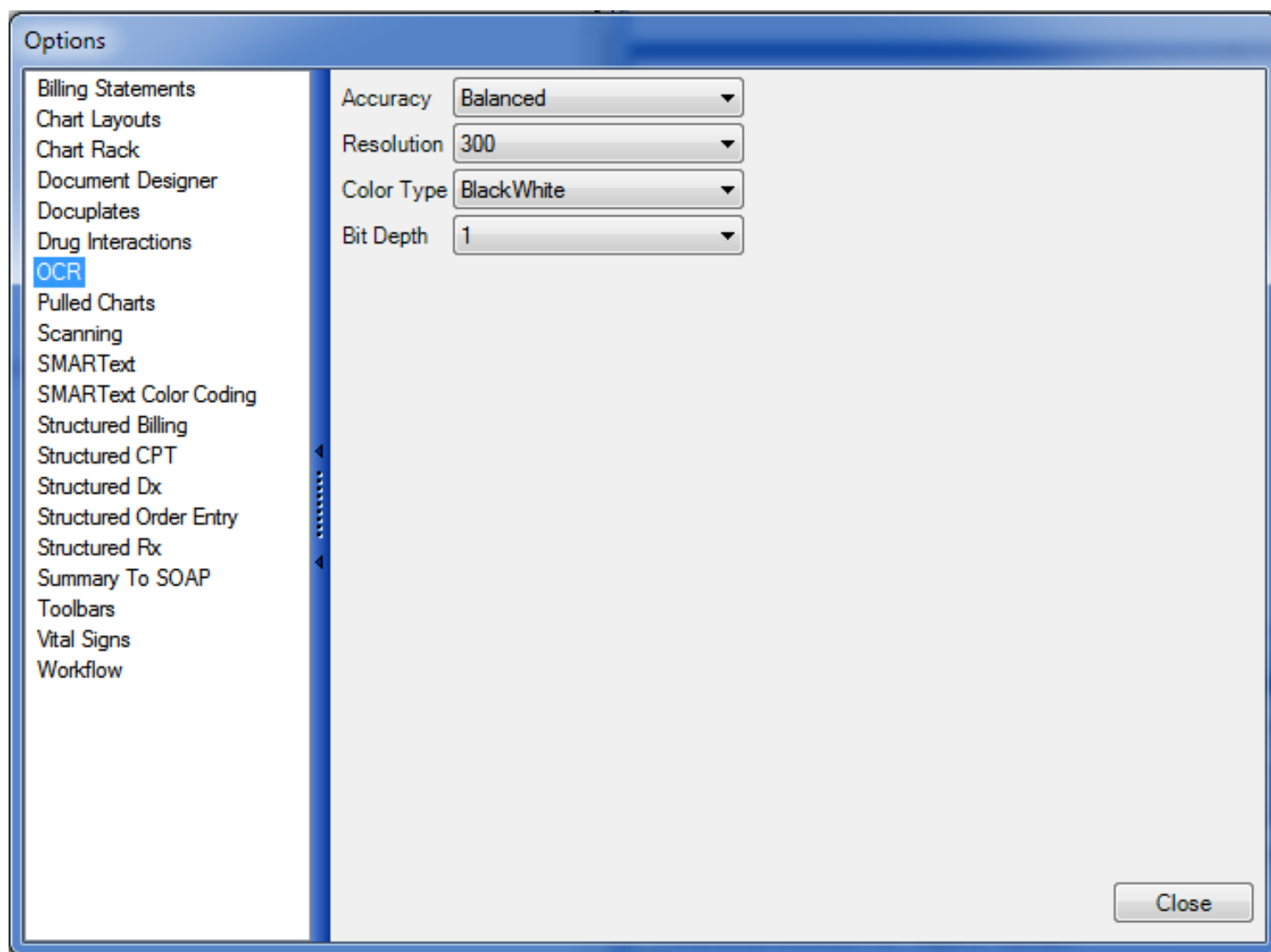


**Auto Close:** Once a Docuplate is selected, the Docuplates window will close. If not checked, the Docuplates window will remain open, even after a selection.

## Drug Interactions



This setting controls the severity level of drug interactions of which you are notified. Your choices are Minor, Moderate and Major. If you only want to be notified of major interactions, you will select that setting. If you select Minor interactions, you will be notified more frequently.



OCR stands for Optical Character Recognition. This feature will convert a scanned image into an editable document. The following settings will affect the manner in which it "reads" your scanned image.

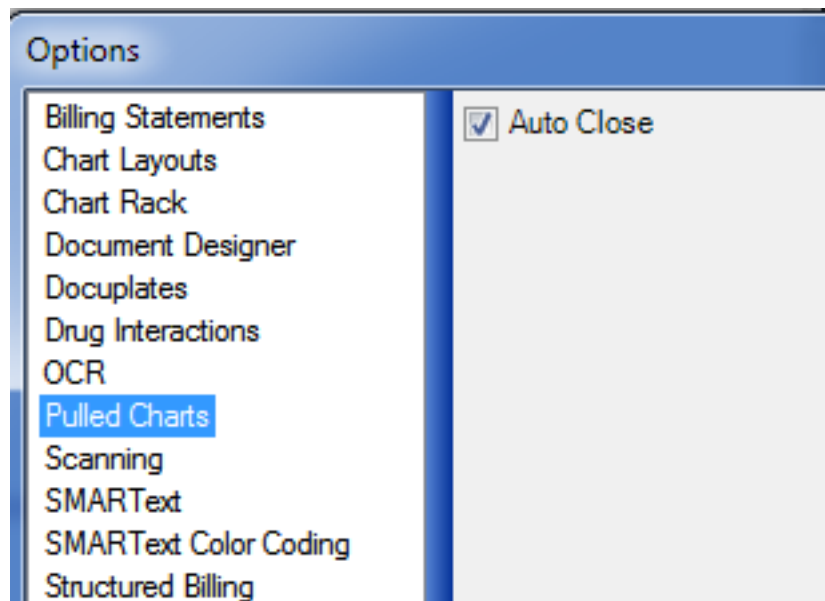
**Accuracy:** Your options are Accurate, Balanced and Fast. If you select Accurate, it will take a longer amount of time to convert your document, but it will be most accurate in its conversion. Balanced will give a decent amount of accuracy and still convert in reasonable amount of time. Fast will lower the accuracy and will do the conversion quickly.

**Resolution:** This controls the dots per inch. The higher the resolution is set, the larger your database will get.

**Color Type:** You will be able to select Black and White, Gray or Color. Black and White will be the most accurate and fastest option. If you want to convert color documents, you certainly can. Both Gray and Color will affect the Bit Depth of the conversion as well.

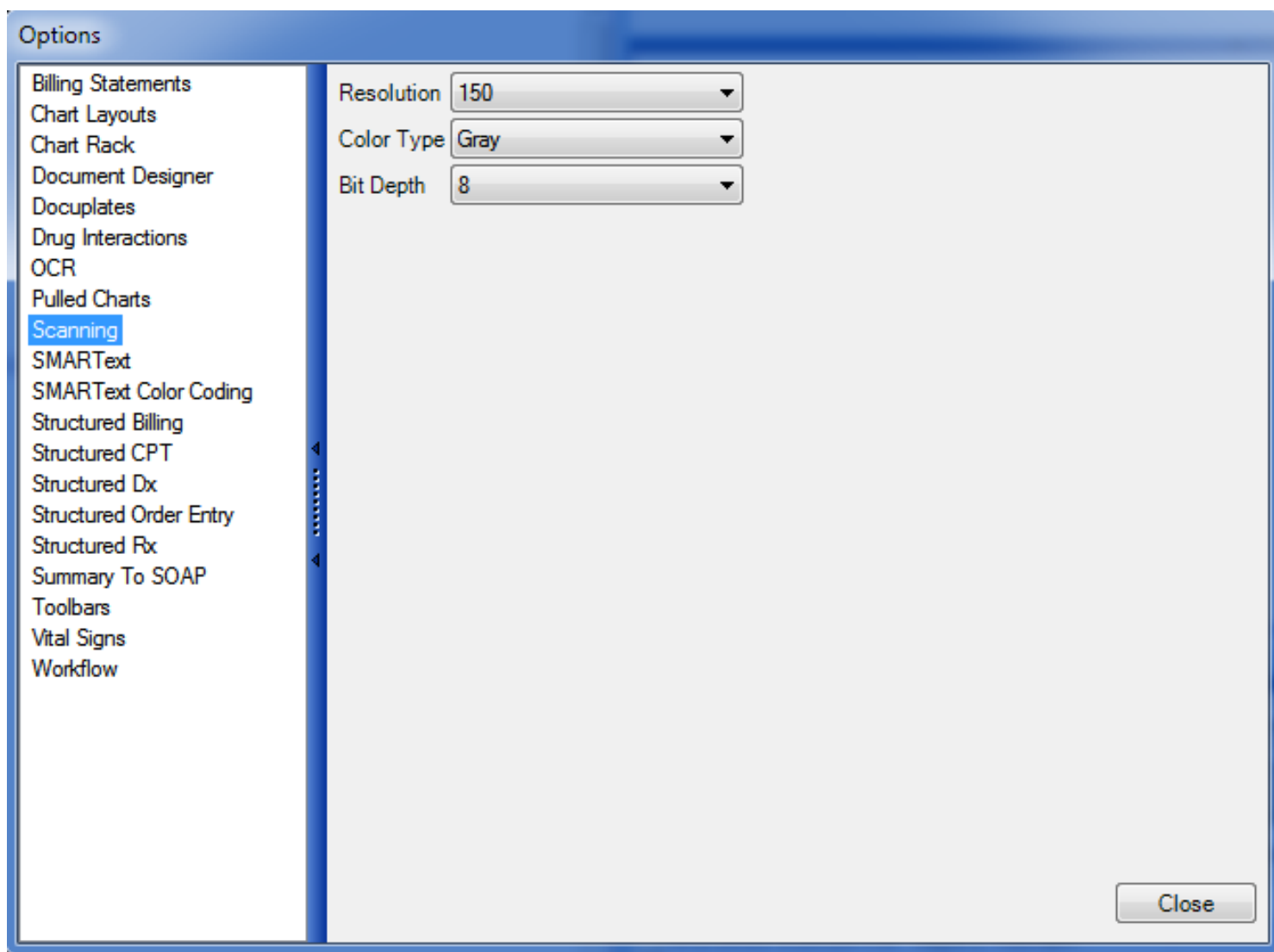
**Bit Depth:** Affects the granularity of the conversion. If you have a Gray or Color type set, the higher the bit depth you select, the clearer the picture will be.

## Pulled Charts



**Auto Close:** If checked, the Pulled Charts dialog will close once a patient is selected from the list.

## Scanning



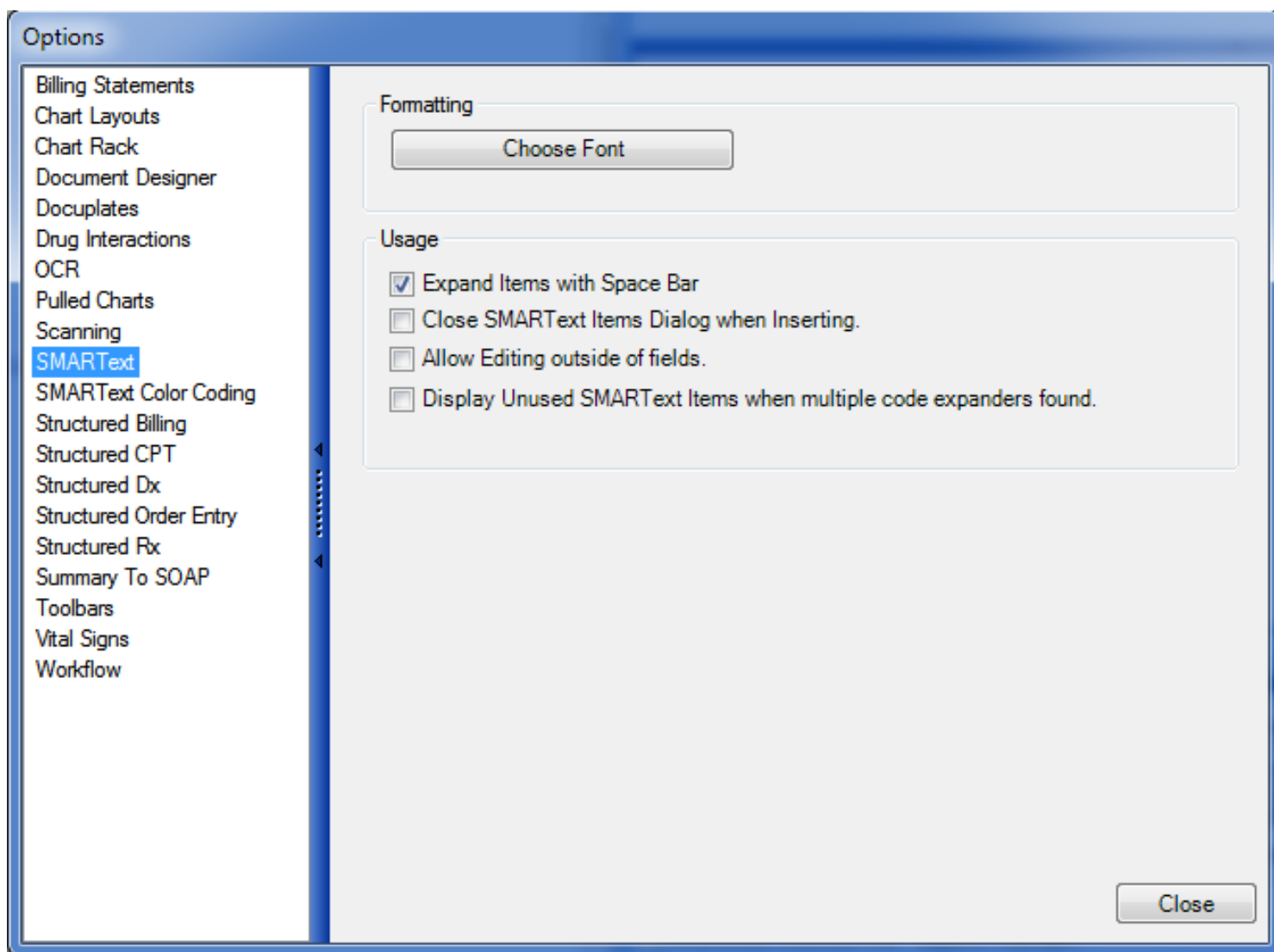
These settings determine the quality of your scanned images. Remember that the higher resolution you set, the clearer the picture, but the slower the scanning time will be.

**Resolution:** This controls the dots per inch. The higher the resolution is set, the larger your database will get.

**Color Type:** You will be able to select Black and White, Gray or Color. Black and White will be the most accurate and fastest option. If you want to convert color documents, you certainly can. Both Gray and Color will affect the Bit Depth of the conversion as well.

**Bit Depth:** Affects the granularity of the conversion. If you have a Gray or Color type set, the higher the bit depth you select, the clearer the picture will be.

## SMARText



This area will allow you to set some specific preferences in regards to how you will use SMARText, in addition to setting the size and look of your SMARText font.

**Choose Font:** Allows you to select the default font for SMARText. After clicking the button, you will be presented with a standard font selection dialog where you can change the font, style and size of the default SMARText font used in SOAPware.

**Note:** The changes will not take effect until after you close and reopen SOAPware and the font changes are not retroactive for previously created document items, it will only change items that are created after the font change.

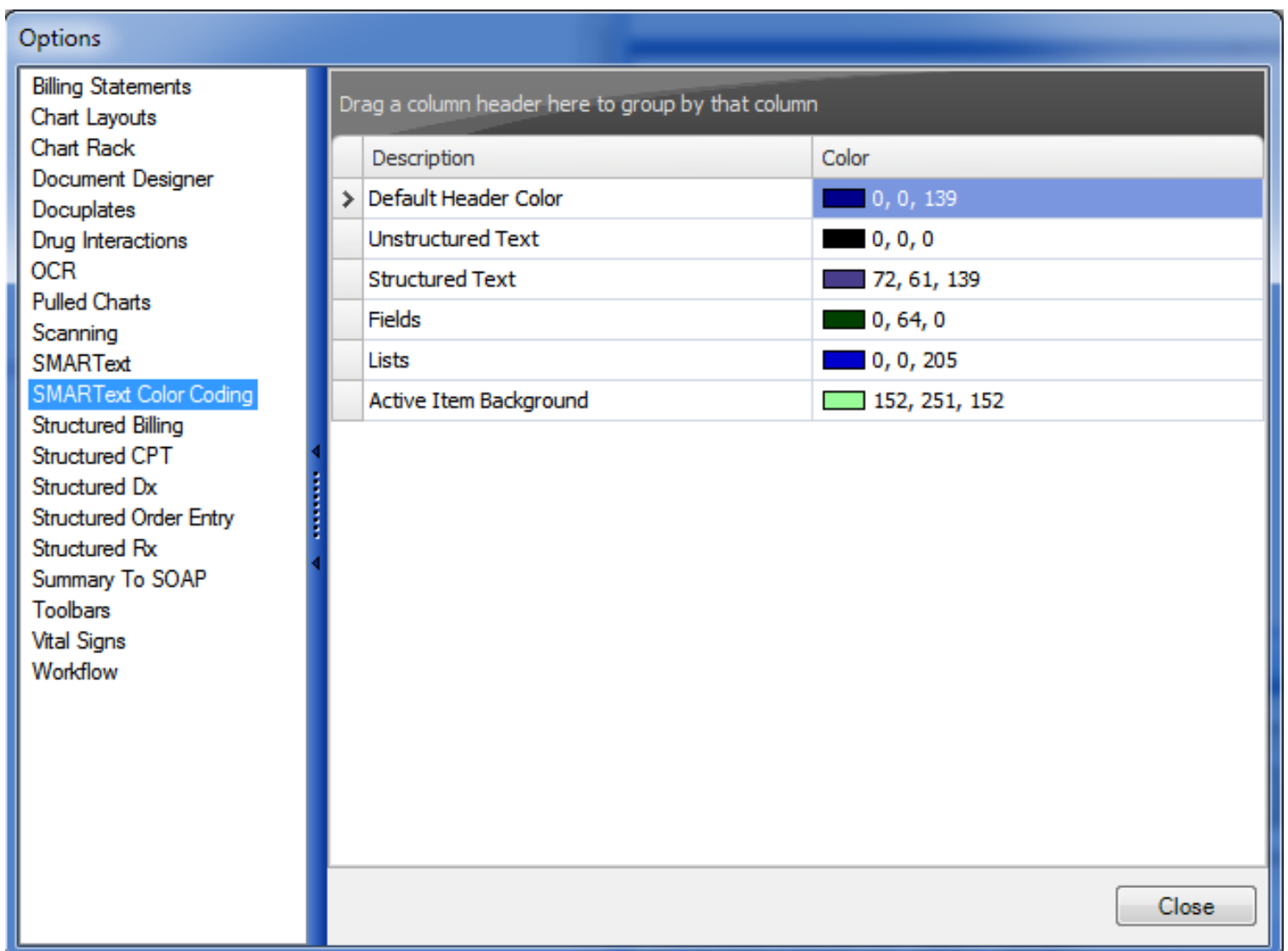
**Expand Items with Space Bar:** Allows you to set whether a SMARText Item expands to full length when you press the space bar. To enable this feature, check the box. To disable this feature, uncheck the box.

**Close SMARText Items Dialog when Inserting:** Allows you to set whether the SMARText Dialog closes after you have placed a SMARText Item into your document. To enable this feature, check the box. To disable this feature, uncheck the box.

**Allow Editing Outside of Fields:** Allows you to set whether text entry is allowed outside the green SMARText brackets in an Encounter Field. To enable text entry outside of these brackets, check the box. To disable text entry outside these brackets, uncheck the box.

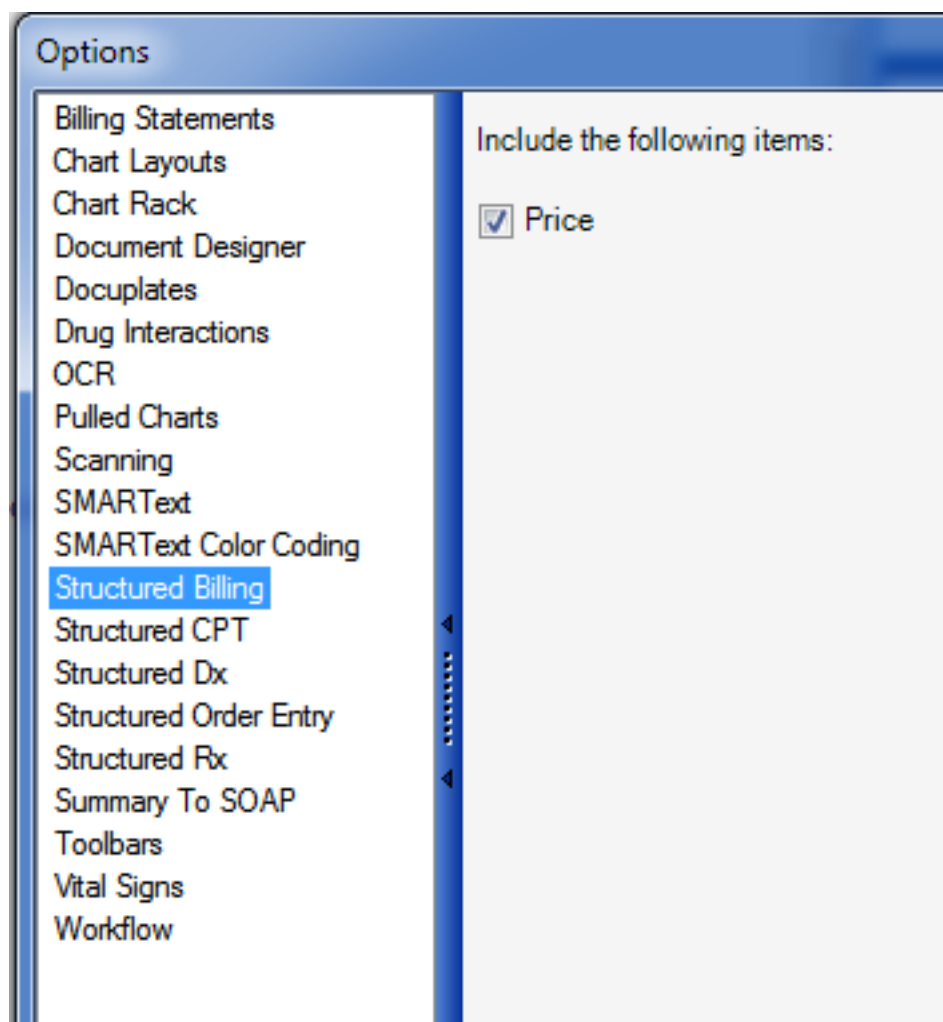
**Display Unused SMARText Items:** Display Unused SMARText Items when multiple code expanders found - allows you to set to show SMARText item sections that you never use. When this setting is off, sections that you never use will be hidden from view.

## SMARText Color Coding



This setting gives you the option to color code different types of SMARText for easy recognition.

## Structured Billing



There are several options that you can set to customize Structured Billing settings for your needs.

## Structured CPT

Options

Billing Statements	Include the following items:
Chart Layouts	
Chart Rack	
Document Designer	
Docuplates	
Drug Interactions	
OCR	
Pulled Charts	
Scanning	
SMARText	
SMARText Color Coding	
Structured Billing	
Structured CPT	
Structured Dx	
Structured Order Entry	
Structured Rx	
Summary To SOAP	
Toolbars	
Vital Signs	
Workflow	

☒ Related Dx  
☒ Modifiers  
☐ Date of Service From  
☐ Date of Service To  
☐ Place of Service  
☐ EPSDT  
☐ Family Plan  
☐ Supplemental  
☐ Days or Units  
☐ Emergency

Close

Select subitems for the structured CPT items which will be inserted in the Plan section of the SOAPnote.



## Structured Dx

Options

Billing Statements  
Chart Layouts  
Chart Rack  
Document Designer  
Docuplates  
Drug Interactions  
OCR  
Pulled Charts  
Scanning  
SMARText  
SMARText Color Coding  
Structured Billing  
Structured CPT  
**Structured Dx**  
Structured Order Entry  
Structured Rx  
Summary To SOAP  
Toolbars  
Vital Signs  
Workflow

Include the following items:

<input checked="" type="checkbox"/> Description	<input type="checkbox"/> Status
<input type="checkbox"/> Lay Term	<input type="checkbox"/> EncounterDates
<input checked="" type="checkbox"/> ICD#	<input type="checkbox"/> Cause
<input type="checkbox"/> Responsible MD	<input type="checkbox"/> Subjective
<input type="checkbox"/> Onset	<input type="checkbox"/> Objective
<input type="checkbox"/> Resolved	<input type="checkbox"/> System
<input type="checkbox"/> Orders	<input type="checkbox"/> Variable
<input type="checkbox"/> Plan	<input type="checkbox"/> Value
<input type="checkbox"/> Problem Number	<input type="checkbox"/> Location
<input type="checkbox"/> Course	<input type="checkbox"/> Extent
<input type="checkbox"/> Recorded	<input type="checkbox"/> Duration
<input type="checkbox"/> Diagnosing MD	<input checked="" type="checkbox"/> Comments
<input type="checkbox"/> Initial Date	

Close

This section determines what items are auto inserted when a structured diagnosis is entered into the chart. Check only the options that you, as a Provider, would likely use and fill out when entering your diagnosis codes for your visits.

**Description:** Technical description for the ICD code

**Lay Term:** An easy-to-understand, non-technical description

**ICD#:** Numeric diagnosis code

**Responsible MD:** The provider responsible for the diagnosis

**Onset:** Provides further detail as to when the particular diagnosis began

**Orders:** Links any associated orders needed for the particular diagnosis code used

**Plan:** Allows a plan to be indicated for the particular diagnosis code

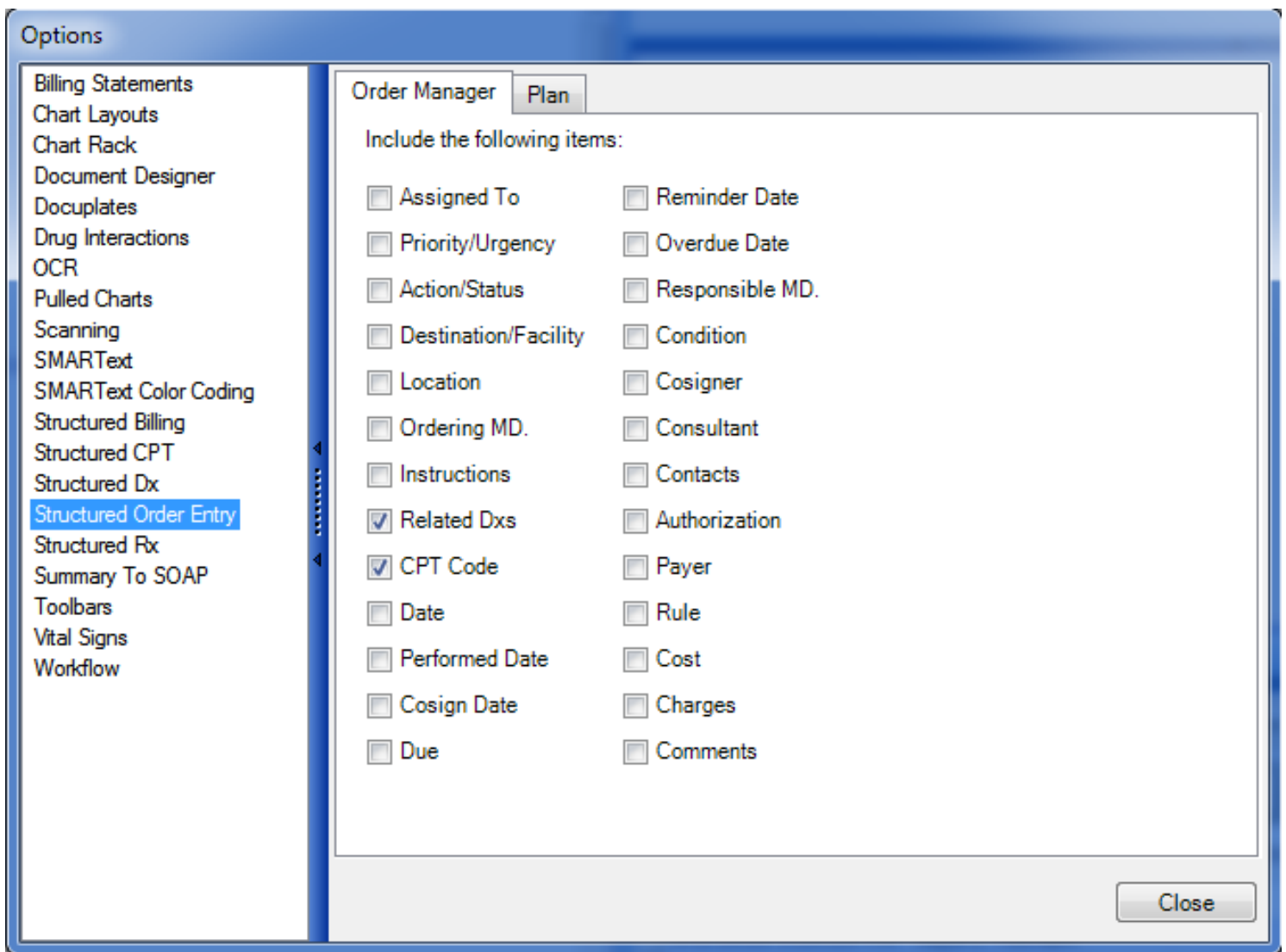
**Problem Number:** Related to E&M Coder calculation

**Course:** Related to E&M Coder calculation

**Initial Date:** Related to E&M coder calculation

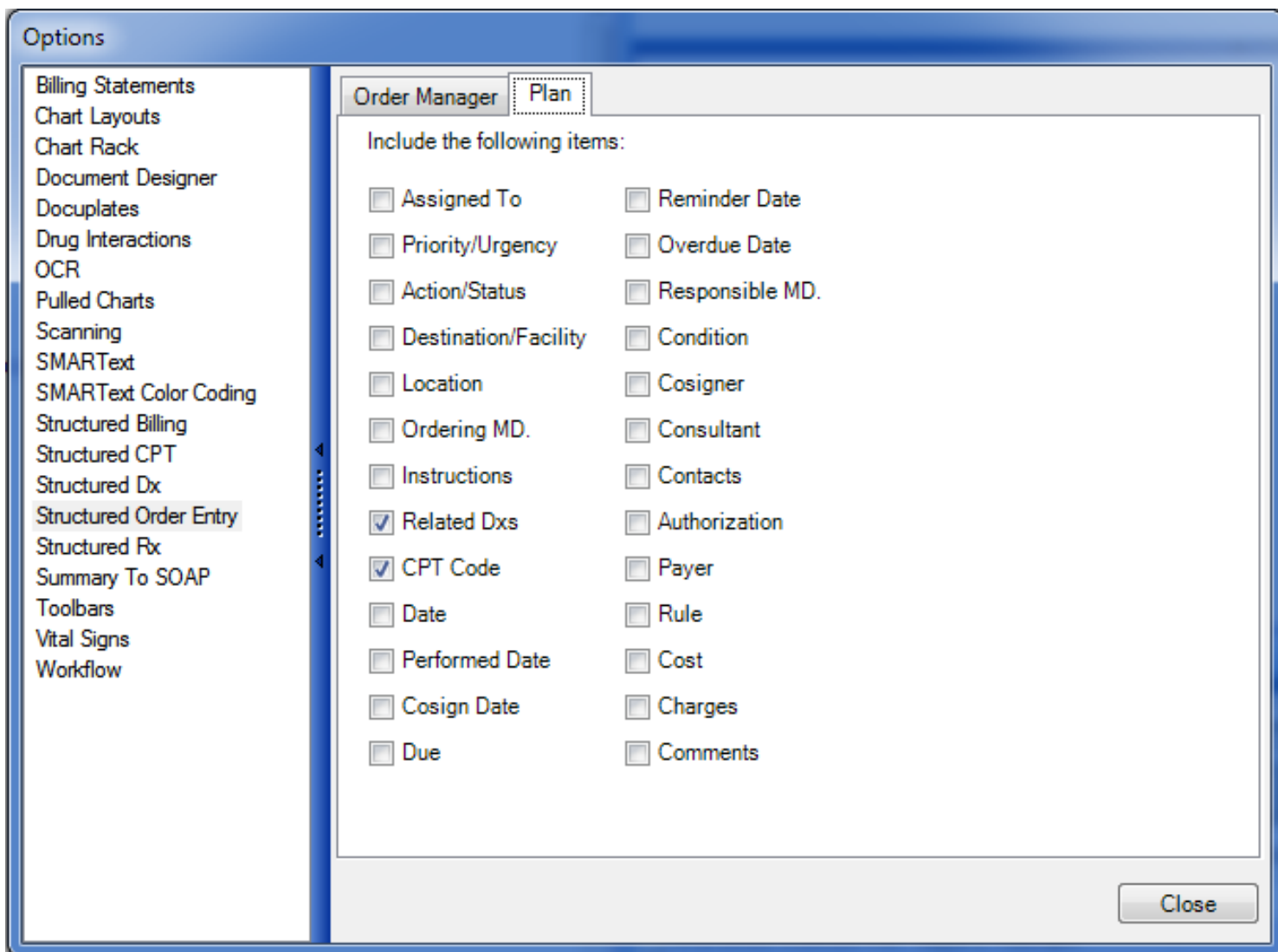
**Comments:** Allows any further details concerning the diagnosis to be entered.

## Structured Order Entry: Order Manager



When orders are displayed in the Order Manager, the sub-items that are checked (see screenshot below) will be displayed in the lower pane of the Order Manager when the order is clicked.

## Plan Options



When orders are transferred to the Plan field via either Order Manager or with the Quick Entry (i.e. F4 method), the sub-items that are checked (see screenshot above) will be displayed.

### List and Explanations of Order Entry Sub-Items

**Assigned To:** Allows for the selection of the SOAPware user to whom the order is assigned. Note that the value selected at this step will be indicated in the Task item associated with the order.

**Priority/Urgency:** Allows for the setting of the priority of the order (e.g. High, Low, Urgent, Normal, etc.). The value selected at this step will be indicated in the Task item associated with the order.

**Action/Status:** Allows for the definition of a particular default status or action for the order (e.g. Signature Needed, Review, Waiting on call-back, etc.). This will be displayed-associated with its Task Item.

**Destination/Facility:** Specifies the facility where the order will be performed. The options provided here are pulled from the Destinations entered from the Docutainers menu, under Order Entry. Defining the Destinations should be a part of initial implementation set-ups.

**Location:** Defines where the patient is located (e.g. exam room, lab, etc.) Define destinations via the Tools > List Options. Alternatively, it define where an order is to be performed.

**Ordering MD:** This is an Order Manager item - By default, the Owner of an order is the Active Provider.

**Instructions:** Provides specific directions or further details pertaining to the order.

**Condition:** Or interpretation (Normal, Abnormal, etc.) Type the condition here (in Order Manager) and an icon is placed in this column in its Task Item. Clicking on the icon will bring up the order in Order Manager.

**Co-signer:** Specifies who will need to co-sign on the order to approve it.

**Consultant:** References consulting clinicians who are associated with the order in some fashion. This links to the Contact Manager.

**Contacts:** References any person, other than consultants, who are associated with the order in some fashion. This links to the Contact Manager.

**Authorization:** This indicates that a particular payer requires prior authorization for the order and procedure(s).

**Payer:** Will be implemented in a later version.

**Rule:** Will be implemented in a later version.

**Cost:** Will be implemented in a later version.

**Charges:** Will be implemented in a later version.

**Comments:** Allows additional information or details to be entered.

Note that there are some Order Entry sub-items that are not typically included as sub-items in the Order Entry items themselves. These items are accessed in the Order Manager, except for the CPT code.

**Related Dxs** - Allows the order to be associated with a diagnosis in the Assessment field.

**CPT Code** - This is defined in the Codes/Notes area of the Order Entry item.

**Date** - Defines when the order was placed-executed or entered into chart.

**Performed Date** - Defines when order was actually performed.

**Co-sign Date** - Defines when the order was co-signed by another clinician.

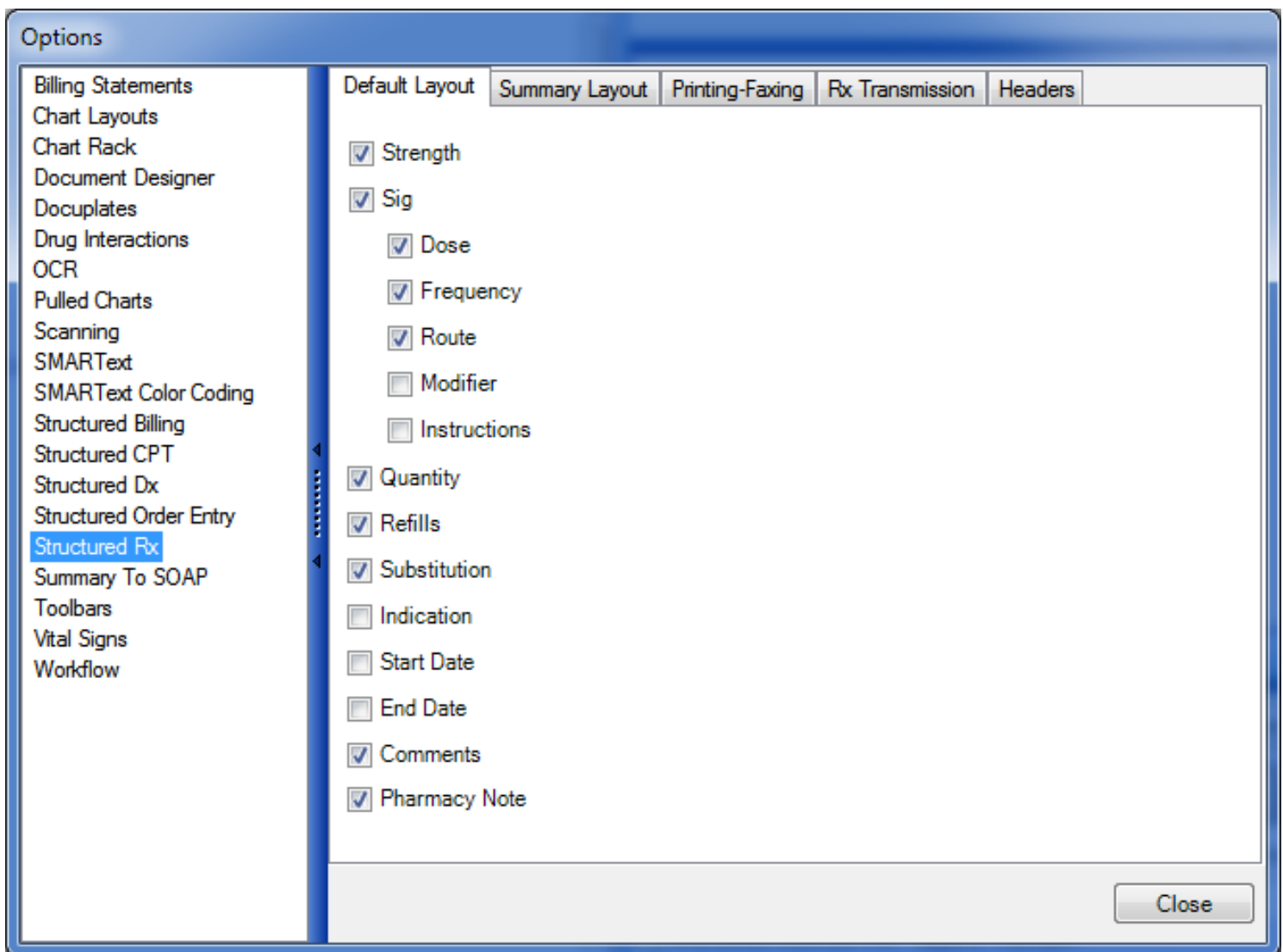
**Due** - Defines when an order is considered as due, or when it should have been completed.

**Reminder Date** - The Reminder Date is just that. It is an alert sent to the physician responsible for the order.

**Overdue Date** - The Overdue Date will eventually be able to trigger a message to be sent to an administrator or medical director. This function is not currently available, but will be added in a future release.

**Responsible MD** - This is the clinician who is ultimately responsible and who oversees the order.

## Structured Rx - Default Layout



**Default Layout:** This section of Options allows you to select what fields are included when entering a Structured Prescription.

The Default choices affect the Structured Prescription as it appears in the SOAPnote. Select the boxes of the items that you feel that you would fill out and use when prescribing a medication.

## Summary Layout

The screenshot shows the 'Options' dialog box with the 'Summary Layout' tab selected. The left pane lists various options, and the right pane shows checkboxes for fields to include in the summary layout.

Options	Default Layout	Summary Layout	Printing-Faxing	Rx Transmission	Headers
Billing Statements	<input checked="" type="checkbox"/> Strength				
Chart Layouts	<input checked="" type="checkbox"/> Sig				
Chart Rack	<input checked="" type="checkbox"/> Dose				
Document Designer	<input checked="" type="checkbox"/> Frequency				
Docuplates	<input type="checkbox"/> Route				
Drug Interactions	<input type="checkbox"/> Modifier				
OCR	<input type="checkbox"/> Instructions				
Pulled Charts	<input type="checkbox"/> Quantity				
Scanning	<input type="checkbox"/> Refills				
SMARText	<input type="checkbox"/> Substitution				
SMARText Color Coding	<input type="checkbox"/> Indication				
Structured Billing	<input type="checkbox"/> Start Date				
Structured CPT	<input type="checkbox"/> End Date				
Structured Dx	<input type="checkbox"/> Comments				
Structured Order Entry	<input type="checkbox"/> Pharmacy Note				
Structured Rx					
Summary To SOAP					
Toolbars					
Vital Signs					
Workflow					

Close

The Summary Medications Field choices affect the Structured Prescription as it appears in the summary or when transferred to the Summary via SOAP to Summary, Drag and Drop, etc.

## Printing-Faxing

The screenshot shows a software window titled "Options". On the left is a vertical list of menu items: Billing Statements, Chart Layouts, Chart Rack, Document Designer, Docuplates, Drug Interactions, OCR, Pulled Charts, Scanning, SMARText, SMARText Color Coding, Structured Billing, Structured CPT, Structured Dx, Structured Order Entry, Structured Rx (highlighted), Summary To SOAP, Toolbars, Vital Signs, and Workflow. To the right of this list are five tabs: Default Layout, Summary Layout, Printing-Faxing (active), Rx Transmission, and Headers. The "Printing-Faxing" tab contains two settings: "Printing" and "Faxing", each with a dropdown menu currently showing "Rx/Fax - Alone\*". A "Close" button is located in the bottom right corner of the dialog.

Printing-Faxing settings determine what document design is printed when you print or fax a prescription. To set up these reports, see: [Document Designer](#)



## Rx Transmission

**MU**

- Chart Rack
- Document Designer
- Docuplates
- Drug Interactions
- OCR
- Pulled Charts
- Scanning
- SMARText
- SMARText Color Coding
- Structured Billing
- Structured CPT
- Structured Dx
- Structured Order Entry
- Structured Rx
- Summary To SOAP
- Toolbars
- Vital Signs
- Workflow

Default Layout Summary Layout Printing-Faxing **Rx Transmission** Headers

Transmit Via

Default	eRx
Schedule II	Fax and Print
Schedule III	Print
Schedule IV	Print
Schedule V	Print

Close

Rx Transmission is the default settings for how prescriptions submit from Rx Manager.

**\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - EPRESCRIBING FOR 40% OF PERMISSIBLE SCRIPTS**

[Click here to view Meaningful Use Criteria](#)

## Headers

Options

Billing Statements  
Chart Layouts  
Chart Rack  
Document Designer  
Docuplates  
Drug Interactions  
OCR  
Pulled Charts  
Scanning  
SMARText  
SMARText Color Coding  
Structured Billing  
Structured CPT  
Structured Dx  
Structured Order Entry  
Structured Rx  
Summary To SOAP  
Toolbars  
Vital Signs  
Workflow

Default Layout Summary Layout Printing-Faxing Rx Transmission Headers

Item Headers

<input checked="" type="checkbox"/> Visible only when empty.	Strength Header	Strength-
	Sig Header	SIG-
<input checked="" type="checkbox"/> Visible only when empty.	Dose Header	Dose-
<input checked="" type="checkbox"/> Visible only when empty.	Frequency Header	Freq-
<input checked="" type="checkbox"/> Visible only when empty.	Route Header	Route-
<input type="checkbox"/> Visible only when empty.	Modifier Header	Modifier-
<input type="checkbox"/> Visible only when empty.	Instructions Header	Instructions-
<input checked="" type="checkbox"/> Visible only when empty.	Dispense Header	Dispense-
	Refills Header	Refills-
<input checked="" type="checkbox"/> Visible only when empty.	Substitutions Header	Substitutions-
<input type="checkbox"/> Visible only when empty.	Indication Header	Related Dxs-
<input type="checkbox"/> Visible only when empty.	Start Date Header	Start Date-
<input type="checkbox"/> Visible only when empty.	End Date Header	End Date-
<input checked="" type="checkbox"/> Visible only when empty.	Note Header	Notes-

Rx Layout

☒ Single Line  
☐ 4 - Lines

☒ Separate with blank lines

Substitutions Denied Wording

Substitutions Not Allowed

Close

**Item Headers:** Allows you to choose which headers are visible and which headers are only visible when they are empty.

### Rx Layout:

**Single Line:** This setting displays medications on a single line but medications may wrap to the screen due to space limitations.

**4 - Lines:** This setting splits up medications into three lines and makes them easier to read.

**Separate with blank Lines:** This setting separates medications with blank lines.

**Substitutions Denied Wording:** This box allows you to enter custom text that will be used when you choose to deny substitutions in a prescription. To change the text, replace the default wording with one of your choosing by typing it into the box.

## Summary to SOAP

Options

Billing Statements  
Chart Layouts  
Chart Rack  
Document Designer  
Docuplates  
Drug Interactions  
OCR  
Pulled Charts  
Scanning  
SMARText  
SMARText Color Coding  
Structured Billing  
Structured CPT  
Structured Dx  
Structured Order Entry  
Structured Rx  
**Summary To SOAP**  
Toolbars  
Vital Signs  
Workflow

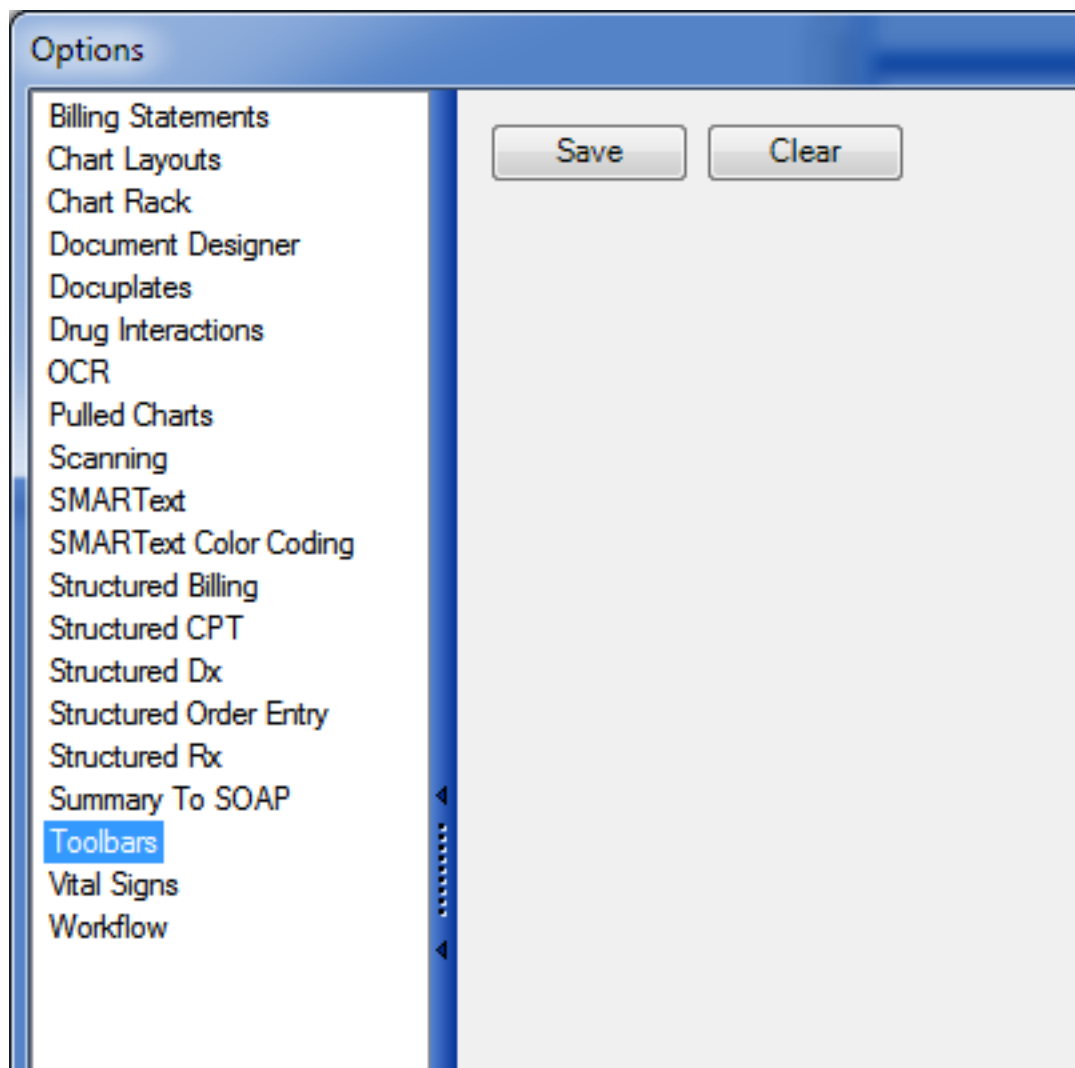
Drag a column header here to group by that column

	Summary Field	Header	Position	Destination
>	Active Problems		1	Assessment
	Inactive Problems		1	Don't Move
	Surgeries		1	Don't Move
	Medications		1	Medications
	Allergies		1	Don't Move
	Family History		1	Don't Move
	Tobacco		1	Don't Move
	Alcohol		1	Don't Move
	Interventions		1	Don't Move
	Social History		1	Don't Move
	ROS		1	Don't Move
	Physical		1	Objective

Close

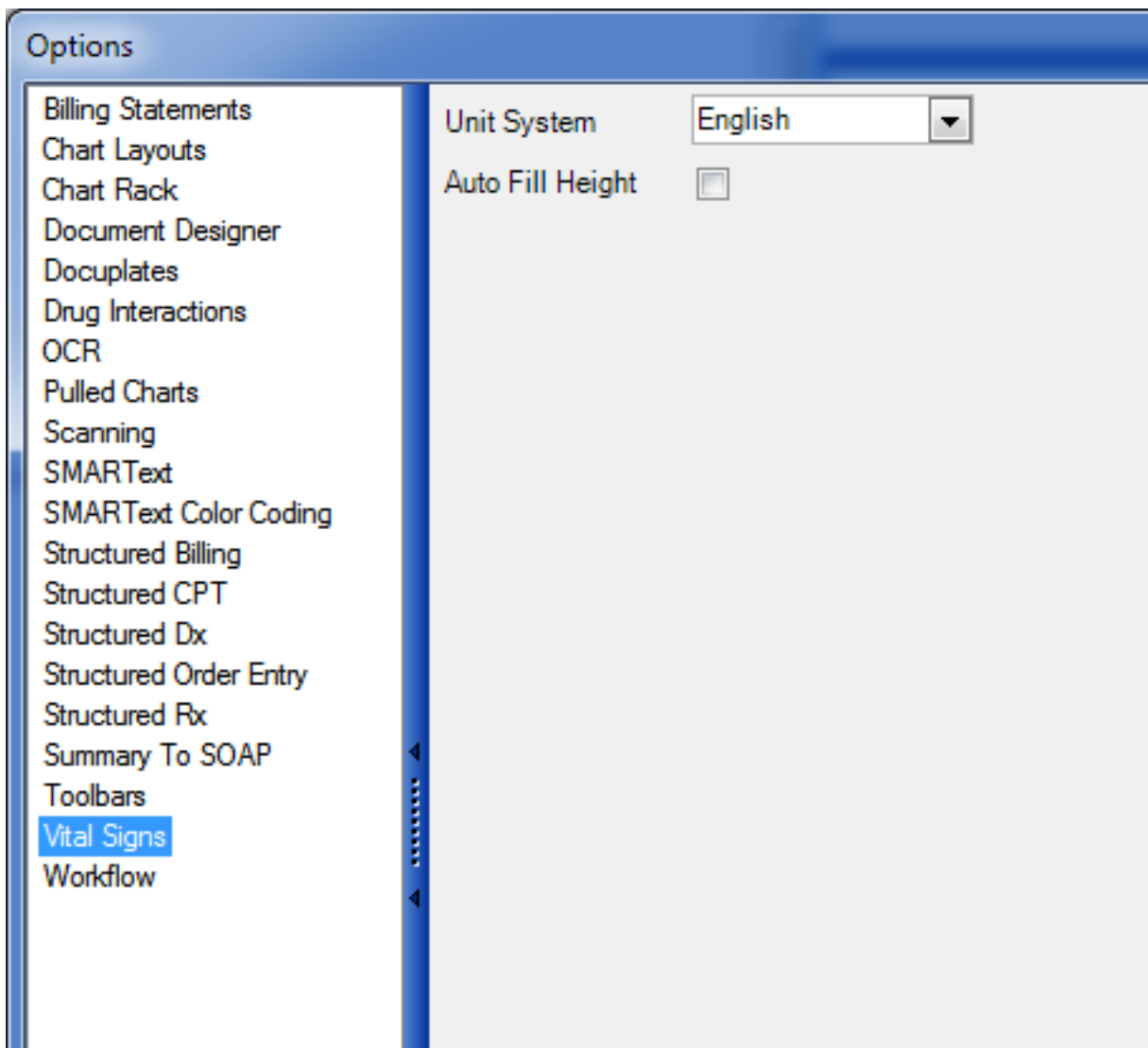
Allows for pulling over information under any field header in the Summary section to any area in the SOAPnote.

## Toolbars



This box will save customizations made to toolbars. The option is also made available if you would like to clear out your toolbars and revert to what was defaulted with the system originally.

## Vital Signs



**Unit System:** Allows you to determine whether your units for your Vital Signs are English or Metric.

**Auto Fill Height:** Allows the patient's height to be auto filled from the previous vital reading. Useful in clinics where your patient's heights don't frequently change.

## Workflow

Options

- Billing Statements
- Chart Layouts
- Chart Rack
- Document Designer
- Docuplates
- Drug Interactions
- OCR
- Pulled Charts
- Scanning
- SMARText
- SMARText Color Coding
- Structured Billing
- Structured CPT
- Structured Dx
- Structured Order Entry
- Structured Rx
- Summary To SOAP
- Toolbars
- Vital Signs
- Workflow**

☐ Auto Summary to SOAP

☒ Create Report Tasks

On Patient Close Show Tasks ▼

☐ Expand Docked Display on mouse over.

Close

**Auto Summary to SOAP:** Checking this box will automatically pull your Summary findings into every new SOAPnote created.

It moves the Summary Physical section to the Encounter/SOAPnote Objective section, the Summary Active Problems section to the SOAPnote Assessment section, and the Summary Medications section to the SOAPnote Medications Section.

**Create Report Tasks:** If this box is checked, anytime a SOAPnote is created, you will be able to report an associated task.

**On Patient Close Show:** Any time a patient's chart is closed, you can select what you would like to happen at that time. You can opt to have the Pulled Charts window, Chart Rack window or the Tasks window to pop up upon the close. You can also choose for the system to do nothing upon a chart close.

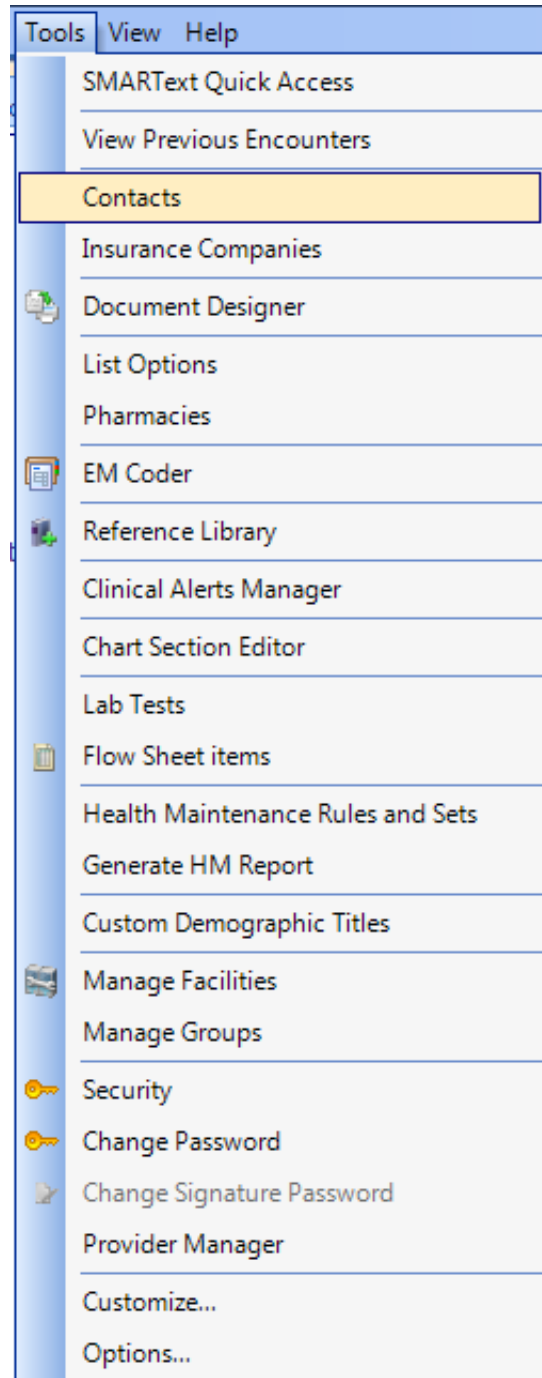
**Expand Docked Display on mouse over:** Docked displays can be set to either auto expand when your mouse hovers over the tab or it can be set to require a Click before expanding. By default, the tabs are set to require a Click. That is, you have to Click on the tab before the panel will slide out.

## Contacts

---

SOAPware can maintain a list of frequently used contacts along with their basic demographic information. SOAPware's document designs can then pull this information to create personalized documents such as referral letters. The contact list is also used to maintain frequently used names and addresses. In this fashion it functions much as a Rolodex.

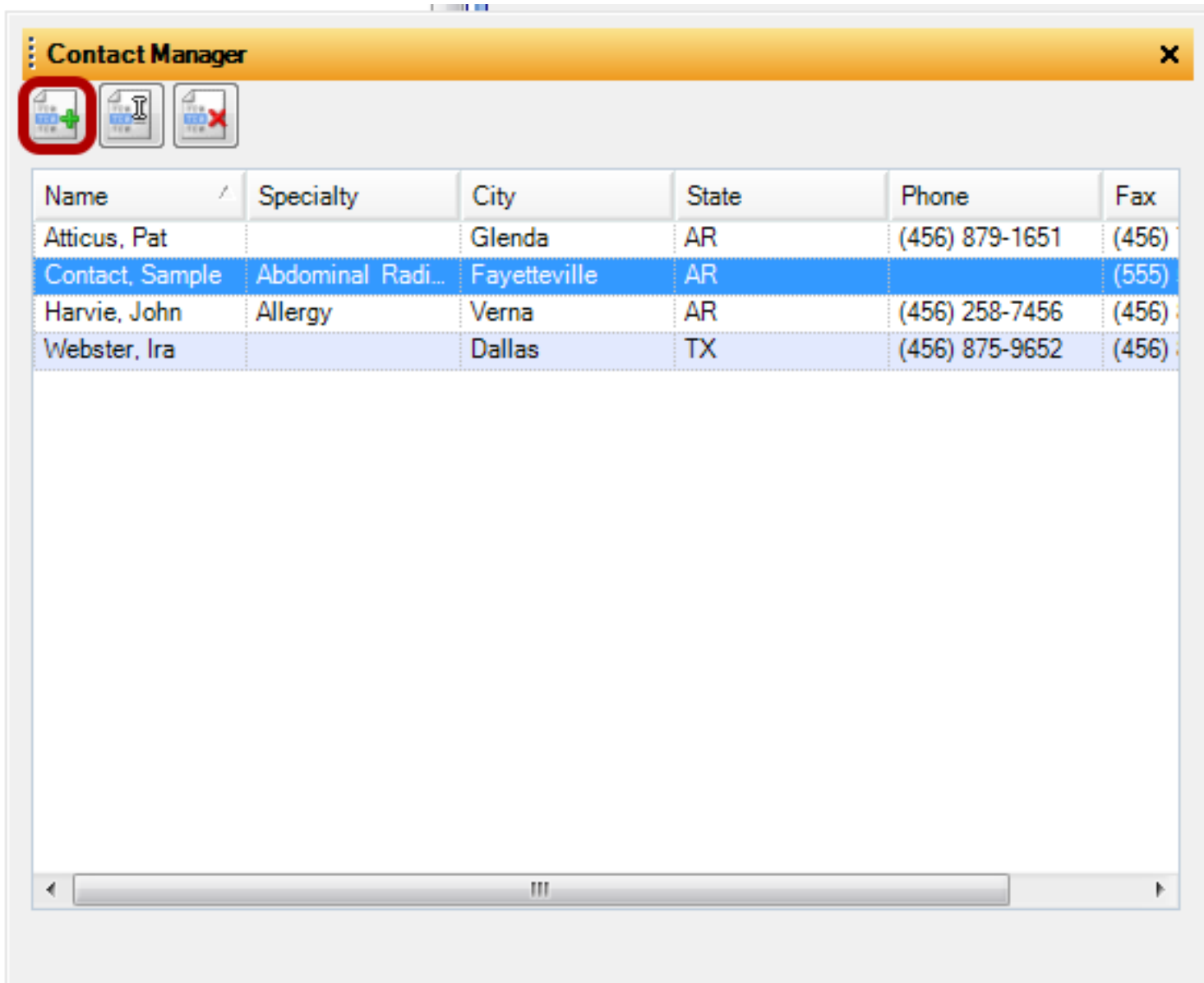
### Opening Contact Manager



Click Tools in the menu bar, and Click the Contact Manager menu item.



## Adding Contacts

The image shows the 'Contact Manager' dialog box in SOAPware 2010. It has a yellow title bar with the text 'Contact Manager' and a close button (X). Below the title bar are three icons: a document with a green plus sign (Add), a document with a pencil (Edit), and a document with a red X (Delete). The main area contains a table with six columns: Name, Specialty, City, State, Phone, and Fax. The table has four rows of data. The second row, 'Contact, Sample', is highlighted in blue. At the bottom of the dialog is a horizontal scrollbar.

Name	Specialty	City	State	Phone	Fax
Atticus, Pat		Glenda	AR	(456) 879-1651	(456)
Contact, Sample	Abdominal Radi...	Fayetteville	AR		(555)
Harvie, John	Allergy	Verna	AR	(456) 258-7456	(456)
Webster, Ira		Dallas	TX	(456) 875-9652	(456)

The SOAPware 2010 Contact Manager dialog has an added Insurance Information section, allowing Insurance-assigned legacy number entry in addition to the NPI number. The contact name will print in box 17 on the CMS 1500 claim form when listed as the Referring Provider in the general Demographics section of a patient chart. The NPI number typed here will print in box 17b on the CMS 1500 form and the legacy number will print in box 17a.

To add a contact, Click the Add button in the Contact Manager viewer.

## New Contact

**New Contact**

Title First Name Middle Last Name Suffix

Address Notes

City St Zip Code

Office Phone Home Phone Cell Phone

Fax Pager

Email

Website

**Provider Information**

NPI UPIN Specialty

**Insurance Information**

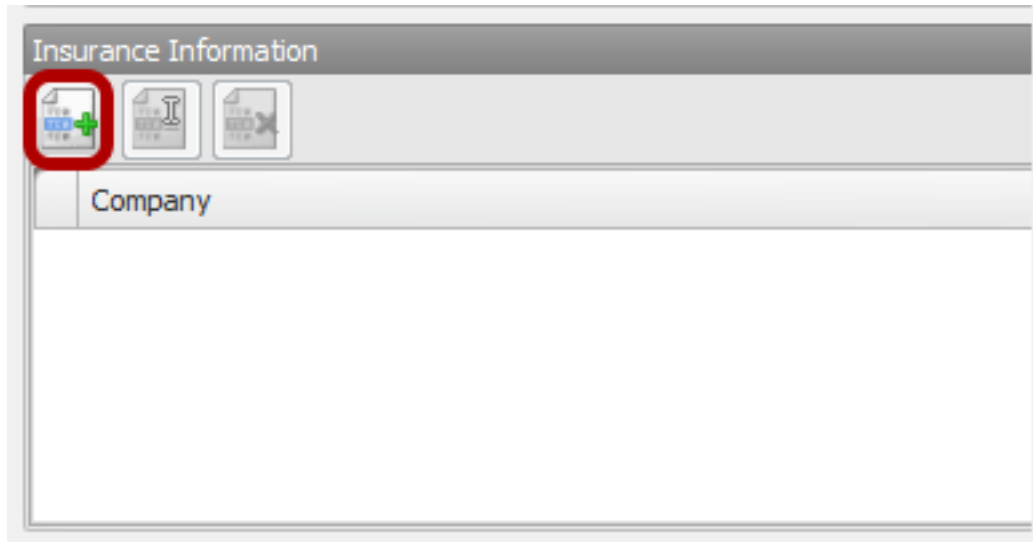
Company

OK Cancel

This displays the New Contact dialog as seen in the above screenshot. Complete the New Contact information and the Provider Information section for Insurance filing purposes. The UPIN field next to the NPI entry is being phased out and in current versions of SOAPware 2010, the field will be grayed

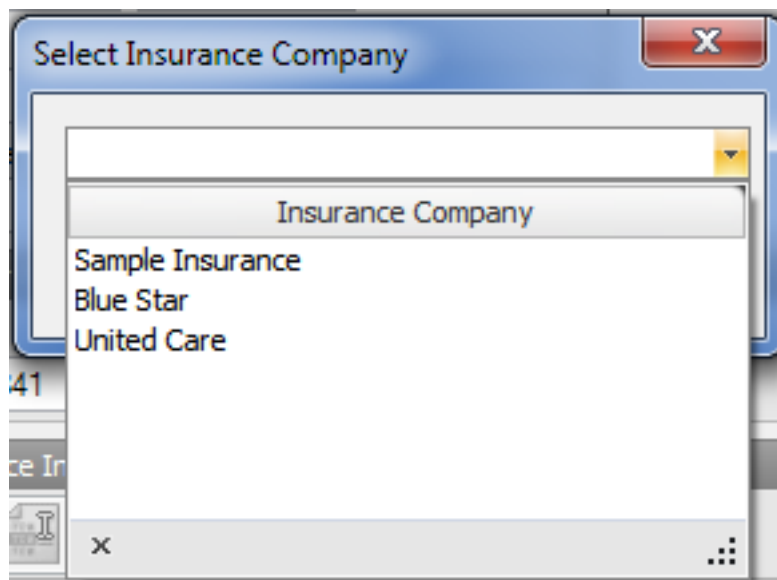
out. If the UPIN is still required by certain Insurance companies, the number can be typed in the Legacy number field as instructed in the ID Number step below.

## Insurance Mapping



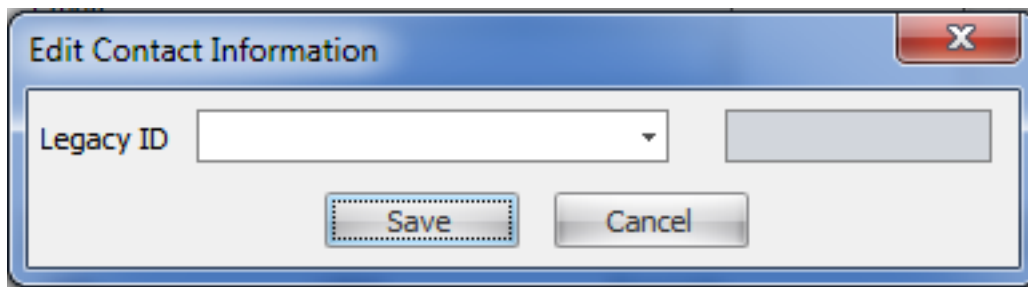
Click the New Insurance Mapping button in the Insurance Information section. The Select Insurance Company dialog displays.

## Insurance Company Manager



Click the Drop-down menu to display a list of insurance companies from the Insurance Company Manager.

## ID Number



The image shows a software dialog box titled "Edit Contact Information". It features a standard Windows-style title bar with a close button (X) in the top right corner. The main content area contains a label "Legacy ID" positioned to the left of a drop-down menu and a text input field. Below these fields are two buttons: "Save" and "Cancel".

Click the Drop-down button to display the list of different types of legacy numbers, followed by the legacy number ID Qualifier. Type the contact/Referring Provider Medicare legacy number and Click Save.

## Updating/Editing Contacts

**Contact Manager**

Name	Specialty
Atticus, Pat	
Contact, Sample	Abdominal Radi...
Harvie, John	Allergy
Webster, Ira	

**Edit Contact Information**

Title: | First Name: John Middle: Last Name: Harvie Suffix: |

Address: 1254 Red Oak

City: Verna St: AR Zip Code: 45621-

Office Phone: (456) 258-7456 Home Phone: ( ) - Cell Phone: ( ) -

Fax: (456) 879-5236 Pager: ( ) -

Email:

Website:

Notes:

**Provider Information**

NPI: 2459841 UPIN: Specialty: Allergy

**Insurance Information**

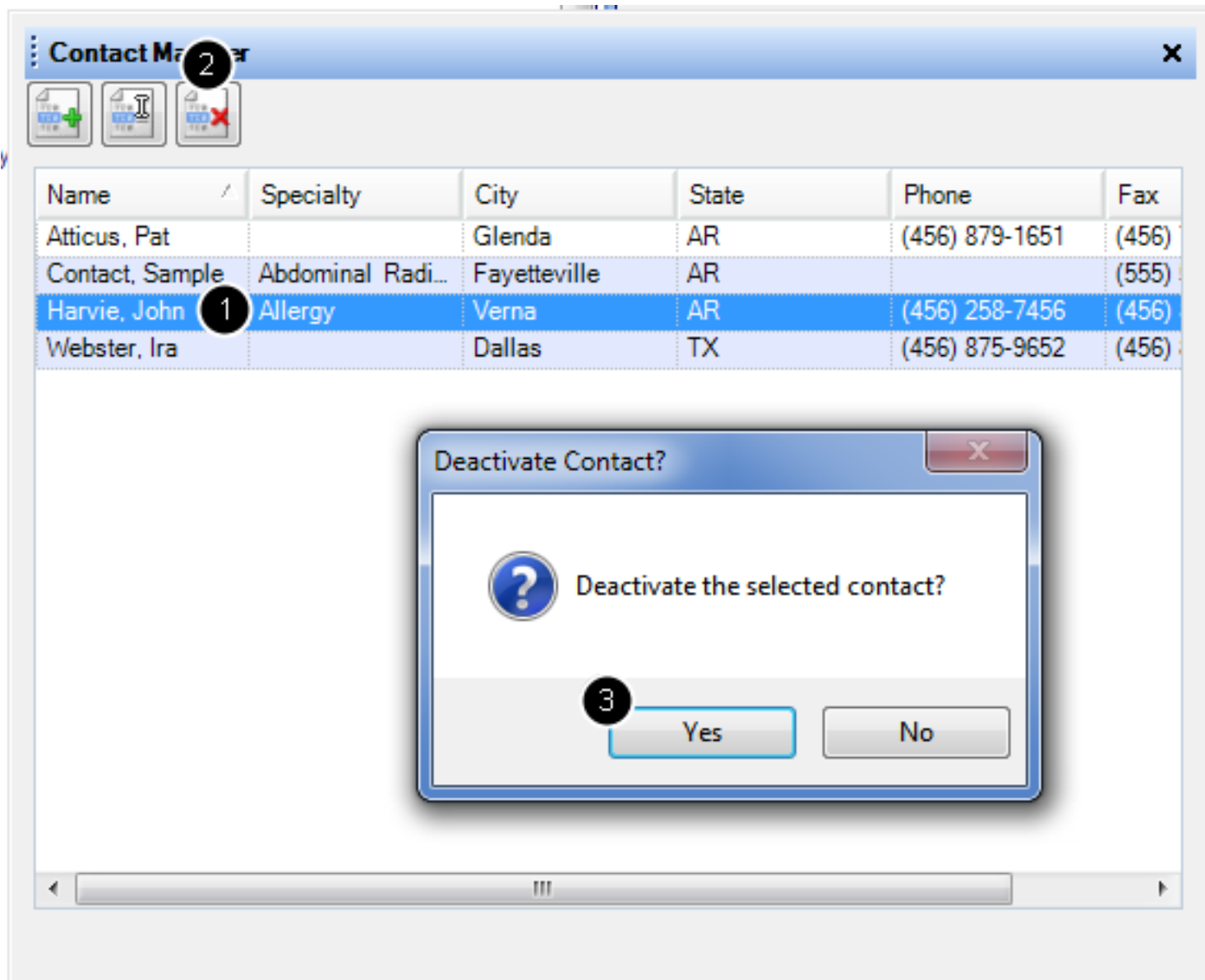
Company: United Care

OK Cancel

1. Click a Contact list item to select-highlight.
2. Click the Edit button.
3. Perform edits.

4. Click the OK button to save, or Click the Cancel button and return to the Contact Manager viewer.

## Removing Contact



1. Click a Contact list item to select-highlight.

2. Click the Remove button.

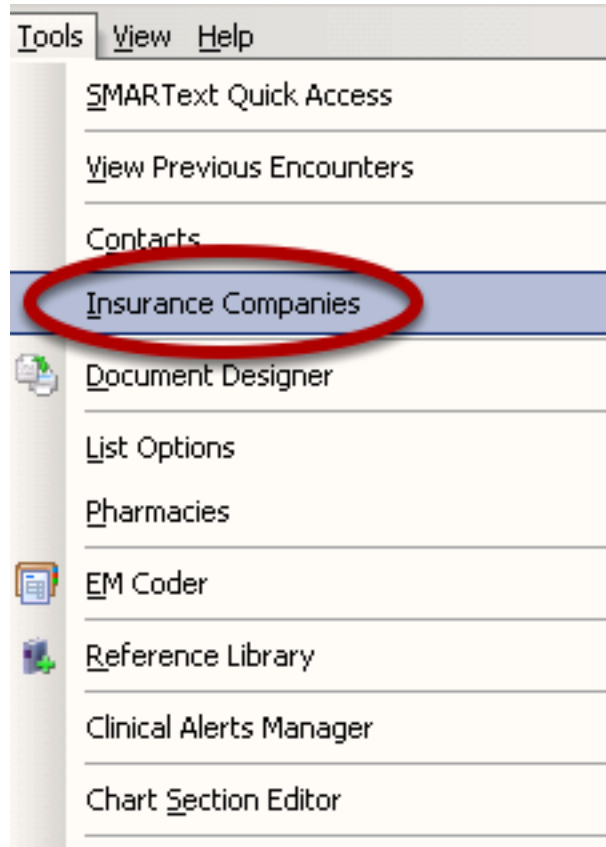
3. Click the Yes button when asked to verify the deactivation. Click Cancel to return to the Contact Manager viewer.

## Insurance Company Manager

---

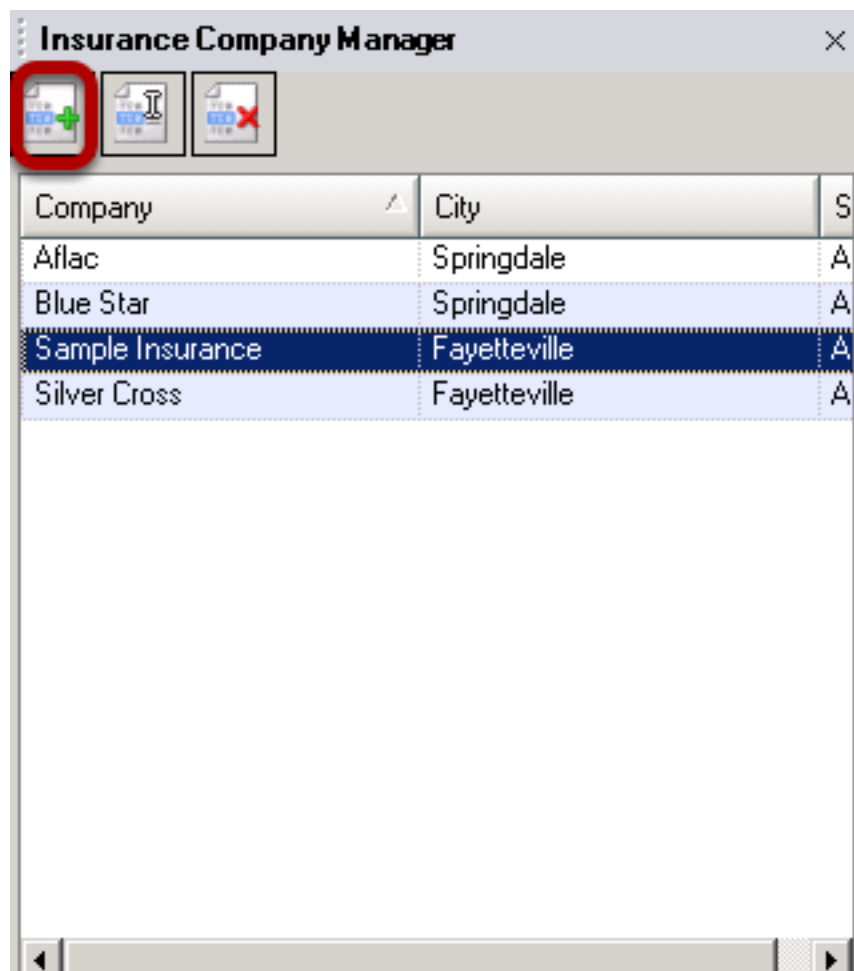
Adding Insurance Companies for the Drop list will be created with this tool. You will fill in the appropriate information for the Insurance Company.

### Insurance Company Manager



Insurance Company Manager to build Insurance Company demographics is accessible by going to Tools and clicking on Insurance Companies.

## Creating/Editing/Removing Insurance Companies in Insurance Company Manger



To Create or Add an Insurance Company you will Click on the button with the **Green +** . To Edit click on button with the white cursor. To Remove an Insurance Company, click on the button with the **Red X**.



## Adding/Editing Insurance Company Demographics

Edit Insurance Company			
Company Name	<input type="text" value="Sunshine Insurance"/>		
Address	<input type="text" value="1234 Sunshine Lane"/> <input type="text"/>		
City	<input type="text" value="Sunshine City"/>		
State	<input type="text" value="AR"/>	Zip	<input type="text" value="72703-____"/>
Phone	<input type="text" value="(479)555-5555"/>	ext	<input type="text" value="____"/>
Type (CMS 1500)	<input type="text" value=""/> ▼		
Group Provider (Legacy)	<input type="text"/>		
Fee Schedule (Legacy)	<input type="text"/>		

Enter in the information for the Insurance Company in available fields. You will notice that Group Provider Legacy and Fee Schedule fields are grayed out due to being inactive until the Billing Suite is released in version 2010.2 in SOAPware. The same window will display when Editing Insurance Company information.

## Insurance Electronic Submission Info




Electronic Submission Info	
Payer Qualifier	<input type="text"/> ▼
Payer ID	<input type="text"/>
Clearinghouse Name	<input type="text"/>
Clearinghouse ID	<input type="text"/>
Type (Electronic)	<input type="text"/> ▼
Receiver Qualifier	<input type="text"/> ▼
Receiver ID	<input type="text"/>
SEC. Claim Type	<input type="text"/> ▼

This area will be for entering and choosing information from Drop Down menus needed for Electronic Submission of your CMS 1500 forms.

## Insurance Provider Setup

Active ☒ Show Legacy IDs ☐

Provider Setup

Name ▲	Pay To NPI	Pay To Legacy ID	Rendering NPI	Rendering Legacy ID
--------	------------	------------------	---------------	---------------------

OK Cancel

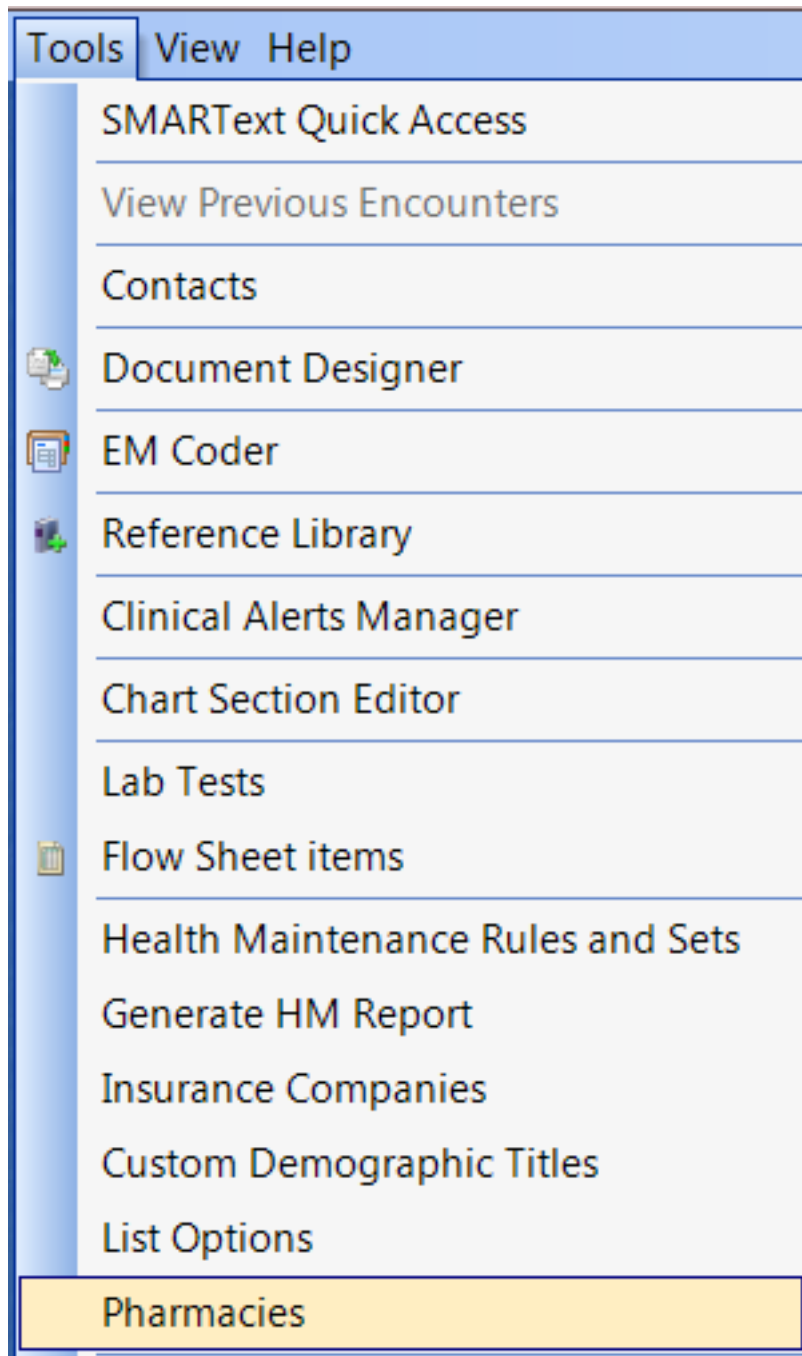
The Provider Setup window will be an area to select Provider(s) within your network that are under contract with that Insurance Company. Clicking on the **Green +** will display a window with your network Providers to choose from. Click OK after completion.

## Pharmacy Setup

---

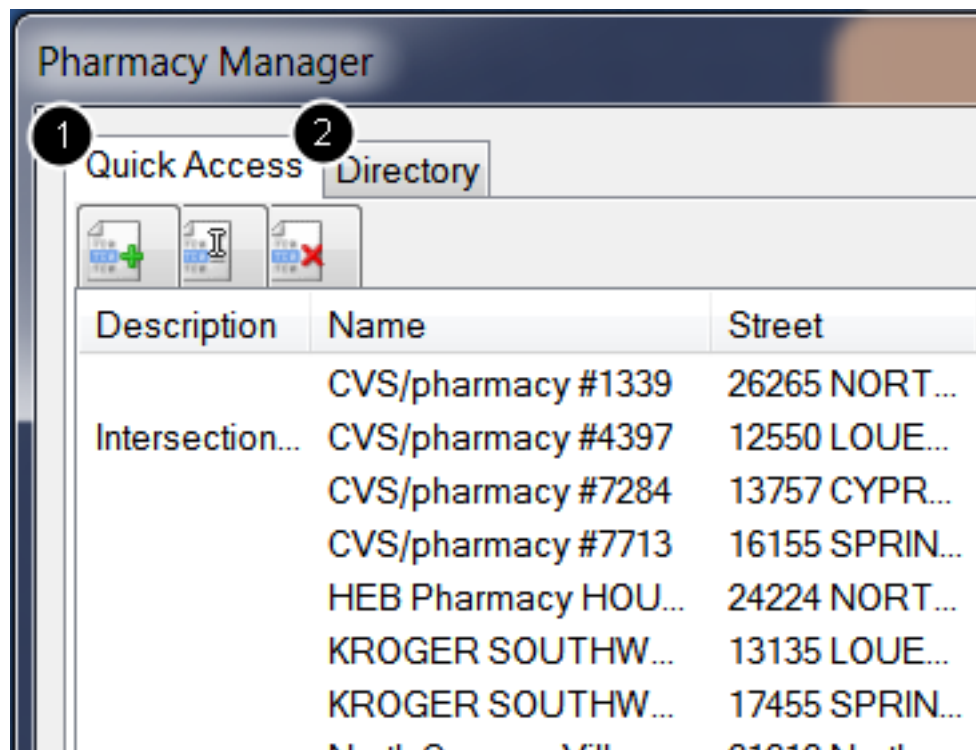
Prior to sending prescriptions electronically or faxing to a participating pharmacy, Pharmacies must be set up in the Pharmacy Manager.

### Pharmacy Manager



To access Pharmacy Manager, click Tools in the menu bar, and click the Pharmacies menu item. Click the Directory tab in order to search for pharmacies to include in the Quick Access list.

## Two Tabs



There are two tabs in the Pharmacy Manager:

1. Quick Access: Includes the list of pharmacies on the local database (this list will be used to populate the drop-down pharmacy selection in Rx Manager. There are two ways to add pharmacies to quick access. One is to add them manually, using the buttons in the toolbar. Pharmacies added manually in this way can only be used for faxing prescriptions. The second way to add pharmacies is to use the directory.

2. Directory: Use the directory to add pharmacies from the Sure Scripts network. The pharmacies added from the Directory tab are the ones used to send e-prescriptions.

## Adding Pharmacies using the Directory

The screenshot shows the 'Pharmacy Manager' application window with the 'Directory' tab selected. The 'Find By' dropdown menu is set to 'Zip Code' (labeled 1). The search field contains the zip code '72701' (labeled 2). The 'Find' button (labeled 3) is highlighted. Below the search fields is a table of search results. The table has columns: Description, Name, Street, Street2, City, State, Zipco..., Office Phone, and Fa. The results list several pharmacies, including 'COLLIER DRUG STO...', 'MEDICAL ARTS PHA...', 'USA Drug Express', 'Southgate Pharmacy', and 'Walgreens Drug Stor...'. At the bottom right of the window are buttons for 'Add to Quick Access' and 'Close'.

Description	Name	Street	Street2	City	State	Zipco...	Office Phone	Fa
	COLLIER DRUG STO...	100 W. DICK...		FAYE...	AR	72701	(479) 442-6261	(479) 442-6261
	MEDICAL ARTS PHA...	2515 E HUN...		FAYE...	AR	72701	(479) 443-3411	(479) 443-3411
	USA Drug Express	2111 West H...		Fayett...	AR	72701	(479) 442-5240	(479) 442-5240
	Southgate Pharmacy	1620 S Scho...		Fayett...	AR	72701	(479) 443-4747	(479) 443-4747
	COLLIER DRUG STO...	100 W. DICK...		FAYE...	AR	72701	(479) 442-7344	(479) 442-7344
	Walgreens Drug Stor...	524 S. Schoo...		Fayett...	AR	72701...	(479) 251-7685	(479) 251-7685

Pharmacies are found via searching options in the Directory tab allows.

1. Click the "Find by" drop down menu to obtain a menu list containing Pharmacy Name, Zip Code, Phone Number or State.
2. *In our example we will search by zip code.* Type the zip code into the field to the right of the Find By field.
3. Press the Find button. The results of the search will display in the list area below.

## Select Pharmacies

Pharmacy Manager

Quick Access Directory

Find By Zip Code 72701 Find

Description	Name	Street	Street2	City	State	Zipco...	Office Phone	Fa
	COLLIER DRUG STO...	100 W. DICK...		FAYE...	AR	72701	(479) 442-6261	(47
	MEDICAL ARTS PHA...	2515 E HUN...		FAYE...	AR	72701	(479) 443-3411	(47
	USA Drug Express	2111 West H...		Fayett...	AR	72701	(479) 442-5240	(47
	Southgate Pharmacy	1620 S Scho...		Fayett...	AR	72701	(479) 443-4747	(47
	COLLIER DRUG STO...	100 W. DICK...		FAYE...	AR	72701	(479) 442-7344	(47
	Walgreens Drug Stor...	524 S. Schoo...		Fayett...	AR	72701...	(479) 251-7685	(47

Add to Quick Access

Close

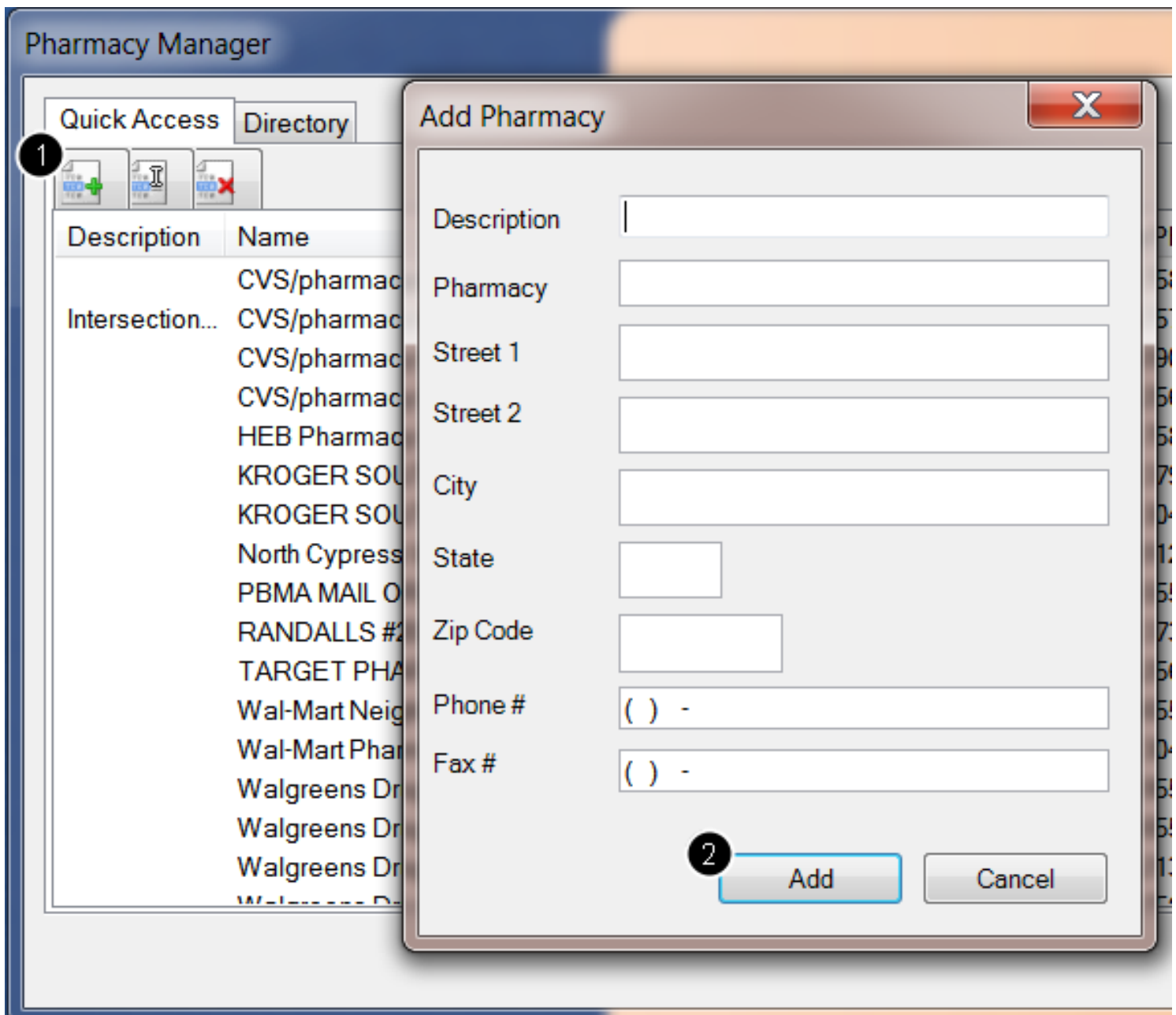
Selection of pharmacies to add to Quick Access can be accomplished using the following methods:

1. To select an individual pharmacy, Click the Name of the pharmacy.
2. To select a group of pharmacies, all of which are contiguous, click on the first pharmacy in the list. Then, press and hold-down the shift key while clicking on the last pharmacy. This select-highlights all pharmacies between the first and the last.
3. Holding-down the control key, click on noncontinuous pharmacy items in a random fashion.

After pharmacy selections are made, press the Add to Quick Access button.

Click the Quick Access tab to view the pharmacies added.

## Manually Add Pharmacies



Pharmacies not found searching in the Directory tab can be manually added in the Quick Access tab.

1. Click the Create button at the top left.
2. Type the pharmacy information into the Add Pharmacy dialog as in screenshot, and click the Add button.

# **Set Up Security Settings and Users**

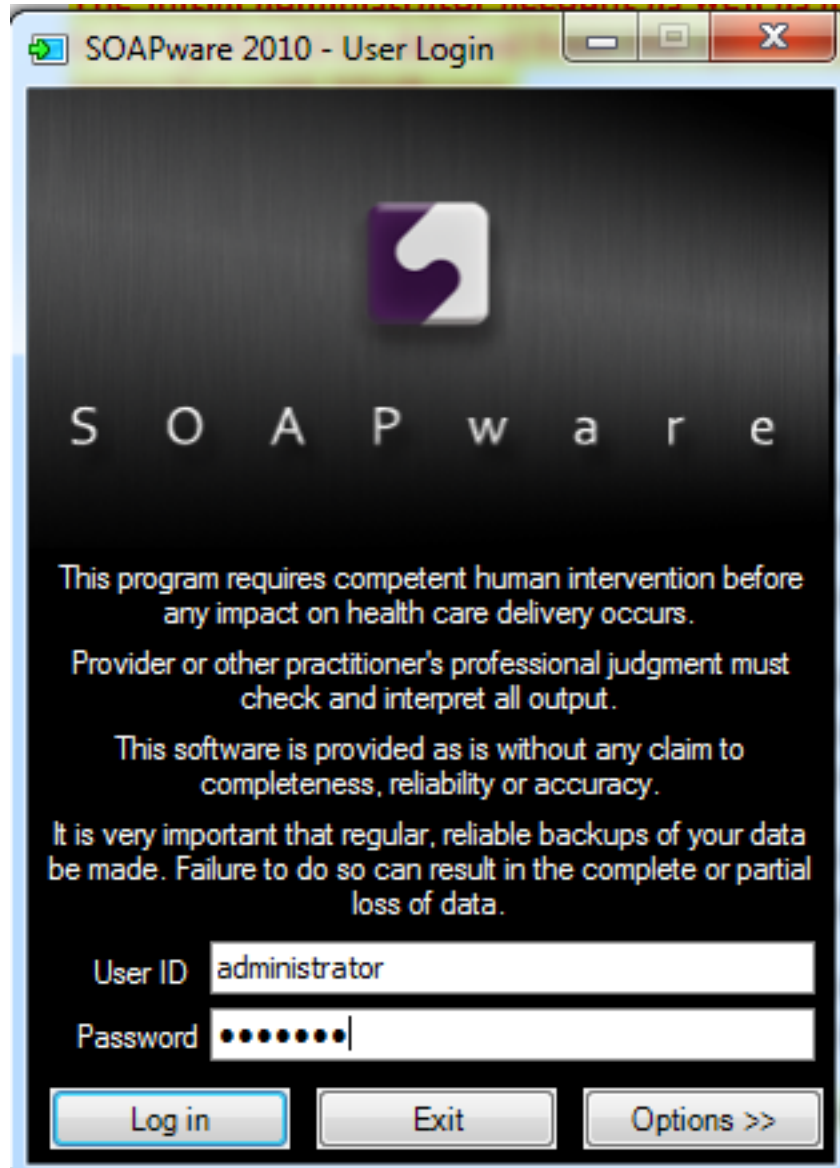


## Intro to Security

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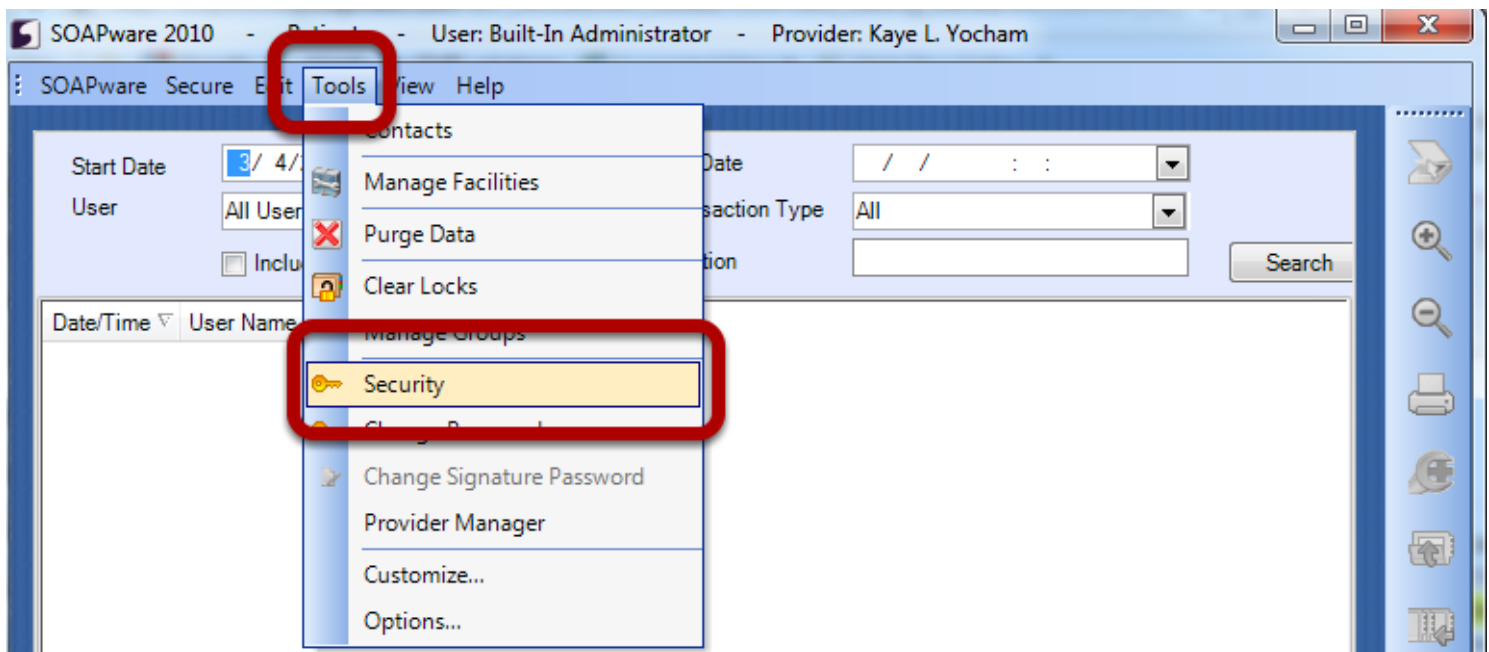
This lesson teaches how to setup Security for a clinic staff that will include settings for Groups, Roles, and individual users according to HIPAA guidelines and regulations for electronic health records.

### Logging into Security as Administrator



Log in as administrator using the User ID and Password given at time of install. The Administrator account is used to set-up all user accounts but does not allow access to patient information.

## Accessing Security



1. Click on the Tools menu
2. Click on Security

## Security Settings

---

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) CORE REQUIREMENT - SEE LOGGING ON AND LOGGING OFF, SEARCH AUDIT LOG**

The default System Administrator Login for SOAPware only grants access to Security. **This login DOES NOT include access to any patient information.**

To gain access to Security, a user must be granted the access rights of a System Administrator. Before beginning to assign security settings, the System Administrator should become familiar with the functions related to Groups, Roles and Users.

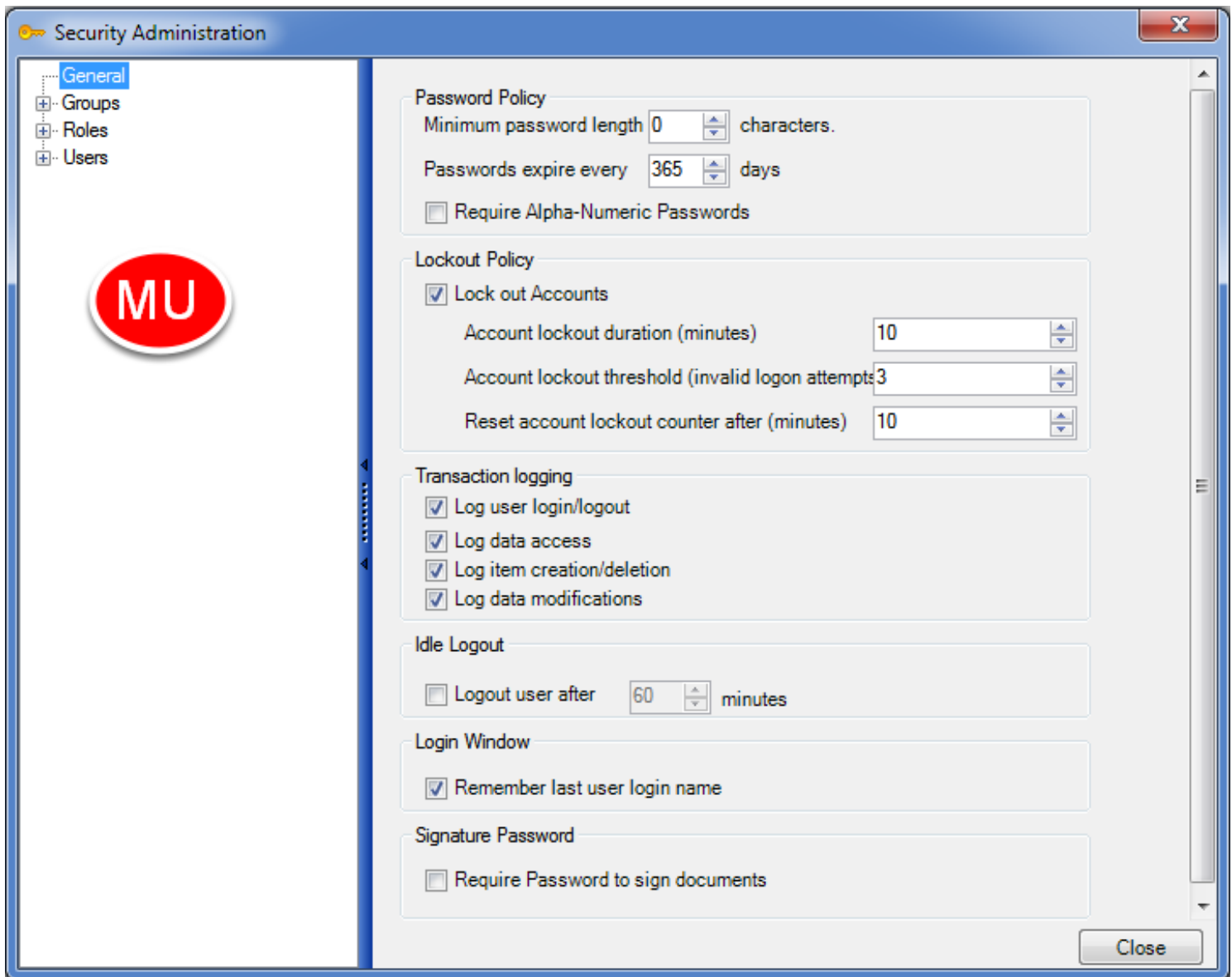
After logging in to SOAPware using the System Administrator account, Click on *Tools* in the main menu bar, then Click the *Security* menu item to access the Security Administration dialog window.

### 1. Intro to Security Manager

Start SOAPware, and Log in as an administrator (Initially, User ID: administrator, and Password: administrator. Later it could be any unique password defined earlier).

The security system in SOAPware has been set up to help ensure only authorized users are able to access patients' information. Once a user has logged into the system, the security system will track everything the user views, and it logs all changes the user makes. Since this tracking is available, it is very important that each staff member have a unique log-in ID. For example, if a shared log-in is being used, there is no way to know what person in the office actually changed a patient's demographics or removed a medication from the chart.

## 2. Logging On and Logging Off



### **\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - DATA PROTECTIONS**

[Click here to view Meaningful Use Criteria](#)

#### a. Password Policies

This setting is to ensure passwords are secure and cannot be easily guessed. Unfortunately, it's a common practice to write passwords on post-it notes attached on or near computers. We definitely advise against this.

#### b. Account Lockout Policies

This can be setup to ensure that if somebody is trying to guess another user's password, it will disable the account for a period of time.

#### c. Auto Log-Out

This determines when to log out a user after a certain amount of idle time has occurred. This is done to make sure that patient information is not visible.

#### d. Log Options

Allows the administrator to disable logging of certain events in the system.

### 3. Search Audit Log

SOAPware 2010 - Patient: - User: Built-In Administrator - Provider: Kaye L. Yocham

SOAPware Secure Edit Tools View Help

Start Date: / / : : End Date: / / : :  
User: All Users Transaction Type: All  
☐ Include Inactive Users Location: Search

Date/Time	User Name	Location	Type	Patient Name
-----------	-----------	----------	------	--------------

MU

#### **\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - DATA PROTECTIONS**

[Click here for Meaningful Use Criteria](#)

Audit Logs are the way SOAPware tracks changes and events in the system such as users logging in and patient information being modified. When you log in as the administrator, you will see the Search Audit Log window. Notice the main display has some fields at the top. To demo, use these fields to

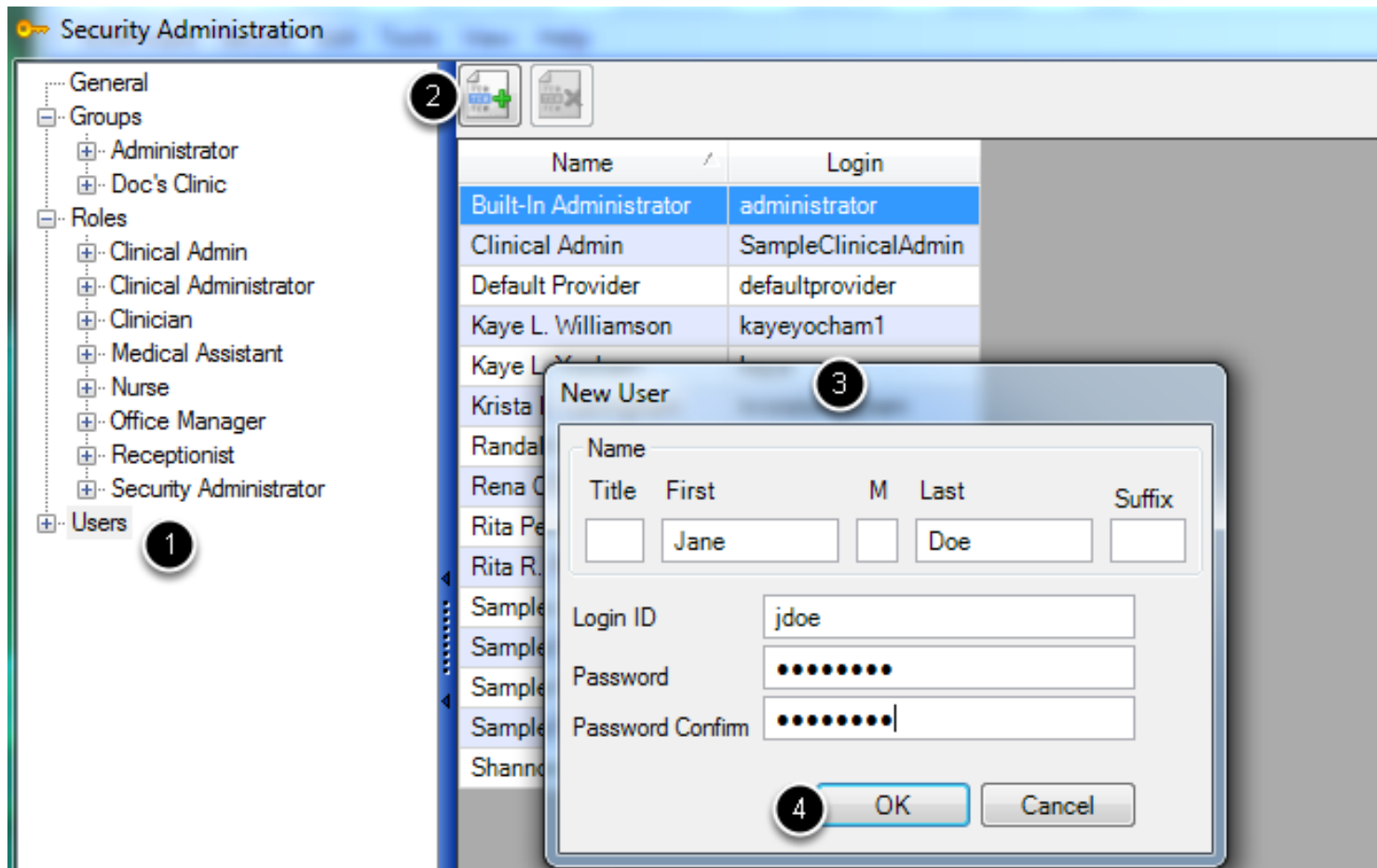
perform a search for log-ins to the system. Click on the Transaction Type drop-down menu; Click on the Log-in menu item; and Click the Search button. Now you should see some records displayed showing all the log-ins to the system including when you logged in. To be able to search the Audit Logs, a SOAPware Standard or SOAPware Professional license is required.

For Detailed Instructions, see: [Security Auditing in SOAPware](#)

## Users in Security

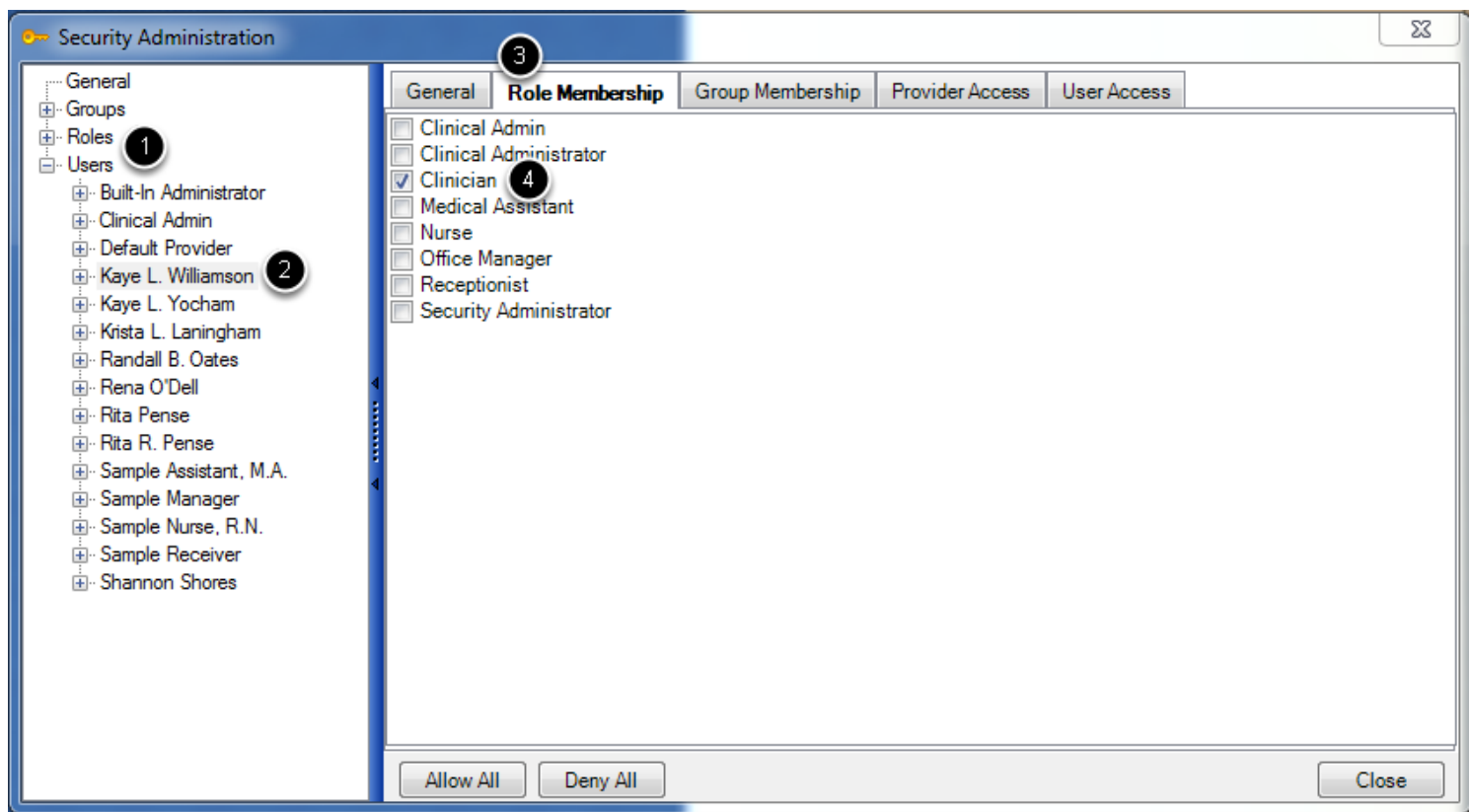
Users are the individuals accessing SOAPware. So, everyone needing access to SOAPware will need to be set up as a specific, individual User.

### Creating a new User



1. Click to highlight "Users"
2. Click the New User button
3. Fill in the First name, Last name, assign a Login ID, assign a Password, Confirm the password (***the user will be told that their Password has expired when they log in for the first time allowing them to change the password to one that only they will know***)
4. Click on OK

## Setting Up a New User and Assign a Role



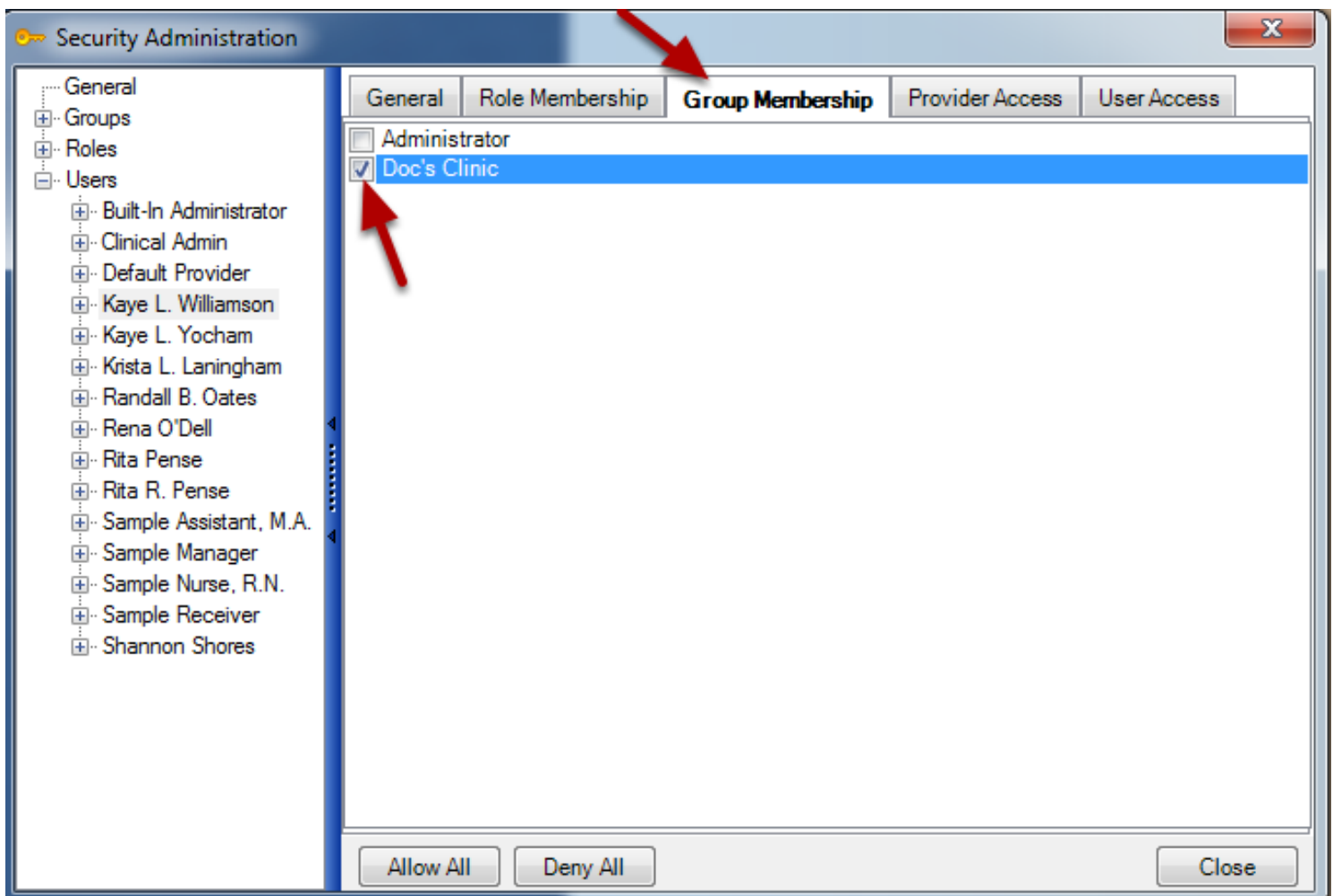
**Important to note:** Any clinician that owns a SOAPware license will be set up in Security in the Role of Clinician automatically once the license is activated

**Another important note:** A User will not be able to log into SOAPware unless they are assigned a Role

1. Click on the + next to User to drop down user names
2. Click to highlight the User's name
3. Click on the Role Membership tab
4. Place a check next to the User's assigned Role (more than one Role may be selected)



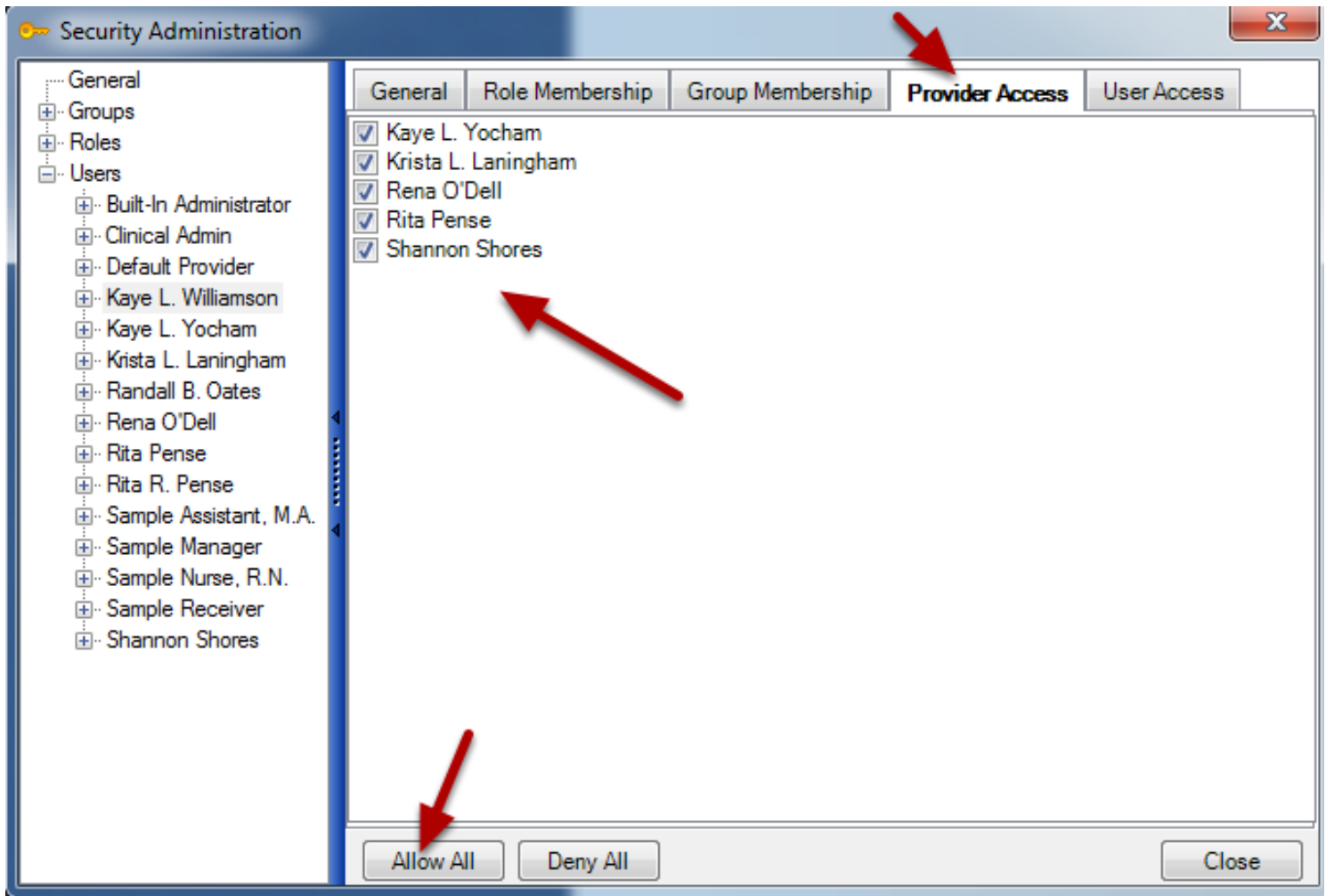
## Assign a New User to a Group



Click on the Group Membership tab.

Place a check next to the Group that the User will be a member of (**Administrator Group is a default and does not need to be selected unless the user is an Administrator in the facility**)

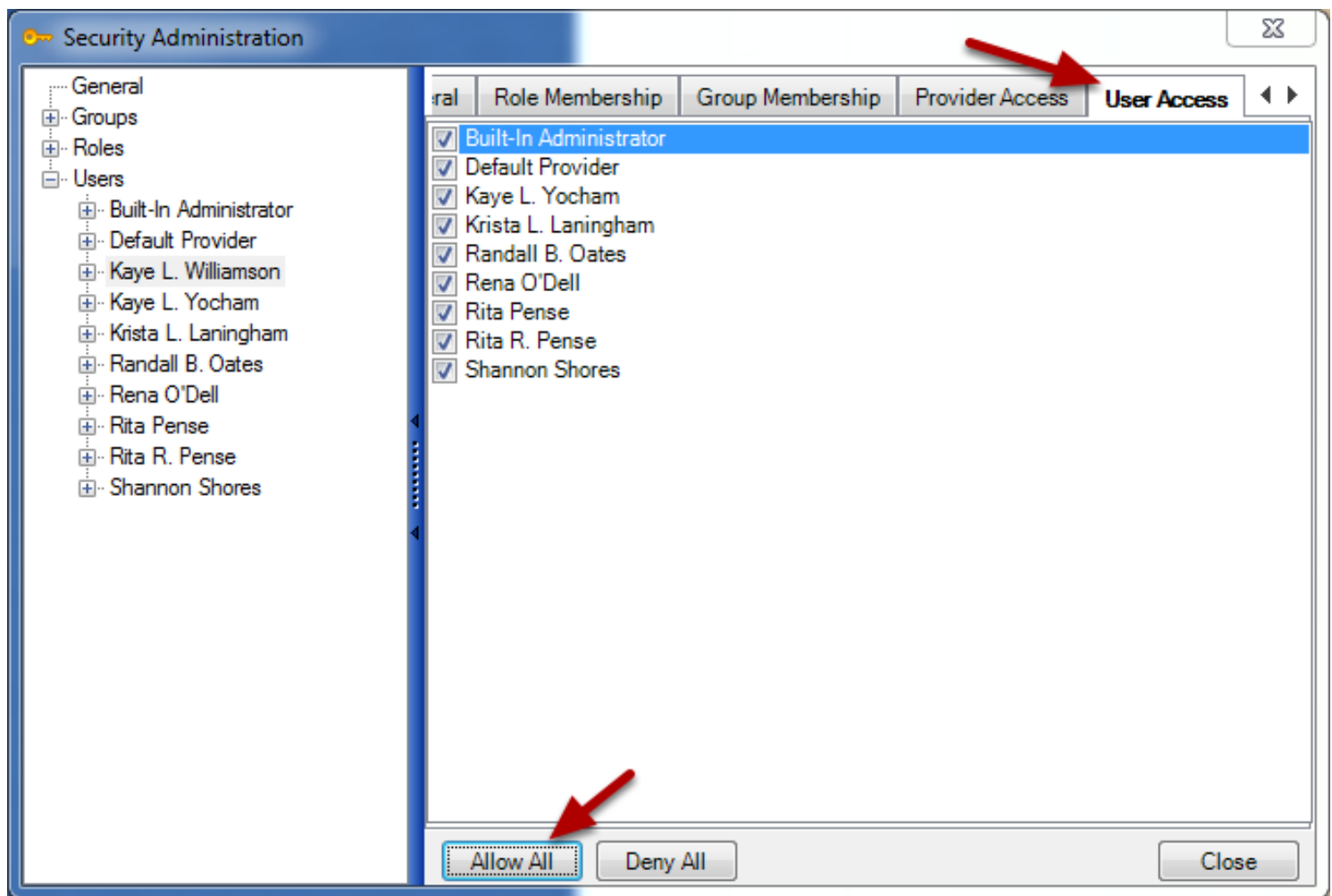
## Assigning Provider Access for a New User



Click on the Provider Access tab (***A User will not have access to patient charts in the Chart Rack unless Provider Access is given***)

Place a check next to the Providers name whose charts the User will be accessing (most clinics Click Allow All)

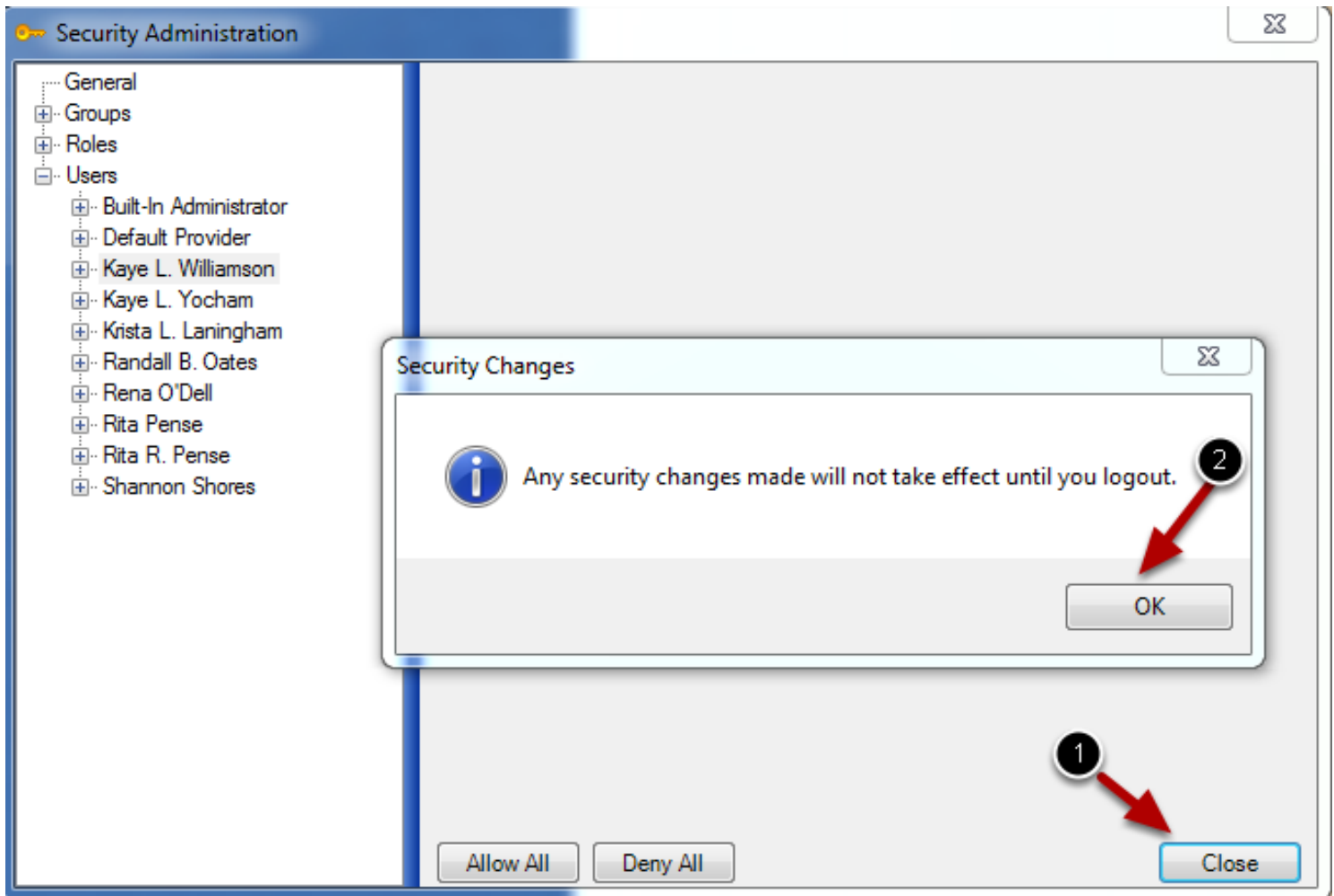
## Assigning User Access for a New User



Click on the User Access tab (**A User will not have access to other Task lists (formally known as the ToDo List) unless User Access is given**)

Place a check next to the User names that the new User will need to send Tasks (**most clinics Click on Allow All**)

## Saving Changes in Security



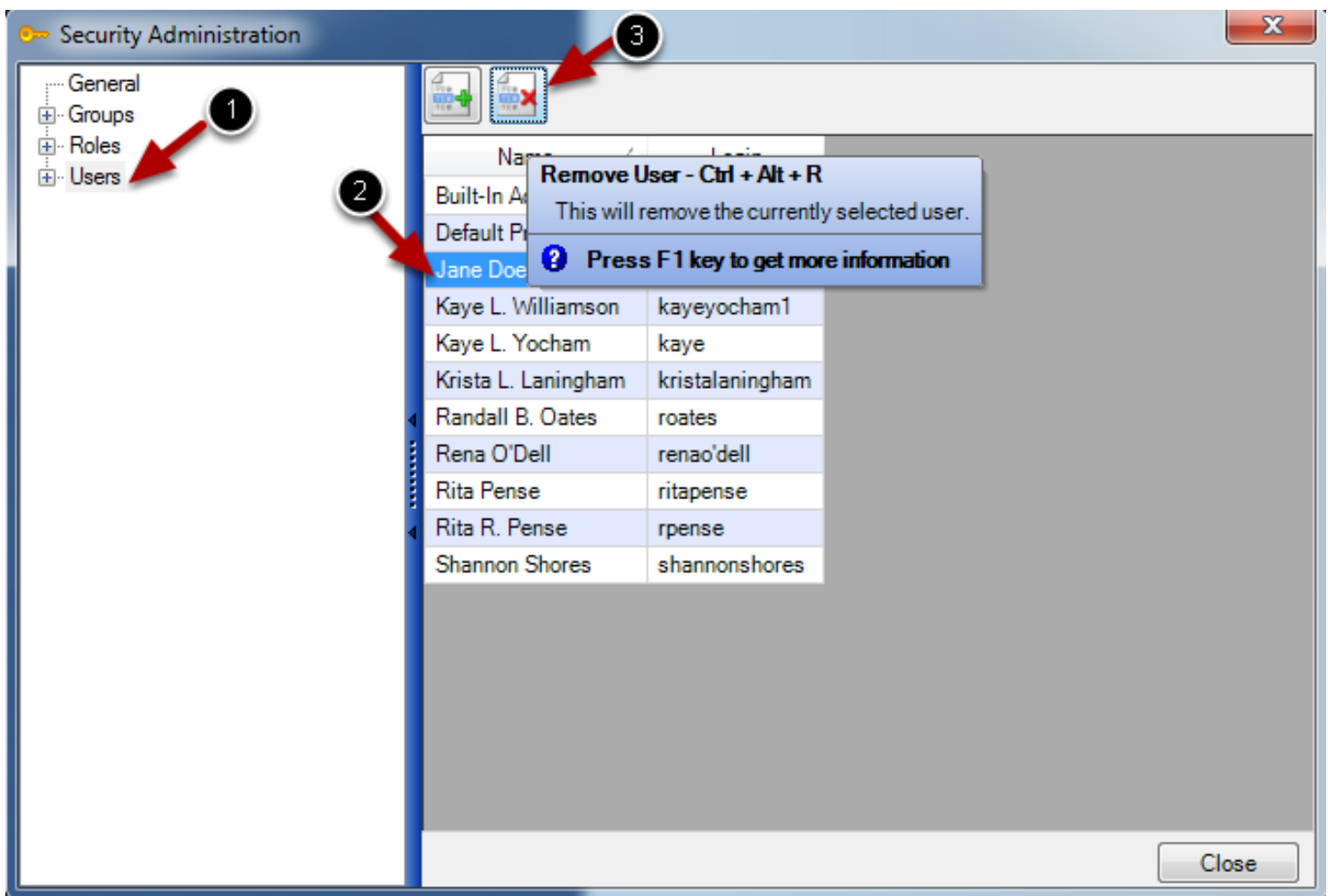
1. When all changes are completed, Click on the Close button

***Note that any Security changes will not take effect until you logout***

2. Click on OK

Log out of SOAPware by going the SOAPware menu and then Click on Log Out

## How to Delete/Remove a User from Security



**Important:** A clinician with a SOAPware license cannot be deleted/removed from SOAPware Security. The license must be made Inactive in Site Administration. Removing all permissions in Security and un-checking their name in the Group, Provider Access, and Users tabs will make them invisible.

1. Click to highlight Users
  2. Click to highlight the name of the User to be Deleted/Removed
  3. Click on the Remove User button
- Click on Yes to remove selected User

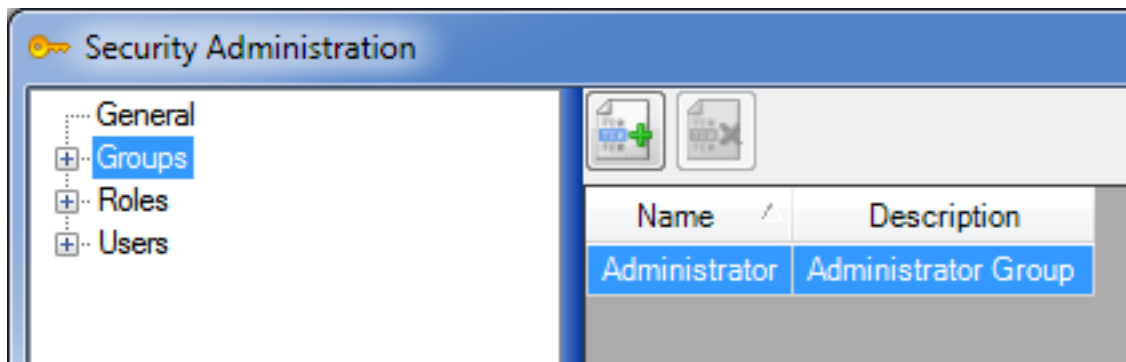
## Groups and Roles in Security

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SOAPware Groups describe a set of privileges that can be applied to a selection individual users. Groups can be thought of as departments within an office, and a listing the responsibilities and limitations of members of that group. Users can belong to any number of groups simultaneously, and entire groups can be assigned to Group.

A Role is intended to represent a particular job function within the clinic, such as Nurse, Office Manager, Clinician, etc. Each one of these roles will need restricted access to particular actions.

### Groups in Security

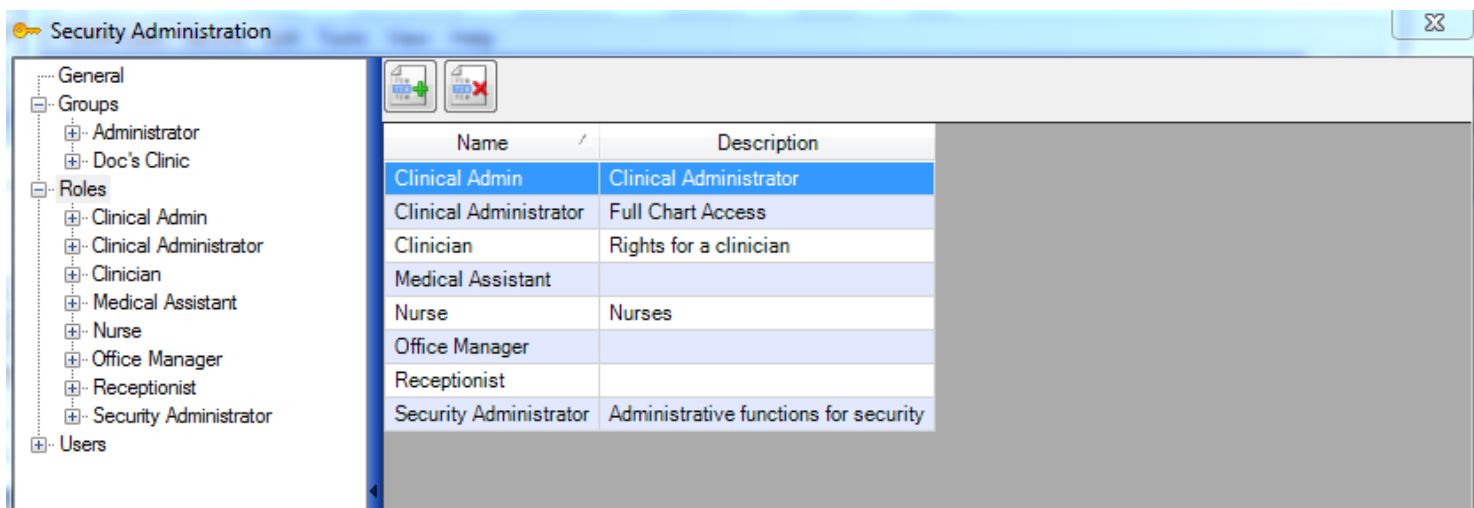


Think of a Group as being very similar to a department within the clinic. For example, there is commonly a clinical user group and a front office user group. Within each of these groups, there are, typically, different Roles. For instance, in your clinical group, you may have an R.N. and a clinical assistant. In your front office group, you may have a main scheduler and a check-In person. So, the individuals in a Group can serve different Roles.

A Group could also refer to different clinics in a multi-clinic installation. SOAPware has a default Administrator Group that cannot be edited.

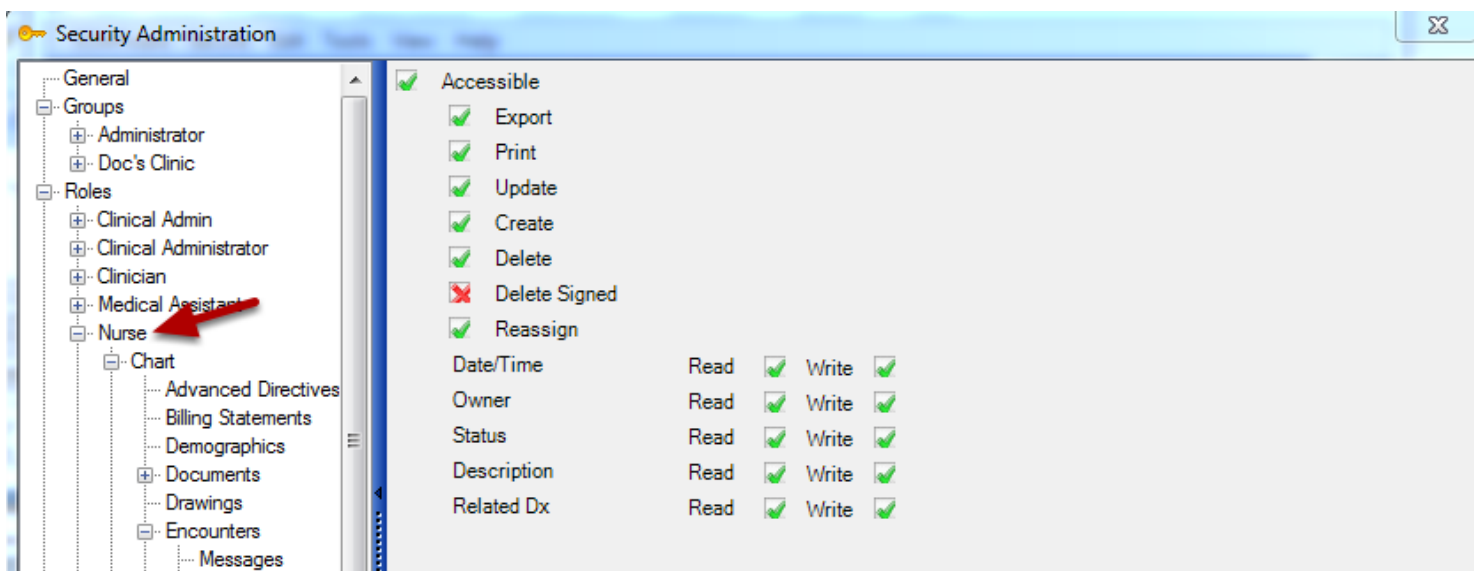
Make a list of the members of your clinic staff and sort into the relevant groups. Then sort further by defining the roles. Use this sorted list of Groups and Roles to define access rights for each individual that is based upon what they have in common to each Group and Role. It is easy to add users to groups/roles, and they will immediately inherit the security rights that have been set for the group or role.

## Default Roles in Security



SOAPware, at installation, includes some users roles with pre-set security rights common to most clinics. These are completely customizable, and can be edited and changed in any fashion or even deleted. **Note: Users must be created first and then assigned a Role**

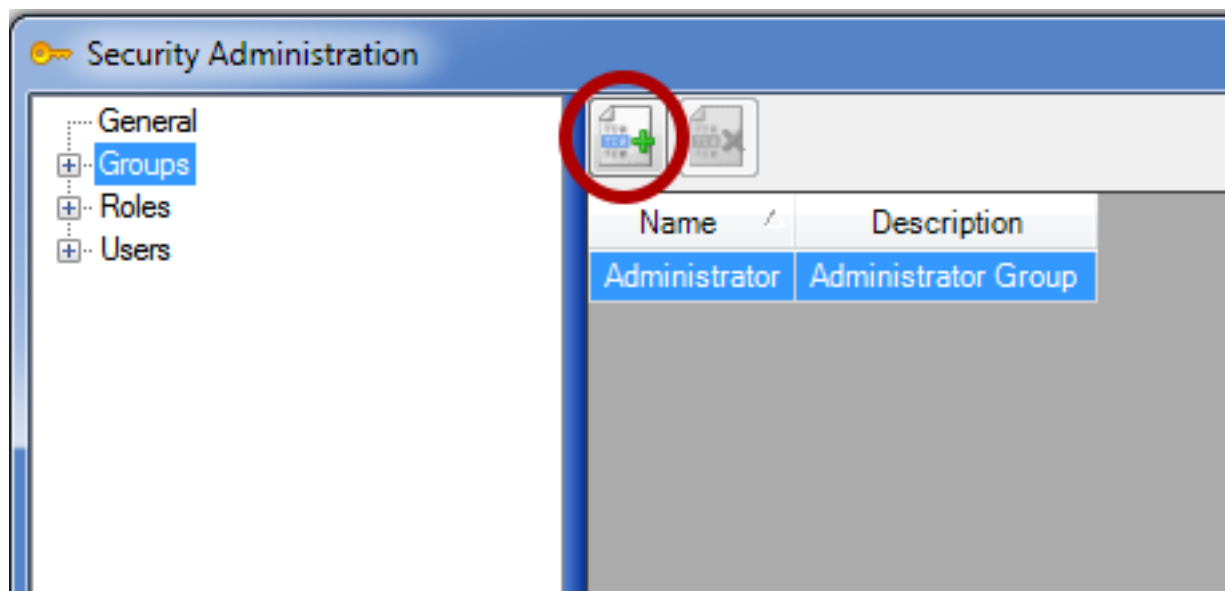
## Example of pre-set security Role (Nurse)



Clicking on the plus sign next to the Role will begin to expand the areas in SOAPware that Security needs to be enabled.

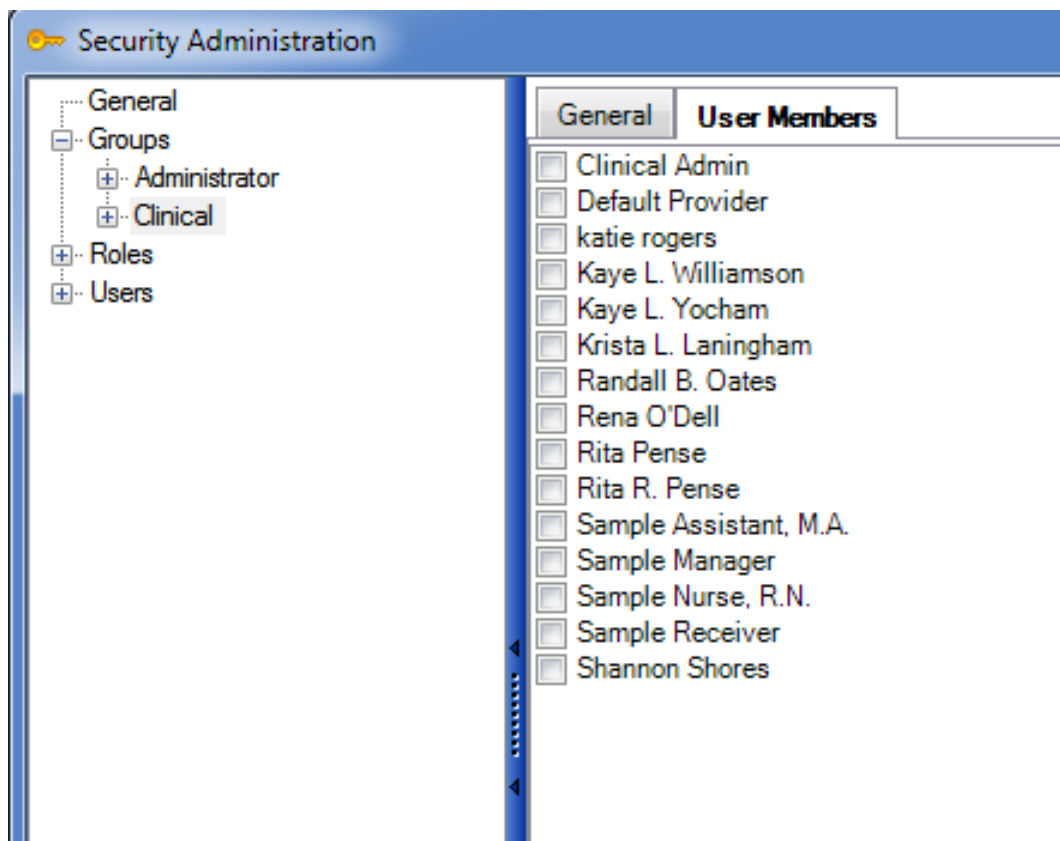
Clicking on specific area will display what can be designated as permission given (green check) or permission denied (red X).

## Setting up a Group/Role



Adding a Group or a Role is basically the same. Click on the Groups List item. Click the Create Group button (green +), and Type a Group Name (i.e. Clinical) and Description. (i. e. Clinical Staff). Click OK.

## Editing Groups/Roles



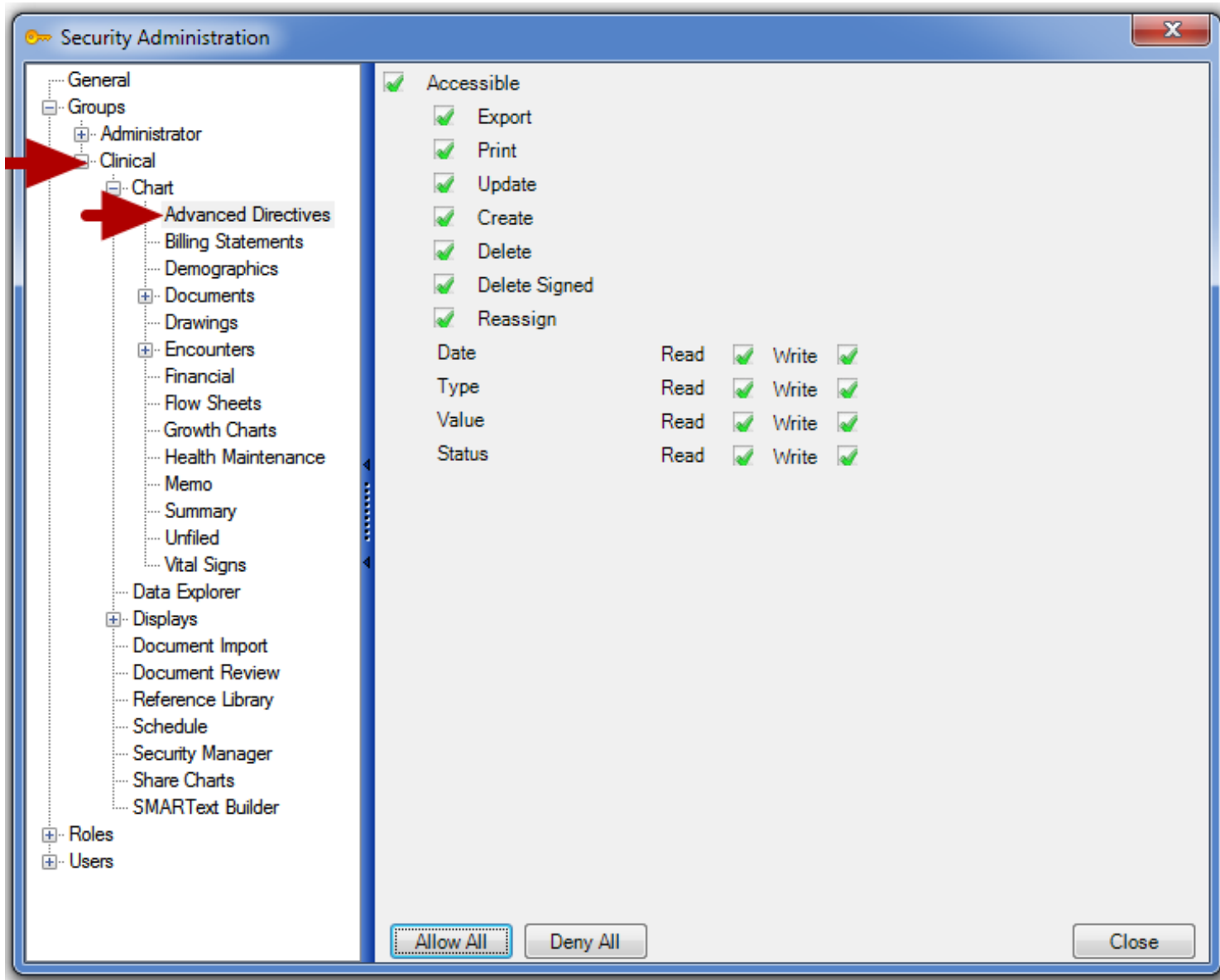
The new Group name should appear in the item list on the left (i.e. under the Administrator list item). Name of the new group to see the group settings. There will be two tabs displayed in the window to the right. The first tab, General, will show the Name and Description you set up for the group. The second



tab, User Members, is where you will assign users to this group.

To add users to the group, Click the User Members tab, and Click the Name checkboxes for the users to include. To set the group's shared security settings, navigate down the list of categories, and Click the + signs to expand the security items needing action. Follow the same instructions (above) to add a Role. Click the Roles list item to get started.

## Changing Security Privileges

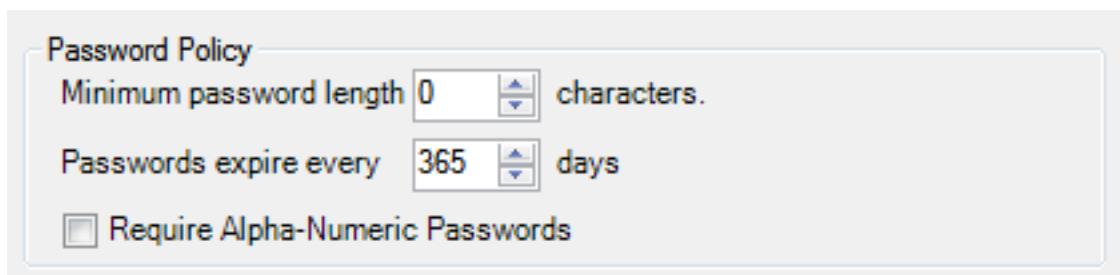


To change security privileges for groups and roles, Click the plus sign to the left of the group. This will expand all of the security areas for this group. From here, you can Click on the areas you wish to edit and use the window on the right to customize the security settings. A green check mark indicates the user will have access, a red X indicates the user will not have access and an empty box indicates that the setting will default to the user's individual rights.

## Setting Practice Security Defaults

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### Password Policy



The screenshot shows a 'Password Policy' window with three settings: 'Minimum password length' set to 0 characters, 'Passwords expire every' set to 365 days, and a checkbox for 'Require Alpha-Numeric Passwords' which is currently unchecked.

#### Minimum Password Length

Sets a minimum requirement for password length.

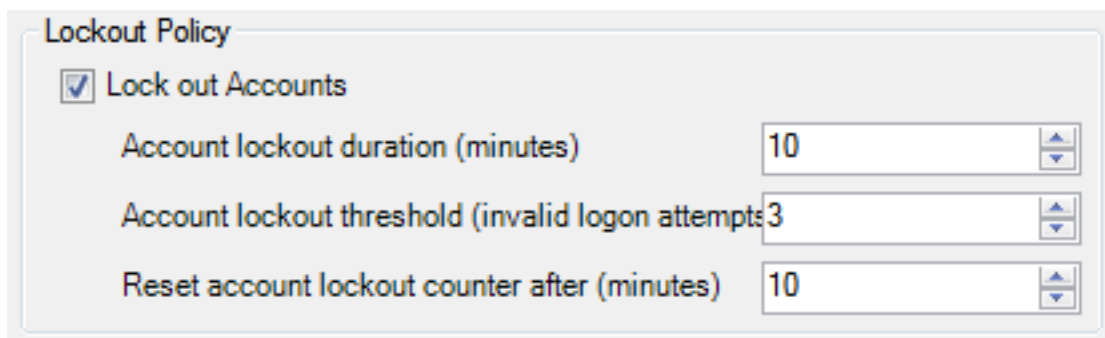
#### Passwords expire Every \_\_ Days

This number determines how frequently users must reset passwords.

#### Require Alpha-Numeric Passwords

Clicking this checkbox mandates that all users passwords will contain at least one number and one letter.

### Lockout Policy



The screenshot shows a 'Lockout Policy' window with the following settings: 'Lock out Accounts' is checked, 'Account lockout duration (minutes)' is set to 10, 'Account lockout threshold (invalid logon attempts)' is set to 3, and 'Reset account lockout counter after (minutes)' is set to 10.

#### Lock Out Accounts

The default is to have a check in the checkbox for Lock out Accounts. Click the Lock out Accounts checkbox to uncheck if the preference is for users to never to be locked out. The lock out policy only applies if the wrong password has been entered too many times.

#### Account Lockout Duration

Sets the amount of time, in minutes, that the user account will be locked out.

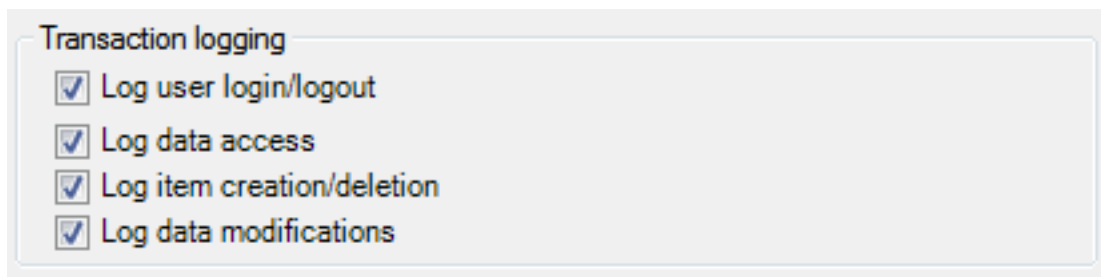
#### Account Lockout Threshold

The number of incorrect attempts allowed before the lockout

## Reset Account Lockout Counter

This setting determines the amount of time, in minutes, that the user has to wait before they can attempt to log in again.

## Transaction Logging

A screenshot of a software settings panel titled "Transaction logging". It contains four checkboxes, all of which are checked. The checkboxes are labeled: "Log user login/logout", "Log data access", "Log item creation/deletion", and "Log data modifications".

Transaction logging

- ☒ Log user login/logout
- ☒ Log data access
- ☒ Log item creation/deletion
- ☒ Log data modifications

This section defines the kind of user activity that will be tracked/logged within your system. Check all that apply.

### Log User Log in/Logout

This setting will track the time that users log in and logout.

### Log Data Access

Tracks the data that each user views and opens.

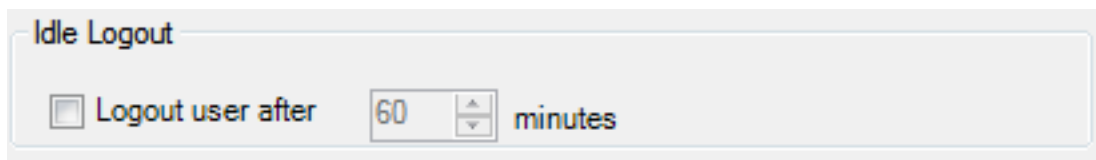
### Log Item Creation/Deletion

Tracks when anything new is created or deleted by a user within the system.

### Log Data Modifications

Any time information is changed or edited, it will be tracked and the time shown for the time of the change.

## Idle Logout

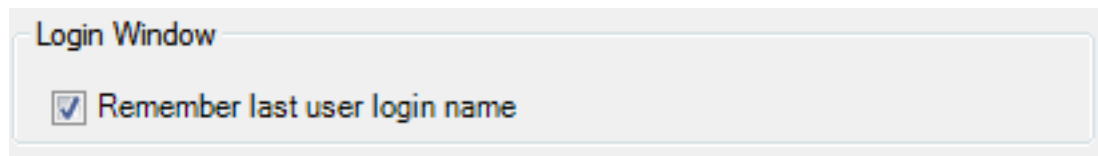
A screenshot of a software settings panel titled "Idle Logout". It contains a checkbox labeled "Logout user after" which is unchecked. To the right of the checkbox is a numeric input field containing the value "60", followed by a "minutes" label.

Idle Logout

☐ Logout user after 60 minutes

This setting determines how long a computer can be idle, until a user is logged-out. This is a security setting that helps prevent non-staff/non-employees from accessing patient records illegally.

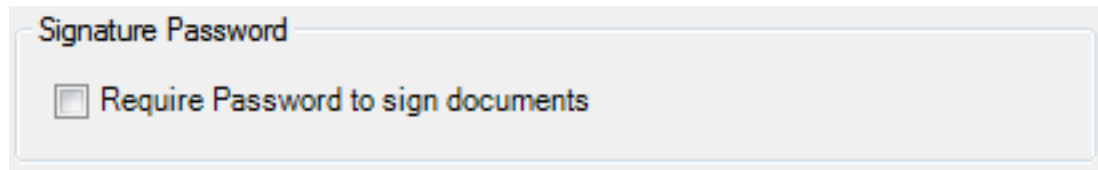
## Login Window



The screenshot shows a settings panel titled "Login Window". Inside the panel, there is a single checkbox labeled "Remember last user login name", which is currently checked.

Check this box to enable SOAPware to save the last user log-in ID in the Log-in field when the next attempt is made.

## Signature Password

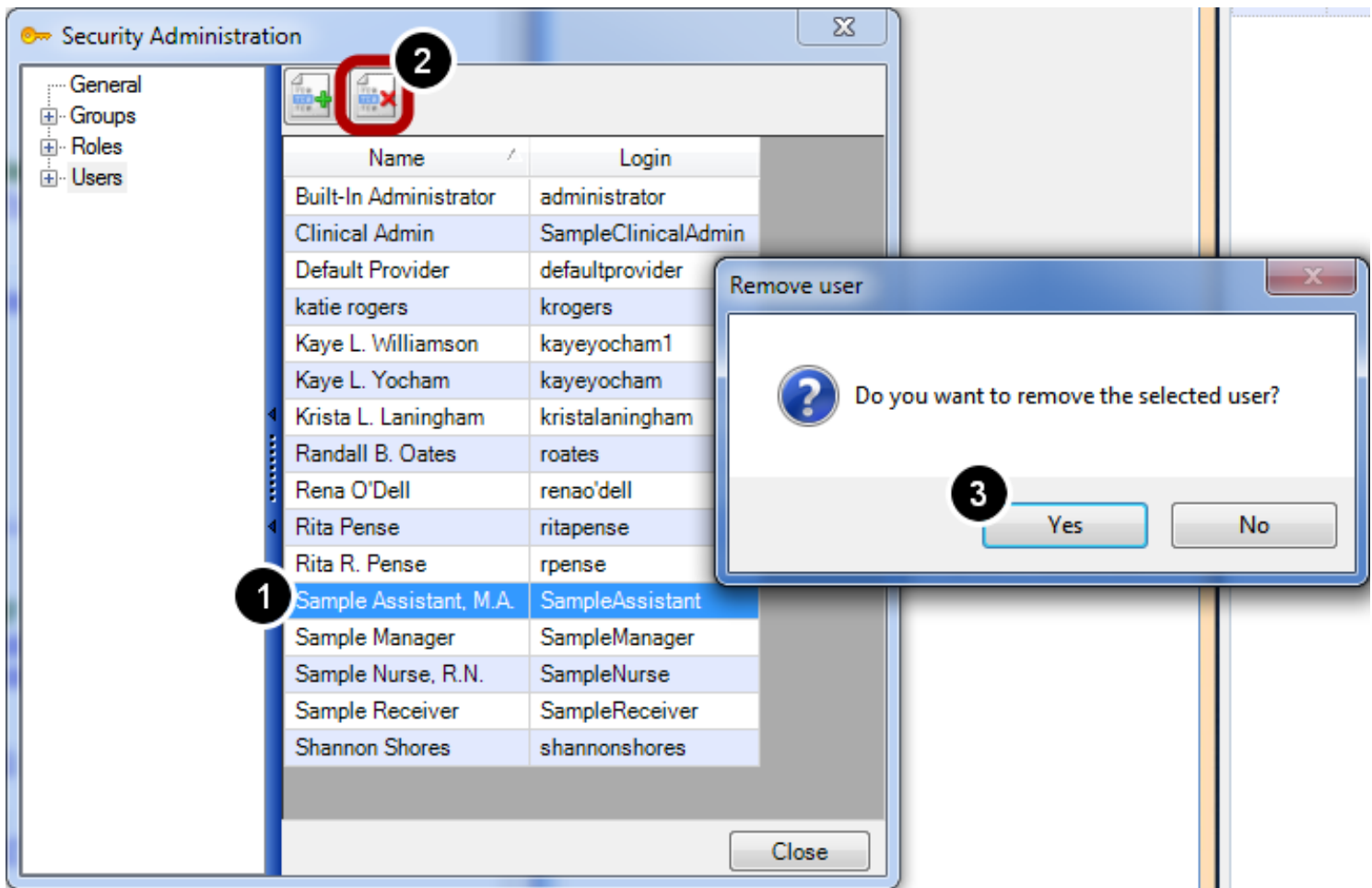


The screenshot shows a settings panel titled "Signature Password". Inside the panel, there is a single checkbox labeled "Require Password to sign documents", which is currently unchecked.

Specifies whether a password is necessary to sign-off documents.

## Deleting Users & Reassign Tasks

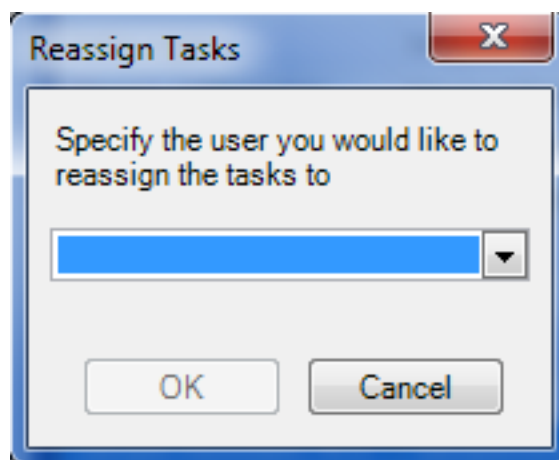
### Delete User



You can delete Users in Security by going to Tools, Security. This will bring up the Security Administration window.

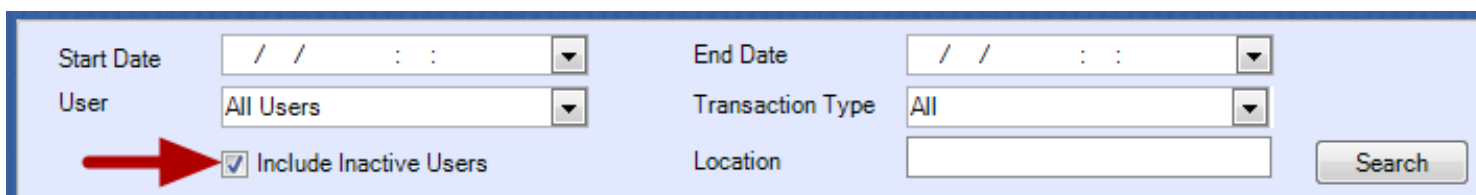
1. Highlight the name of the user you want to delete
2. Click the delete button
3. A prompt window will display to verify this action. Select "Yes" or "No".

## Reassign Tasks



A "Reassign Tasks" window will appear to prompt the action to reassign the deleted user's tasks to another user. Select the user to reassign the tasks to from the drop-down menu. After this, the Security Changes window will display a prompt to log out before these changes will take place.

## Searching the Audit Log of Deleted Users

A screenshot of a search interface for the audit log. It features several input fields: 'Start Date' and 'End Date' with date/time pickers, 'User' with a dropdown menu set to 'All Users', 'Transaction Type' with a dropdown menu set to 'All', and 'Location' with a text input field. A red arrow points to a checked checkbox labeled 'Include Inactive Users'. A 'Search' button is located on the right side.

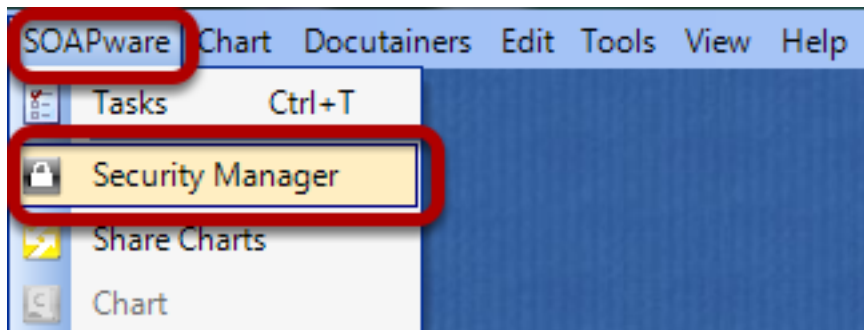
After deleting a User, their SOAPware activity may still be viewed in the audit log located in the Security Manager workspace. To do so, log in as the administrator and Click on the SOAPware menu item, then Click on Security Manager. You will check the "Include Inactive Users" box.

## Security Auditing in SOAPware

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Once Security has been set up and all staff members have a unique login and password, it is possible to track changes and events in SOAPware connecting modifications made to patient information to a specific user. *To be able to search the Audit Logs, a SOAPware Standard or SOAPware Professional license is required.*

### How to access Security Manager



**Note:** Only the person with Security Administration rights should access Security Manager. The Security Login ID and Password are assigned specifically for Setting up Security and to perform a Search Audit log.

Click on the SOAPware Menu Item

Click on Security Manager

## How to perform a Search Audit Log

SOAPware 2010 - Patient: - User: Kaye L. Yocham - Provider: Kaye L. Yocham

SOAPware Secure Edit Tools View Help

1 Start Date 5/ 3/2010 12:00:00 AM End Date 5/10/2010 12:00:00 AM

2 User Kaye L. Yocham 3 Transaction Type All 5

6 ☐ Include Inactive Users 4 Location Search

Date/Time	User Name	Location	Type	Patient Name
5/7/2010 4:48:56 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Logout	
5/7/2010 4:46:28 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Login	
5/7/2010 4:32:23 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Logout	
5/7/2010 3:21:24 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	GenDemoRxEligibility	Slim Jim
5/7/2010 3:21:24 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	DocumentModified	Slim Jim
5/7/2010 2:20:31 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:18:20 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:48 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:38 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:25 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:25 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:25 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 2:14:02 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 1:59:53 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 1:52:21 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	Field_Updated	Slim Jim
5/7/2010 1:52:15 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	DocutainerDisplayed	Slim Jim
5/7/2010 1:52:14 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	DocumentModified	Slim Jim
5/7/2010 1:52:14 PM	Kaye L. Yocham	KAYELAPTOP-PC (192.168.200.37)	DocumentAdded	

1. Select a Start Date and an End Date for the Audit search
2. Select the User
3. Select the Transaction Type
4. Select a Location. Note: Location to the name of the computer
5. Click on the Search Button
  - A list of activities will display
6. Inactive Users refers to users who were deleted from the system or whose SOAPware license was inactivated



# **Download Most Common Coded SMARText Items**

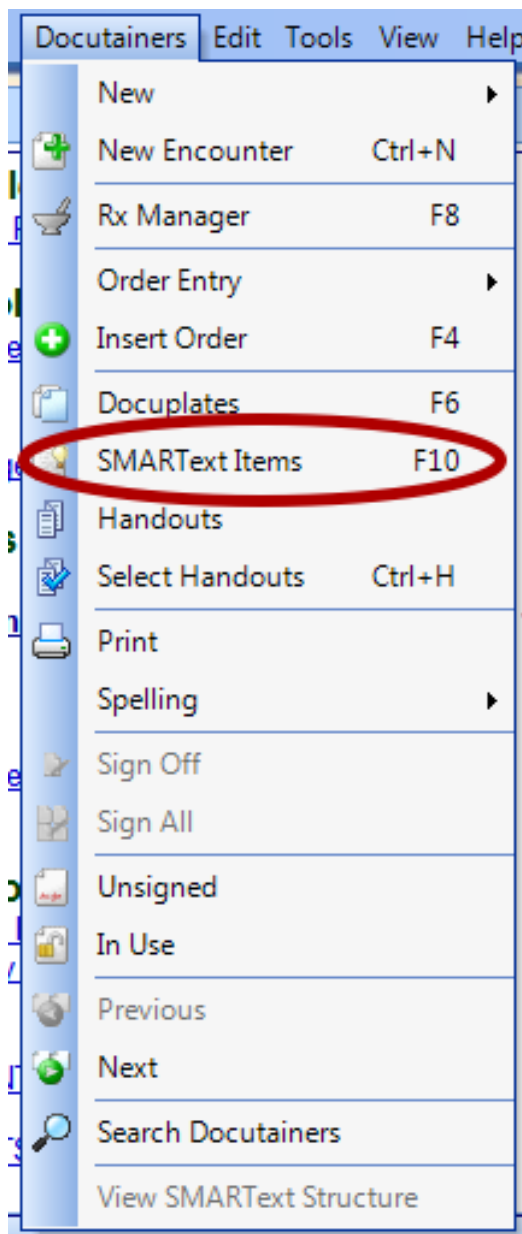
## Download Most Common Coded SMARText Items

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SOAPware provides all CPT (procedure codes = Plan Items), all ICD-9CM diagnosis codes and all medications in the U.S. Pharmacopoeia (and much more) on the SOAPware online library. All are specially formatted as SMARText items.

SMARText items offer a world of possibilities for streamlining workflows. To take full advantage of this option, make sure that the needed SMARText items are downloaded to your local system.

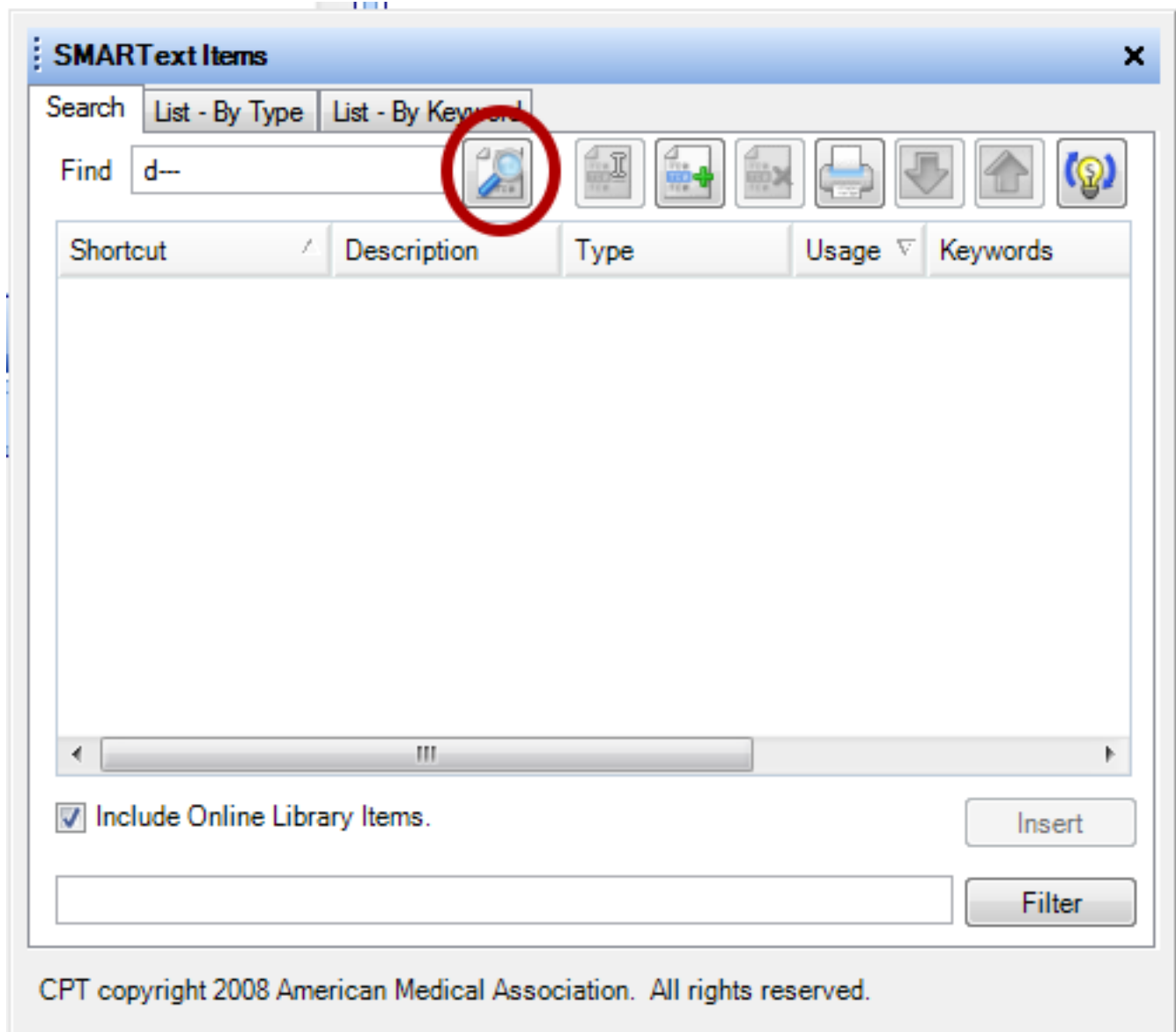
### SMARText Items Manager



All SMARText items are downloaded in the SMARText Items Manager. Click Docutainers in the menu bar, and Click the SMARText Items menu item to get to it. Follow the instructions below to download the needed codes and items.

**IMPORTANT:** Allow 10 to 20 minutes for each list, and do NOT do this while seeing patients. Access of patient charts can be slowed during the downloads.

## Diagnosis Items



These are the SMARTText items of Structured Dx type and are used in the Assessment, Active Problems and Inactive Problems fields. Make certain there is a check placed in the box to Include the Online Library items.

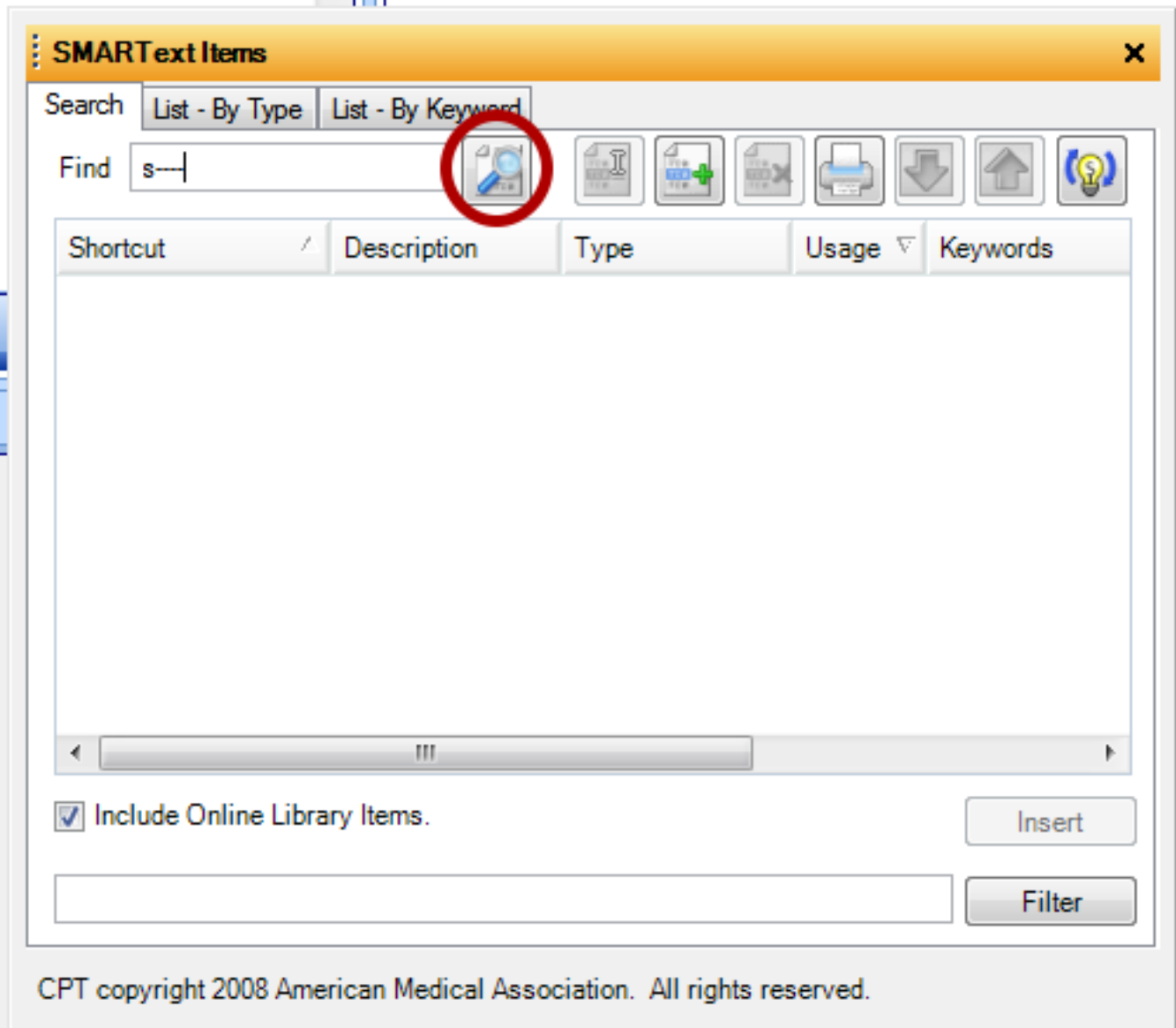
In the Search box, Type d--- (d, followed by three dashes and no spaces), and Click the Search Button (magnifying glass).

It may take several minutes for the entire list to display. Once the list is displayed, all the list items can be selected in bulk and downloaded all at once. To select in bulk, Click the first list item in the list so that it is highlighted. Next, either Press the Shift + End keys together (which will select all items in the

list below the one selected) OR Press Shift, and Click on the last list item (which will select all the items in between the two items you clicked). To download (while the items are highlighted), Click the Download button.

Alternatively, you can search for a specific item you may need by simply entering a keyword for that item rather than choosing it off of the d--- list.

## CPT Plan Items



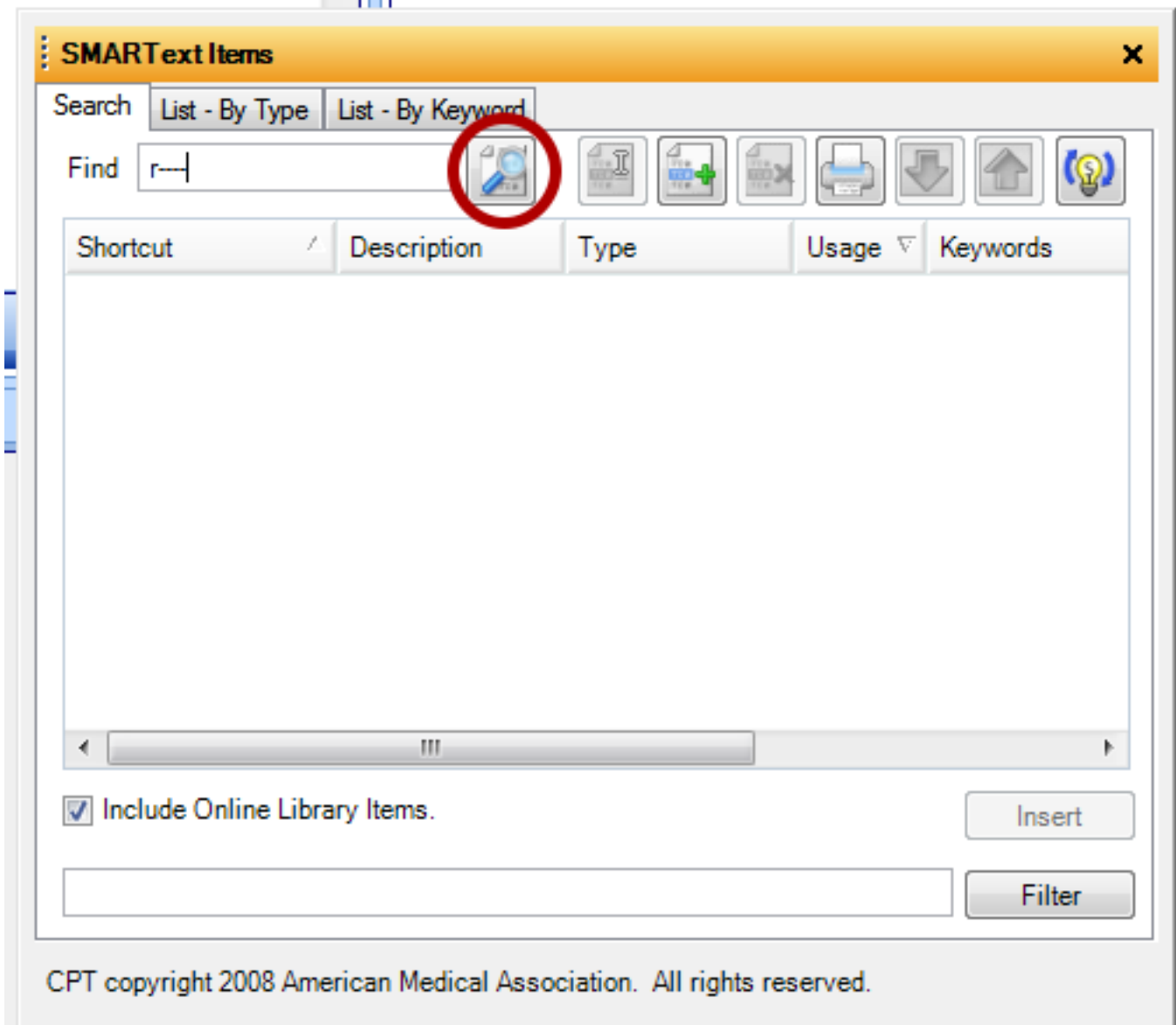
These are the SMARTText items of the Plan item type that are used in the Plan field. There are also some order entry items included in this list.

In the Search box, Type s---- (s, followed by four dashes and no spaces). To select in bulk, Click the first list item in the list so that it is highlighted. Next, Press the Shift + End keys together, and Click on the last list item. This will highlight all the items in the list between the first and the last items. To

download (while the items are highlighted), Click the Download button as shown in the screenshot above.

Alternatively, you can search for a specific item you may need by simply entering a keyword for that item rather than choosing it off of the s--- list.

## Prescription Items

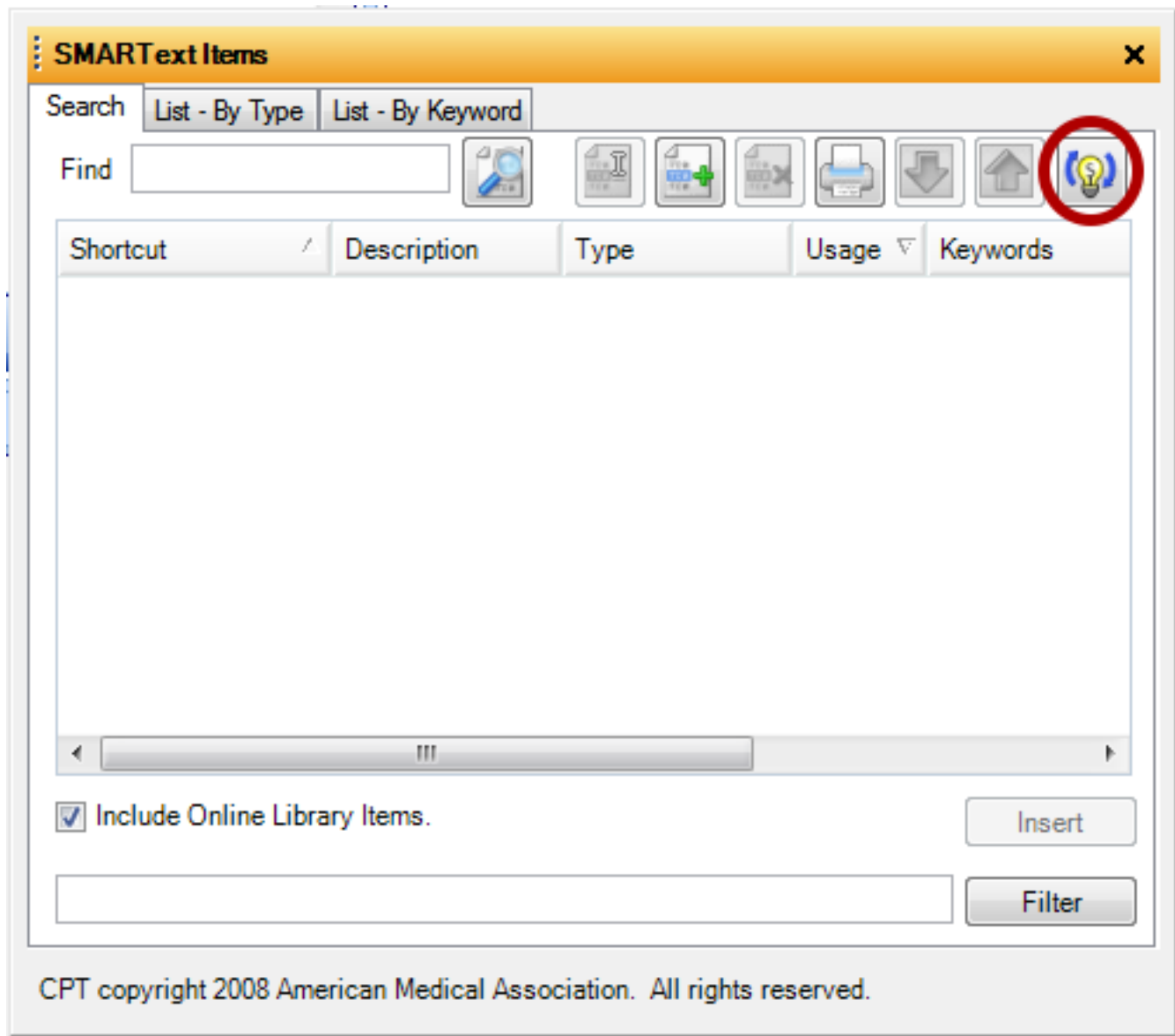


These are the SMARText items of the Structured Rx type that are used in the Medications fields.

In the Search box, Type in r--- (r, followed by three dashes and no spaces). To select in bulk, Click the first list item in the list so that it is highlighted. Next, Press the Shift + End keys together, and Click on the last list item. This will highlight all the items in the list between the first and the last items. To download (while the items are highlighted), Click the Download button as shown in the screenshot above.

Alternatively, you can search for a specific item you may need by simply entering a keyword for that item rather than choosing it off of the r--- list.

## Updating SMARText Items



Finally, to get the latest SMARText items to use in other areas, perform an update of SMARText items. Plan to do this once every 2-4 weeks as the library is growing and changing rapidly.

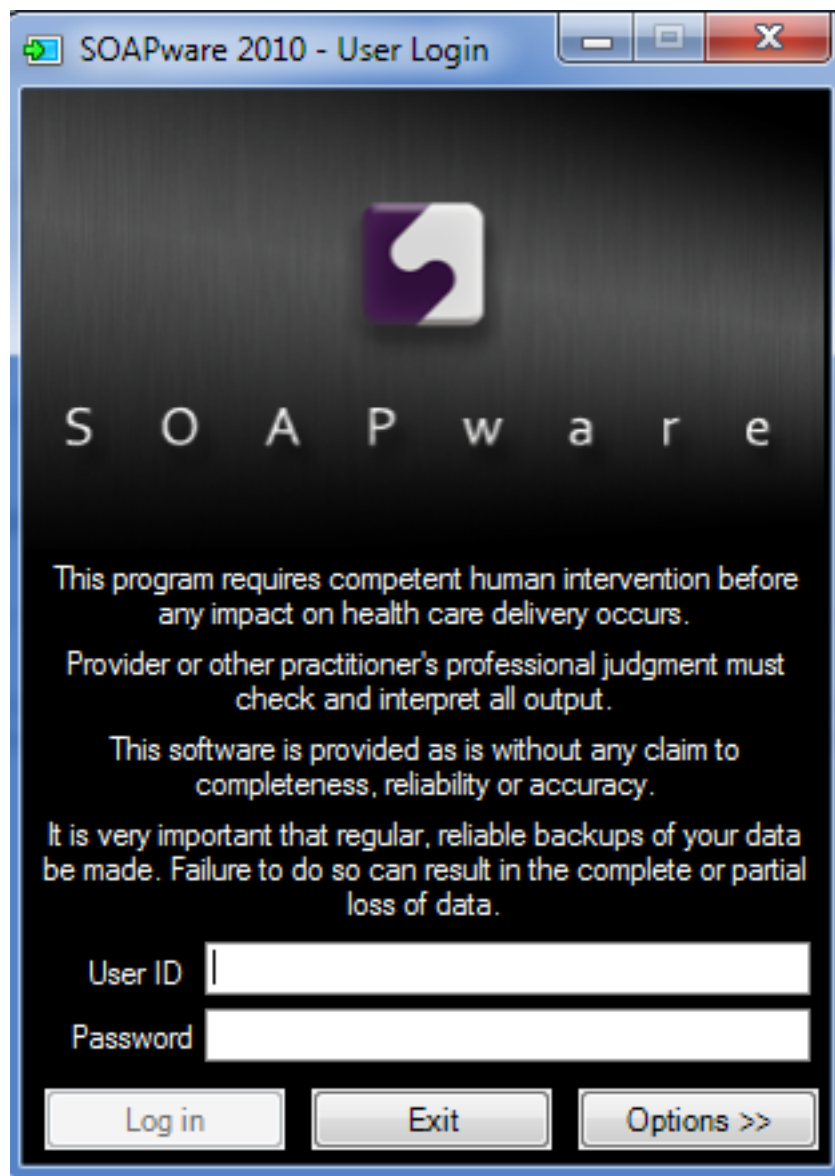
To update SMARText items, these steps only need to be performed on one computer in your network. In the SMARText Items Manager, Click the "nervous lightbulb" button. This will run an update on the entire network of SMARText items, updating areas such as codes and keywords associated with the SMARText items that are used. Updating SMARText items can slow down your network and can take several hours so it is recommended that this is done at the end of the workday and is left to run overnight.

# Exploring SOAPware

## Open and Log In to SOAPware

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### Open SOAPware



Start by opening SOAPware. Click Start; Click the Programs (or All Programs) menu item; Click the SOAPware folder; and then Click the SOAPware menu item. SOAPware opens with the User Log-In dialog.

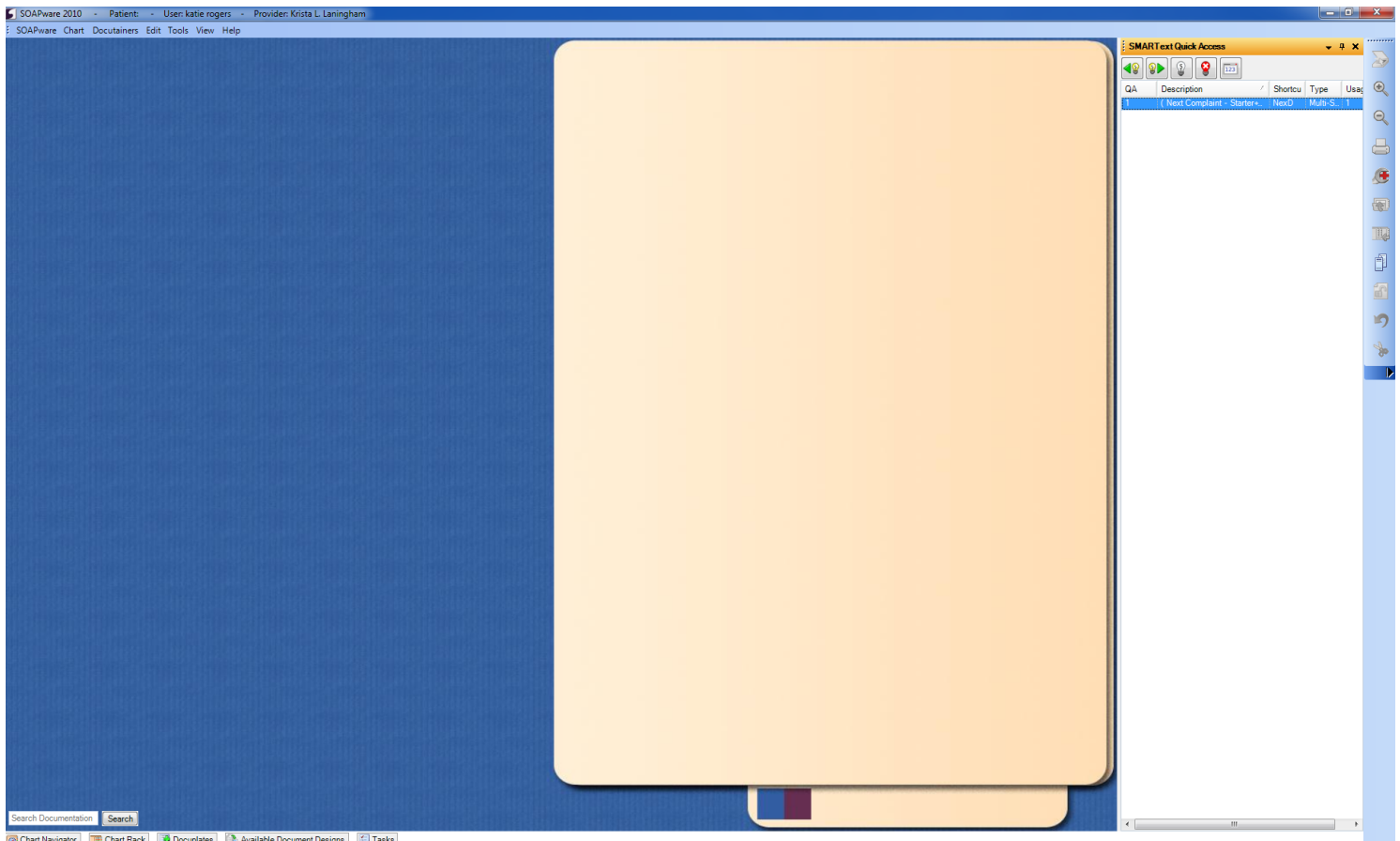




At the start of every SOAPware session, log in to the system with both a user ID and password. For now, sign in will be with a default user. Type SampleNurse in the User ID and samplenurse for the Password, and Click LogIn.

If you cannot log in with SampleNurse, the final step of installation was not performed. Obtain an alternative ID and Password from your administrator.

## SOAPware Opens



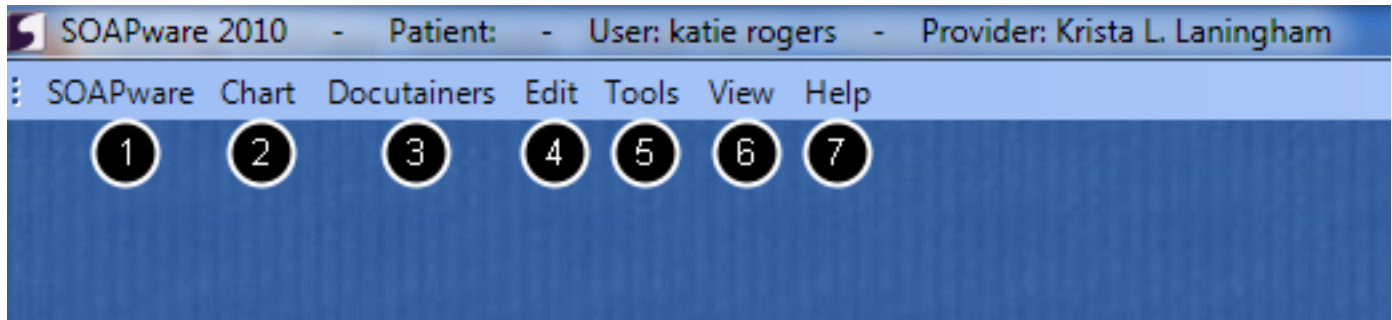
Once SOAPware fully loads, the Chart workspace is displayed. If this is the first time to log in as SampleNurse, there may be an additional dialog presented where the Active Provider for SampleNurse is selected.

## Exploring the SOAPware Interface - Toolbars

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Many commands in SOAPware are used repeatedly, and it is common to place frequently used commands on toolbars. By default, a common toolbar is placed on the right side of the screen. Multiple toolbars are an option, and they can be placed/docked to any edge of the screen. Also, they can float anywhere desired.

### Primary Toolbar - Menu



#### 1. SOAPware Workspaces

SOAPware contains many different workspaces. Each has a different function. If you want to change workspaces, just Click on SOAPware, and select another workspace.

#### 2. Chart

The Chart menu provides many of the tools needed for the chart workspace.

#### 3. Docutainers

This menu area includes many tools needed to create and build your documentation, including Rx Manager, Docuplates, and SMARText, as well as many other tools.

#### 4. Edit

The Edit menu provides tools needed for editing your documentation.

#### 5. Tools

The Tools menu is an area where users will do a lot of set up for their SOAPware workflow. For example, a user would want to come to this menu option to set up insurance companies, pharmacies, and contacts.

#### 6. View

The View menu includes refill requests, layouts, and several view-related settings.

#### 7. Help Menu

One of the many options within the Help Menu is to view what version of SOAPware is running on your database. Click Help-->About SOAPware.

## Common Toolbar

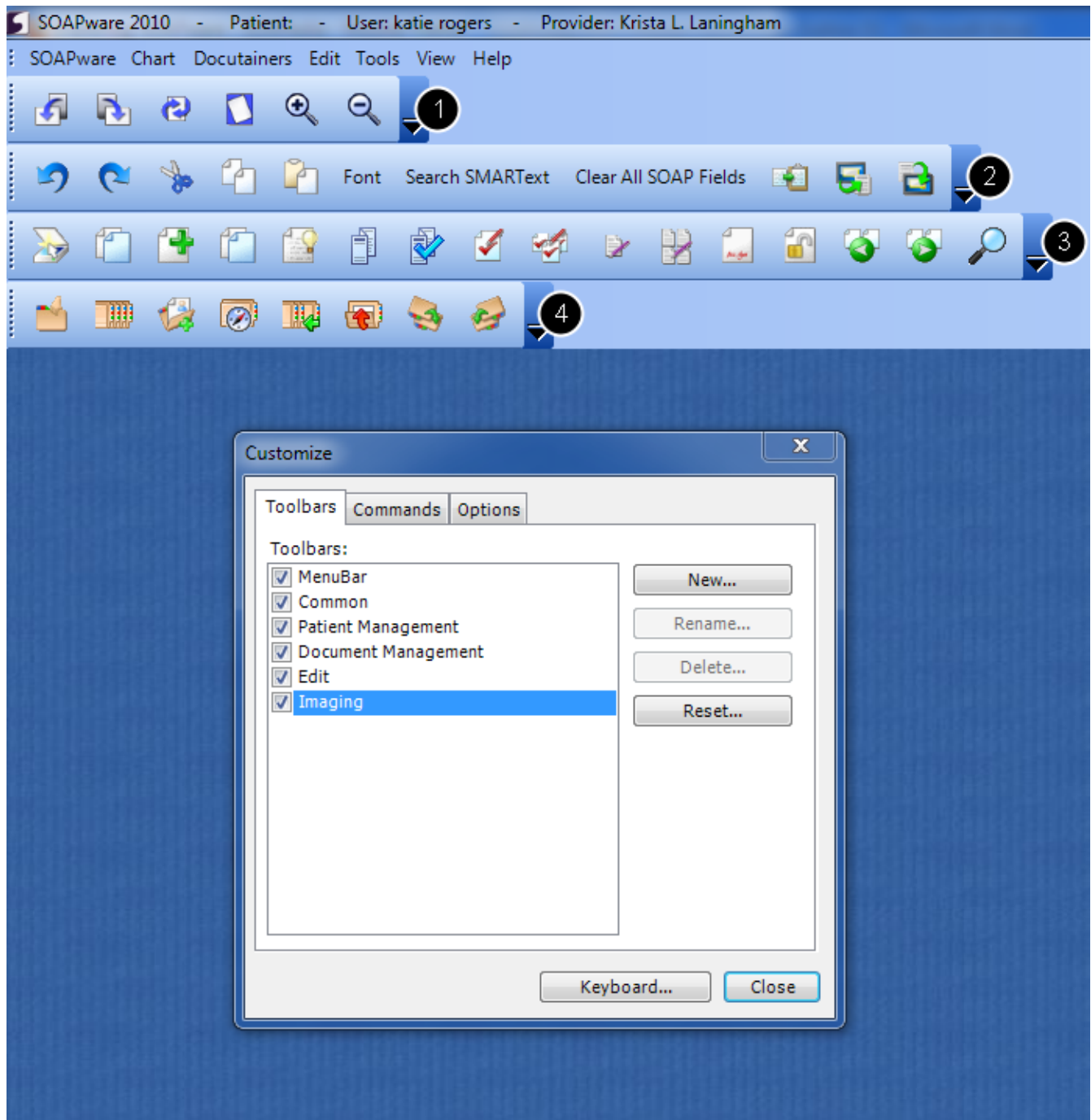


The Common Toolbar provides quick access to many frequently used tools in SOAPware. Instead of having to search using the primary tool, Click on the buttons on the toolbar to perform the following actions:

1. Scan an image
2. Zoom in
3. Zoom out
4. Print a document from your Available Document Designs
5. Manage an order
6. Close the chart
7. Refile a chart

8. Handout Manager
9. Unlock chart sections
10. Undo
11. Cut

## Multiple Toolbar Options



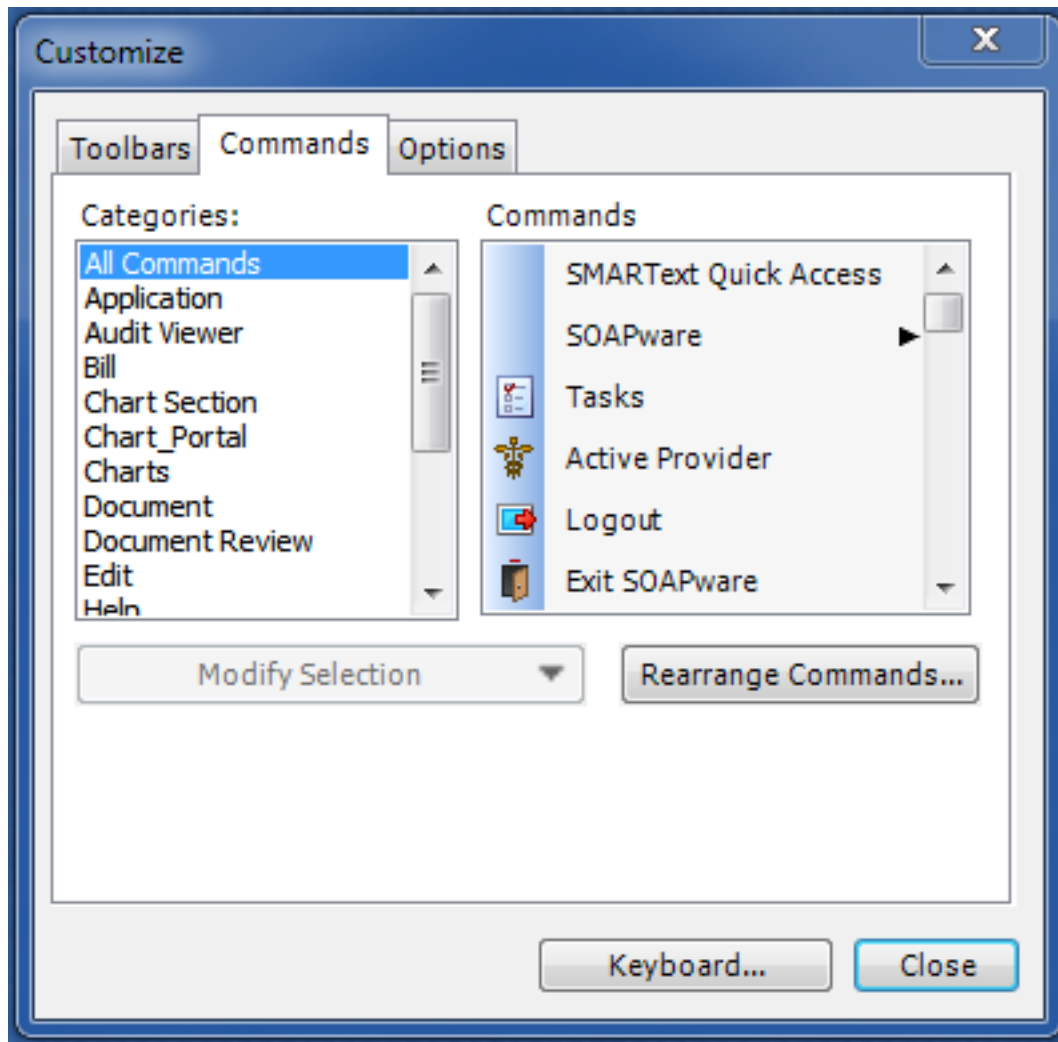
In addition to the Common Toolbar, there are several additional toolbars available. To view these, Click on the Tools Menu and select "Customize". This will bring up the Customize window above. Click each individual toolbar wished to be displayed.

The additional toolbars are:

1. Imaging
2. Edit
3. Document Management
4. Patient Management

Users may also Click "New" to create their own customized toolbar, and may Click Reset to reset the toolbars to the default settings.

## Customizing Toolbars



Users may customize the existing toolbars by adding and deleting buttons from the existing toolbar. To do this, Click the Commands tab in the Customize window shown above.

To add commands to a toolbar, locate the command you wish to add. To locate the commands a user would like to include, Click on "All Commands", or browse by category, such as "Chart Section" or "Edit". Next, Click and hold on the command in the "Command" section of the window and drag it to the toolbar and drop it in the desired location. When the command is ready to drop, a black bar will be

visible in the toolbar, indicating where the new command will be located.

To remove a command from a toolbar, with the command window above still open, Click and hold the button on the toolbar and drag it to the command window and drop it. This will remove it from the toolbar. Users may also use this method to rearrange the commands on the toolbars by dragging them to another position.

## Exploring the SOAPware Interface - Docked Tabs

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At the bottom edge of the SOAPware Interface, docked tabs are displayed. These docked tabs can be moved to any corner of your screen, can be free floating, removed entirely, and are user-specific.

### Docked Tabs

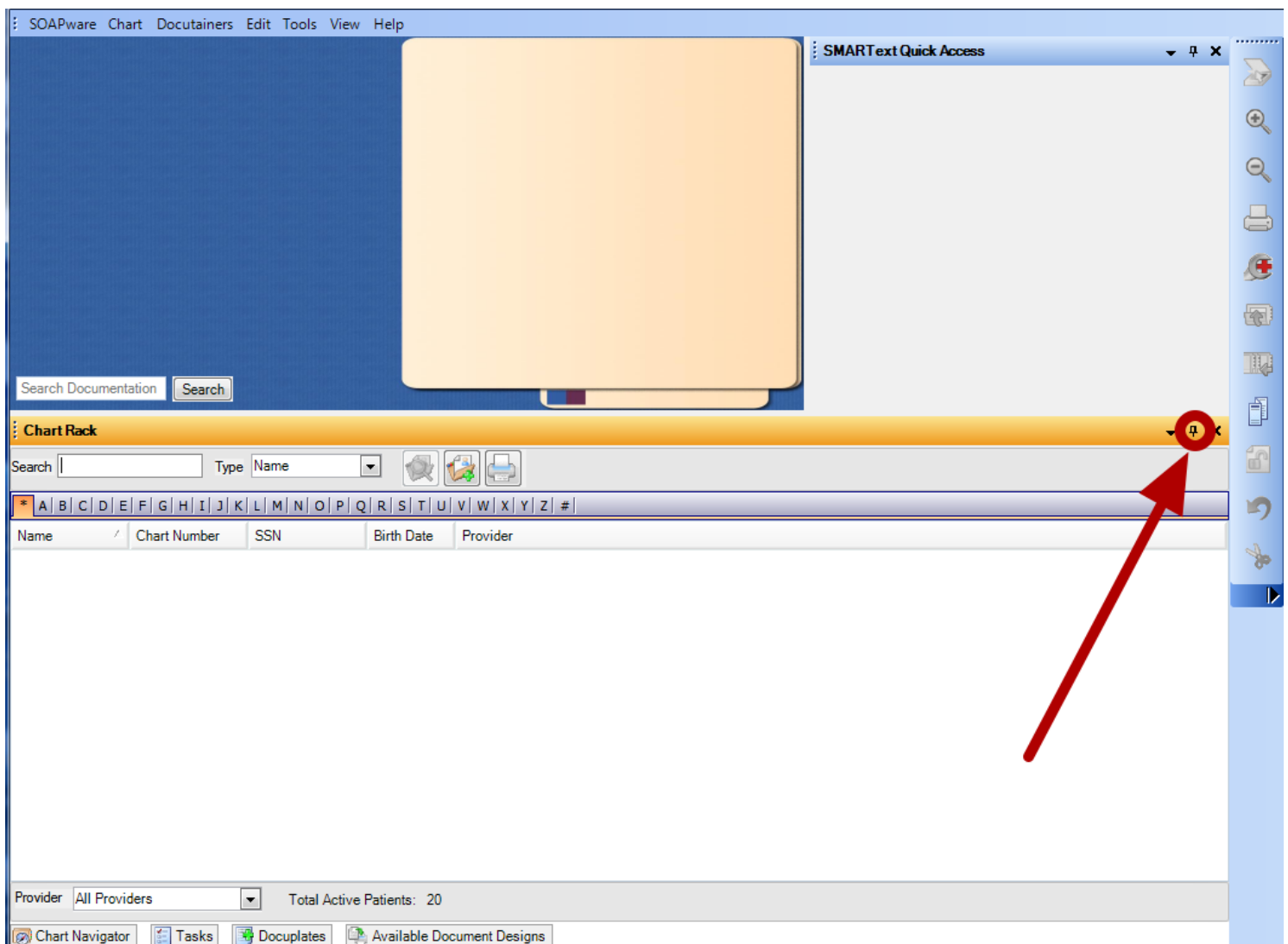


These four docked tabs come defaulted with SOAPware. A user may Click on these tabs to expand them, or have them expand automatically when moused over or hovered over one of them.

Simply pointing to/on (or hovering over) these tabs causes their viewers to pop-out, or expand, to a full view. Once a viewer is expanded, Click in the SMARText Quick Access dialog (or somewhere outside of the viewer), and the viewer will slide back, or collapse, back into the tab. The Chart Rack viewer will remain open until a chart is selected. Many of the viewers in SOAPware can be docked to any of the four edges of the Chart workspace. Viewers that are docked can be undocked, so that they can float anywhere.

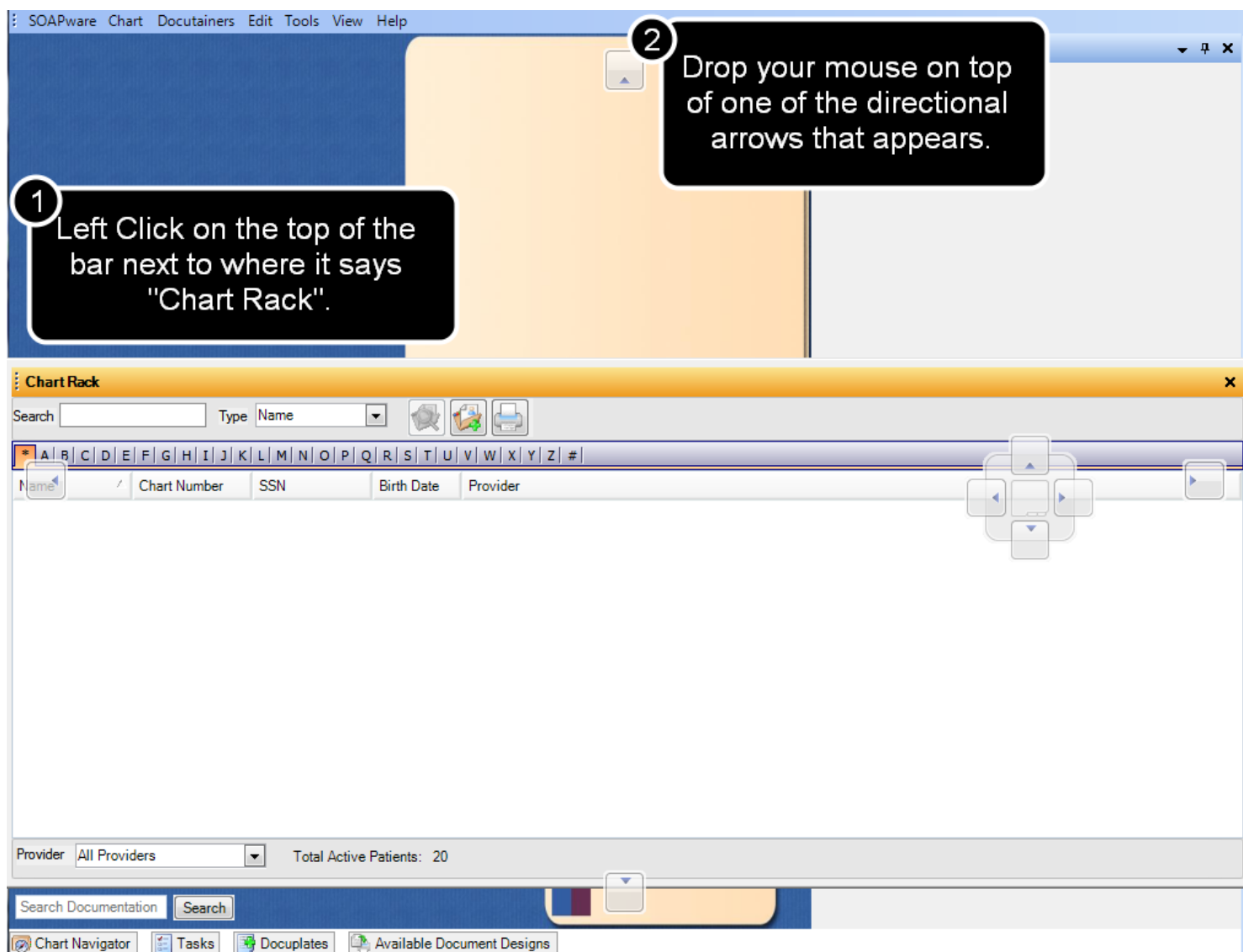


## Pin-Open Docked Tabs



Sometimes, it is preferred that the viewer remain in full view even if the mouse is moved to elsewhere. To pin the viewer open, open a docked tab (such as Chart Rack), and Click on the small pin icon in the upper right corner of an expanded viewer (see screenshot above, noticing the downward pointing pin). Re-Clicking the pin will un-pin, and thus reactivate the viewer's ability to collapse back into the tab.

## Move a Docked Tab



To move a docked tab, first action will be to pin it open, using the instructions above for pinning open a docked tab.

Left Click and hold on the docked tab top bar, and continue to hold down your left click as you start to move your docked tab.

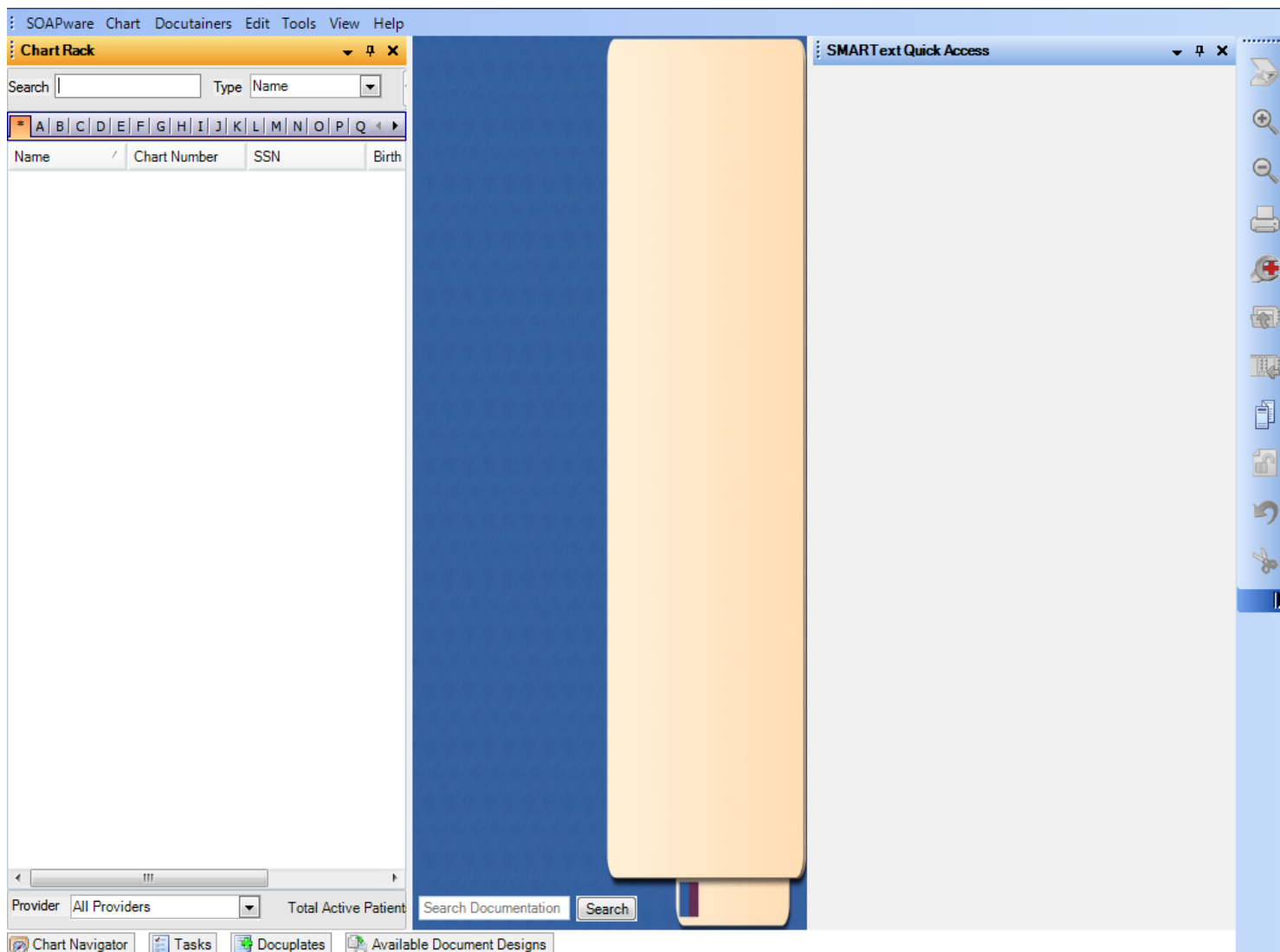
You will notice some directional arrows which have now appeared on the screen while you are holding down your left click.

To dock your tab at the top of the screen next to the Menu Toolbar, drag and drop the tab to the arrow that appears at the top of the screen. There are arrows which correspond with each of the four sides of the screen, as well as arrows in the middle which also correspond to the four sides of the screen.

Make sure to drag the top bar of the docked tab to the directional arrow. You can let go of your left

click when you see the blue shading appear.

## Un-Pin the Docked Tab



Notice that the chart rack docked tab is now placed to the left of the screen.

Un-pin by Clicking on the pin icon. The pin should be facing side-to-side now. Click on the "X" to close the docked tab. Note: The docked tab is not removed from the chart layout. Instead it returns to its original position.

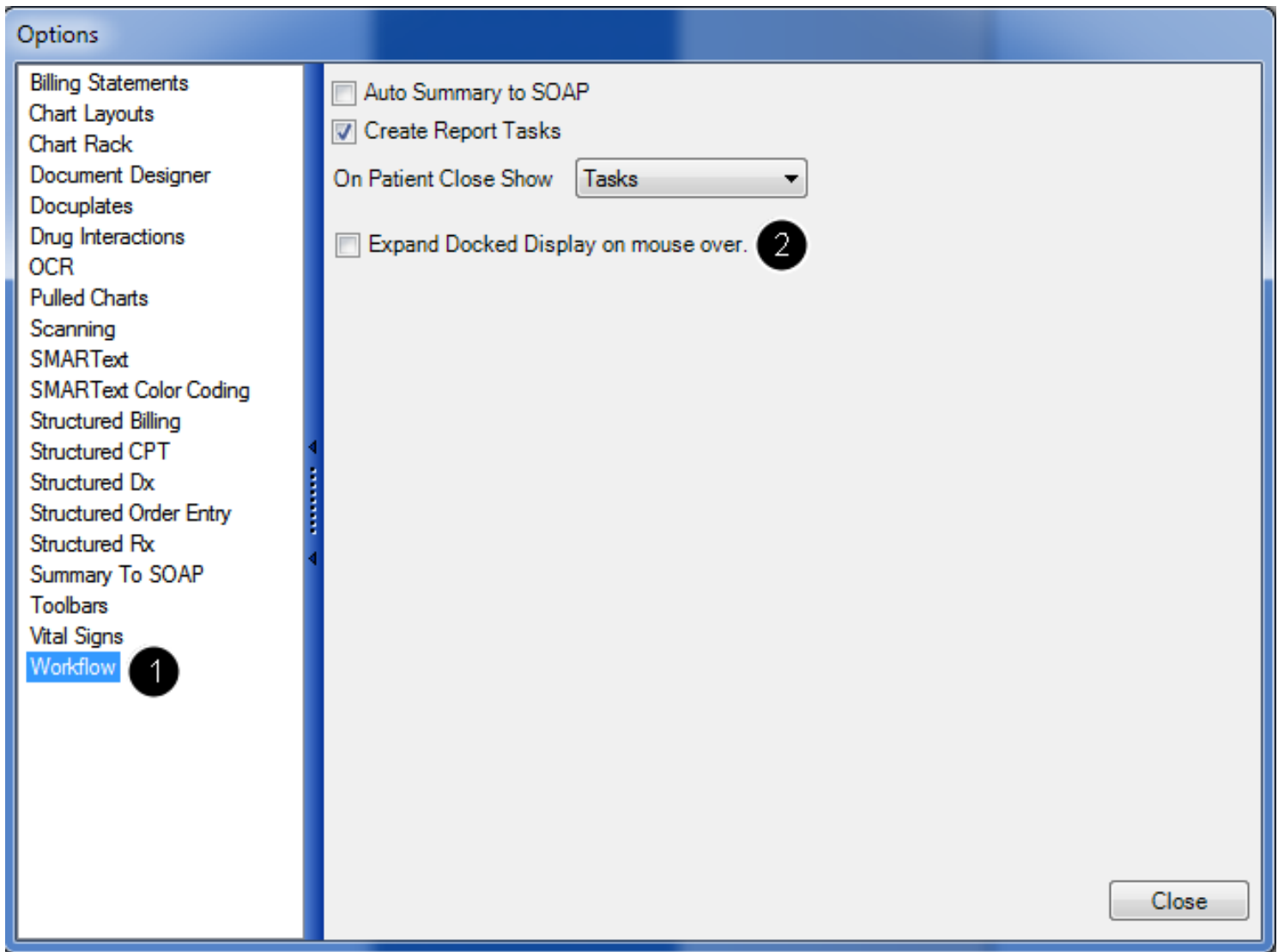
## Remove a Docked Tab

To leave a tab free-floating so that it is no longer docked, Click on a docked tab to expand the tab, and pin it open as shown above.

Left click on the docked tab top bar, and continue to hold down your left click as you start to move your docked tab.

Instead of dropping the tab on one of the arrows provided, instead drop the tab out in the middle section of the screen. This will leave it free-floating and you can Click on the X to remove the docked tab from your view.

## Expand Docked Tabs Automatically



You can set up docked tabs to expand automatically so that you hover your mouse over the docked tab to expand it instead of clicking to expand.

To set this as your preference, click on Tools-->Options

1. Click on Workflow
2. Check the box next to "Expand Docked Display on mouse over." Click Close.

## Log out

Click on SOAPware-->log out. Then log back in for this change to take effect. Remember, this change will be user-specific!

### **User Tip**

While Pulled Charts is a docked tab option, using Pulled Charts is not recommended in SOAPware 2010. It is only available as a legacy item for customers converting from Version 4.

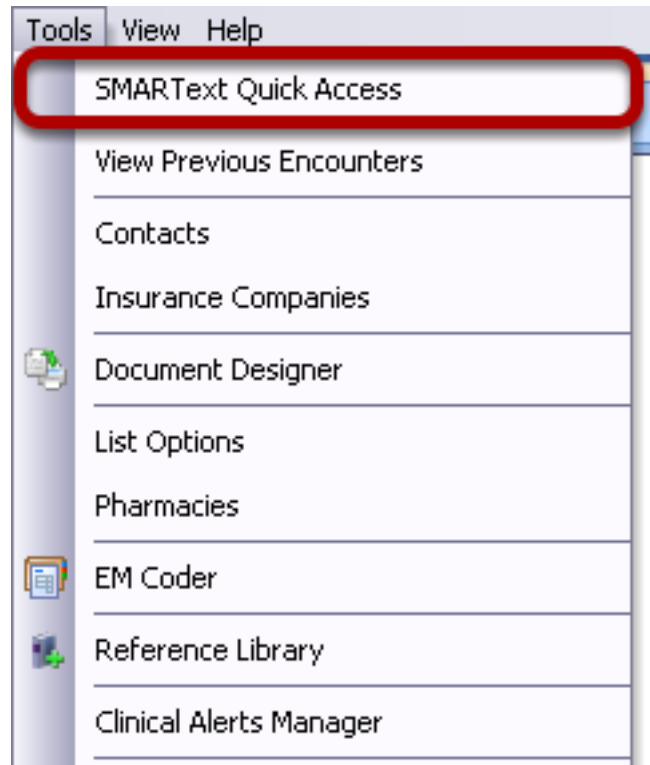
## TIP - Docking SMARText Quick Access

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In this lesson we will describe how to dock the SMARText Quick Access window.

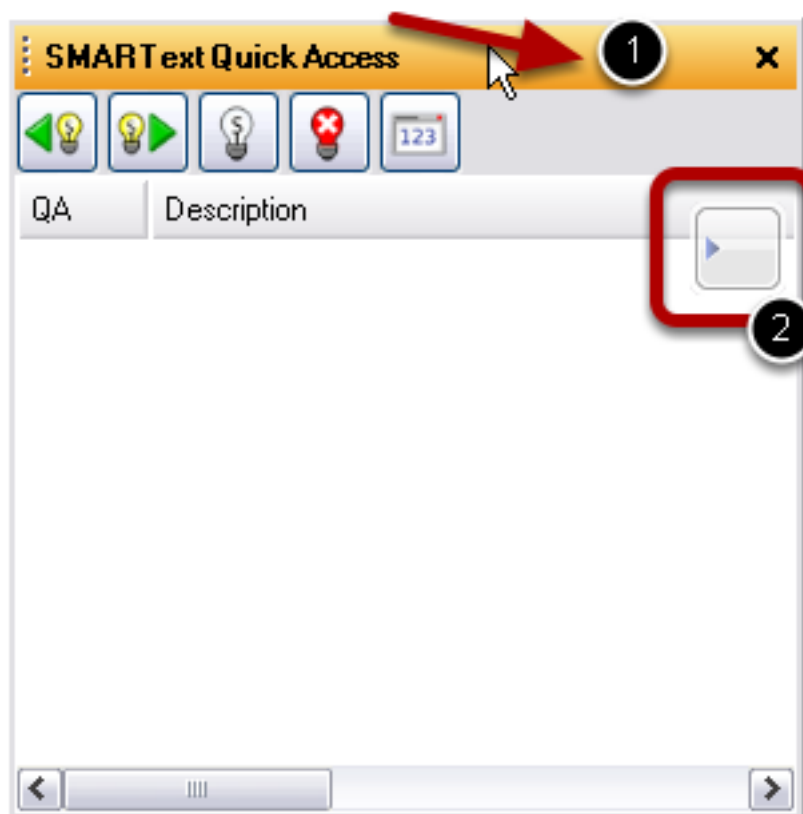
The SMARText Quick Access window is used when working with SMARText and Location Pick Lists. You can dock the SMARText Quick Access window on any side of your computer screen, however we suggest that the SMARText Quick Access be docked on the right hand side of your screen for easy retrieval of the Pick List items.

### Retrieving the SMARText Quick Access Window



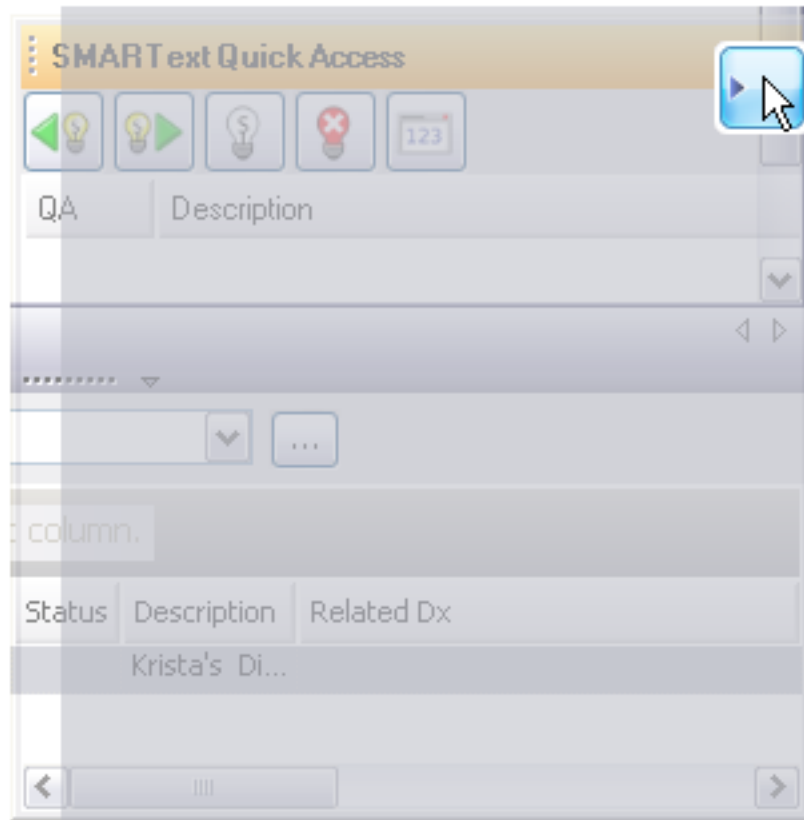
1. Click on Tools in the Menu bar.
2. Select SMARText Quick Access

## Dragging the SMARText Quick Access Window



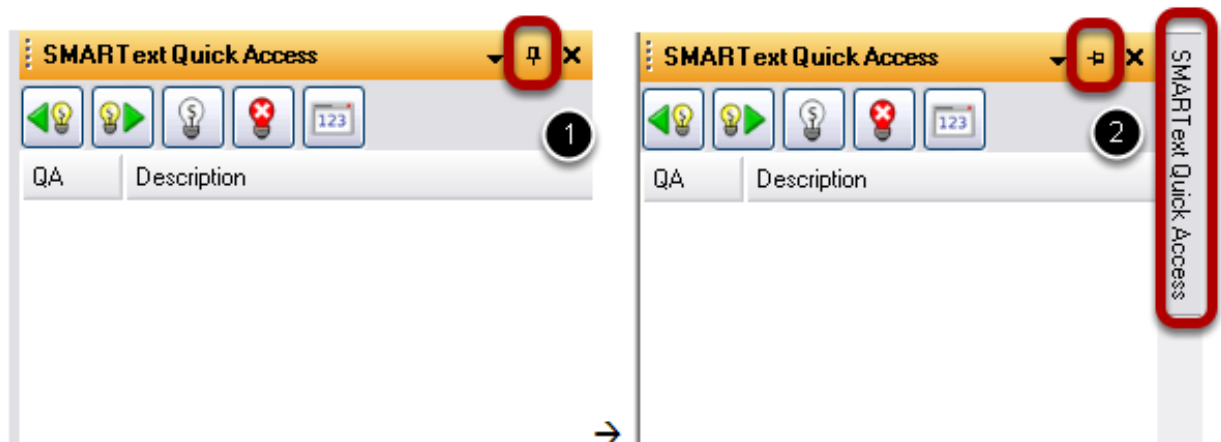
1. Left-Click on the SMARText Quick Access title bar.
2. While holding the left-click, begin dragging the SMARText Quick Access window towards the blue arrow box on the right side of your screen (see above).

## Positioning your Cursor to Dock the SMARText Quick Access Window



1. When your cursor is directly on top of the blue arrow, the arrow box will turn darker blue with light blue shading. This indicates that it is ok to release your left-click.
2. Release your left-click to place the SMARText Quick Access window on the right side of your screen.

## Docking the SMARText Quick Access Window



1. When the SMART Quick Access window is released, the push pin button will be pointing down indicating that the window is pinned open. To dock the window, Click once on the push pin button (see above).



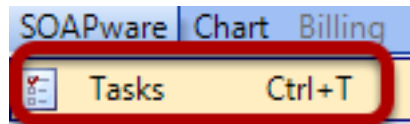
2. The push pin button will now be pointing to the side and the SMARTText Quick Access docked tab will appear.

## What Can Be a Docked Tab?

This lesson will demonstrate what items in SOAPware, can be a docked tab. To review how to dock a tab, see: [Docked Tabs](#).

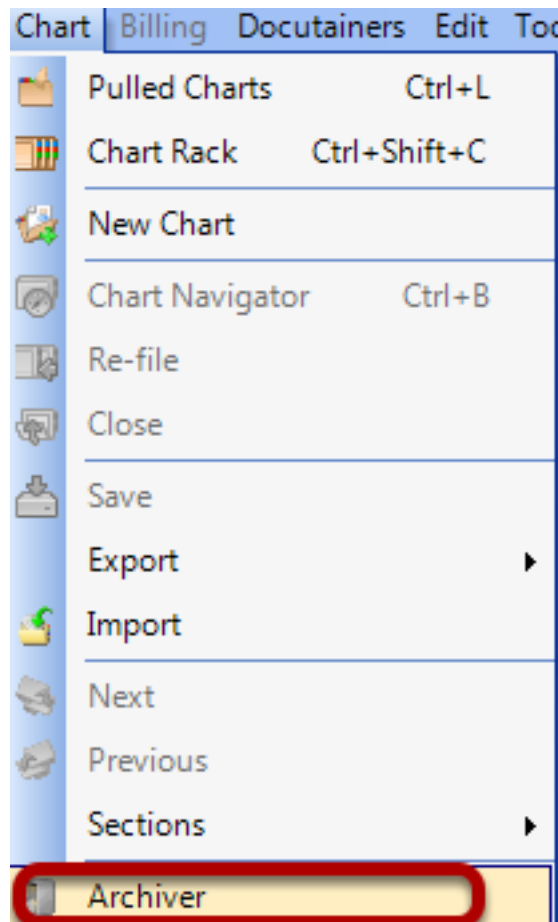
**Note:** A user can dock an item to the top, bottom, right, or left side of the SOAPware Interface. A user is also able to leave the item free floating .

### Tasks



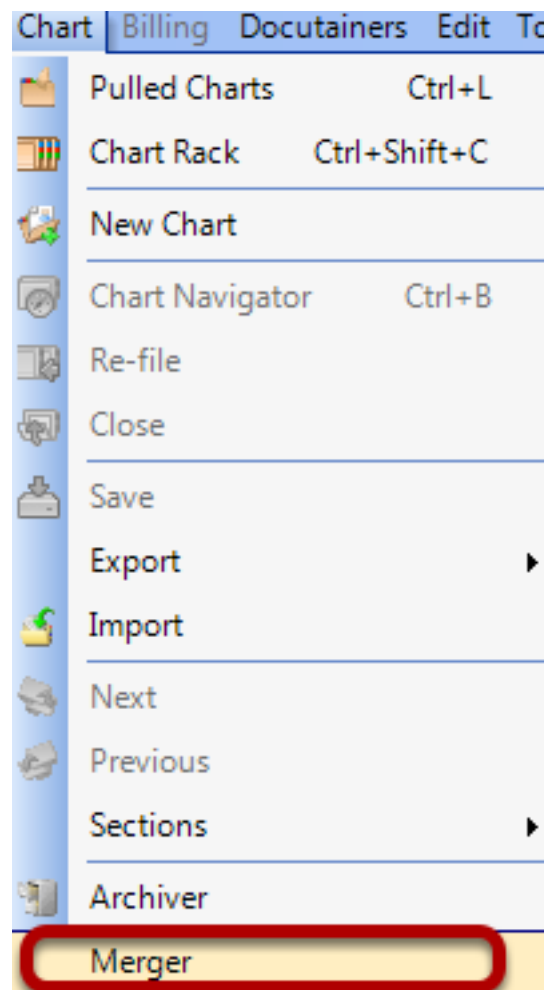
To dock Tasks, Click SOAPware > Tasks.

### Chart - Archiver



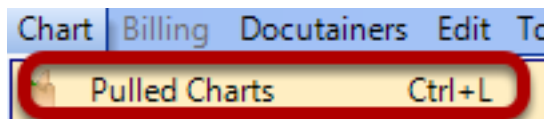
To dock Chart Archiver, Click Chart > Archiver.

## Chart - Merger



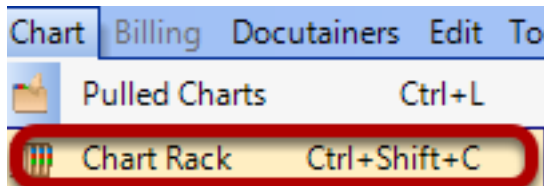
To dock Chart Merger, Click Chart > Merger.

## Chart - Pulled Charts



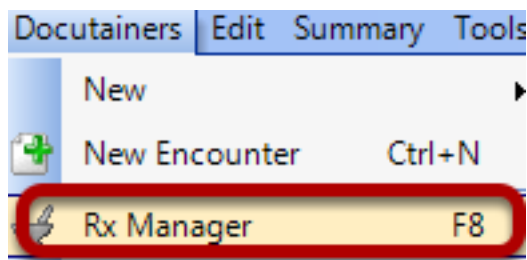
To dock Pulled Charts, Click Chart > Pulled Charts.

## Chart - Chart Rack



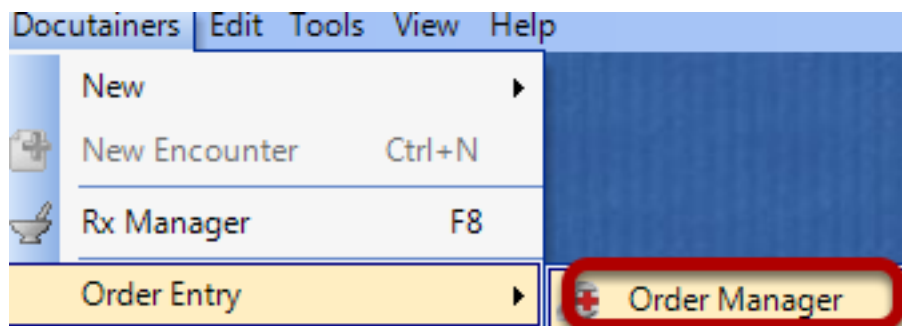
To dock the Chart Rack, Click Chart > Chart Rack.

## Docutainers - Rx Manager



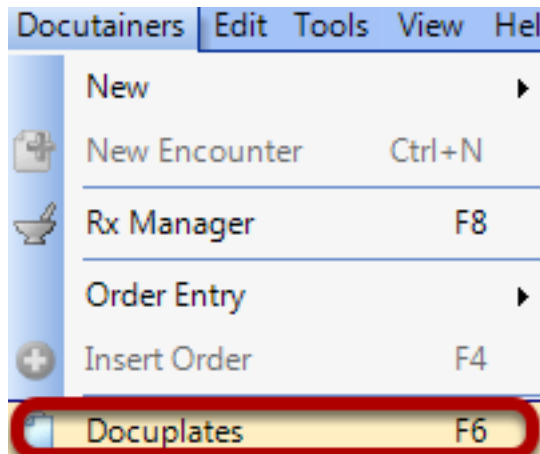
To dock Rx Manager, Click Docutainers > Rx Manager.

## Docutainers - Order Manager



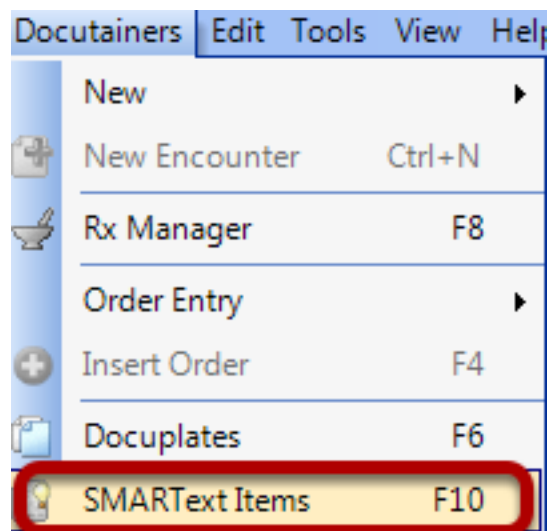
To dock Order Manager, Click Docutainers > Order Entry > Order Manager.

## Docutainers - Docuplates



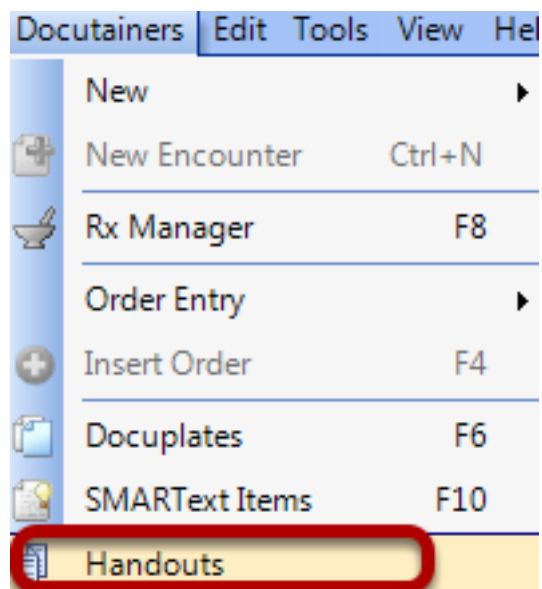
To dock Docuplates, Click Docutainers > Docuplates.

## Docutainers - SMARTText Items



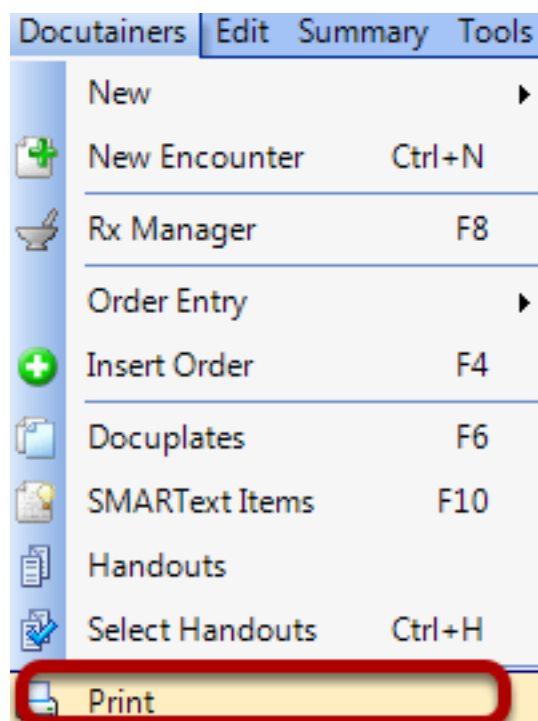
To dock SMARTText Items, Click Docutainers > SMARTText Items.

## Docutainers - Handouts



To dock Handouts, Click Docutainers > Handouts.

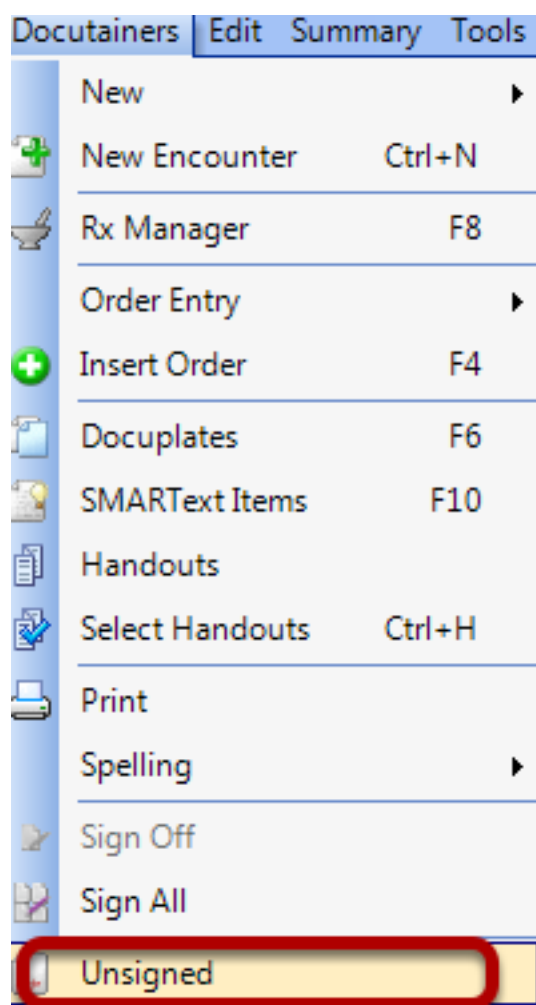
## Docutainers - Print



To dock Print, Click Docutainers > Print.

**Note:** The Print item is a list of your Available Document Designs.

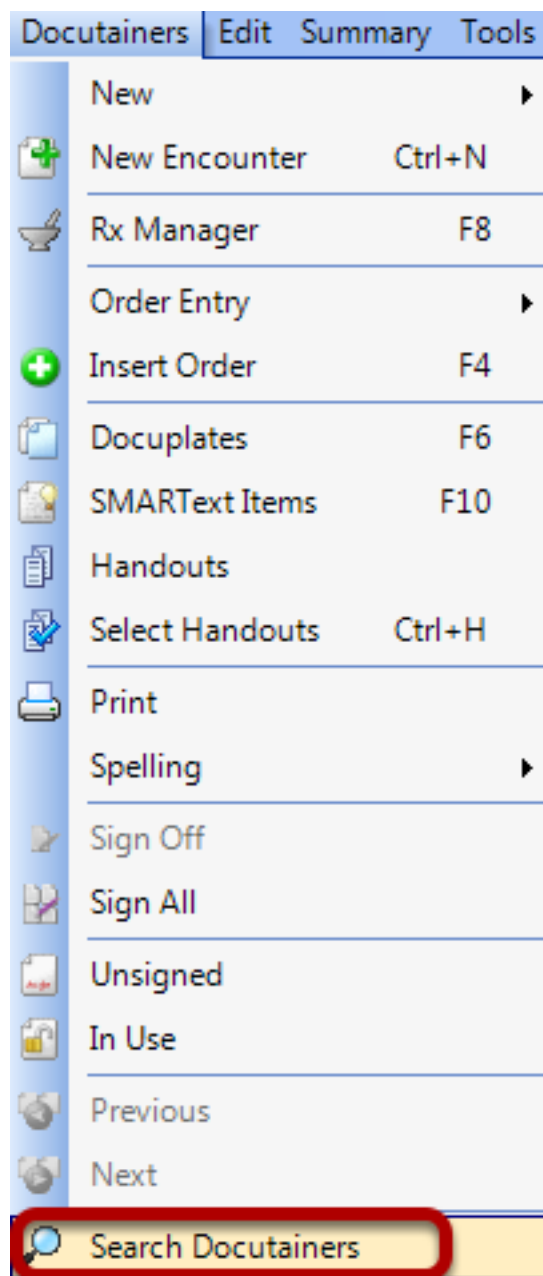
## Docutainers - Unsigned



To dock Unsigned, Click Docutainers > Unsigned.

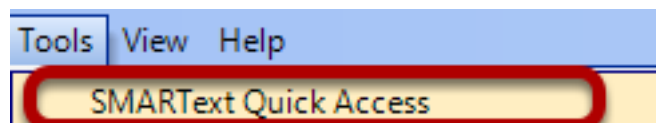
**Note:** This item brings up the "Unsigned Documents" dialog.

## Docutainers - Search Docutainers



To dock Search Docutainers, Click Docutainers > Search Docutainers.

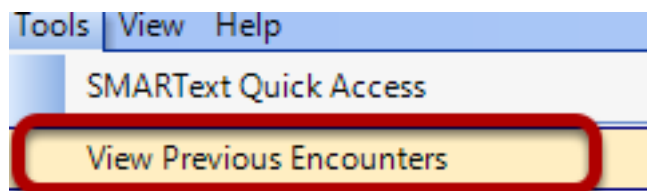
## Tools - SMARText Quick Access



To dock SMARText Quick Access, Click Tools > SMARText Quick Access.  
To view more information on docking SMARText Quick Access, Click [here](#).

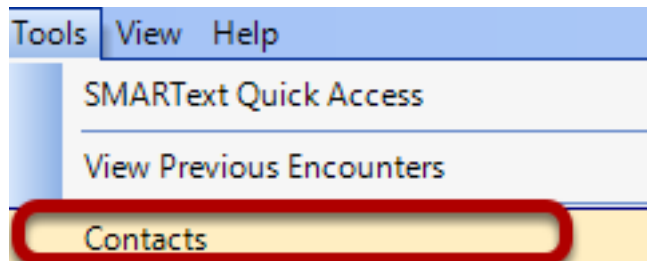


## Tools - View Previous Encounters



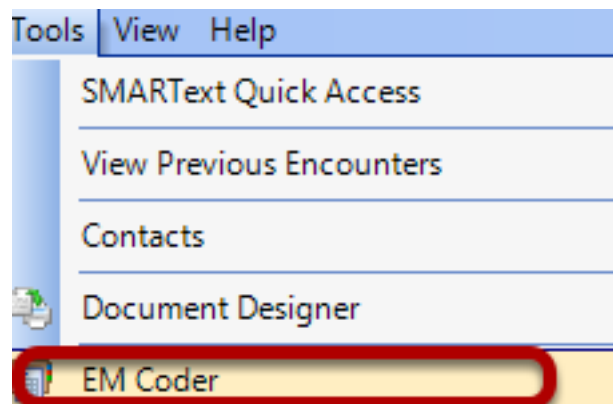
To dock View Previous Encounters, Click Tools > View Previous Encounters.

## Tools - Contacts



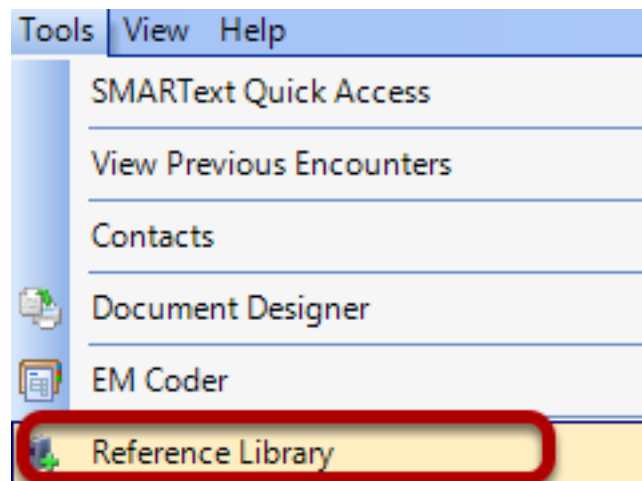
To dock Contacts, Click Tools > Contacts.

## Tools - EM Coder



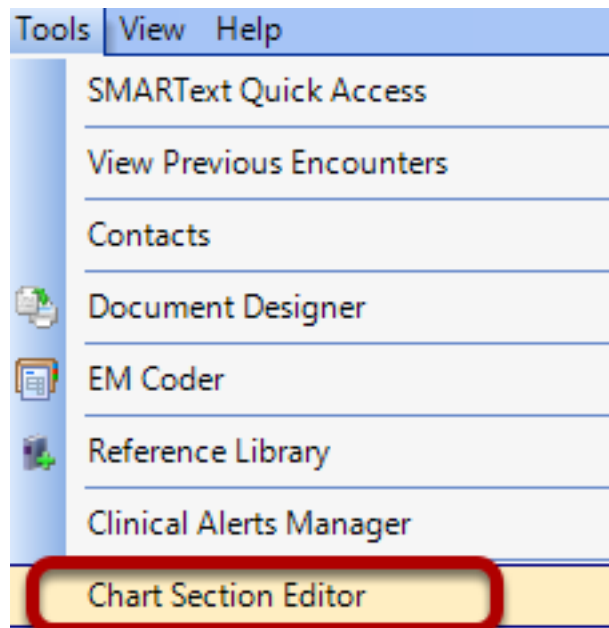
To dock EM Coder, Click Tools > EM Coder.

## Tools - Reference Library



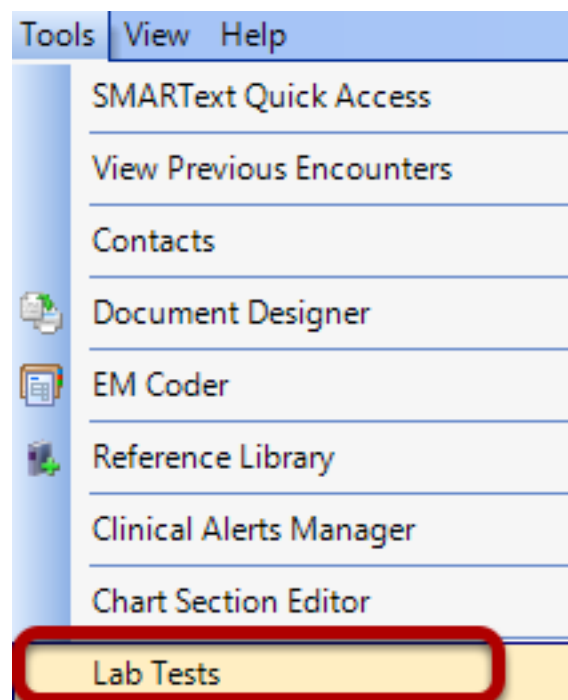
To dock the Reference Library, Click Tools > Reference Library.

## Tools - Chart Section Editor



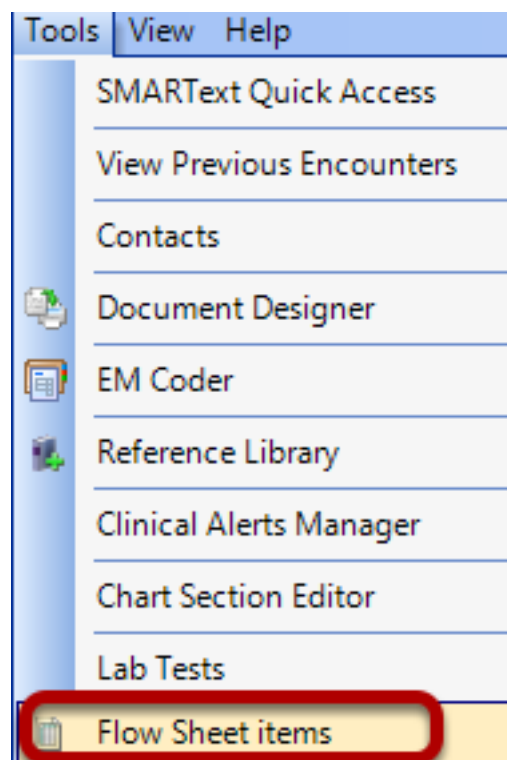
To dock Chart Section Editor, Click Tools > Chart Section Editor.

## Tools - Lab Tests



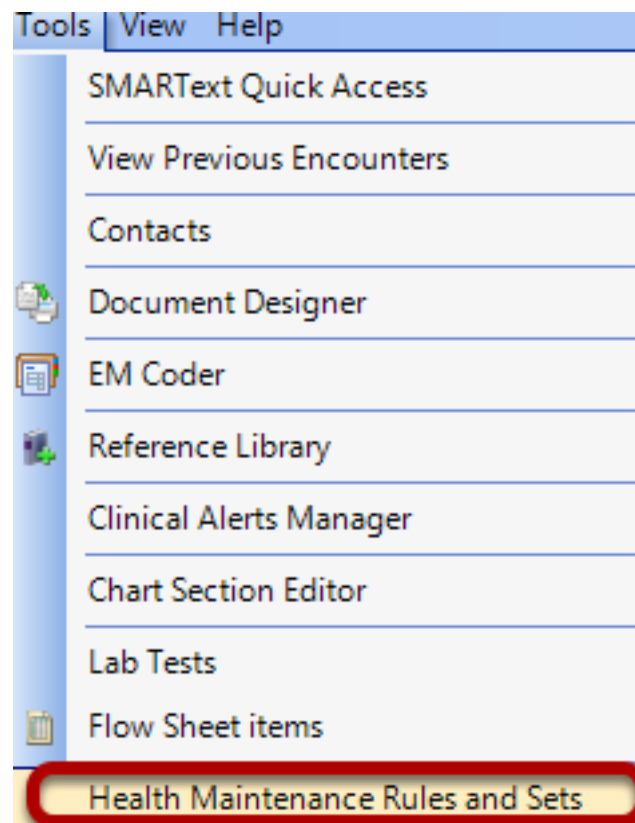
To dock Lab Tests, Click Tools > Lab Tests.

## Tools - Flow Sheet Items



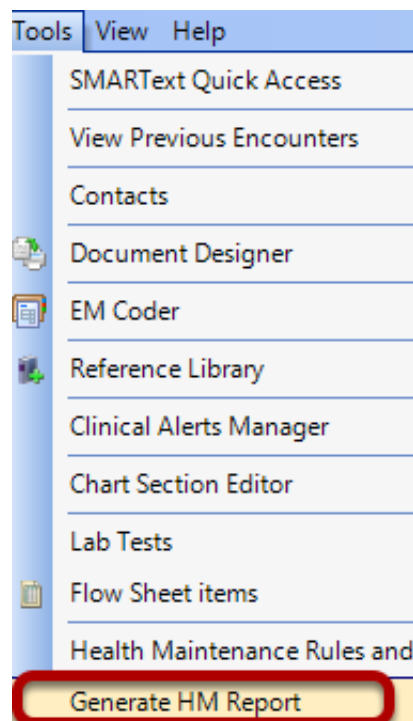
To dock Flow Sheet items, Click Tools > Flow Sheet items.

## Tools - Health Maintenance Rules and Sets



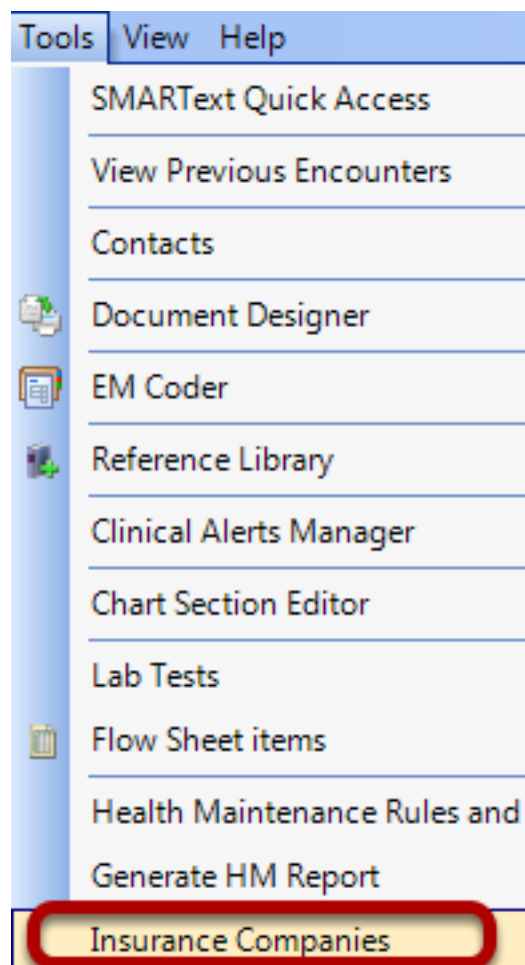
To dock Health Maintenance Rules and Sets, Click Tools > Health Maintenance Rules and Sets.

## Tools - Generate HM Report



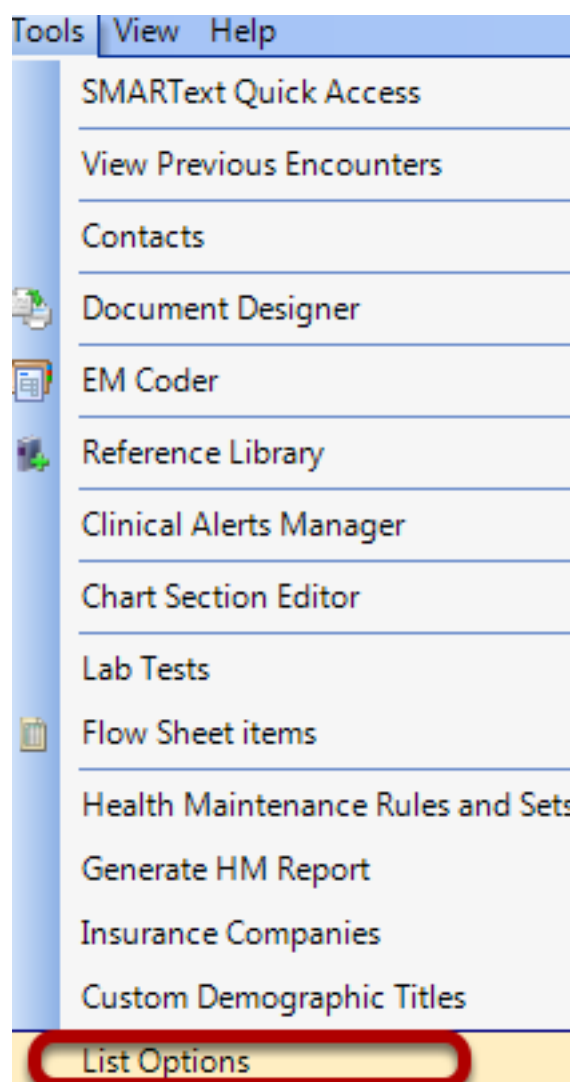
To dock the Generate Health Maintenance Report dialog, Click Tools > Generate HM Report.

## Tools - Insurance Companies



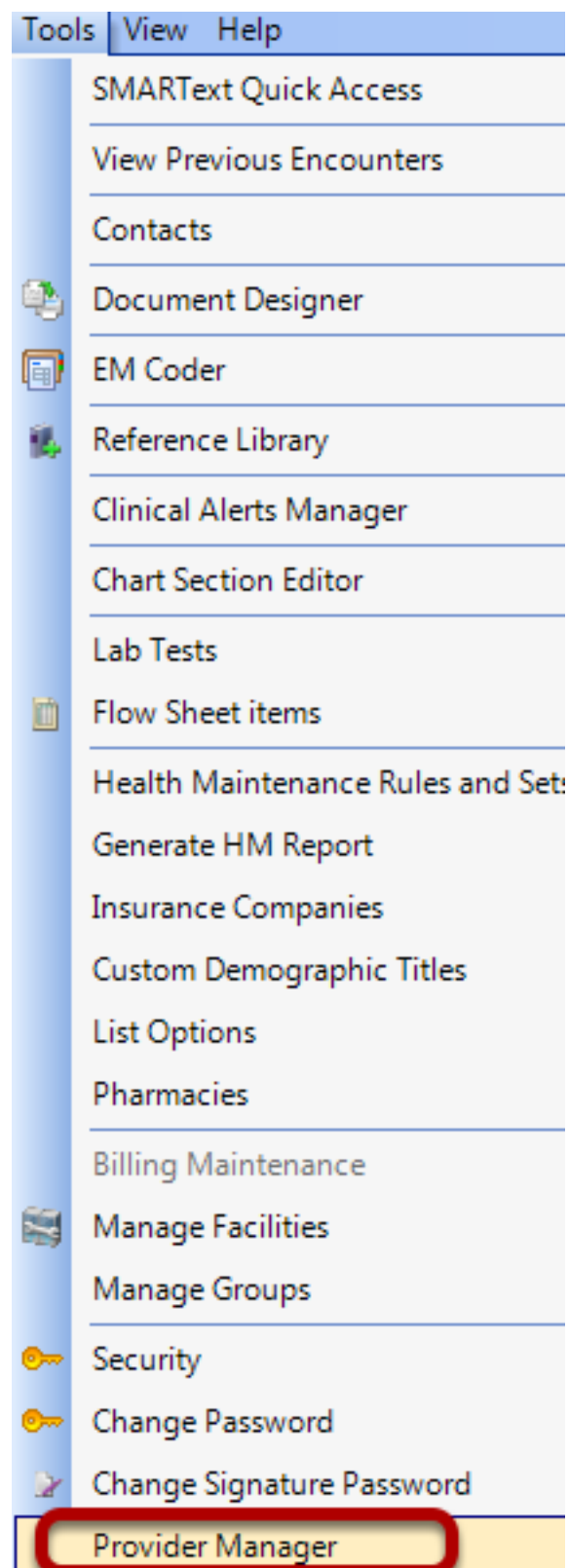
To dock Insurance Companies, Click Tools > Insurance Companies.

## Tools - List Options



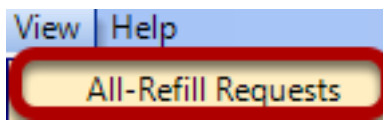
To dock List Options, Click Tools > List Options.

## Tools - Provider Manager



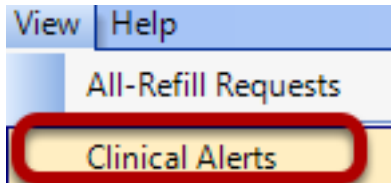
To dock Provider Manager, Click Tools > Provider Manager.

## View - All Refill Requests



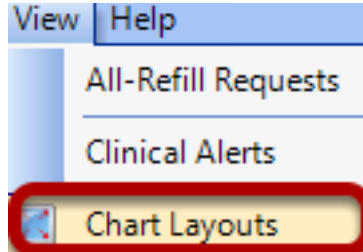
To dock All Refill Requests, Click View > All Refill Requests.

## View - Clinical Alerts



To dock Clinical Alerts, Click View > Clinical Alerts.

## View - Chart Layouts



To dock Chart Layouts, Click View > Chart Layouts.

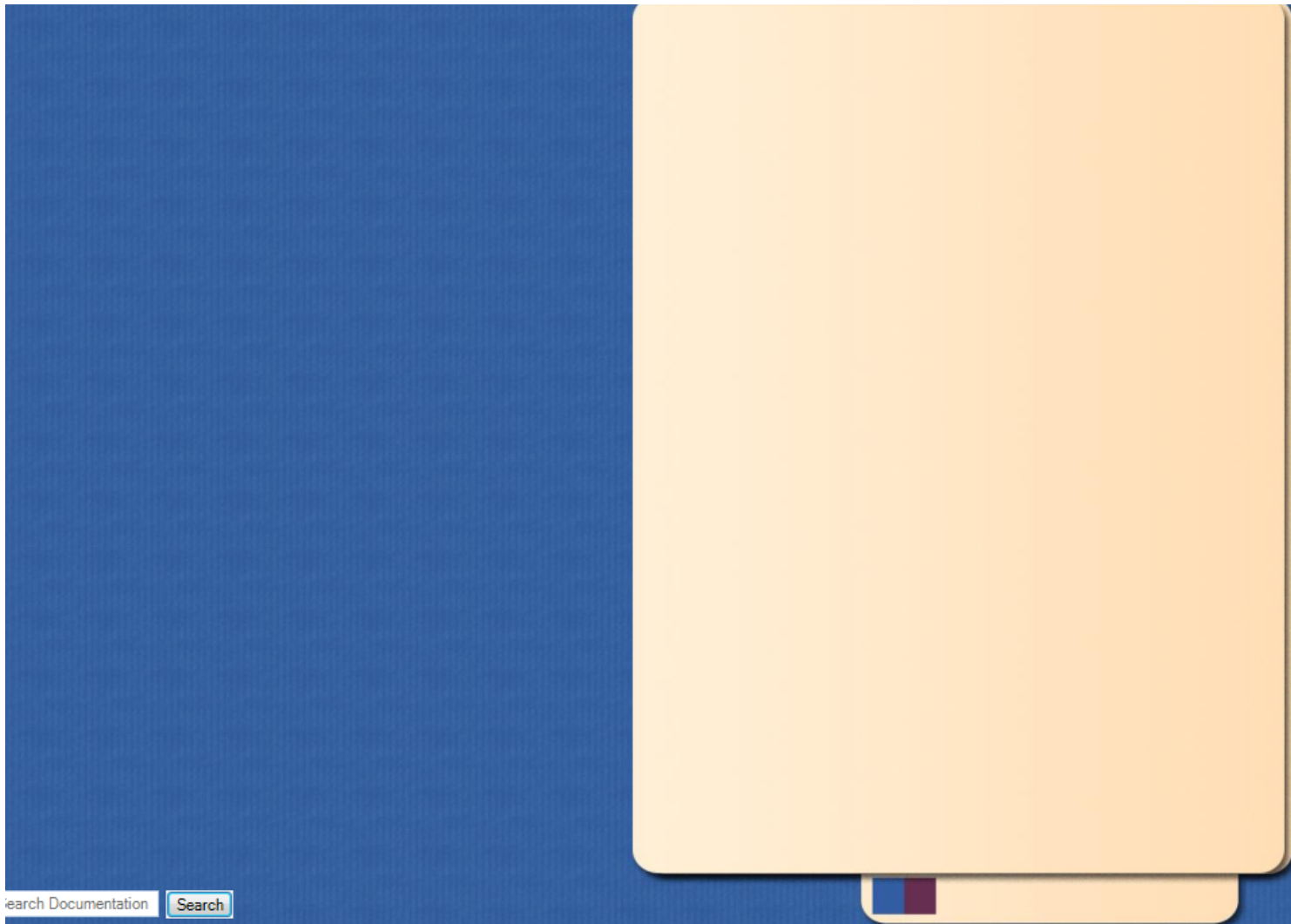


## SOAPware Workspaces

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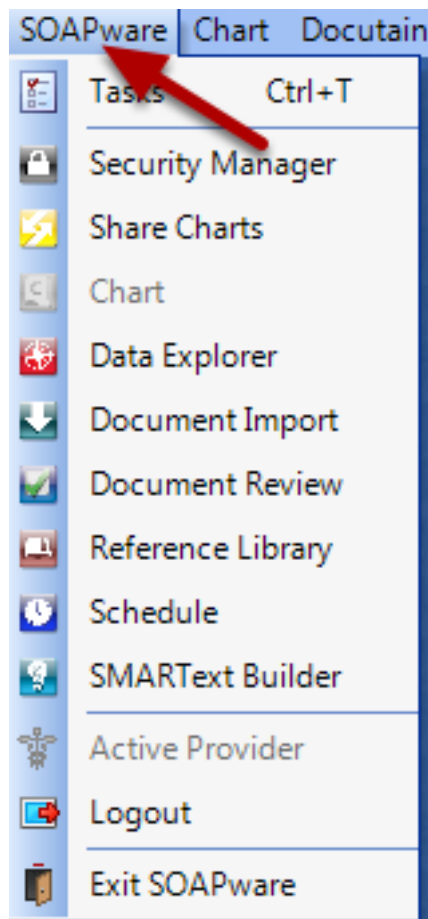
This introductory lesson is designed to teach you how to change workspaces when working in SOAPware.

**When you are first logged into SOAPware, you are in the chart workspace.**



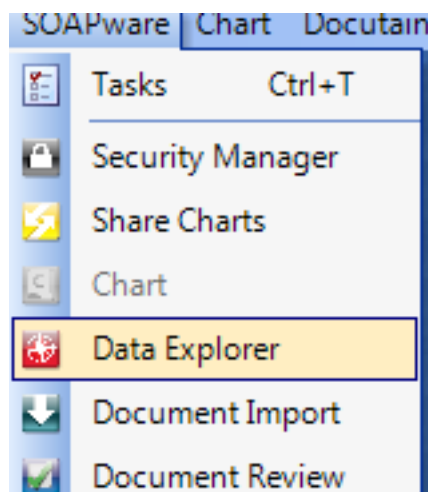
You know you are in the chart workspace because you see a manila file folder.

To change which workspace you are working in, click on the SOAPware menu.



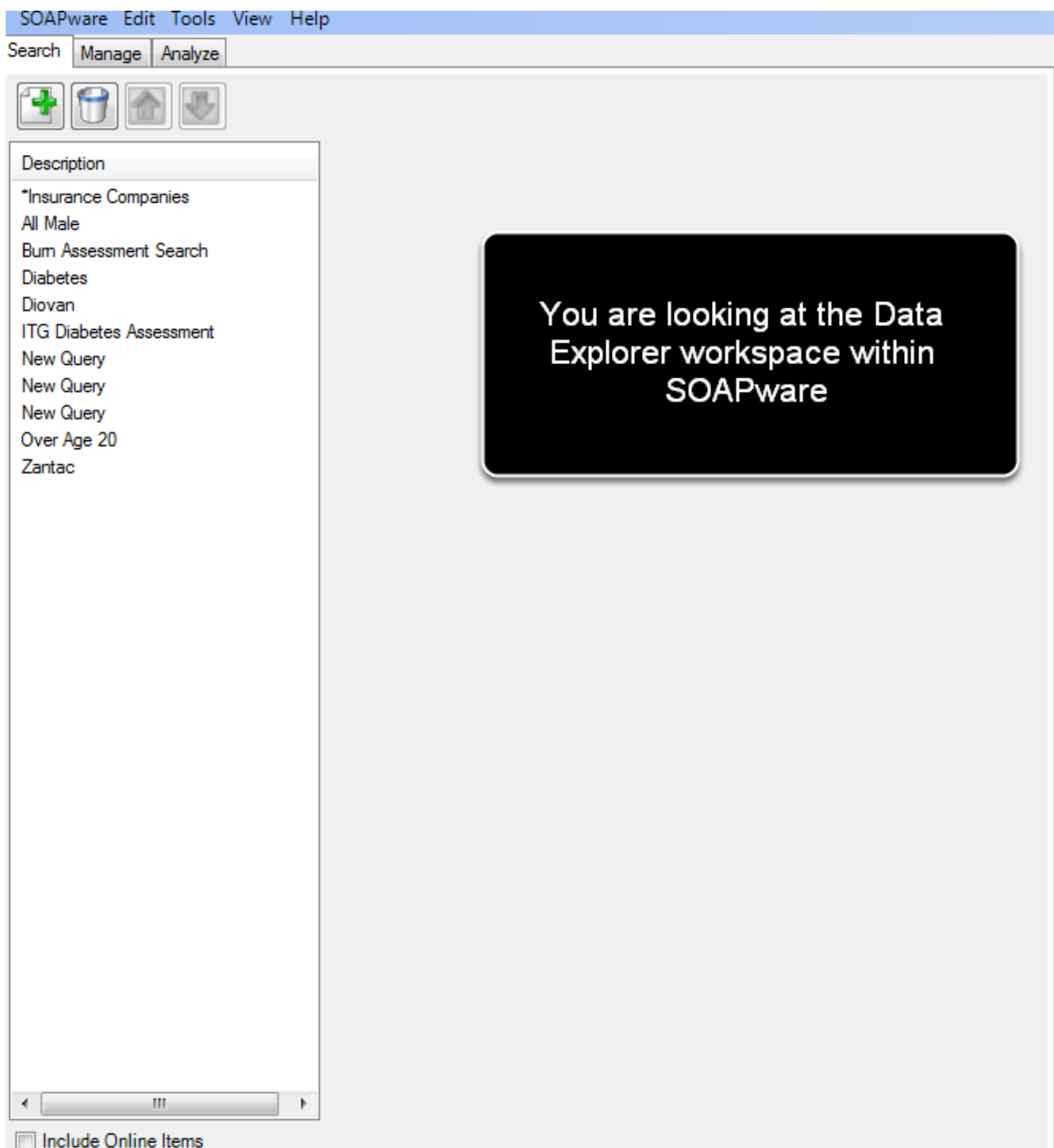
Click on the SOAPware menu option.

Next, click on another workspace.



In this example, we clicked on Data Explorer.

## Congratulations, you have now entered the Data Explorer workspace!



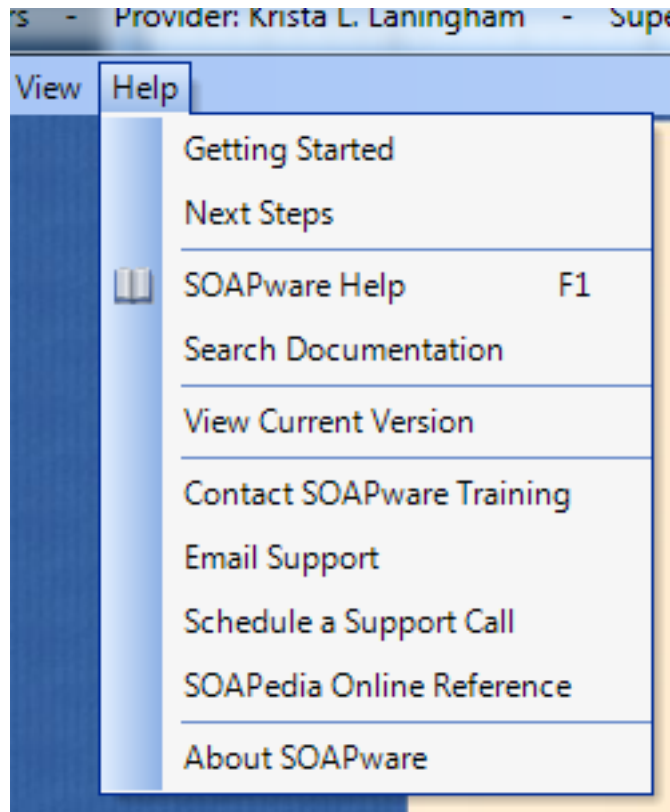
## Understanding SOAPware Commands

---

Most SOAPware commands are available via several actions:

1. Clicking a menu item
2. Clicking a button
3. Pressing combinations of keyboard keys

### Menu Buttons vs. Key Commands



Buttons exist in the toolbar and within most of the viewers. Beginners tend to prefer to click on menu items or buttons, and later tend to use more key-commands. Key-commands are often, but not always, listed to the right of menu items.

For example, Click Help in the menu bar (as in screenshot above), notice F1 is the key-command for SOAPware Help). As an example of a key-command using a combination of keys, the Chart Rack menu item is located under the Chart menu, and has a key-command of Control + Shift + C. This means that while holding-down the Control and Shift keys, pressing the C key will open the Chart Rack viewer.

## **Exception Set-ups that Prevent Key-Command Actions**

Note, in some set-ups where SOAPware is operating in a remote desktop, vps, Citrix meta frame, Terminal Services or thin-client situation, some of the key-commands may not function.

## **The Alt Key**

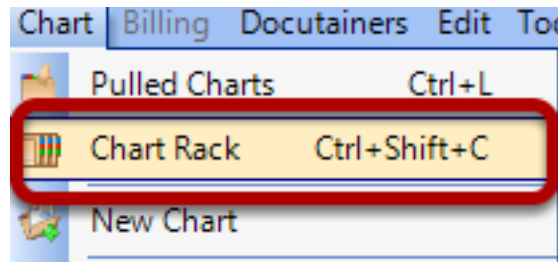
The Alt key is often used in key-commands. Most menus and menu items include an underlined letter. Pressing the Alt key and the corresponding underlined letter at the same time either opens the menu or activates a menu item. For example, in the Chart workspace, Press Alt + C. This opens the Chart menu, so that pressing C will open the Chart Rack.

## Key Commands

---

This lesson will demonstrate the steps necessary to use the Chart Rack key command.

### Access the Chart Rack



If SOAPware has a key command assigned to an item or a function within SOAPware, it will often display to the right of the menu item.

### Use the Key Command

In the screen shot above, the key command to display the Chart Rack is Ctrl + Shift + C.

To use this command, press and hold down the "Ctrl" key, then press and hold down the "Shift" key, and finally press and hold the "C" key.

Once the Chart Rack is open, release the keys.

**Note: Ctrl = Control Key**

## Key Commands - Reference Guide

---

This lesson will demonstrate a list of key commands within SOAPware, divided into various sections.

### General Windows Shortcuts

The General Windows Shortcut list includes:

- \* **Alt + Tab** Quickly switch between open programs.
- \* **Alt + F4** Closes the currently active program or window.
- \* **Ctrl + X** Cuts selected text.
- \* **Ctrl + C** Copies selected text.
- \* **Ctrl + V** Pastes text.
- \* **Ctrl + Z** Undo the last action performed.
- \* **Ctrl + Y** A redo is performed once the undo command has been used.

### Navigation

The Navigation list includes:

- \* **Alt + Underlined Menu letter** Drops down the selected menu from the top of the screen. Example:  
Alt + S drops down the SOAPware menu.

[ In a case where two or more menu items share the same access letter, press Alt + the letter and then enter, to access the items in the first menu, and Alt + the letter again, to access the items in the additional menu (s). ]

- \* **Ctrl + B** Open Chart Navigator.
- \* **Ctrl + Shift + C** Open Chart Rack.
- \* **Ctrl + Alt + P** Initiate the print list function within Chart Rack dialog.
- \* **Ctrl + T** Open Task List.
- \* **Ctrl + N** Create a new SOAPnote encounter in the currently opened chart.
- \* **Ctrl + Shift + L** Display/Hide the document/docutainer list under a lower splitter bar.
- \* **Ctrl + Alt + T** Transfer vital signs to the Objective field in the active SOAPnote.

### Navigation between SMARText Items

The Navigation between SMARText Items list includes:

- \* **Tab** Move to the next SMARText item.

- \* **Shift + Tab** Move to the previous SMARTText item.
- \* **Ctrl + Tab/Shift Tab** Move to the previous and next fields ( Within the Summary or the SOAPnote.)

## Date/Time

The Date/Time list includes:

- \* **Ctrl + D** Insert the current date and time in text field in the format of MM/DD/YYYY HH:MM.
- \* **Ctrl + Shift + Y** Insert current time in 24 hour military format of HH:MM.

## Task List

The Task list includes:

- \* **Ctrl + Left Arrow** Move to the next field to the left in the Task List.
- \* **Ctrl + Right Arrow** Move to the next field to the right in the Task List.
- \* **Ctrl + Alt + E** Edit the selected task.
- \* **Ctrl + Alt + N** Add a new task.
- \* **Ctrl + Alt + P** Initiate the print list function.
- \* **Ctrl + Alt + R** Delete task permanently and remove from the Task List.
- \* **Ctrl + Alt + S** Sign off the selected task and associated document in the patient's chart.
- \* **Ctrl + Alt + V** View the document associated with the currently selected task.

## Document Designer

The Document Designer list includes:

- \* **Ctrl + X** Cuts selected text.
- \* **Ctrl + C** Copies selected text.
- \* **Ctrl + V** Pastes text.

## Quick Print Key Commands

The Quick Print list includes:

- \* **Ctrl + F1**
- \* **Ctrl + F2**
- \* **Ctrl + F3**
- \* **Ctrl + F4**

These key commands can be designated to directly print a document design without having to go through the print menus. For more information, see: [Quick Print Key Commands](#)



## SMARText

The SMARText list includes:

- \* **Ctrl + Del** Clear out the contents of the active SMARText item.
- \* **F10** Display the SMARText Items Manager.

## Encounter Specific

The Encounter list includes:

- \* **Ctrl + Shift + Del** Clear out the content of the current field. (Subjective, Objective...)
- \* **Ctrl + H** When used in the Plan field, this command will insert handouts based on the diagnosis and medication prescribed. For more information, see: [Handouts](#)
- \* **Ctrl + R** Delete everything to the right of the cursor to the next period.
- \* **Ctrl + W** Inserts the word, "normal".
- \* **Ctrl + >** Open a search list for code expanders and shortcuts.
- \* **Ctrl + /** Display the field history.
- \* **Ctrl + Up Arrow** Move the cursor to the beginning of the previous section.
- \* **Ctrl + Down Arrow** Move the cursor to the beginning of the next section.
- \* **F9** Remove unused items in all docutainers actively open. (Usually used for cleaning up the Summary and SOAPnote simultaneously)
- \* **Ctrl + F9** Remove unused items in the active docutainer.
- \* **Spacebar** Used after a code expander or shortcut, to expand it. For example: typing "tyl3" and pressing the spacebar, expands to the Tylenol #3 Medication.
- \* **Ctrl + F7** Initiate Spellcheck for all documents.
- \* **F7** Initiate Spellcheck for the current document.

## Docuplate Specific

The Docuplate list includes:

- \* **Ctrl + Shift + T** Save the current docuplate information as a new docuplate.
- \* **F5** Initiate Quick Entry dialog box for easy insertion of a docuplate.
- \* **F6** Open Docuplates.
- \* **F11** Expand a code or shortcut. This command is useful if the spacebar expand command is turned off.

## SOAPnote Specific

### Objective

The Objective list includes:

- \* **Ctrl + Shift + J** Store exam/ Copy Objective to Summary Physical - will prompt to append or replace Summary Physical with SOAPnote Objective field.
- \* **Ctrl + J** Get stored exam/ Copy Summary Physical to Objective - will prompt to replace or append SOAPnote Objective field with Summary Physical.
- \* **Ctrl + O** Enter Objective field/ Position cursor in the Objective field.
- \* **Ctrl + Shift + O** Empty Objective field/ Position cursor in the Objective field and will remove all text in the field.

### Assessment

The Assessment list includes:

- \* **Ctrl + Shift + F6** Store Assessment field -will prompt to append or replace Summary Active Problems with Assessment field.
- \* **Ctrl + F6** Get stored Assessment field - will prompt to replace or append Assessment field with Active Problems.
- \* **Ctrl + A** Enter Assessment field / Position cursor in the Assessment field.
- \* **Ctrl + Shift + A** Empty Assessment field/ Position cursor in the Assessment field and remove all text in the field.

### Medications

The Medications list includes:

- \* **Ctrl + F8** Store Rx field - will prompt to append or replace Summary Medications with SOAPnote Medications field.
- \* **Ctrl + Shift + F8** Get stored Rx field - will prompt to replace or append SOAPnote Medications field with Summary Medications field.
- \* **Ctrl + M** Enter Medications field / Position cursor in the Medications field.
- \* **Ctrl + Shift + M** Empty Medications field / Position cursor in the Medications field and removes all text in the field.

## Rx Pad Key Commands

The Rx Pad list includes:

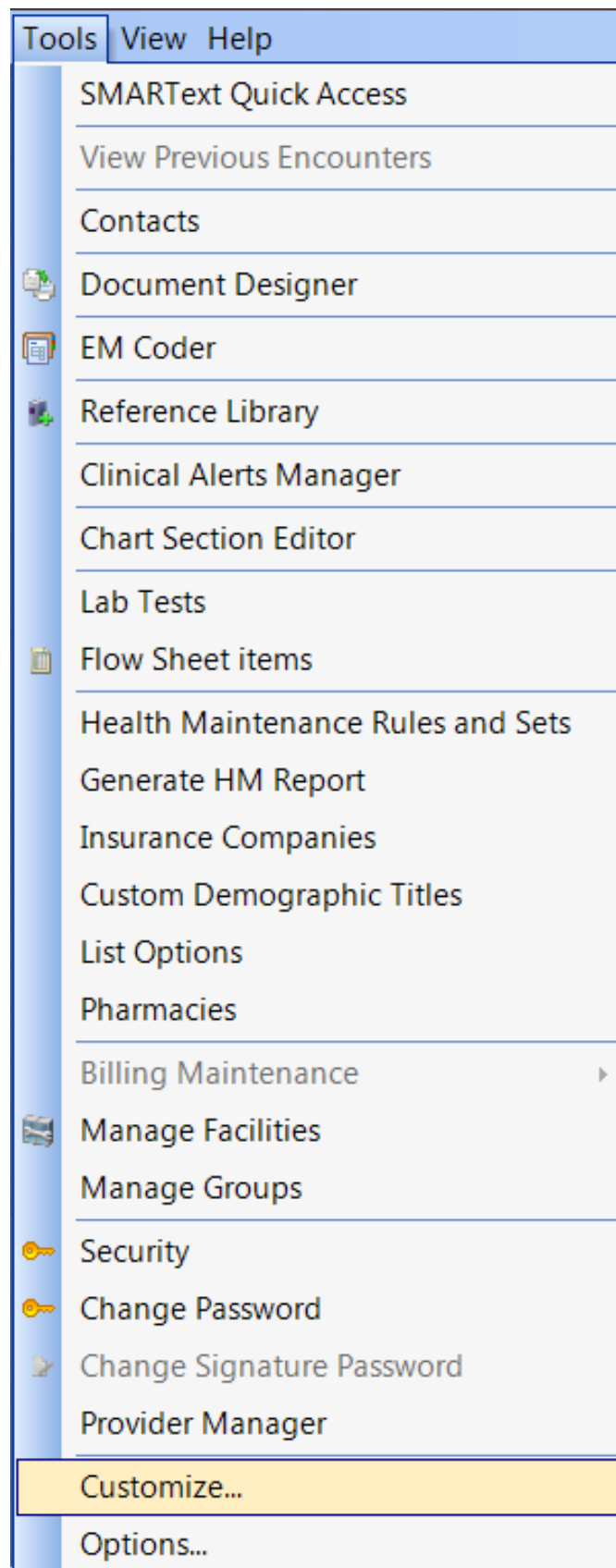
- \* **Ctrl + Alt + R**      Open "Add Rx" dialog.
- \* **Ctrl + Alt + I**      Display the "Interaction Summary" dialog.
- \* **Ctrl + Alt + P**      Activate the print command.
- \* **Ctrl + Alt + U**      Display the "Update Summary" dialog.
- \* **Ctrl + Alt + S**      Activate the "Submit" button.
- \* **Ctrl + Alt + F**      Activate the fax command.
- \* **Ctrl + Alt + E**      Place the cursor in the Eligibility field.
- \* **Ctrl + Alt + H**      Activate the Pharmacy list.

## Key-Command Customization

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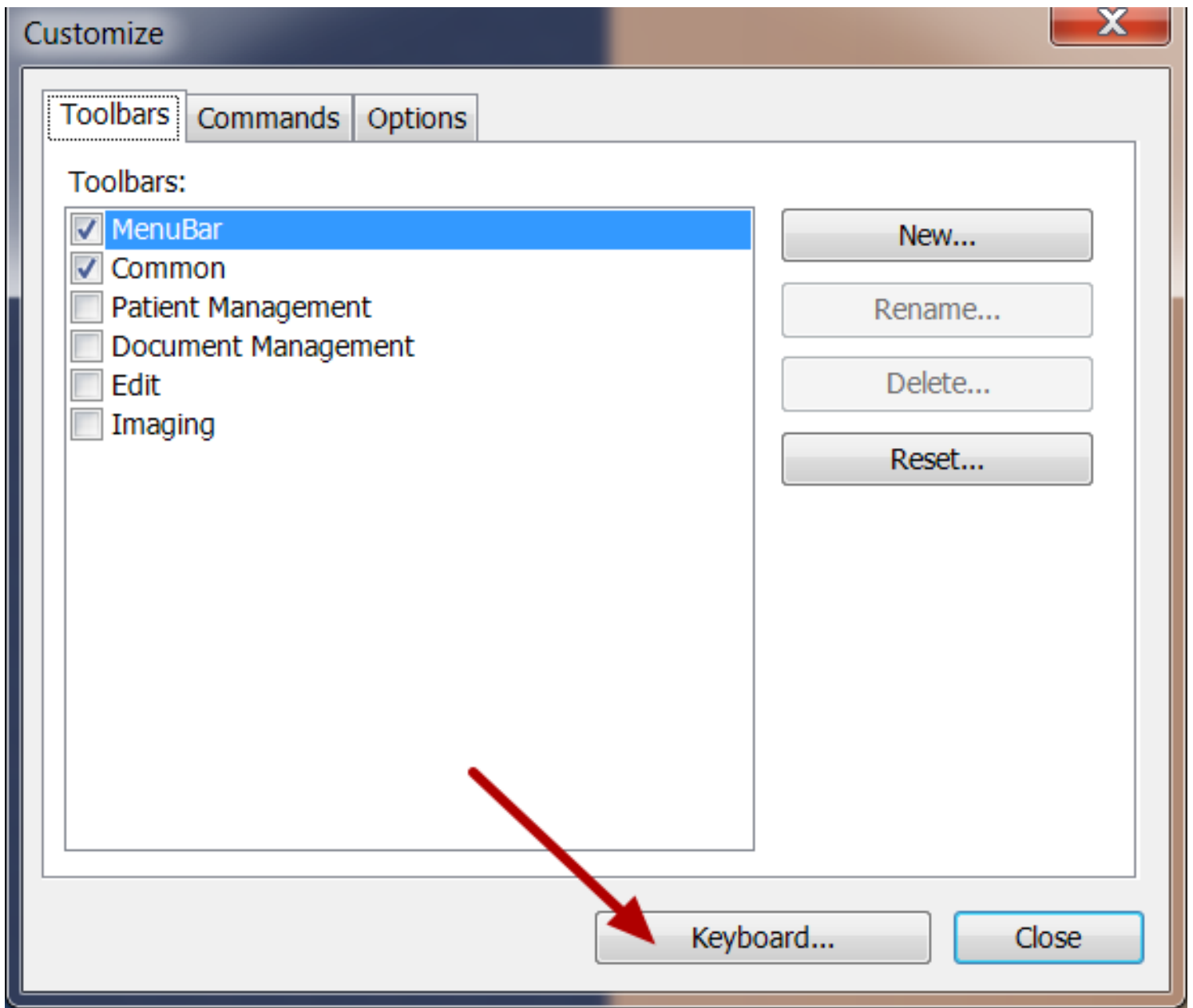
The Customize Keyboard tool allows shortcut key-command to be assigned for use within SOAPware. This can greatly increase productivity by making it faster and easier to access the SOAPware functions. Keyboard commands are network-wide in SOAPware 2010.

## Open the Customize Window.



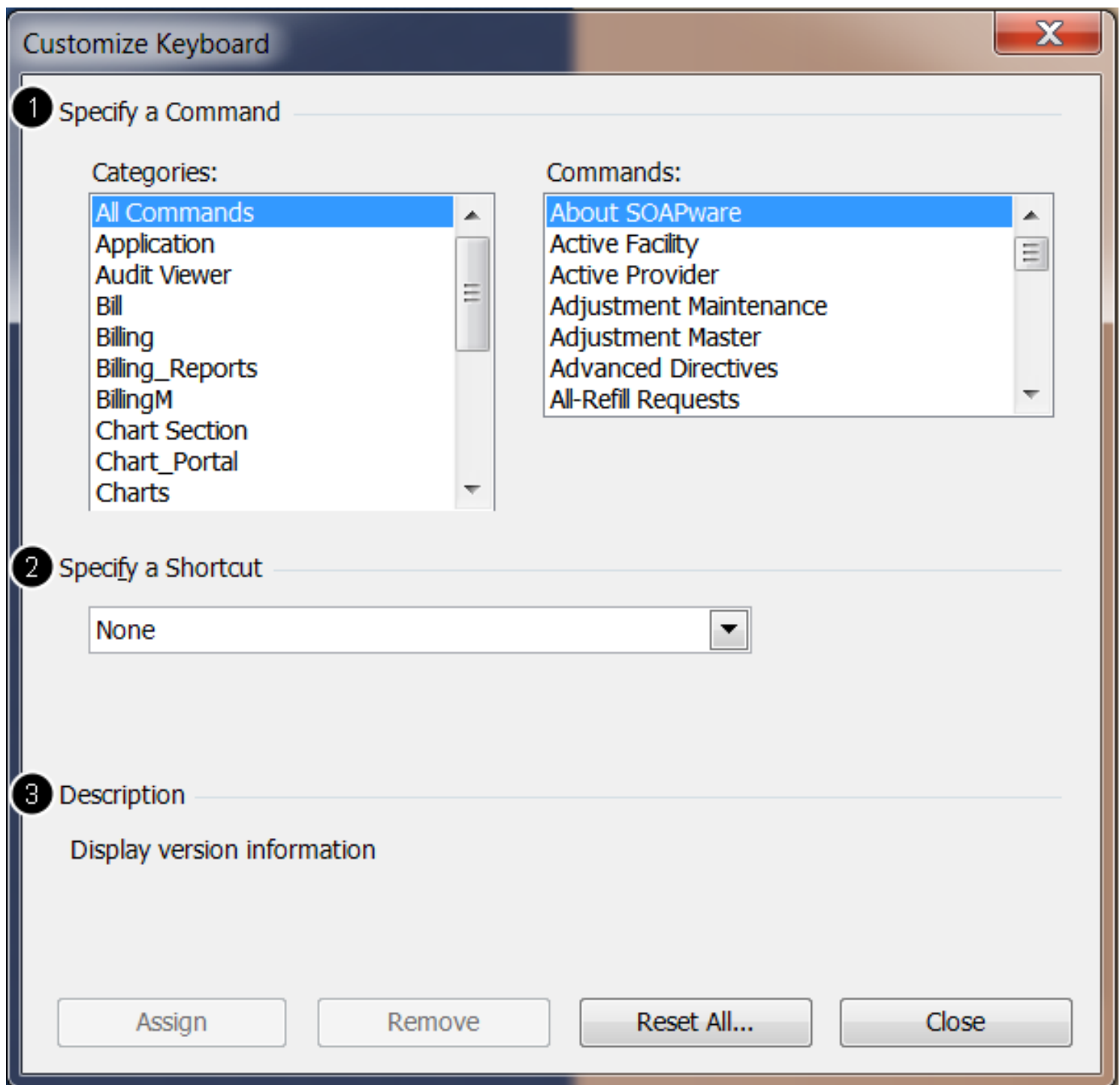
Open the Key Command Customization tool by selecting Tools > Customize.

## Select the Commands Window



Next, select the Keyboard button.

## Customize Keyboard Window



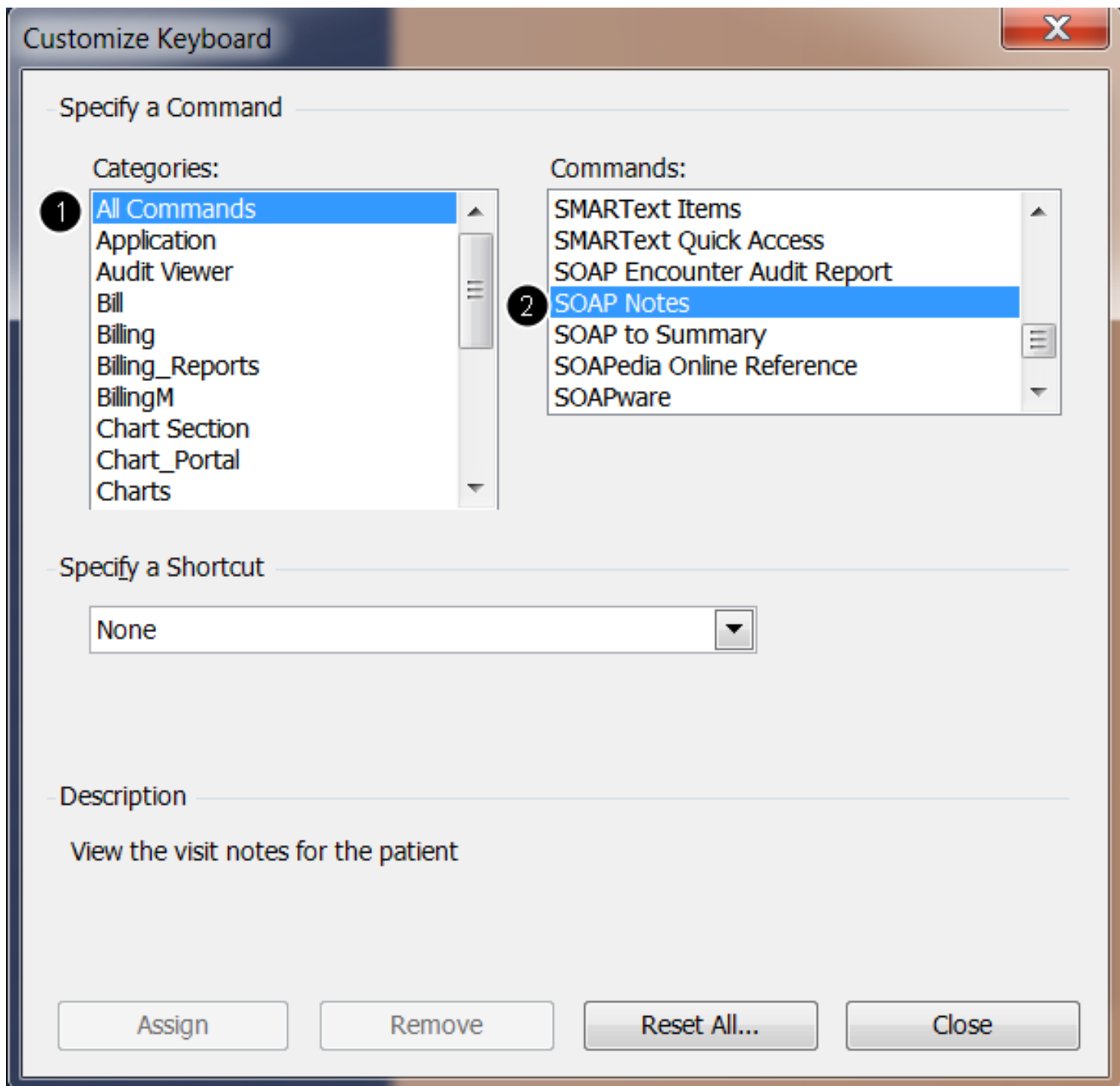
The Customize Keyboard dialog has three main areas which work in concert in setting-up keyboard commands.

1. The top section, Specify a Command, allows for the selection of a command to assign to a key-command shortcut.
2. The center section, Specify a Shortcut, presents a list of possible keys and key combinations to allow

for selection.

3. The bottom section, Description, displays a short explanation of what the selected command does within SOAPware.

### Assigning a Keyboard Shortcut to a Command



To assign a key-command shortcut to a SOAPware command:

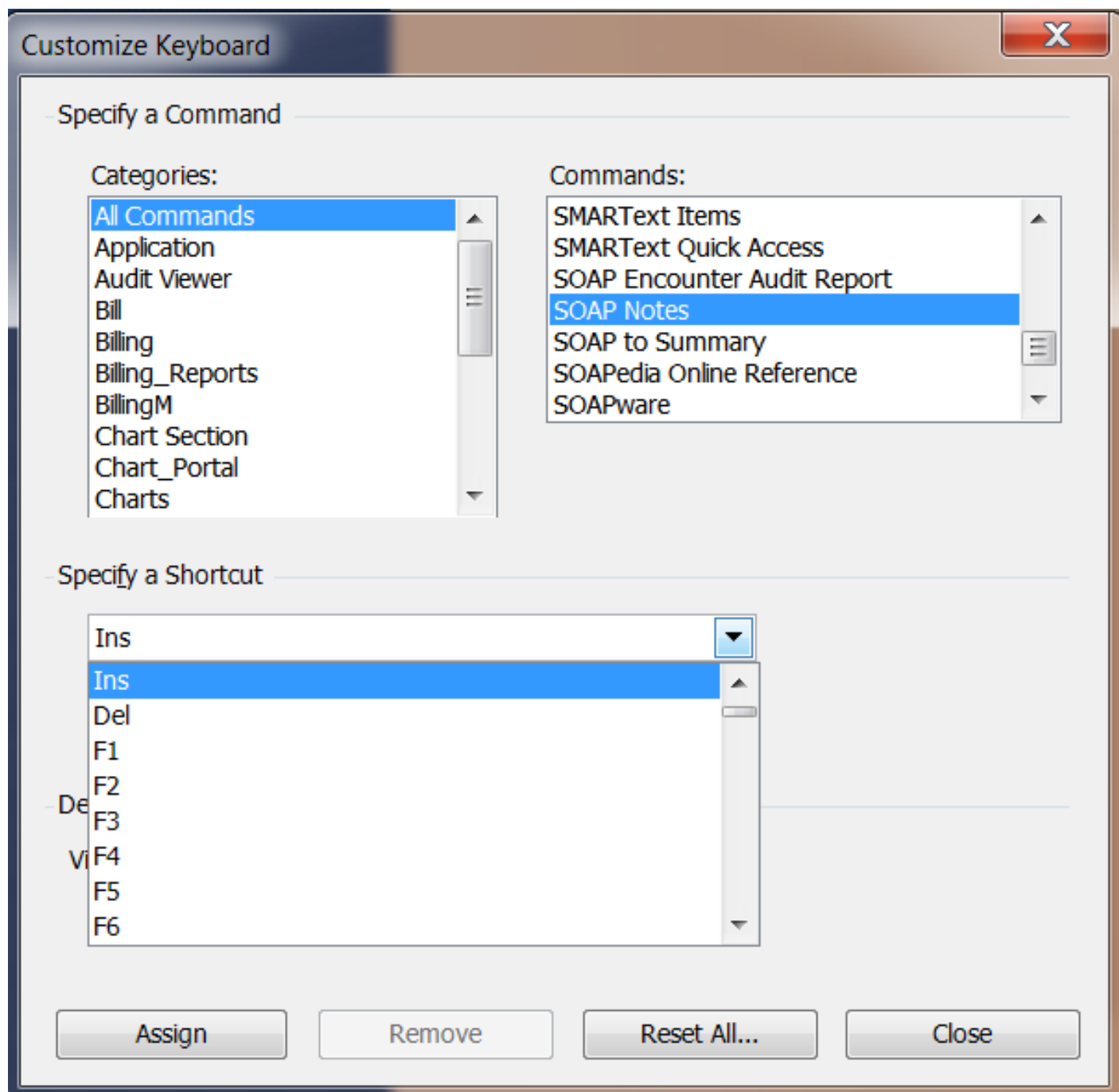
1. Click a Categories list item,



2. Click a Commands list item.

**NOTE:** When browsing commands in the All Commands category, some commands appear to have the same name. If the Description doesn't help identify the difference between commands, try to find the command in a more specific category.

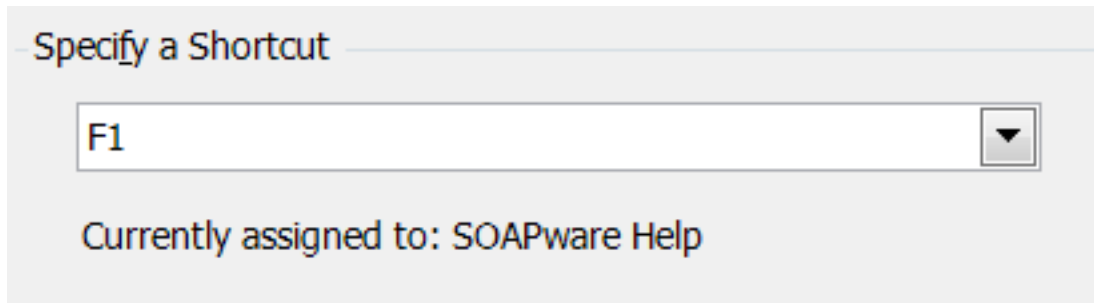
### Specify a Shortcut



Once a command is selected, click the specify a Shortcut drop down list to choose a key-command shortcut.

In the example above, it specifies that Pressing the Insert key causes the SOAP Notes chart section to open.

### When Shortcuts are Already Assigned



The screenshot shows a dialog box titled "Specify a Shortcut". Inside the dialog, there is a text input field containing "F1" and a dropdown arrow button to its right. Below the input field, the text "Currently assigned to: SOAPware Help" is displayed in a smaller font.

**NOTE:** If the selected keyboard shortcut is already assigned to another command, SOAPware warns by displaying a message in the Specify a Shortcut field.

## Assign

**Customize Keyboard**

Specify a Command

Categories:

- All Commands
- Application
- Audit Viewer
- Bill
- Billing
- Billing\_Reports
- BillingM
- Chart Section
- Chart\_Portal
- Charts

Commands:

- SMARText Items
- SMARText Quick Access
- SOAP Encounter Audit Report
- SOAP Notes
- SOAP to Summary
- SOAPedia Online Reference
- SOAPware

Specify a Shortcut

Ins

Currently assigned to: [unassigned]

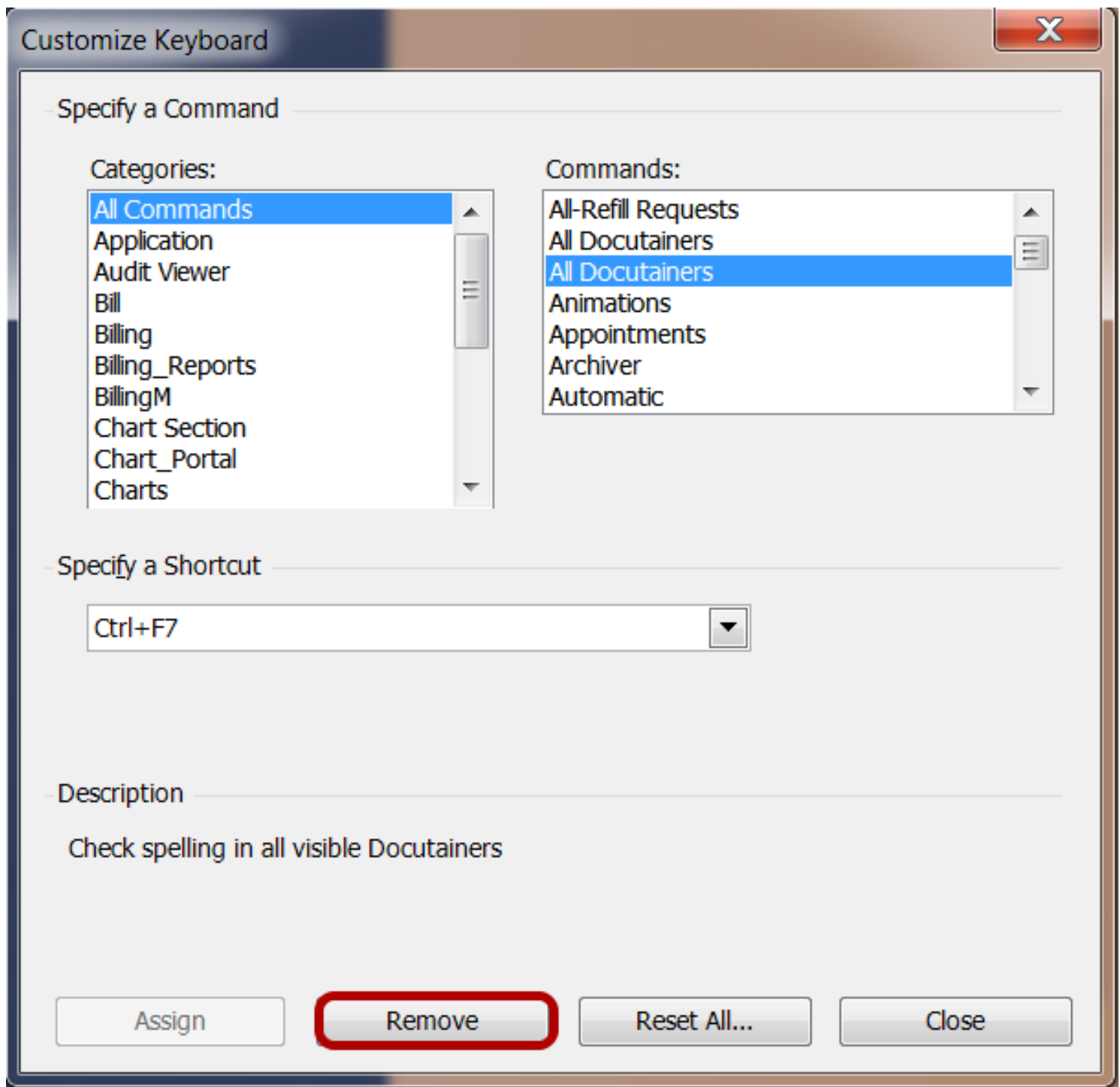
Description

View the visit notes for the patient

Assign Remove Reset All... Close

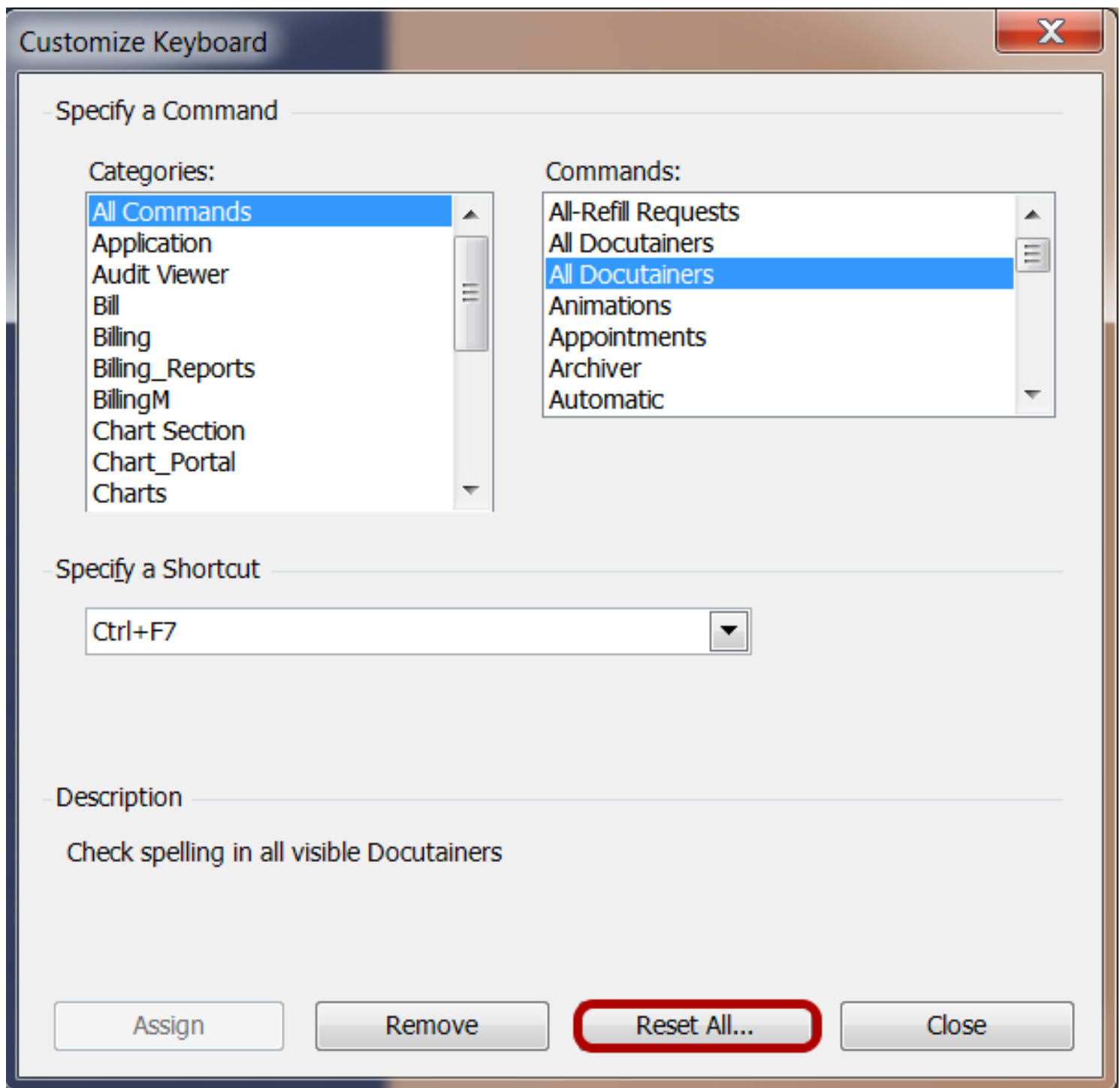
Finally, click the Assign button located at the bottom to assign the selected key-command shortcut to the specified SOAPware command.

## Removing a Keyboard Shortcut from a Command



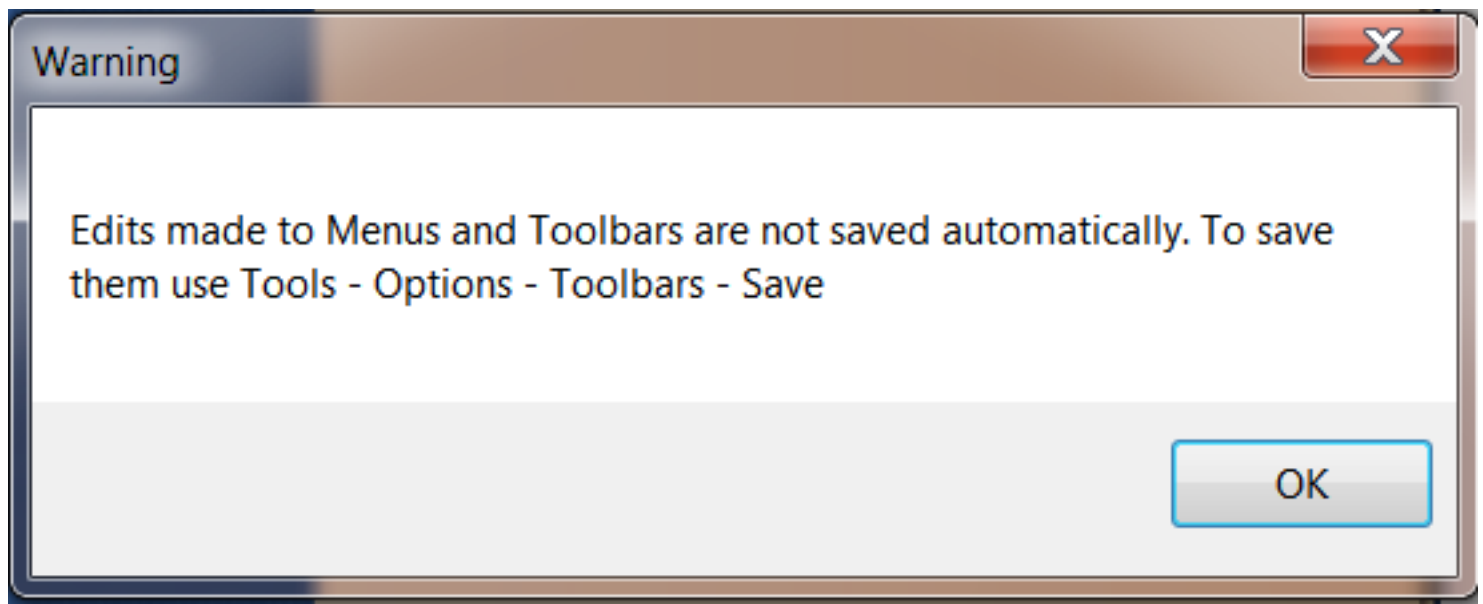
To remove a previously assigned key-command shortcut from a SOAPware command, click the Category list item, then click the command list item, and click the specified Shortcut list item to modify. Once the command is selected, click the Remove button located at the bottom. The shortcut will be removed from the selected command.

## Resetting all Keyboard Shortcuts



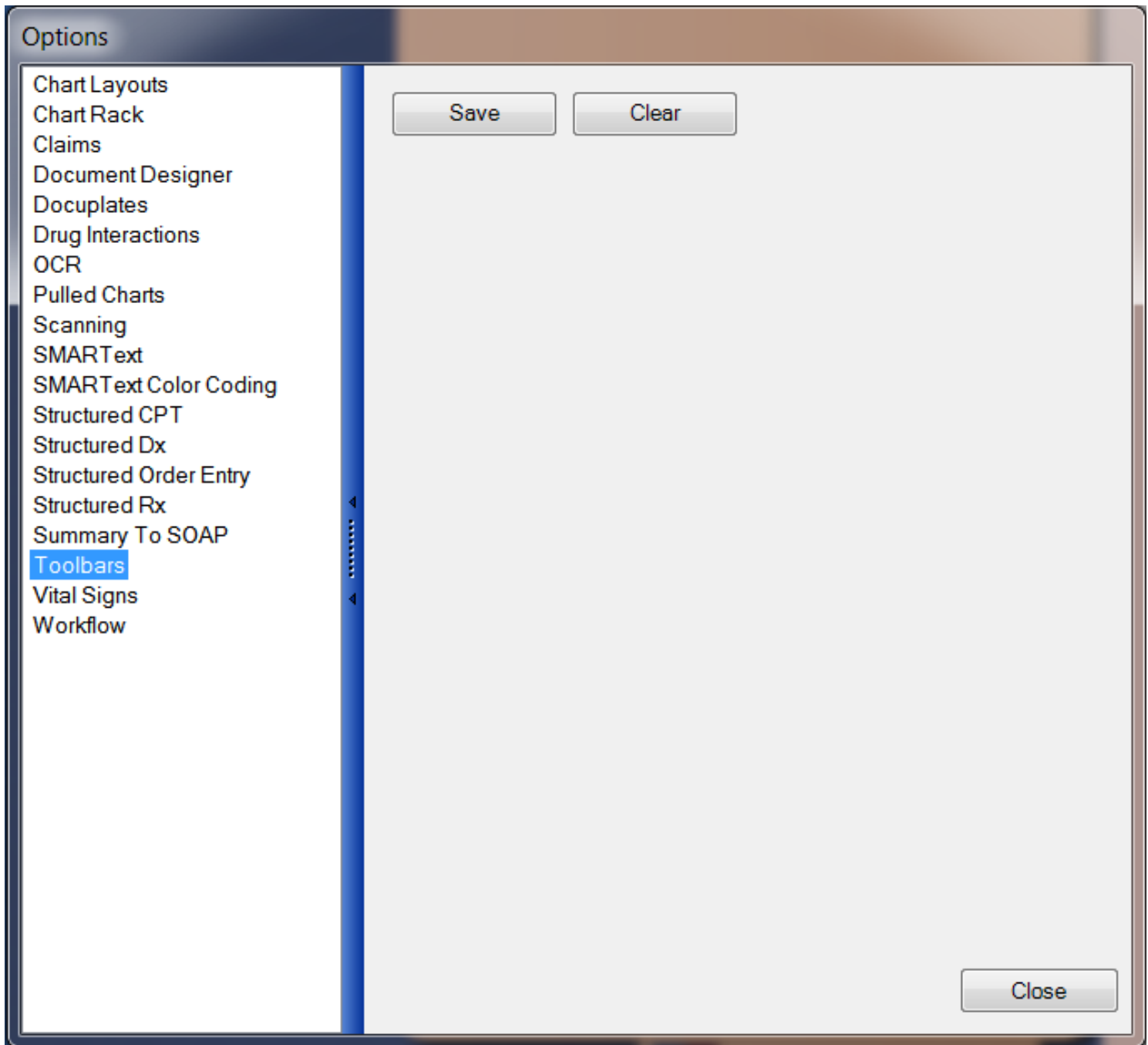
To reset all keyboard shortcuts to their default commands, Click the Reset All... button located at the bottom. SOAPware asks for confirmation. Click Ok to do so, and all key-command shortcuts will be reset to their defaults.

## Saving the Changes



Once finished customizing Key Commands, it is necessary to save the changes manually.

## Tools - Options



To do this, go to Tools > Options > Toolbars, and click Save. You must log out and log back into SOAPware to save the changes.

# Document Review

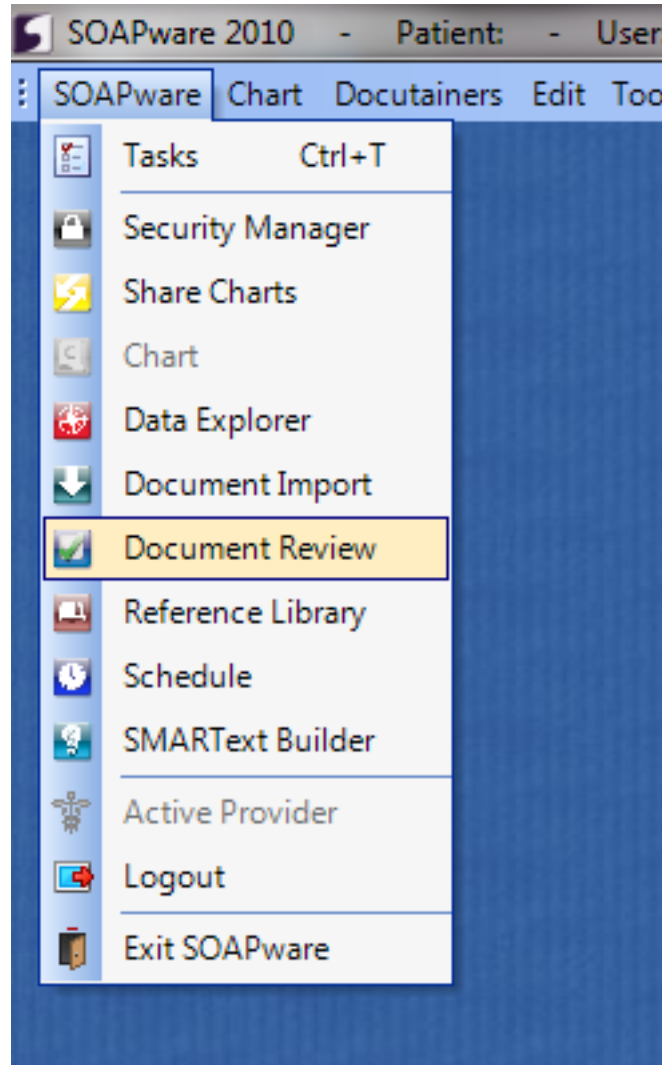


## Document Review

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Document Review is a workspace in SOAPware where users can review tasks and documents associated those tasks without opening each patient chart.

### Document Review Workspace:



To open the Document Review Workspace, click SOAPware and select Document Review.

This will close the Chart workspace and open Document Review.

## Interface

The screenshot displays the SOAPware interface. On the left, the 'Task List' section shows a table of tasks for 'Mouse, Minnie'. The table has columns for Patient, Description, Notes, Priority, and Action/Status. Tasks include 'CBC', 'SOAPNote', 'vis-multi[1].pdf', 'vis-multi[1].pdf', 'Flow Sheet Creat', 'Flow Sheet Creat', 'SOAPNote', and 'Flow Sheet Creat'. The right section shows the 'Document Review' for the selected task, displaying a table of lab results. The table has columns for Name, Flags, Value, Range, Units, Status, Code, Date, Range, Status, Lab Tech, Facility, Lot Number, and Expiration. The results include WBC, RBC, Hgb, HCT, MCV, MCH, MCHC, Platelets, Segs, Lymphs, and MID. The bottom of the screen features navigation buttons: '<< Docutainer', '< Document', 'Sign', 'Document >', and 'Docutainer >>'. The 'Sign' button is highlighted with a red box. The 'Display Chart' button is also highlighted with a red box.

Patient	Description	Notes	Priority	Action/Status
Mouse, Minnie	CBC		Normal	Needs Review
Baby, Girl	SOAPNote		Normal	Needs Review
Baby, Girl	vis-multi[1].pdf		Normal	Needs Review
Baby, Girl	vis-multi[1].pdf		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review
Clyde, Annie	SOAPNote		Normal	Needs Review
Dummy, Big Ol'	SOAPNote		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review

Name	Flags	Value	Range	Units	Status	Code	Date	Range	Status	Lab Tech	Facility	Lot Number	Expiration
WBC		0	(4 - 10)	cmm			7/23/2010						
RBC		0	(0 - 0)	cmm			7/23/2010						
Hgb		0	(0 - 0)	g/dL			7/23/2010						
HCT		0	(0 - 0)	cmm			7/23/2010						
MCV		0	(80 - 94)	cu mic			7/23/2010						
MCH		0	(26 - 34)	pg			7/23/2010						
MCHC		0	(30 - 37)	g/dL			7/23/2010						
Platelets		0	(130 - 400)	cmm			7/23/2010						
Segs		0	(36 - 65)	%			7/23/2010						
Lymphs		0	(25 - 40)	%			7/23/2010						
MID		0	(0 - 8)	%			7/23/2010						

The left side of the screen displays the users Task List.

Task items in this section can be manually created, assigned, reassigned, edited, removed and signed off.

On the right side of the screen, the document associated to the task selected displays. Items can be signed off from this section by clicking on the Sign button at the bottom of the screen. Documents associated with tasks can be displayed for review but cannot be edited from this workspace. To edit the document click on the Display Chart button at the top of the screen. This will close the Document Review workspace, open the Chart workspace and automatically open the chart and document that was displayed in Document Review.

## Change Docutainers

This close-up shows the bottom navigation buttons: '<< Docutainer', '< Document', 'Sign', 'Document >', and 'Docutainer >>'. The '<< Docutainer' and 'Docutainer >>' buttons are highlighted with red boxes.

To move to the next or previous docutainer on your task list click on one of the Docutainer buttons located at the bottom of the screen.

## Display

SOAPware Edit Signature Navigation Tools View Help

User: Jennifer Berg

Name: Baby, Girl Gender: Female DOB: 1/5/2010

Show Tasks: Assigned Tasks Show Tasks due in: --Show All--

Layout: [Dropdown]

Drag a column header here to group by that column.

Patient	Description	Notes	Priority	Action/Status
Mouse, Minnie	CBC		Normal	Needs Review
Baby, Girl	SOAPNote		Normal	Needs Review
Baby, Girl	vis-multi[1].pdf		Normal	Needs Review
Baby, Girl	vis-multi[1].pdf		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review
Clyde, Annie	SOAPNote		Normal	Needs Review
Dummy, Big Ol'	SOAPNote		Normal	Needs Review
Dummy, Big Ol'	Flow Sheet Creat		Normal	Needs Review

**Subjective**

CHIEF COMPLAINT: Well child. 4 month checkup.

CONCERNS: None.

DEVELOPMENT:  
 Holds head erect.  
 Bearing weight on legs.  
 Pushing up when prone. May be rolling over.  
 Reaching/grabbing/playing with hands.  
 Eyes tracking moving objects to 180 degrees.  
 Social smile, may laugh or squeal.  
 Blows bubbles, makes "raspberries."

DIET:  
 Breast \_\_. Bottle(+).  
 Type Formula: Taking \_\_oz every \_\_ hours.  
 Teaching: May begin solids (cereals), no bottle propping.

OUTPUT:  
 Normal stools and urination.

SAFETY ISSUES:  
 Sleeping on back or side. Car seat use (backward facing until 20 lbs and 1 year of age, in back seat). Guns locked up. No smoking in house.  
 Hot water heaters to 120 degrees. Use sunscreen. Watch for baby rolling over.

**Objective**

Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress, in no acute distress, dysmorphic.

HEAD/EARS/NOSE/THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.

Head and face exam reveals normocephalic findings, , fontonelle anterior soft and flat, scalp normal.

Otoscopic Exam: External auditory canals and tympanic membranes are normal.

Nose exam internally reveals nasal mucosa, septum and turbinates are unremarkable.

Oropharynx demonstrates oral mucosa, salivary glands, tongue, tonsils, posterior pharynx, hard-soft palates are normal.

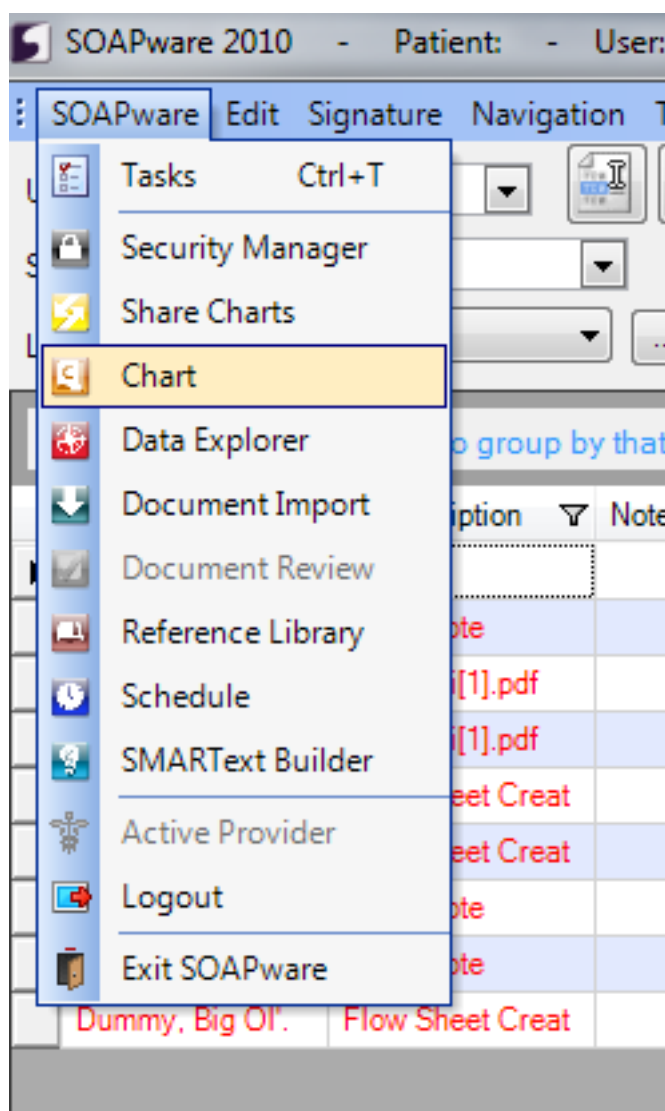
4 month well check - male vis-multi[1].pdf

<< Docutainer < Document Sign Document > Docutainer >>

The Next or Previous Docutainer on your task last will display.

If documents are attached to a docutainer, the two "Document" icons will appear. This allows navigation between documents in the docutainer.

## Return to Chart Workspace



Click on SOAPware and select Chart.

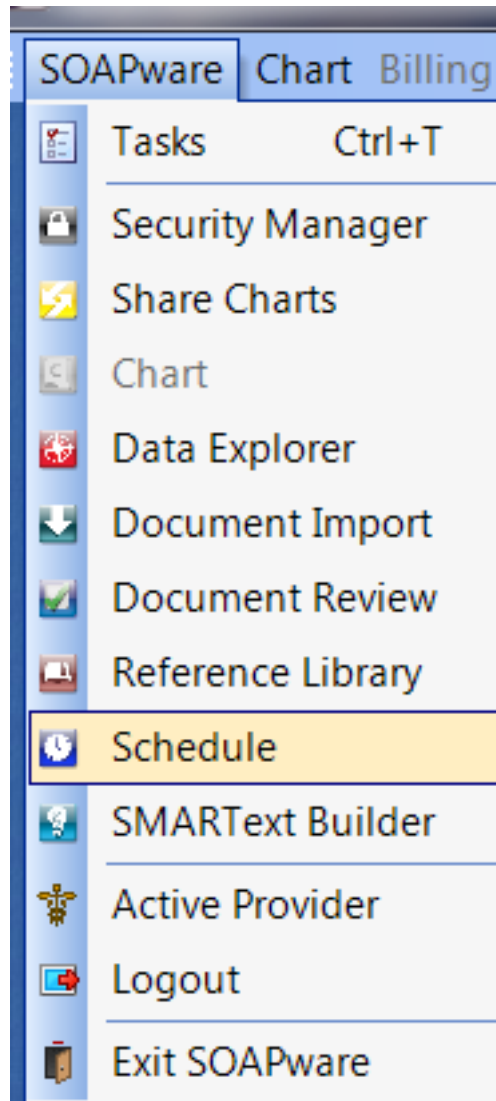
# Schedule

## Intro to Schedule

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SOAPware Schedule is an integrated scheduling application that shares information with SOAPware as needed. Therefore, the SOAPware Schedule workspace runs inside of SOAPware.

### Open Schedule



To get to Schedule workspace, click on SOAPware in the menu bar at the top left. Then Select the Schedule menu item.

# SOAPware Scheduling

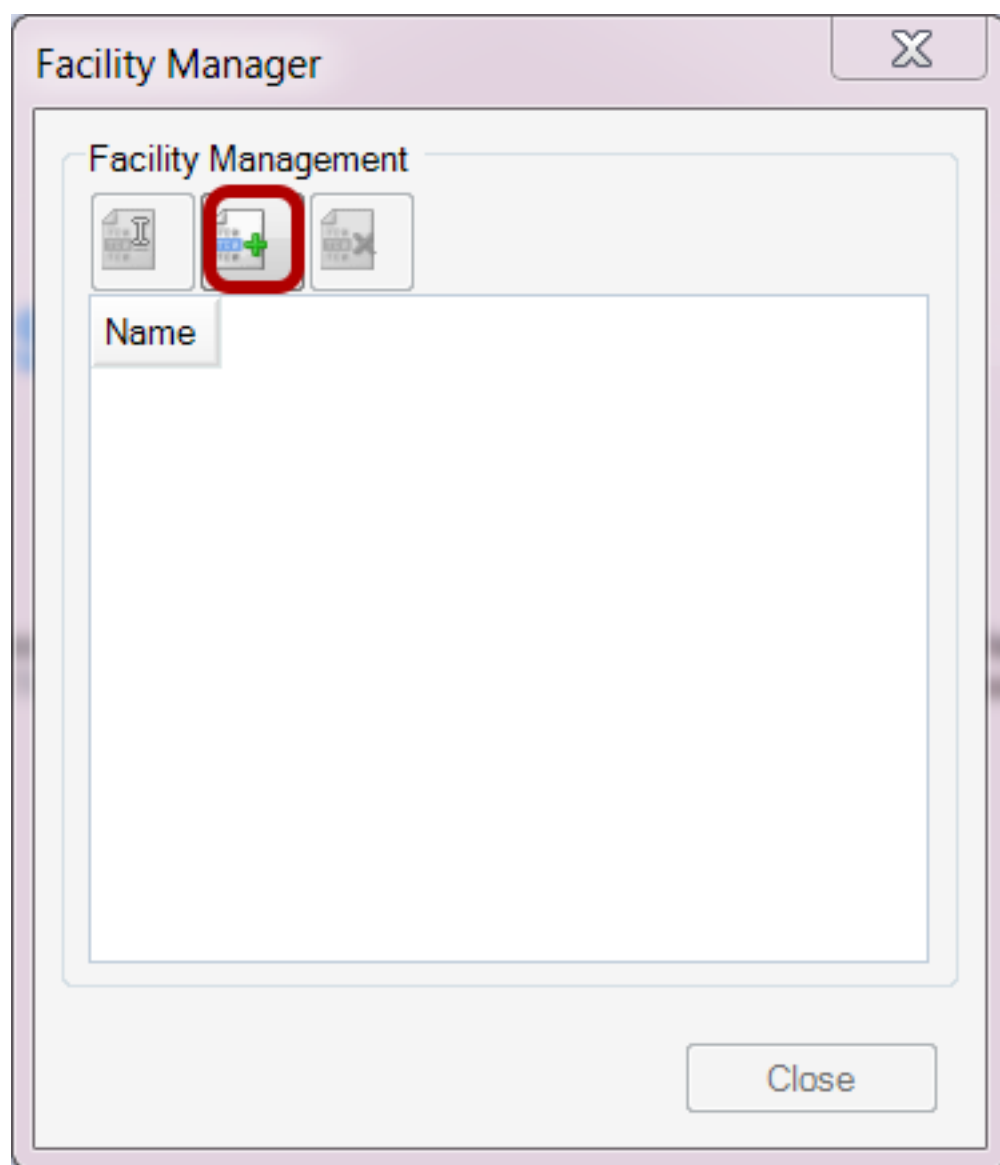
For the scheduling component you need to define at least 1 Facility that has at least 1 visible Provider or Resource. Click Manage Facilities to continue.

**Manage Facilit**

The first time that you enter SOAPware Schedule, you will be prompted to create a facility. If so, Click on the "Manage Facilities" button.

NOTE: If you do not get the above message, Click Tools in the menu bar, and Select Manage Facilities to initiate the Schedule setup process.

Facilities represent your office. SOAPware Schedule is able to handle any number of facilities or offices that you want to define. Some users may want to define a single facility for all their offices, but this is not advised. You will later find that having a facility defined for each of your locations is important for billing purposes.



You should now see the Facility Manager. The Facility Manager allows for the set-up of any number of facilities, and allows for the customizations of the facilities to your practice. Click the Create New Facility button.



## Facility - Details Tab

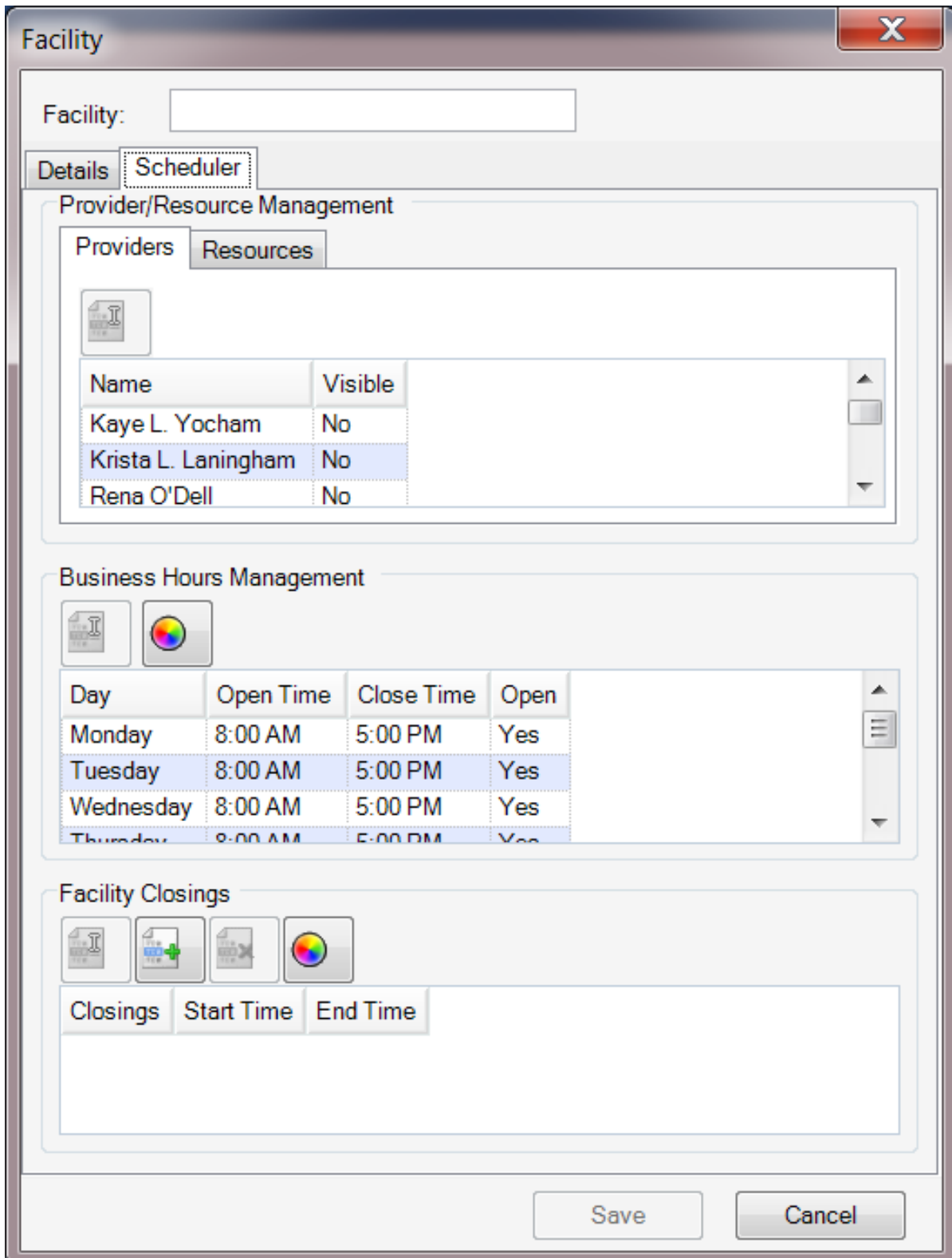
The image shows a software window titled "Facility" with a close button (X) in the top right corner. Inside the window, there is a "Facility:" label followed by a text input field, which is marked with a circled number 1. Below this, there are two tabs: "Details" (which is selected) and "Scheduler". The "Details" tab contains several input fields: "Full Legal Name" with a text input field marked with a circled number 2; "Street" with a larger text input field marked with a circled number 3; "City", "St", and "Zip" each with a text input field, with the "Zip" field marked with a circled number 4; "Phone #" with a text input field marked with a circled number 5; "NPI #" with a text input field marked with a circled number 6; "Place of Service" with a dropdown menu marked with a circled number 7; and "Billing Inquiry #" with a text input field marked with a circled number 8. At the bottom right of the window, there are "Save" and "Cancel" buttons, with the "Save" button marked with a circled number 9.

Steps 1-5 identifies the Place of Service-Block 32

1. The commonly known Facility Name.
2. Legal Name of the facility. (block 32)

3. Physical address of the facility. (block 32)
4. City, State and Zip of the facility. (Block 32)
5. Clinic Phone number.
6. NPI number assigned to the facility. (Block 32a)
7. Place of Service this selection specifies the code that is placed on claims (Block 24B) identifying the type of facility.
8. Phone number for Billing Inquiries. This number will appear on Patient Statements, Receipts, etc. for billing questions
9. Press Update to save

## Facility - Scheduler Tab



The screenshot shows a software window titled "Facility" with a close button (X) in the top right corner. Below the title bar is a text field labeled "Facility:". Below this are two tabs: "Details" and "Scheduler", with "Scheduler" being the active tab. The "Scheduler" tab contains three main sections:

- Provider/Resource Management**: This section has two sub-tabs, "Providers" and "Resources". The "Providers" sub-tab is active, showing a list of providers. Above the list is a "New" icon (document with a plus sign). The list has two columns: "Name" and "Visible".
- Business Hours Management**: This section has a "New" icon and a "Color" icon (rainbow circle). It contains a table with business hours.
- Facility Closings**: This section has four icons: "New", "Add" (document with a plus sign), "Delete" (document with an X), and "Color". Below the icons are three tabs: "Closings", "Start Time", and "End Time". The "Closings" tab is active, showing an empty list.

At the bottom of the window are "Save" and "Cancel" buttons.

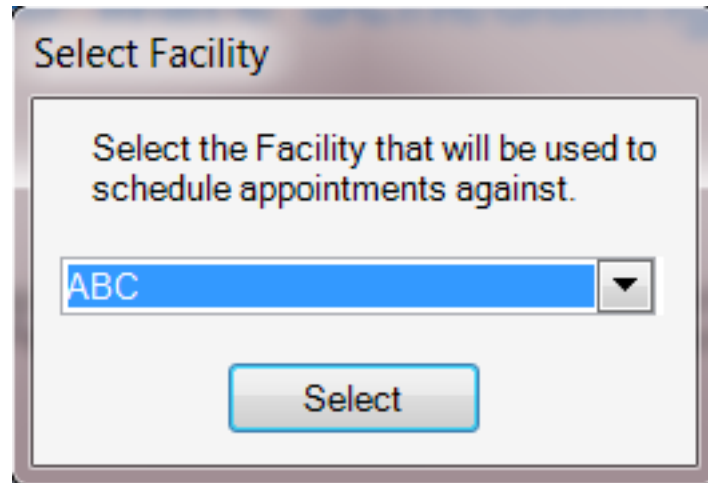
Name	Visible
Kaye L. Yocham	No
Krista L. Laningham	No
Rena O'Dell	No

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes

The Provider/Resource Management section under the Providers tab will be a list of the Providers who have a SOAPware license. The Resources tab will represent other types of appointments, such as Labs, Nurse visits, procedures, etc. The Resource tab can also be used for the providers satellite clinic. The Business Hours Management Section is where the business hours are set for the practice NOT for

the individual Providers. The Facility Closings section is for designating days that the practice will be closed, such as major holidays.

### Select Facility



After setting up the Facility, SOAPware Schedule will prompt you to select the active facility. Choose the facility you would like to use and Click Select.

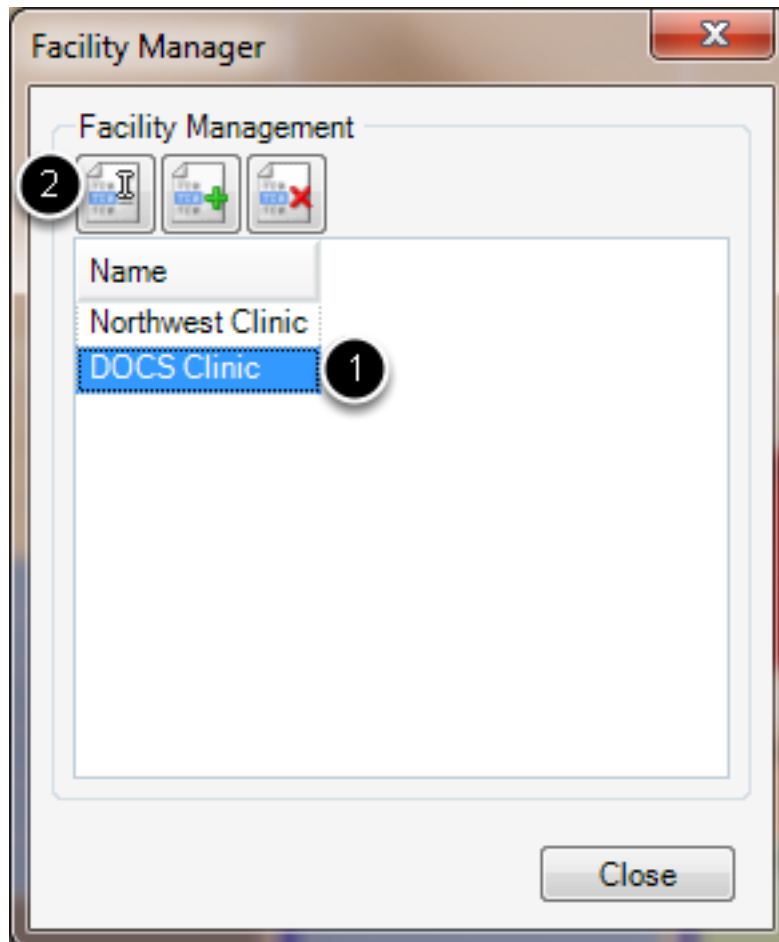
## Entering Facility Business Hours

---

This lesson will demonstrate the steps needed to set up the hours of operation for a facility.

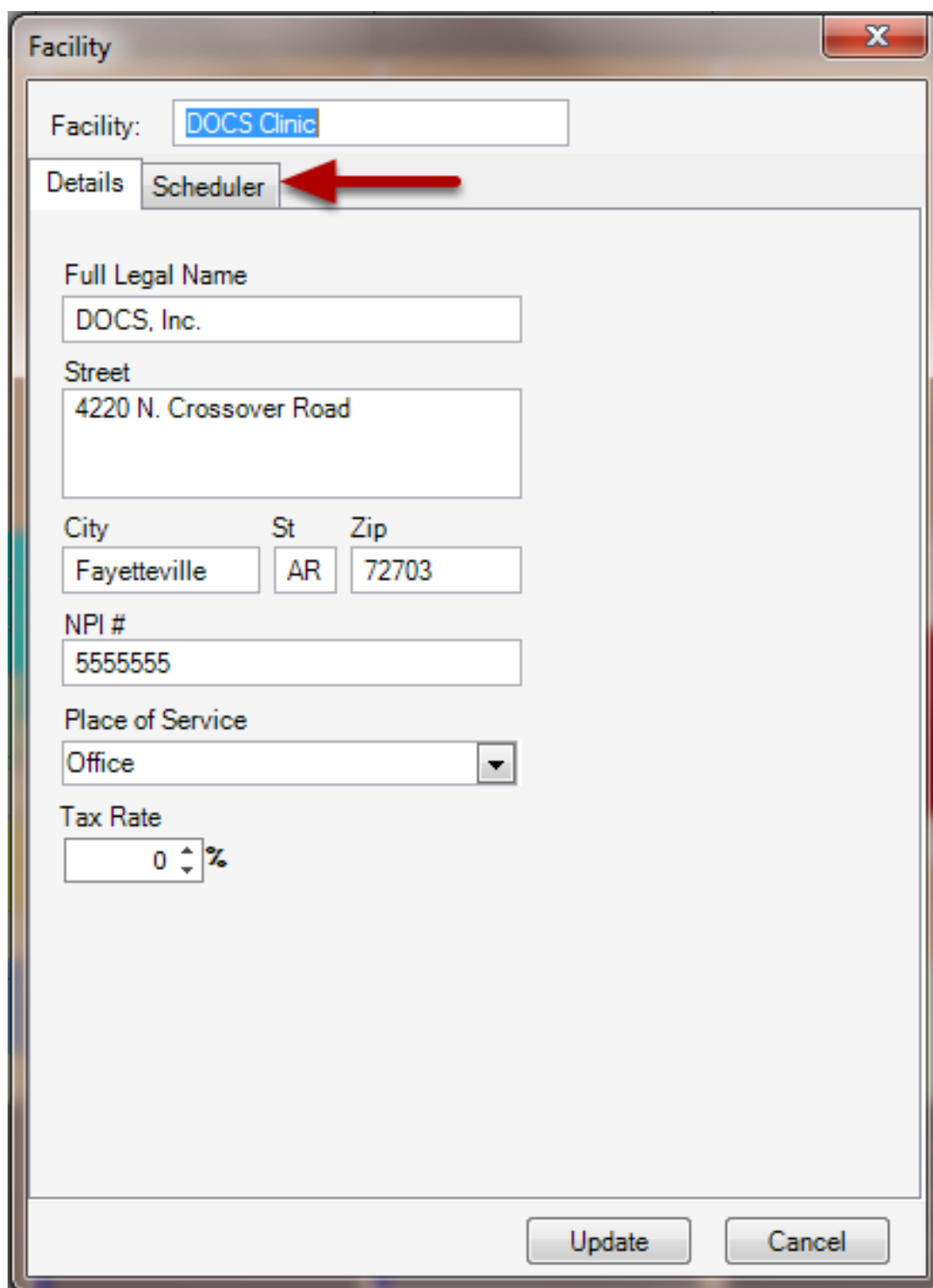
First Click Tools > Manage Facilities, to open the "Facility Manager" dialog.

### Open the Facility



1. Select the Facility.
2. Click Edit.

## Scheduler



The image shows a software window titled "Facility" with a close button (X) in the top right corner. Inside the window, there is a "Facility:" label followed by a text box containing "DOCS Clinic". Below this, there are two tabs: "Details" and "Scheduler". A red arrow points to the "Scheduler" tab. The "Scheduler" tab is active and contains the following fields:

- Full Legal Name: DOCS, Inc.
- Street: 4220 N. Crossover Road
- City: Fayetteville
- St: AR
- Zip: 72703
- NPI #: 5555555
- Place of Service: Office (dropdown menu)
- Tax Rate: 0 % (spinner box)

At the bottom right of the window, there are two buttons: "Update" and "Cancel".

Click the Scheduler Tab.

## Edit Business Hours

Facility: DOCS Clinic

Details Scheduler

Provider/Resource Management

Providers Resources

Name	Visible
Mark Smith	Yes
Sample Doc	No

Business Hours Management

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	6:00 AM	6:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes

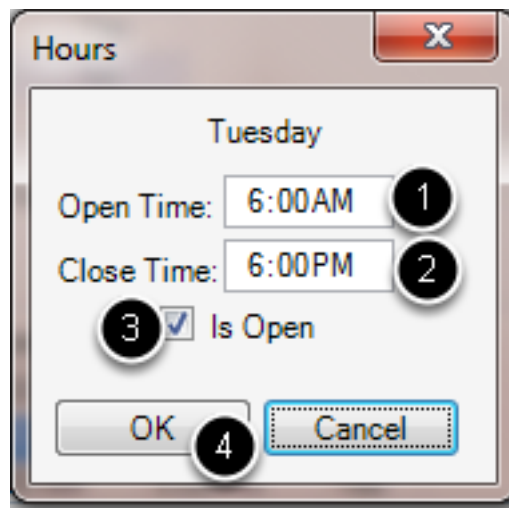
Facility Closings

Closings	Start Time	End Time
WINTER STORM	01/29/2010	01/29/2010

Update Cancel

1. Click on a day of the week.

## Edit the day



1. Enter the Open Time of the clinic for the specific day.
2. Enter the Close Time of the clinic for the specific day.
3. Check the box next to "Is Open" if the facility will be open for business on the specified day of the week.
4. Click OK to save.



## Update the Schedule

Facility:

Details Scheduler

Provider/Resource Management

Providers Resources


Name	Visible
Mark Smith	Yes
Sample Doc	No

Business Hours Management

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	6:00 AM	6:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes

Facility Closings

Closings	Start Time	End Time
WINTER STORM	01/29/2010	01/29/2010



Click the Update button to update the Schedule.

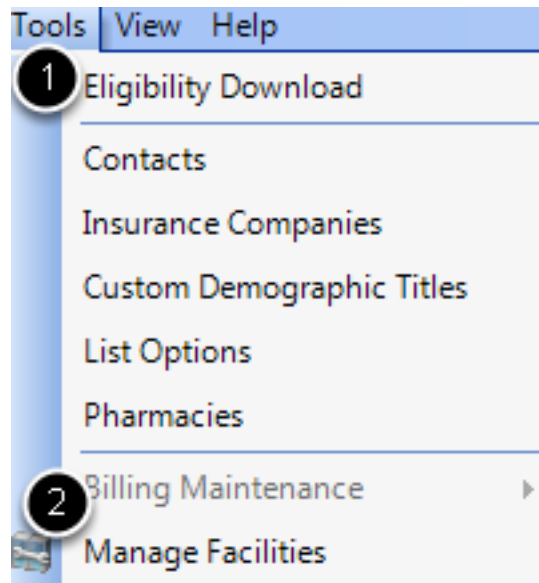
## Activate Providers/Resources for a Facility

---

This lesson will demonstrate the steps required to set scheduling defaults.

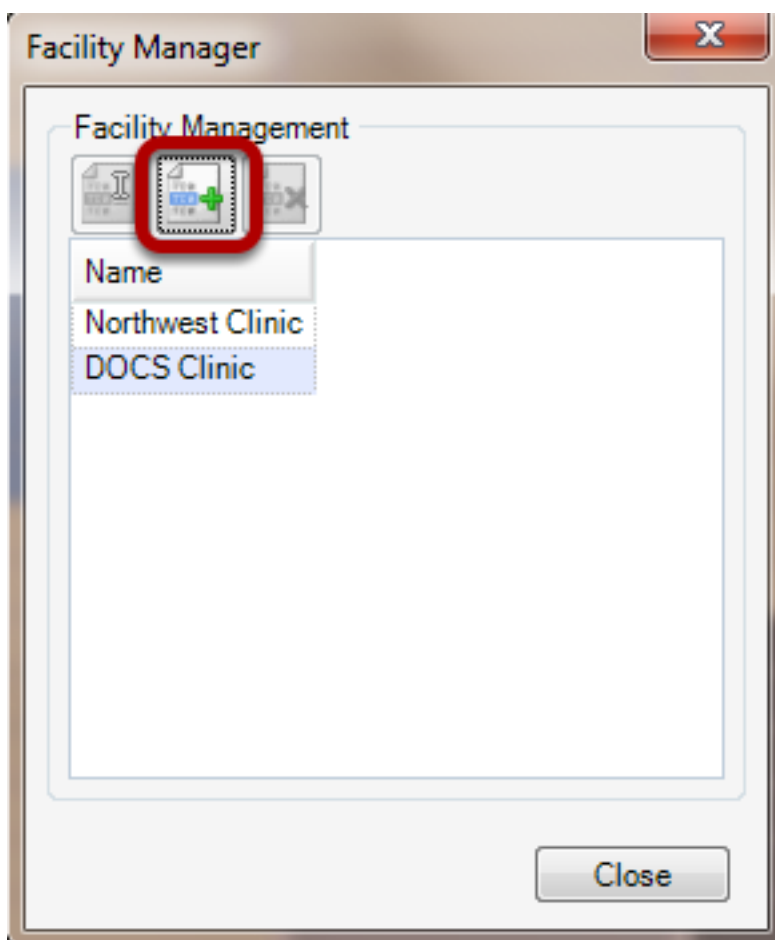
To access the Scheduler workspace, go to the SOAPware menu and Click Schedule.

### Add a Facility



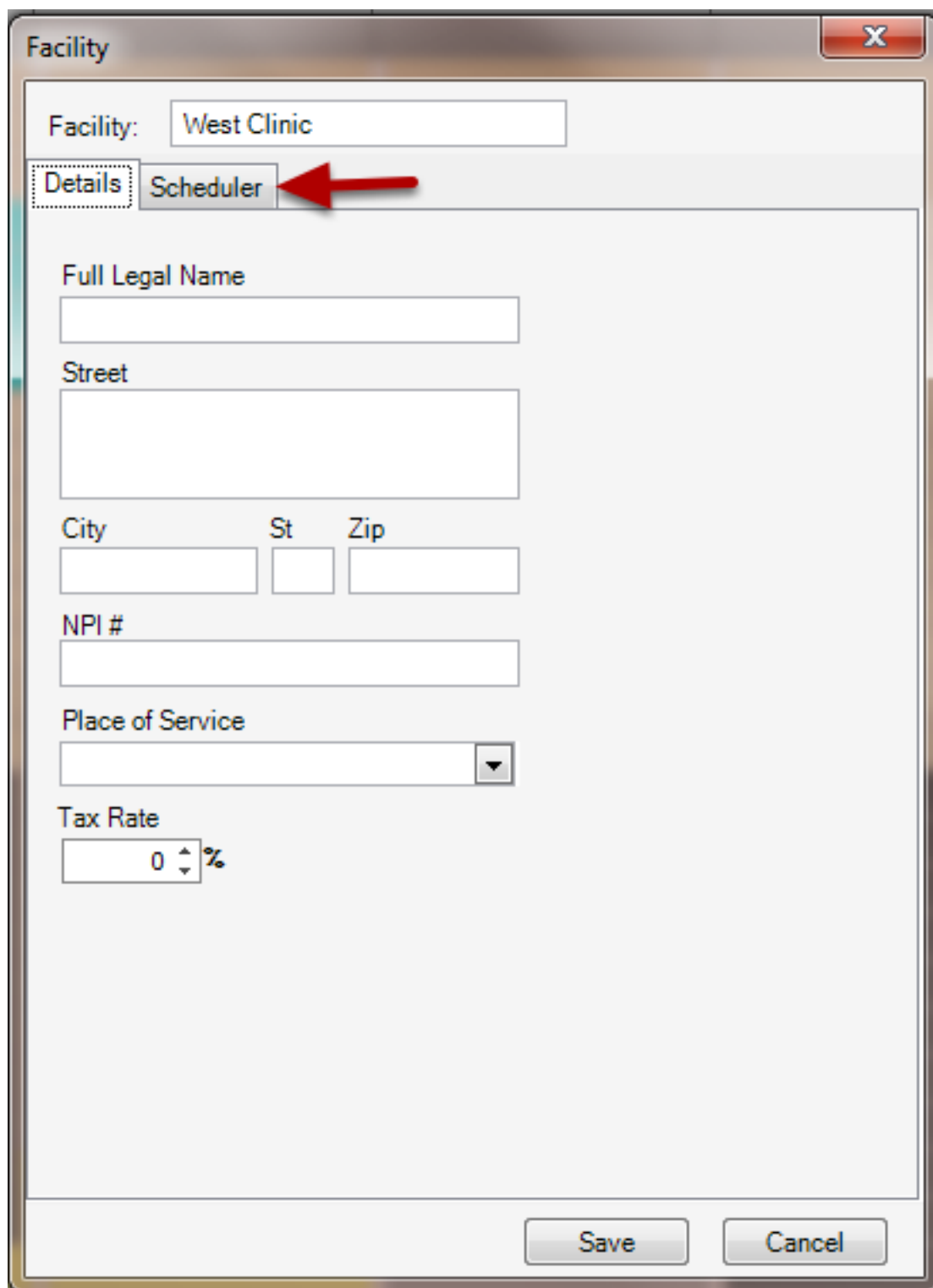
1. Click on the Tools menu.
2. Select Manage Facilities.

## Create a New Facility



Click the Create New Facility button, to setup a new facility. If you already have a facility setup, skip this lesson.

## Scheduler



The image shows a software dialog box titled "Facility" with a close button (X) in the top right corner. At the top, there is a label "Facility:" followed by a text input field containing "West Clinic". Below this, there are two tabs: "Details" and "Scheduler". A red arrow points to the "Scheduler" tab. The "Scheduler" tab is active and contains several input fields: "Full Legal Name" (a single-line text box), "Street" (a multi-line text box), "City" (a single-line text box), "St" (a single-line text box), "Zip" (a single-line text box), "NPI #" (a single-line text box), "Place of Service" (a dropdown menu), and "Tax Rate" (a spinner box showing "0" followed by a percentage sign). At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Click the Scheduler tab to setup the clinic's defaults.

## Opening the Provider's Schedule Defaults


Facility

Facility: West Clinic

Details Scheduler

Provider/Resource Management



Providers Resources

 2

Name	Visible
Randall Oates	No
Sample Doc	No





1

Business Hours Management

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes

Facility Closings

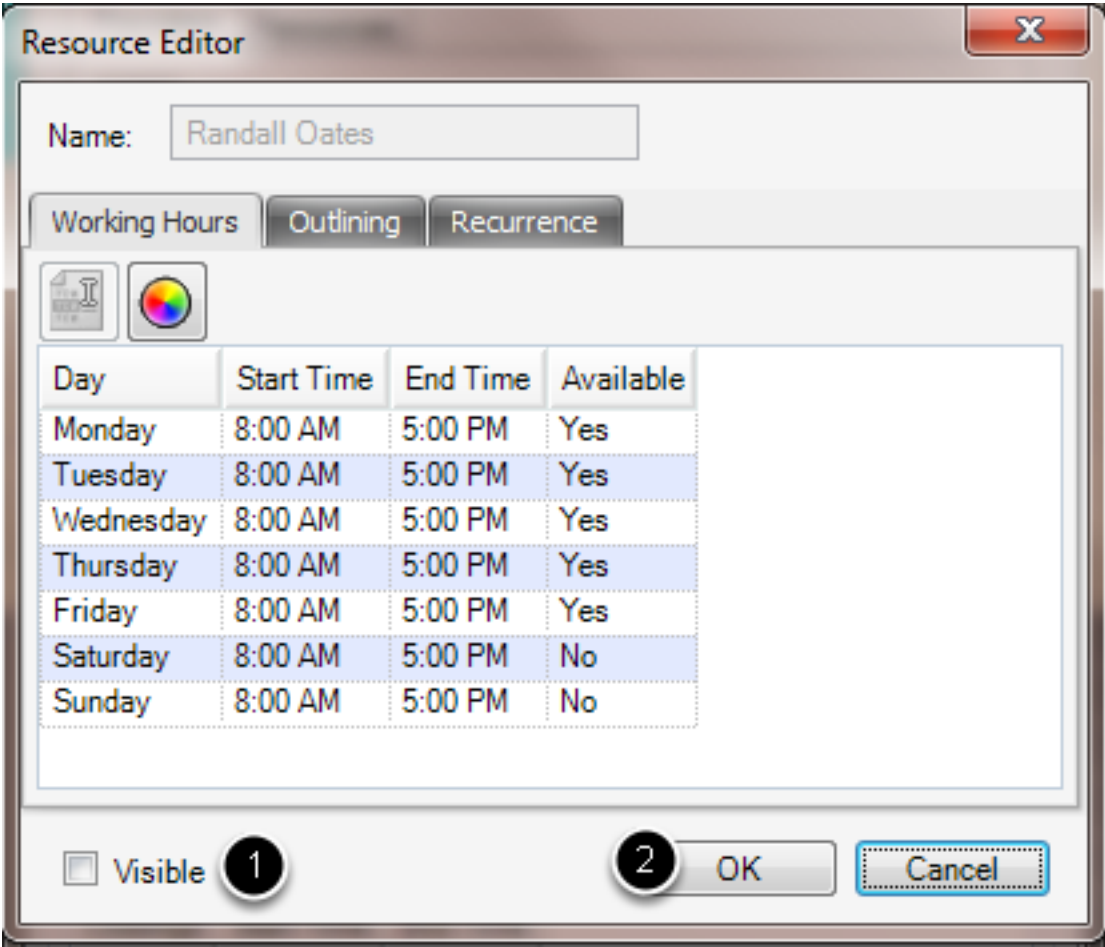
   

Closings	Start Time	End Time
----------	------------	----------

Save Cancel

1. Click on a provider name.
2. Click Edit.

## Making a Provider visible for the Clinic



The Resource Editor dialog box for Randall Oates has three tabs: Working Hours, Outlining, and Recurrence. The Working Hours tab is active, showing a table of availability by day. The table has columns for Day, Start Time, End Time, and Available. The available status is 'Yes' for Monday through Friday and 'No' for Saturday and Sunday. At the bottom, there is a 'Visible' checkbox (labeled 1), an 'OK' button (labeled 2), and a 'Cancel' button.

Name:

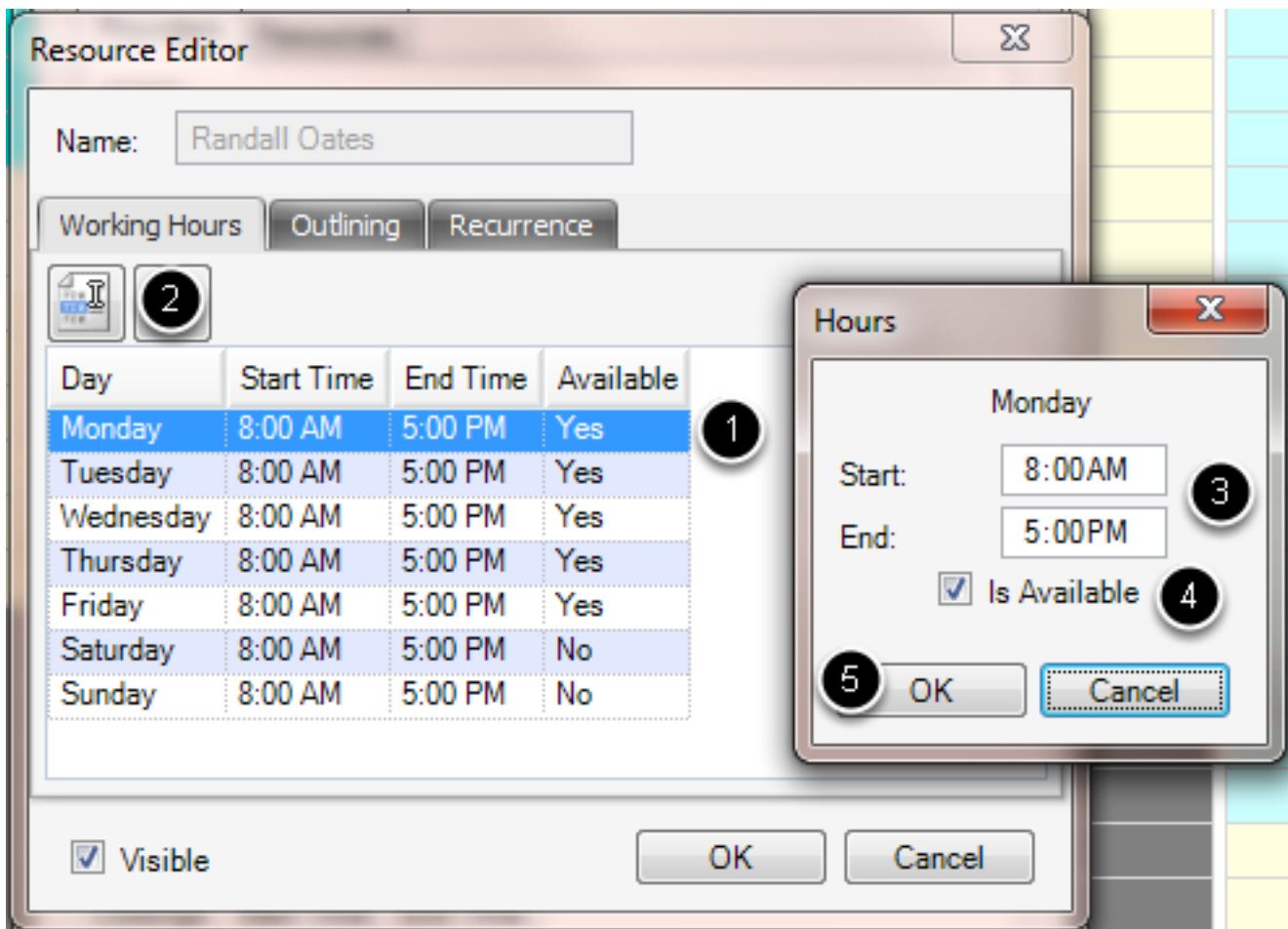
Working Hours   Outlining   Recurrence

Day	Start Time	End Time	Available
Monday	8:00 AM	5:00 PM	Yes
Tuesday	8:00 AM	5:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes
Friday	8:00 AM	5:00 PM	Yes
Saturday	8:00 AM	5:00 PM	No
Sunday	8:00 AM	5:00 PM	No

☐ Visible **1**   **2** OK   Cancel

1. Check the box next to Visible to activate the provider for the clinic.
2. Click OK.

## Set Working Hours for the Provider



1. Click on a day.
2. Click Edit.
3. Enter the Start and End Times.
4. Check the "Is Available" box, to make the provider available for appointments.
5. Click OK.

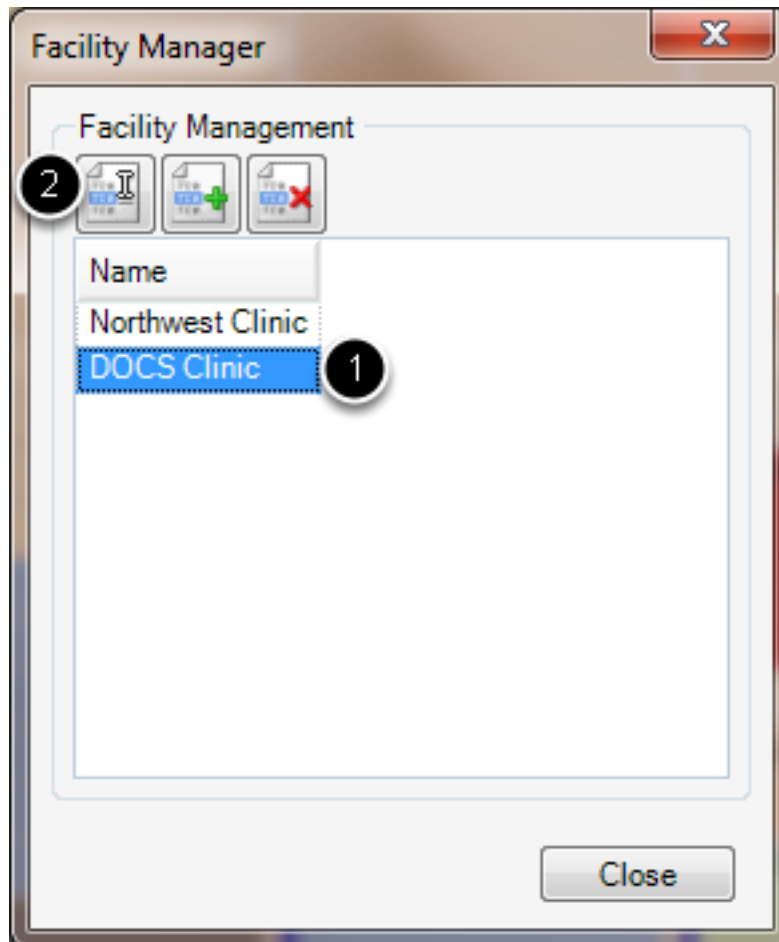
## Creating Holidays/Closings

---

This lesson will demonstrate the steps required to set up the days the facility will be closed.

First Click Tools > Manage Facilities, to access the "Facility Manager" dialog.

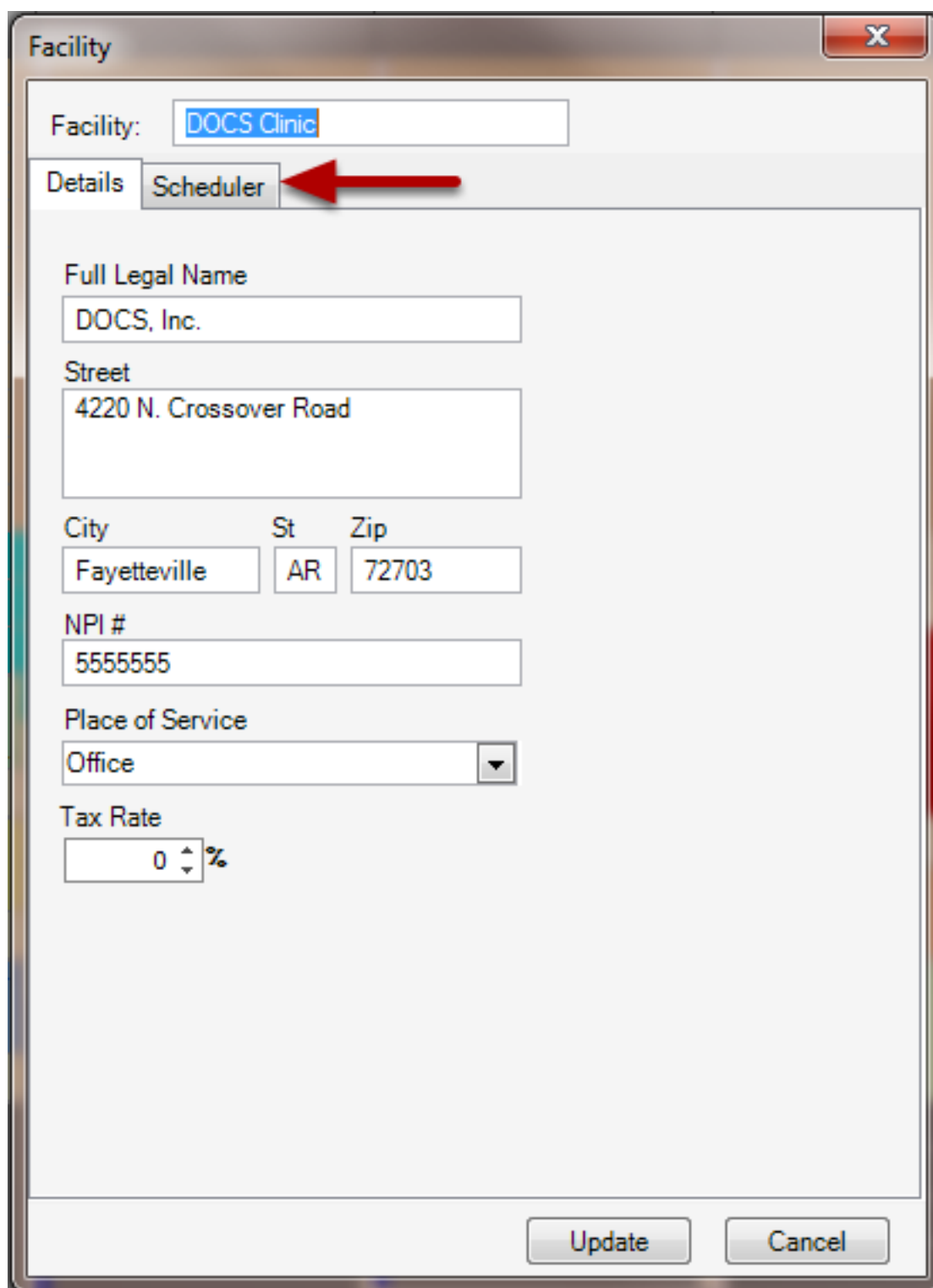
### Open the facility



1. Select the Facility.
2. Click Edit.



## Click Scheduler

A screenshot of a software window titled "Facility" with a close button (X) in the top right corner. The window contains a tabbed interface with two tabs: "Details" and "Scheduler". A red arrow points to the "Scheduler" tab. The "Details" tab is currently active, showing several input fields: "Facility:" with the text "DOCS Clinic"; "Full Legal Name" with "DOCS, Inc."; "Street" with "4220 N. Crossover Road"; "City" with "Fayetteville", "St" with "AR", and "Zip" with "72703"; "NPI #" with "5555555"; "Place of Service" with a dropdown menu showing "Office"; and "Tax Rate" with a spinner box set to "0" and a percentage sign. At the bottom right of the window are "Update" and "Cancel" buttons.

Facility: DOCS Clinic

Details Scheduler

Full Legal Name  
DOCS, Inc.

Street  
4220 N. Crossover Road

City St Zip  
Fayetteville AR 72703

NPI #  
5555555

Place of Service  
Office

Tax Rate  
0 %

Update Cancel

Click the Scheduler Tab.

## Create Facility Closings

Facility

Facility: DOCS Clinic

Details Scheduler

Provider/Resource Management

Providers Resources

Name	Visible
Mark Smith	Yes
Sample Doc	No

Business Hours Management

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	6:00 AM	6:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes

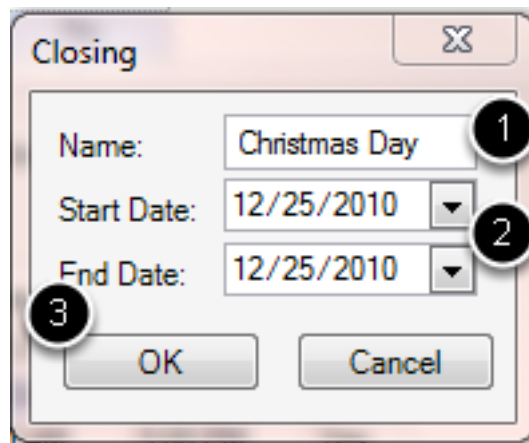
Facility Closings

Closings	Start Time	End Time
WINTER STORM	01/29/2010	01/29/2010

Update Cancel

1. Click the Add Closing button.

## Edit the Day



A screenshot of a 'Closing' dialog box. The dialog has a title bar with the word 'Closing' and a close button (X). Inside, there are three labeled fields: 'Name:' with the text 'Christmas Day', 'Start Date:' with the date '12/25/2010', and 'End Date:' with the date '12/25/2010'. Each field has a small downward arrow on its right side. At the bottom are two buttons: 'OK' and 'Cancel'. Three numbered callouts are present: '1' points to the 'Name' field, '2' points to the 'Start Date' and 'End Date' fields, and '3' points to the 'OK' button.

1. Enter the Name of the closing.
2. Enter the Start and End Dates of the closing.
3. Click OK to save.

## Update the Schedule

Facility

Facility: DOCS Clinic

Details Scheduler

Provider/Resource Management

Providers Resources

Name	Visible
Mark Smith	Yes
Sample Doc	No

Business Hours Management

Day	Open Time	Close Time	Open
Monday	8:00 AM	5:00 PM	Yes
Tuesday	6:00 AM	6:00 PM	Yes
Wednesday	8:00 AM	5:00 PM	Yes
Thursday	8:00 AM	5:00 PM	Yes

Facility Closings

Closings	Start Time	End Time
WINTER STORM	01/29/2010	01/29/2010
Christmas Day	12/25/2010	12/25/2010

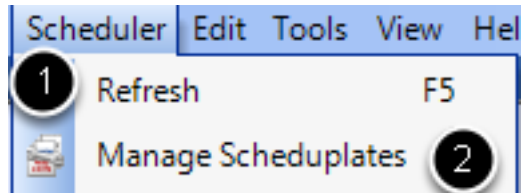
Update Cancel

Click the Update button to update the Schedule.

## Creating Scheduplates

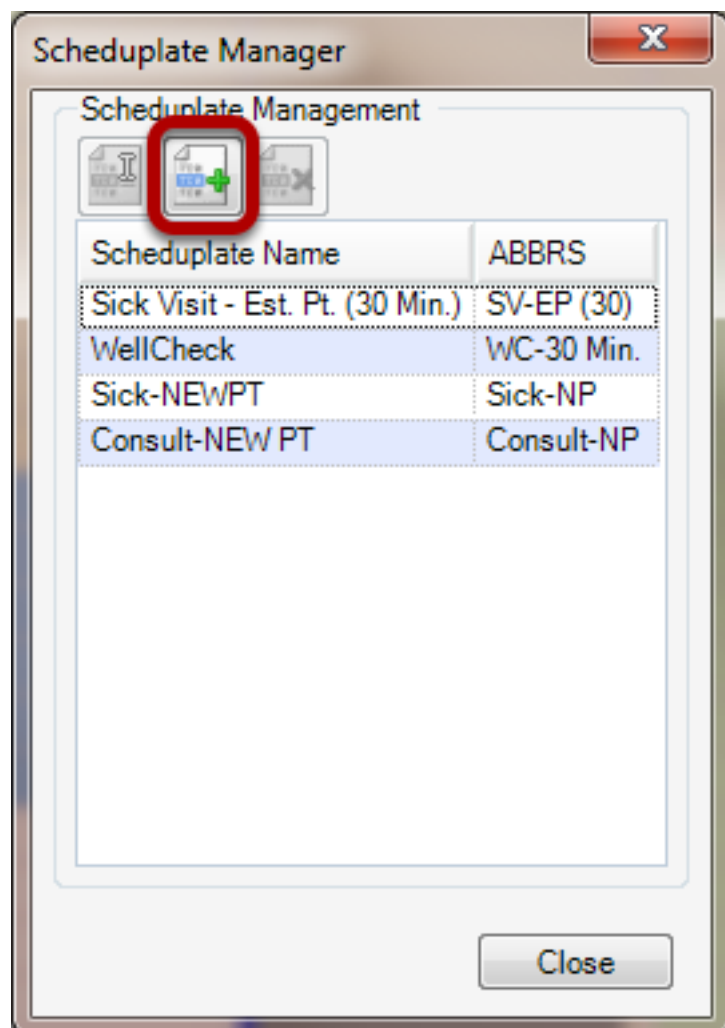
This lesson will demonstrate the steps needed to set up various facility appointment types.

### Open the Scheduplate Manager



1. Click on the Scheduler menu.
2. Select Manage Scheduplates.

### Add a Scheduplate



Click the Create New Template button.

## Enter Scheduplate information

Scheduplate Editor

Scheduplate Name: Sick Visit - Est. Pt. (30 Min.) ABBRS: SV-E

BackGround ForeGround Sample Text

Resources

Resource	Start Time /	Duration	Start Cushion	End Cushion
----------	--------------	----------	---------------	-------------

Update Cancel

1. Type in a Scheduplate Name and Abbreviation. The abbreviation will be shown on the appointment at a glance, and the full scheduplate name will be helpful in selecting the correct appointment type.
2. Select a Background color to show on the appointment.
3. Select a Foreground color for the text displayed. (After selecting the background and foreground colors, the sample text will display what the appointment will look like on the Schedule.)

## Adding a Resource

Scheduplate Editor

Scheduplate Name: Sick Visit - Est. Pt. (30 Min.) ABBRS: SV-E

BackGround ForeGround Sample Text

Resources

Resource	Start Time /	Duration	Start Cushion	End Cushion
----------	--------------	----------	---------------	-------------

Update Cancel

Click the Add Resource button.

## Entering Resource time

Schedule Resource

Resource: Randall Oates 1

2 Start Time (minutes): 3 Duration (minutes): Start Cushion (minutes): 4 End Cushion (minutes):

0 15 0 0

Save Cancel

1. Select the Resource to whom the scheduplate will apply.
2. Enter the number of minutes needed, prior to the patient being seen by the Provider/Resource.
3. Enter the Duration of the appointment with the resource selected. This indicates the length of time needed with the Resource.
4. The Start Cushion indicates the amount of time needed to prepare the patient for the

Provider/Resource's time. Enter the number of minutes by typing the number or clicking the arrows.\*

5. The End Cushion allows for any follow up work related to the appointment to be indicated and accounted. Enter the number of minutes by typing the number or clicking the arrows.\*

6. Click Save.

\*Both the Start and the End Cushion are designed to help prepare for the full length of the appointment. These fields are not necessary to create a schedupdate.

## Update Schedupdates

Schedupdate Editor

Schedupdate Name: Sick Visit - Est. Pt. (30 Min.)    ABRS: SV-E

BackGround    ForeGround    Sample Text

Resources

Resource	Start Time /	Duration	Start Cushion	End Cushion
Randall Oates	00:00:00	00:15:00	00	00

Update    Cancel

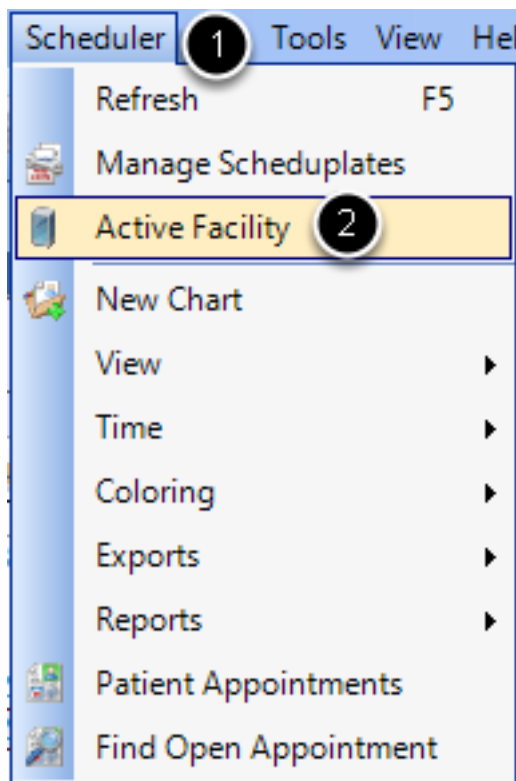
Click Update to save the Schedupdate.



## Change the Active Facility

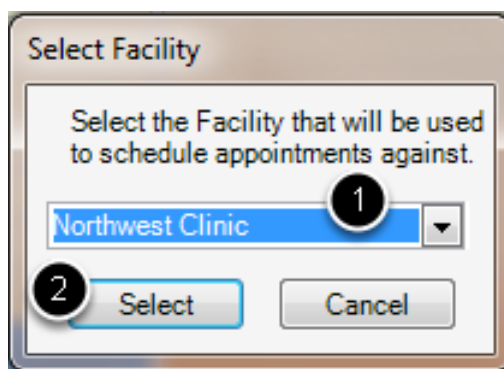
This lesson will demonstrate the steps to change the active facility, if a clinic is part of a multiple site practice.

### Open Active Facility



1. Click on Scheduler.
2. Select Active Facility.

### Select the new Active Facility



1. Click the drop down menu to find the desired facility.
2. Click Select.

# Navigation

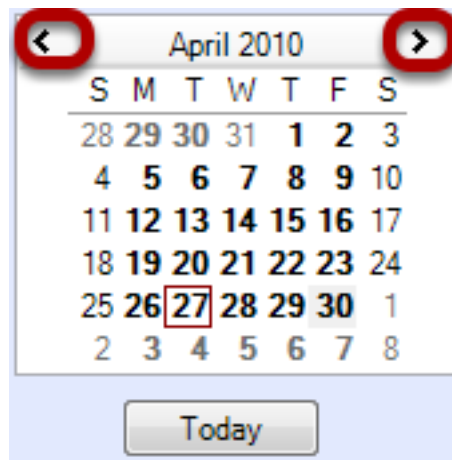
This lesson will show the various ways to navigate in the Schedule workspace.

## Move Quickly between Days, Weeks, and Months

The screenshot displays the SOAPware 2010 Scheduler interface. At the top, the menu bar includes SOAPware, Billing, Scheduler, Edit, Tools, View, and Help. Below the menu bar is a toolbar with various icons for navigation and editing. The main window shows a weekly schedule for Friday, April 30, 2010. The schedule is organized into columns for each provider: Randall Oates, David C. Smith, Sarah Slim, Joe Schmo, JAMES DOE, DO, and Ben Jim. The rows represent time slots from 8:00 AM to 4:00 PM. The schedule is color-coded by provider: Randall Oates (pink), David C. Smith (blue), Sarah Slim (orange), Joe Schmo (green), JAMES DOE, DO (cyan), and Ben Jim (yellow). The schedule includes appointments for various patients, such as Timmy, Bee, Sarah, Marley, B., Jim, Slim T., Fox, Fire, Jo, Betty, Bob, Jim, Toon, Tina, Dee, Kara, Mouse, Mickey, and Boy, Tim. The interface also includes a calendar view on the left showing the current month (April 2010) and a facility legend at the bottom left.

1. Move back 1 day.
2. Move back 1 week.
3. Move back 1 month.
4. Move ahead 1 day.
5. Move ahead 1 week.
6. Move ahead 1 month.

## Monthly Calendar



Click the arrows to move quickly to the month desired.

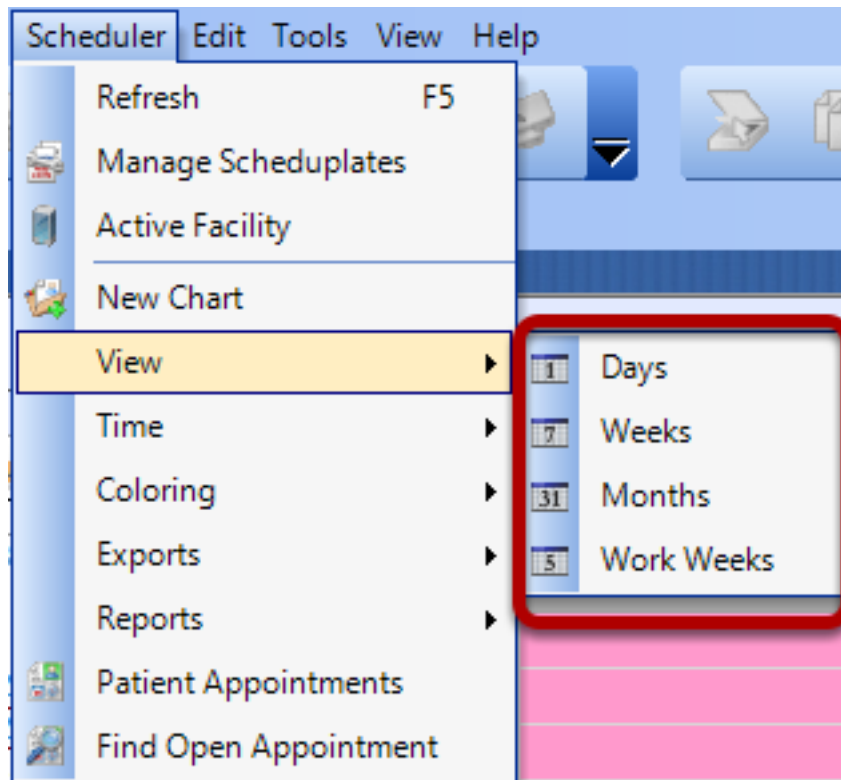
## Views

---

View the Schedule as Days, Weeks, Months, or Work Weeks.

First Select Scheduler > View.

### Select the Schedule View



Select the preferred view.

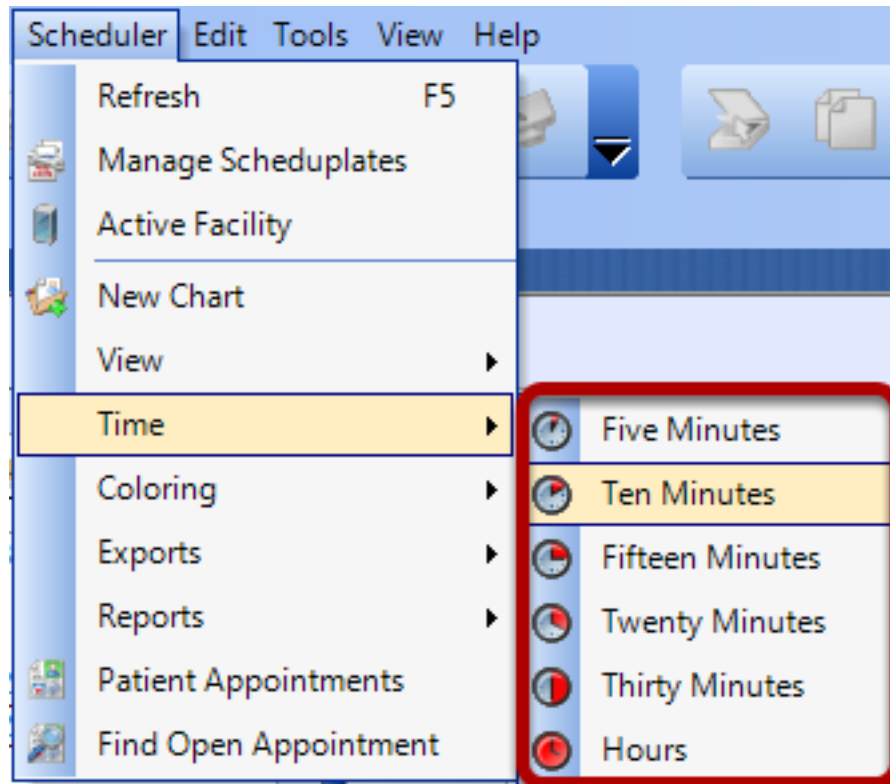
## Time Increments

---

This lesson will show how to set the time increments shown on the Schedule.

First Select Scheduler > Time.

### Select the Time Increment

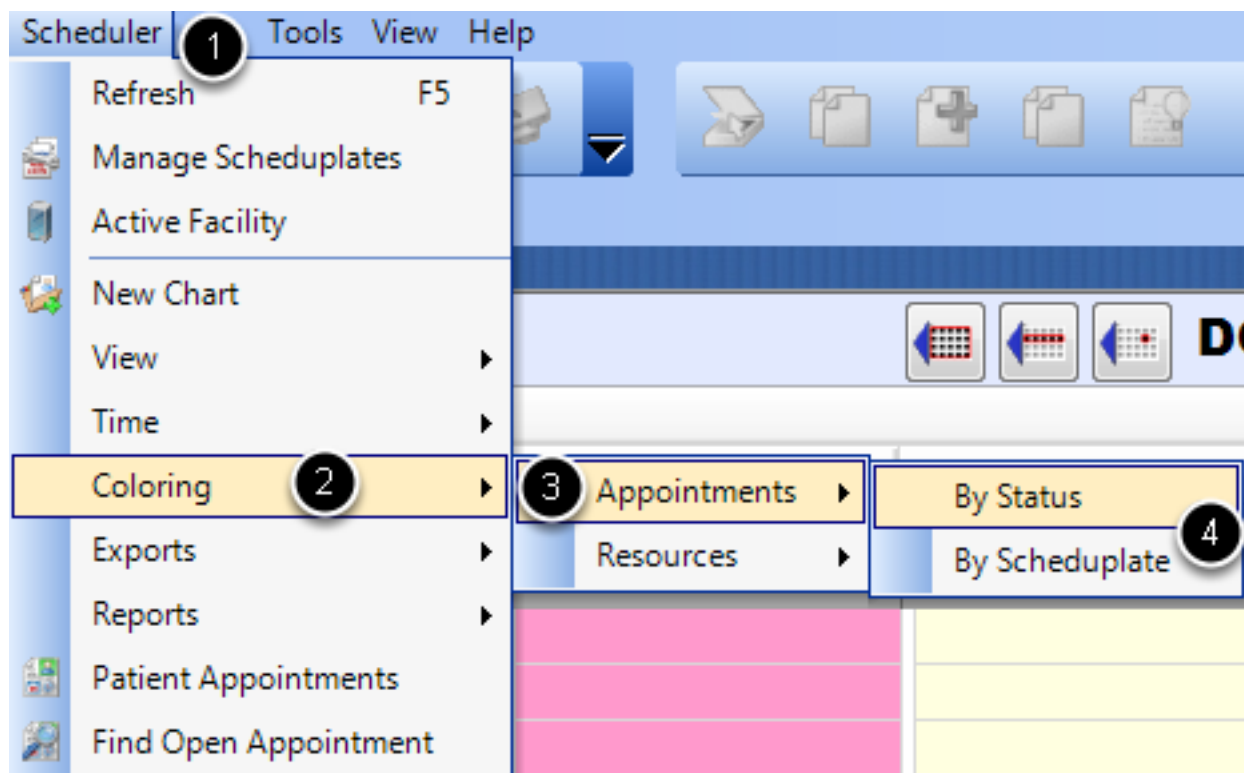


Choose the option that best fits your practice's scheduling needs. The time increment selected here will be displayed to the left of your schedule.

## Coloring

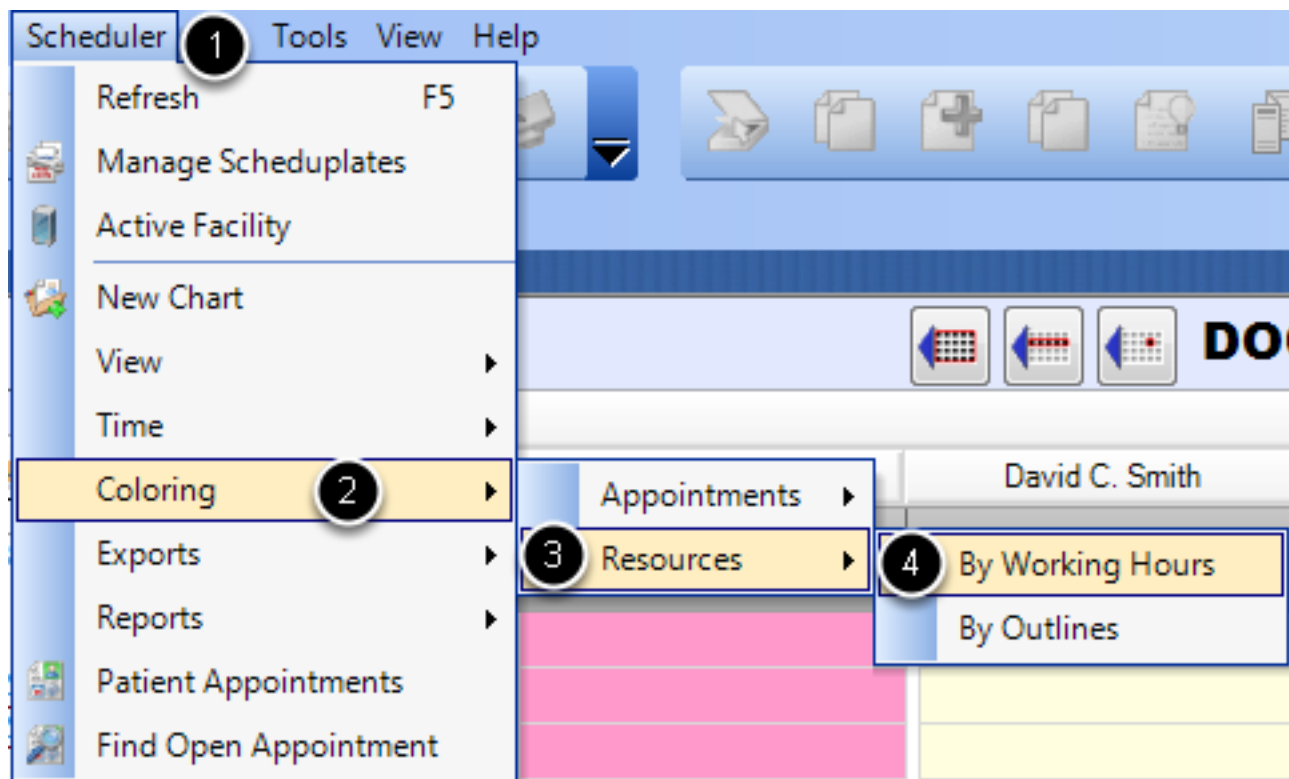
This lesson will show how to set the coloring for Appointments and Resources.

### Coloring for Appointments



1. Click on Scheduler.
2. Select Coloring.
3. Select Appointments.
4. Select either **By Status** or **By Scheduplate**. By Status, will show the shading of the status as it changes, and not show the Scheduplate coloring. By Scheduplate, will show the shading associated with the Scheduplate, and not show the status color changes.

## Coloring for Resources



1. Click on Scheduler.
2. Select Coloring.
3. Select Resources.
4. Select either **By Working Hours** or **By Outlines**. By Working Hours, will only show the hours the provider is available to see patients in the clinic. By Outlines, will show the outline shading associated with how the providers have indicated they want their days scheduled.

## Scheduling an Appointment

---

This lesson will demonstrate how to schedule a patient appointment.

### Double Click on a Needed Time Slot


The screenshot shows the 'Chart Rack' window. At the top left, the title 'Chart Rack' is followed by a circled number '1'. Below the title is a search bar with the label 'Search' and a circled number '2'. To the right of the search bar is a 'Type' dropdown menu set to 'Name' and a folder icon. Below the search bar is a horizontal alphabetical index from A to W, with 'A' highlighted by a circled number '3'. Below the index is a table with columns: Name, Chart Number, SSN, Birth Date, and Provider. The table is currently empty. At the bottom of the window, there is a 'Provider' dropdown menu set to 'All Providers', a 'Total Active Patients: 57' label, and two buttons: 'Select' (with a circled number '3') and 'Cancel'.

1. The Chart Rack will be pulled up.
2. Type in the patient's name.
3. When the correct patient is pulled up, Click Select or double click the patient.



## Schedule Tab - Patient Appointments

Jim, Slim T.



**Jim, Slim T.**

**Account** 34  
**Chart** 68332

**Date of Birth** 3/21/1970 **Age** 40 **Sex** Male **Status** Unknown

**Address** 1539 COUNTY LINE RD Home Town, AR 72711

**Home** (501) 111-1111 **Work** (501) 555-9000 **Cell** (479) 987-6543

**Email** jslim@email.com

**Balances**

Family \$25.00  
Personal \$454.00  
**Total** \$479.00

☐ Self Pay Co-Pay \$20.00

[Schedule](#)
[Demographics](#)
[Insurance](#)
[Custom](#)
[Ledger](#)
[Family](#)
[Claims](#)
[Statements](#)
[New Charges](#)

**Visit Detail for 4/27/2010 7:45 AM - 8:00 AM (0:15)**

**Scheduplate** SV-EP (30) - Sick Visit - Est. Pt. ...  
**Referral** Joe Schmo  
**Facility** DOCS Clinic  
**Status** Confirmed  
**Recurrence**

**Resources**

Date	Start	End	Name
4/27/2010	7:45 AM	8:00 AM	Randall Oates

**Visit Comments**

Patient has fever and chills. Bringing updated insurance cards. LO

**Verification**  
☒ Insurance Verified  
**Date** 4/27/2010  
**User** randalloates

☒ Check In

**Visit List**

Date	Start	End	Facility	Resource Name	Scheduplate
4/30/2010	11:30 AM	12:15 PM	DOCS Clinic	David C. Smith	
4/27/2010	7:45 AM	8:00 AM	DOCS Clinic	Randall Oates	Sick Visit - Est. ...
4/23/2010	8:45 AM	9:15 AM	DOCS Clinic	Randall Oates	Sick Visit - Est. ...
4/22/2010	2:00 PM	2:15 PM	DOCS Clinic	David C. Smith	
4/22/2010	8:45 AM	9:00 AM	DOCS Clinic	Sarah Slim	
4/21/2010	1:45 AM	12:00 PM	DOCS Clinic		Sick Visit - Est. ...
4/20/2010	10:15 AM	10:30 AM	DOCS Clinic	Ben Jim	

Enter the Appointment information, as needed:

- Visit Detail:** Summary of the overall length of the appointment
- Scheduplate:** The appointment type
- Referral:** Referring Provider
- Facility:** Place of Service
- Status:** The status of the patient visit within the clinic's work flow. (This list is completely customizable by clinic.)
- Recurrence:** Sets recurrences of the visit, if needed.

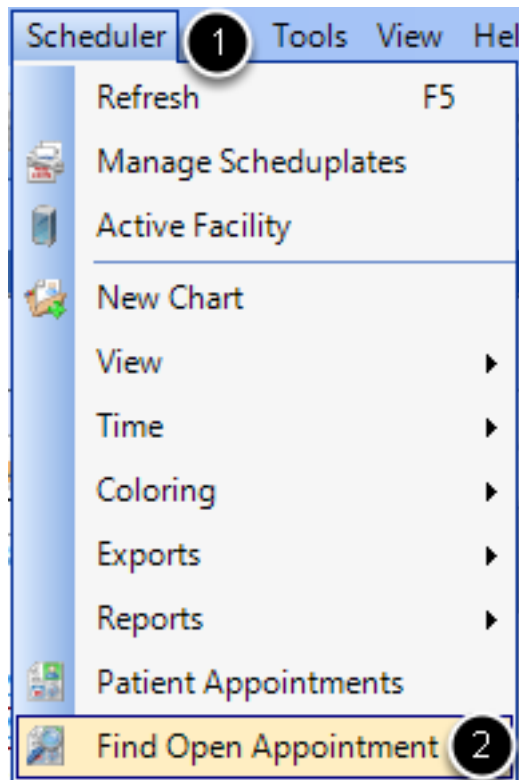
7. **Resources:** Allows the scheduling of one to multiple resources for one visit
8. **Visit Comments:** Allows miscellaneous information and visit details to be entered and stored for the visit.
9. **Verification:** Indicates the date and user who verified the patient's insurance benefits and eligibility.
10. **Check-In:** Allows a patient to be checked in with the click of a button.
11. **Take Co-Pay:** Allows a patient's co-pay to be taken at the beginning of the visit.
12. **Visit List:** Displays all of the patient's past, current and future appointments to be displayed in one place, to help prevent double booking an appointment.
13. **Today:** Immediately selects the current day's visit.
14. **Print Visit:** Prints out the selected visit.
15. **New Visit:** Creates a new appointment for the patient.

## Searching for Available Appointments

---

This lesson will show how to search for open appointments.

### Find an Open Appointment



1. Click on Scheduler.
2. Select Find Open Appointment.

## Enter Basic Search Criteria

Find Open Appointment

**Facility: DOCS Clinic**

Search Criteria

Resource: Randall Oates 1

Start Time: 04/27/2010 12:00AM 2

End Time: 05/11/2010 11:59PM

Start Cushion: 0 3 Duration: 15 4 End Cushion: 0

Advanced Search 5

Open Appointments

Date	Time	Resource Name	Facility
4/27/2010	8:30 AM	Randall Oates	DOCS Clinic
4/27/2010	8:45 AM	Randall Oates	DOCS Clinic
4/27/2010	9:00 AM	Randall Oates	DOCS Clinic
4/27/2010	9:15 AM	Randall Oates	DOCS Clinic
4/27/2010	9:30 AM	Randall Oates	DOCS Clinic
4/27/2010	9:45 AM	Randall Oates	DOCS Clinic
4/27/2010	10:00 AM	Randall Oates	DOCS Clinic
4/27/2010	10:15 AM	Randall Oates	DOCS Clinic
4/27/2010	10:30 AM	Randall Oates	DOCS Clinic
4/27/2010	10:45 AM	Randall Oates	DOCS Clinic
4/27/2010	1:30 PM	Randall Oates	DOCS Clinic
4/27/2010	1:45 PM	Randall Oates	DOCS Clinic
4/27/2010	2:00 PM	Randall Oates	DOCS Clinic
4/27/2010	2:15 PM	Randall Oates	DOCS Clinic
4/27/2010	2:30 PM	Randall Oates	DOCS Clinic

7 Select Cancel

1. Select the **Resource** needed from the drop down menu.
2. Enter the **date ranges** for the possible appointment.
3. Enter the **Start and End Cushions** that the appointment will need to have.

4. Enter the **Duration** for the appointment needed.
5. Click **Search**.
6. If a suitable appointment has been found, **select the appointment time**.
7. Click **Select**.

### Enter Advanced Search Criteria

The screenshot shows the 'Find Open Appointment' dialog box. It has a title bar and a main content area. The 'Search Criteria' section includes a 'Facilities:' list with checkboxes for 'Northwest Clinic' (1) and 'DOCS Clinic' (checked). Below this are 'Start Time:' (04/27/2010 12:00AM) (2) and 'End Time:' (05/11/2010 11:59PM) (2) dropdowns, and a 'Scheduplate:' dropdown (3). There are also icons for adding attachments (4). Below these is a table with columns: 'Resource', 'Start Time /', 'Duration', 'Start Cushion', and 'End Cushion'. At the bottom left is a 'Basic' tab. At the bottom right is a 'Search' button (5). Below the 'Search' button is the 'Open Appointments' section with columns 'Date', 'Time', and 'Facility'. Below this is a list box (6). At the very bottom are 'Select' (7) and 'Cancel' buttons.

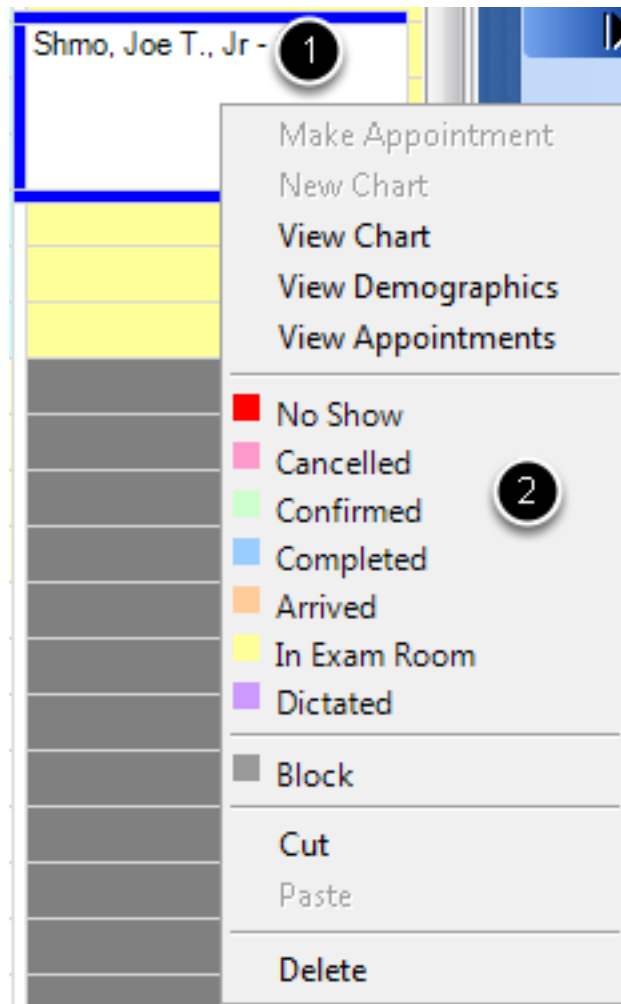
1. Check the **Facility** needed for the appointment.
2. Enter the **date ranges** for the possible appointment.
3. Select a preferred **Scheduplate**.

4. Add a **Provider/Resource** to help narrow down the search.
5. Click **Search**.
6. If a suitable appointment has been found, **Select the appointment time**.
7. Click **Select**.

## Change the Appointment Status

---

This lesson will demonstrate how to change an appointment status.



1. Right click on the desired appointment.
2. Select the needed status for the appointment. (The status should be updated automatically on the Schedule, and in the patient's visit list.)

## Scheduling Repeat Appointments

This lesson will show how to set up repeat appointments for patients.

### Open the Patient Account

**Jim, Slim T.** 1

**Account** 34  
**Chart** 68332

**Date of Birth** 3/21/1970 **Age** 40 **Sex** Male **Status** Unknown

**Address** 1539 COUNTY LINE RD Home Town, AR 72711

**Home** (501) 111-1111 **Work** (501) 555-9000 **Cell** (479) 987-6543

**Email** jslim@email.com

**Balances**  
Family \$25.00  
Personal \$454.00  
**Total** \$479.00

☐ Self Pay ☐ Co-Pay \$20.00

**Schedule** **Demographics** **Insurance** **Custom** **Ledger** **Family** **Claims** **Statements** **New Charges**

**Visit Detail for 4/27/2010 7:45 AM - 8:00 AM (0:15)**

**Scheduplate** SV-EP (30) - Sick Visit - Est... **Referral** Joe Schmo **Facility** DOCS Clinic **Status** Confirmed 2 **Recurrence**

**Resources** 3 **Add Resource**

Date	Start	End	Name
4/27/2010	7:45 AM	8:00 AM	Randall Oates

**Visit Comments**  
Patient has fever and chills. Bringing updated insurance cards. LO

**Verification**  
☒ Insurance Verified  
Date 4/27/2010  
User randalloates

**Check In**  
Check In  
Take Co-Pay

**Visit List**

Date	Start	End	Facility	Resource Name	Scheduplate
4/30/2010	11:30 AM	12:15 PM	DOCS Clinic	David C. Smith	
4/27/2010	7:45 AM	8:00 AM	DOCS Clinic	Randall Oates	Sick Visit - Est. ...
4/23/2010	8:45 AM	9:15 AM	DOCS Clinic	Randall Oates	Sick Visit - Est. ...
4/22/2010	2:00 PM	2:15 PM	DOCS Clinic	David C. Smith	
4/22/2010	8:45 AM	9:00 AM	DOCS Clinic	Sarah Slim	
4/21/2010	1:45 AM	12:00 PM	DOCS Clinic		Sick Visit - Est. ...

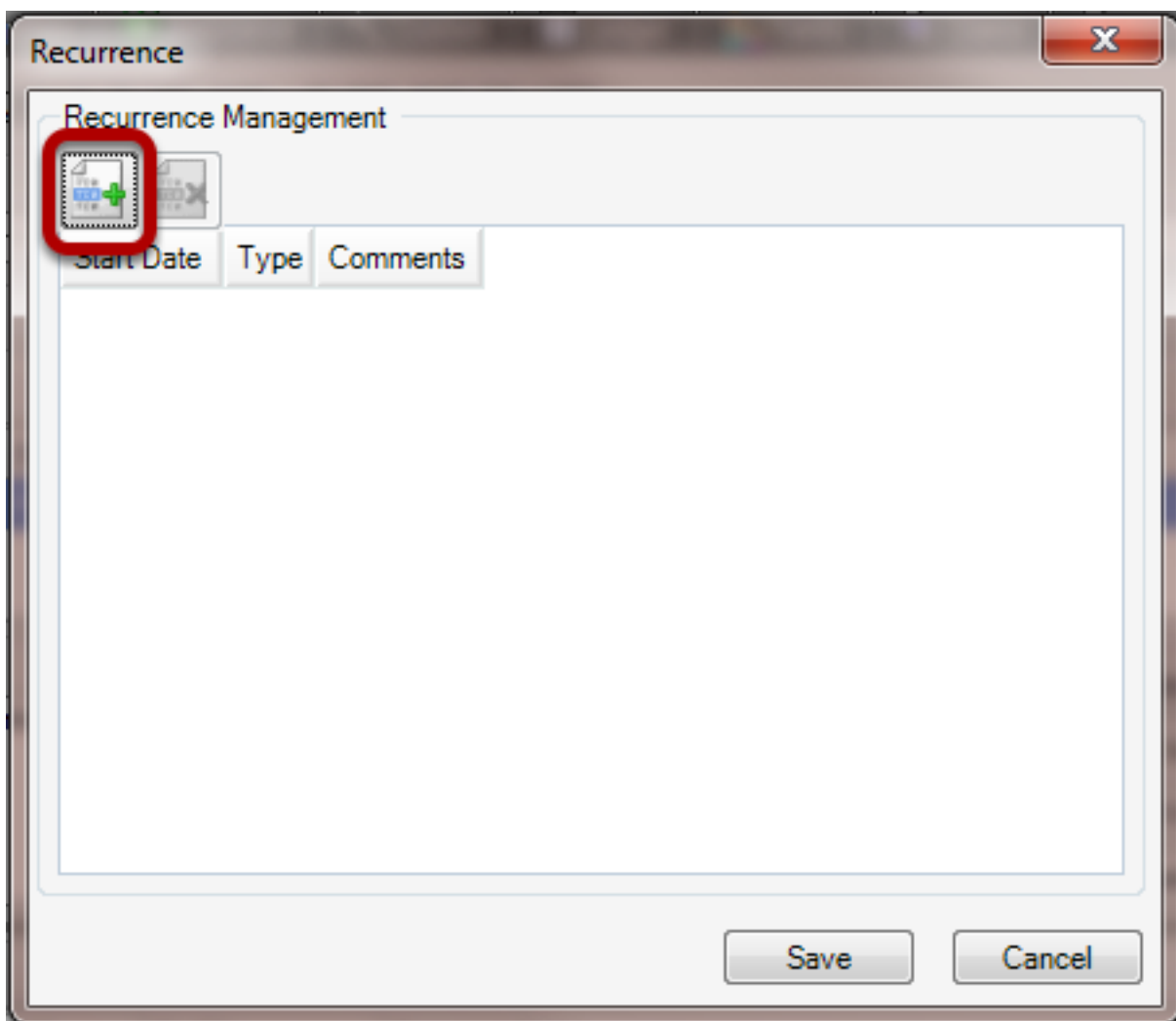
**Today** **Print Visit** **New Visit**

1. Double Click the appointment, needing to be repeated. This will open the patient's account dialog window.

2. On the Schedule tab, Click Recurrence.



## Recurrence Management



Click the Create Recurrence button.

## Set the Recurrence Pattern

The screenshot shows a 'Recurrence Pattern' dialog box with the following fields and controls:

- Appointment Time** (1): A section containing 'Start Time' (7:45AM) and 'End Time' (8:00AM).
- Recurrence Pattern** (2): A section with radio buttons for 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly'. To the right, it says 'Recurs every 2 week(s) on' followed by checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday' (checked), 'Friday', and 'Saturday'.
- Range of Recurrence** (3): A section with 'Start By' (04/27/2010) and two options: 'End after: 2 occurrences' (selected) and 'End by: 04/28/2010'.
- Comments**: A text area for notes.
- Buttons** (4): 'Save' and 'Cancel' buttons at the bottom right.

1. Enter the appointment time.
2. Select whether the appointment will be on a **Daily, Weekly, Monthly or Yearly** basis.
3. Indicate how long the recurrence will take place. **Select the Start Date**, as well as either the **number of occurrences** for the appointment or an **End Date** for the recurrence.
4. Click Save.

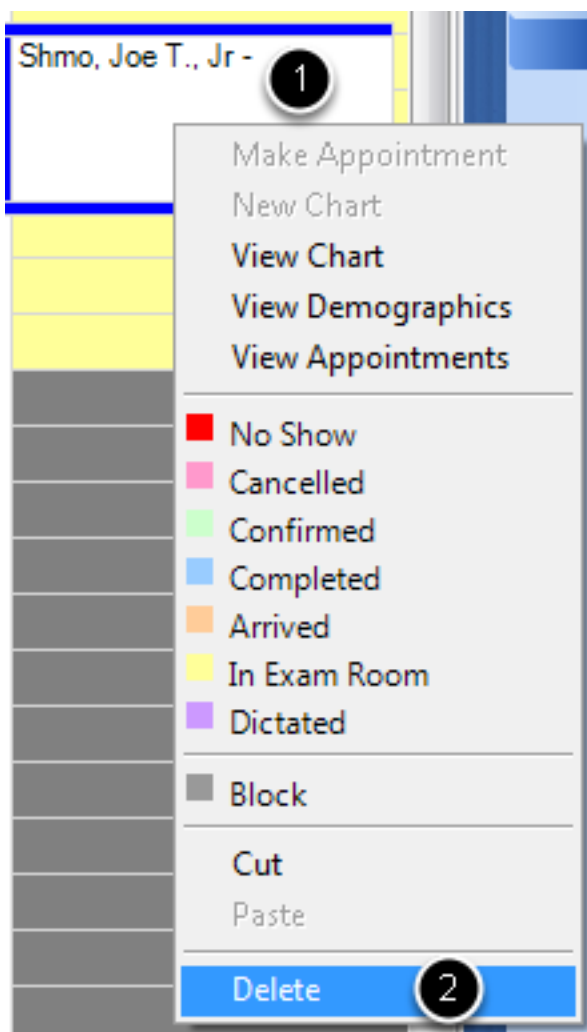
The recurring appointments should be scheduled, and the patient's account updated automatically.

## Deleting an Appointment

---

This lesson will show how to delete a patient appointment.

### Delete an Appointment



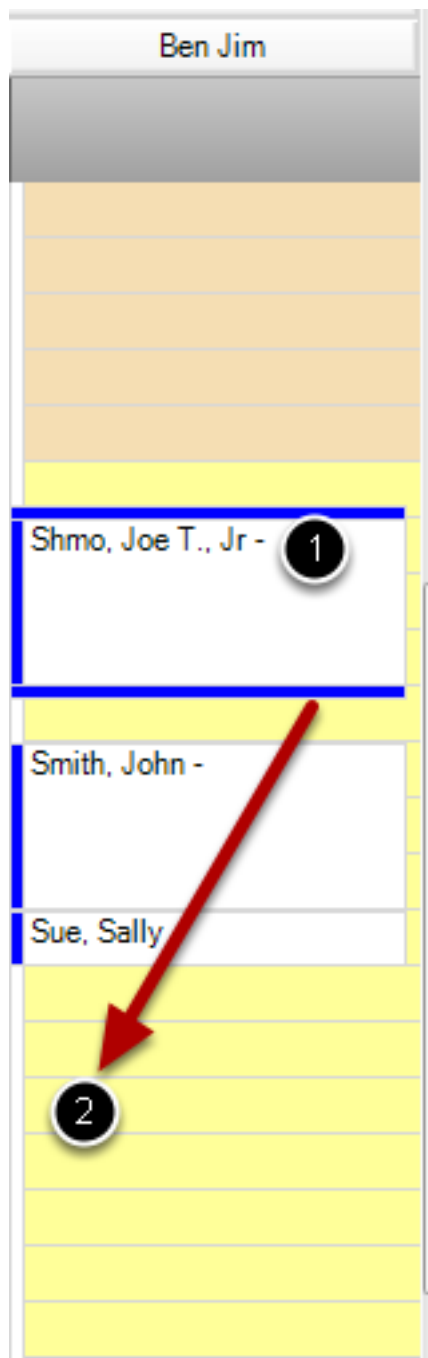
1. Click to select the appointment.
2. Right click on the appointment and select Delete, or Click Delete on the keyboard. (A warning will pop up to make sure the appointment is to be deleted. Click Yes to continue, or No to cancel.)

## Moving an Appointment

---

This lesson will demonstrate how to move an appointment to a different time slot.

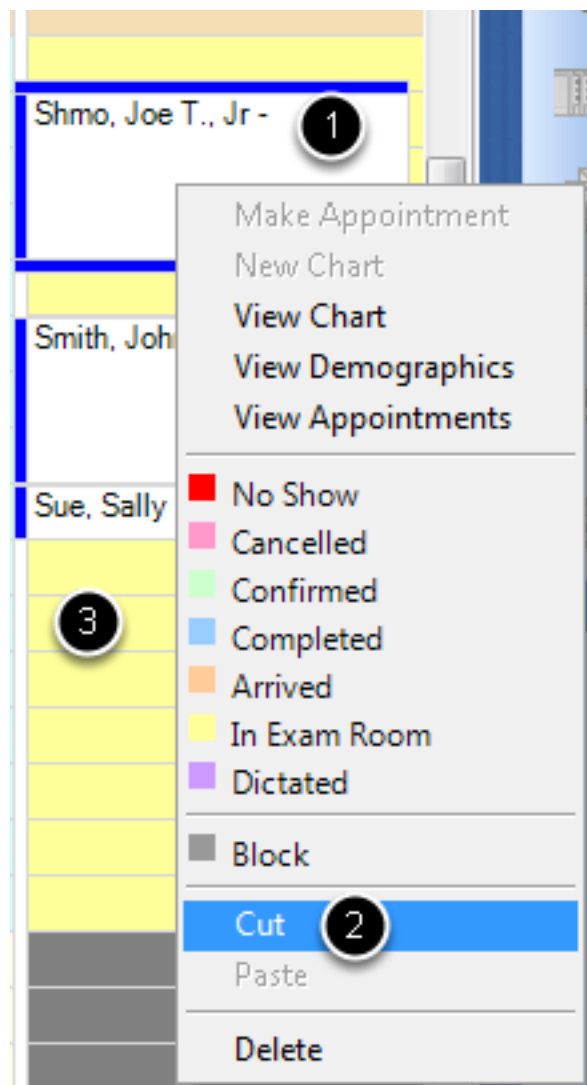
### Dragging and Dropping



1. Click to select the appointment.
2. With the left mouse button held down, drag the appointment to the desired time slot and release the mouse.

The appointment should then be placed at a new time, and the patient's appointment details updated automatically.

## Cutting and Pasting



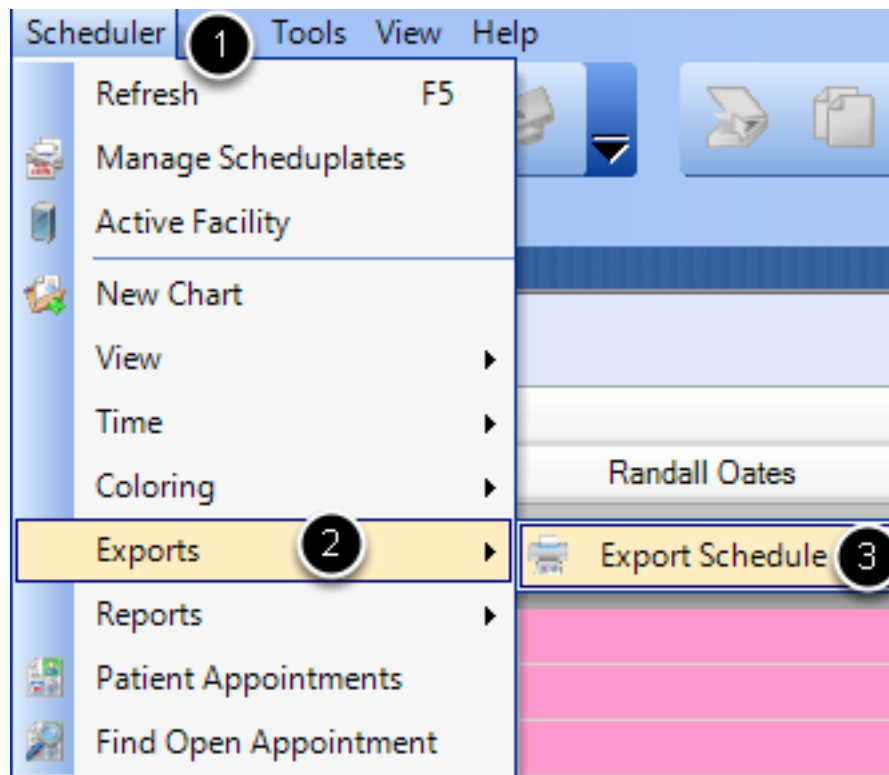
1. Click to select the appointment.
2. Right click on the desired appointment, and Select cut.
3. Click the desired time slot. Right click on the mouse and select Paste. The appointment should then be placed at a new time, and the patient's appointment details updated automatically.

## Export the Schedule

---

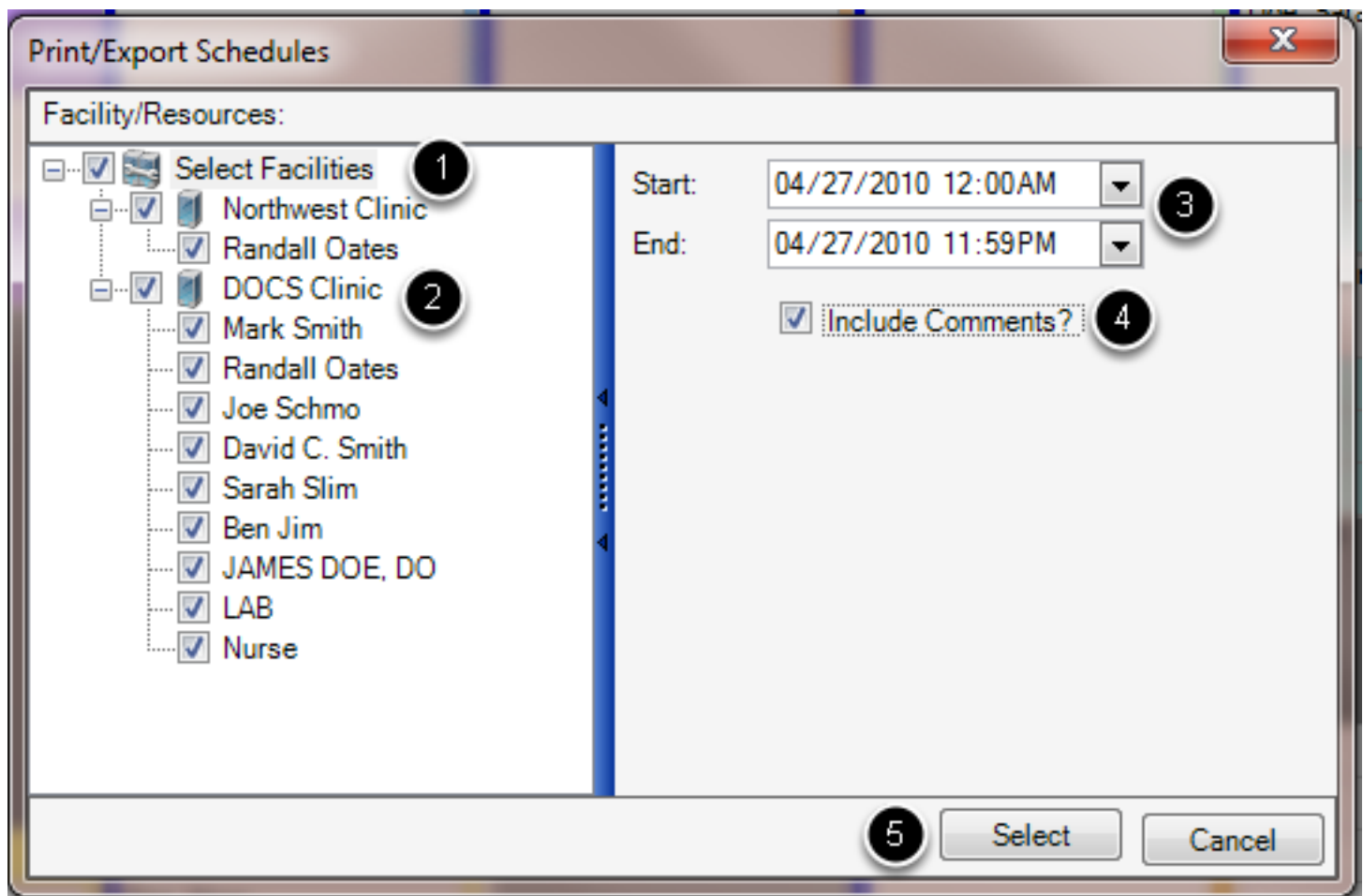
This lesson will demonstrate how to export the clinic's schedule.

### Export the Schedule



1. Select Scheduler.
2. Click on Exports.
3. Select Export Schedule.

## Select the Facilities/Resources to Export



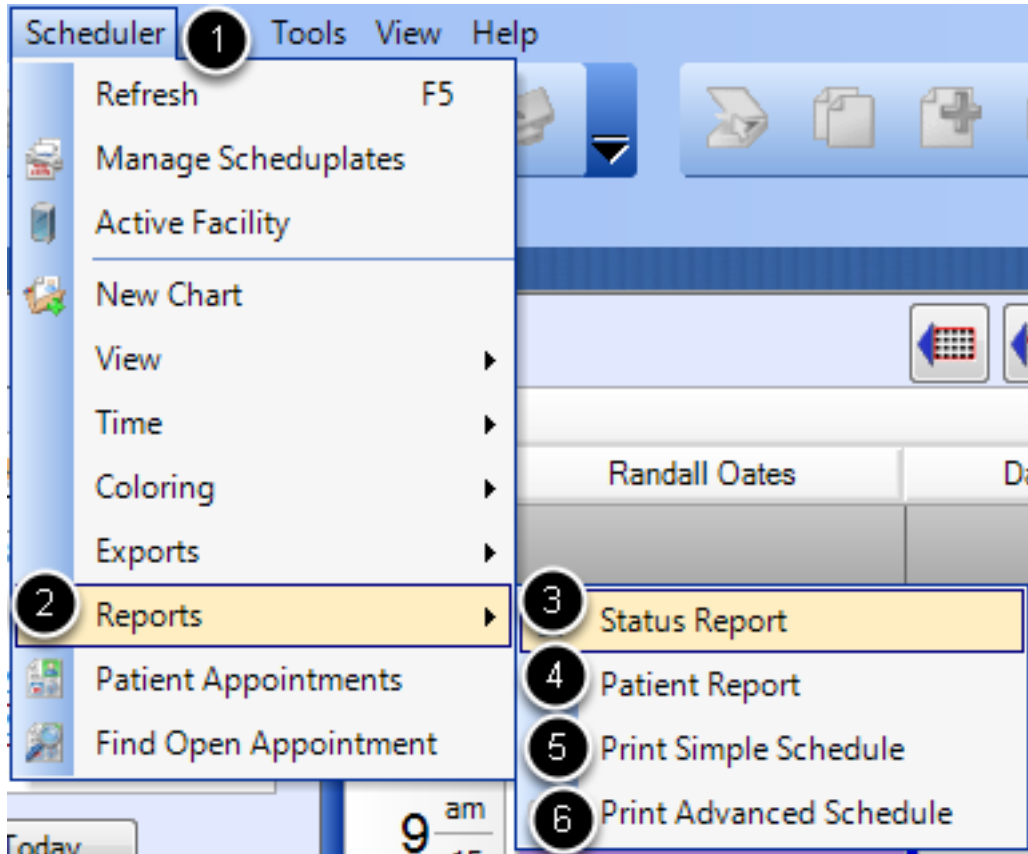
1. Check the boxes of the Facilities to be shown.
2. Select the Resources whose schedules need to be exported.
3. Enter the range of dates to be exported.
4. Check to include the visit comments on the report as reference, if needed.
5. Click Select. The file will be exported as a CSV file.

## Schedule Reports

---

This lesson will demonstrate how to access reports on the Schedule data.

### Print various Schedule Reports



1. Click on Scheduler.
2. Click on Reports.
3. Status Report: View a summary of patients based on their appointment status.
4. Patient Report: Provides both a summary of the specified patient's appointments, but also provides a breakdown of the time spent at each status of each appointment.
5. Print Simple Schedule: Provides a summary of the appointments scheduled by Provider. Indicates the Time, Patient Name, Phone Number, Schedupdate, Status and visit Comments.
6. Print Advanced Schedule: Provides a summary of appointments scheduled across Facilities and Resources. Time, Patient Name, Phone Number, Schedupdate, Status and visit Comments.



# Data Explorer

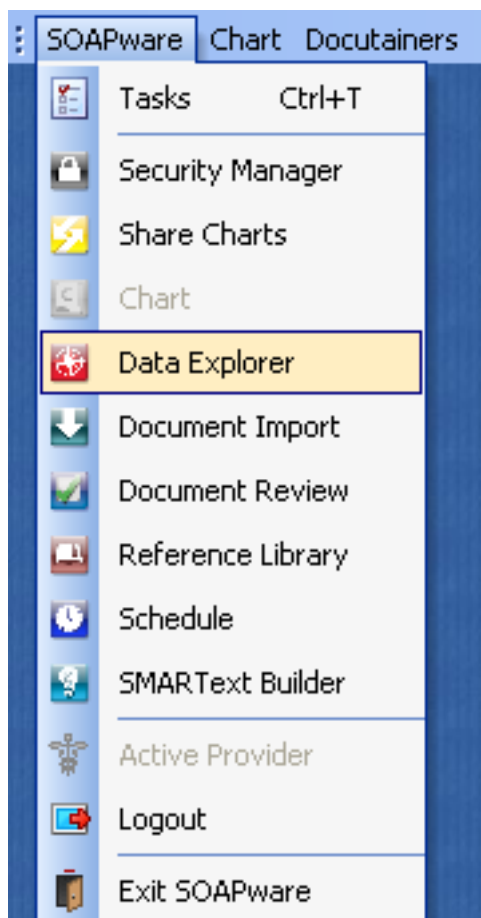
## Data Explorer SOAPnote Medication Search

---

This lesson will cover searching databases for structured SMARTtext medication located in the SOAPnote medication field

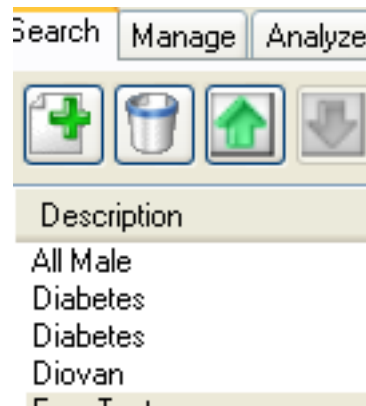
Depending on the size of the database, this search could take several minutes. We do not recommend running database searches during business hours.

### Accessing Data Explorer



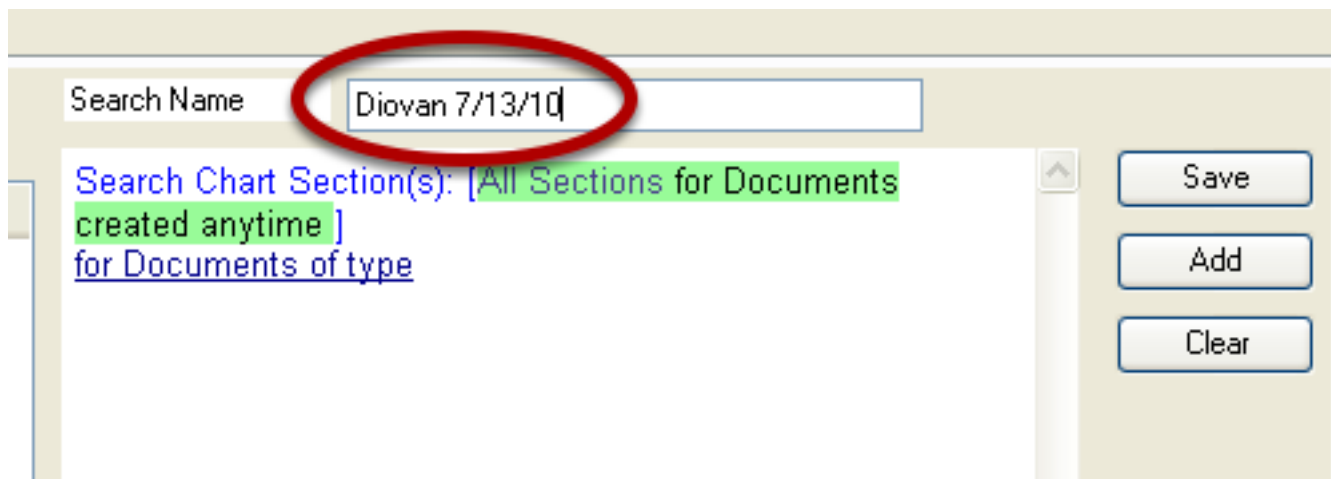
1. Click on SOAPware on the menu bar
2. Click on Data Explorer

## Create New Query



To create a new query, click on the New Query button.

## Name the Query



Name the query. It can be helpful to place a date on the query to differentiate between searches.

## Selecting the Chart Section to Search

The screenshot shows the SMART Text Quick Access window. On the left, a search name 'Diovan 7/13/10' is entered. Below it, the search criteria are displayed: 'Search Chart Section(s): [ SOAP Notes for Documents created anytime for Documents of type ]'. To the right of this text are 'Save', 'Add', and 'Clear' buttons. On the right side of the window, a list of chart sections is shown with checkboxes. The 'All Chart Sections' checkbox is unchecked. The 'Encounters - SOAP Notes' checkbox is checked. A callout box labeled '1' points to the search criteria text, and another callout box labeled '2' points to the 'All Chart Sections' checkbox. A third callout box labeled '3' points to the 'Encounters - SOAP Notes' checkbox.

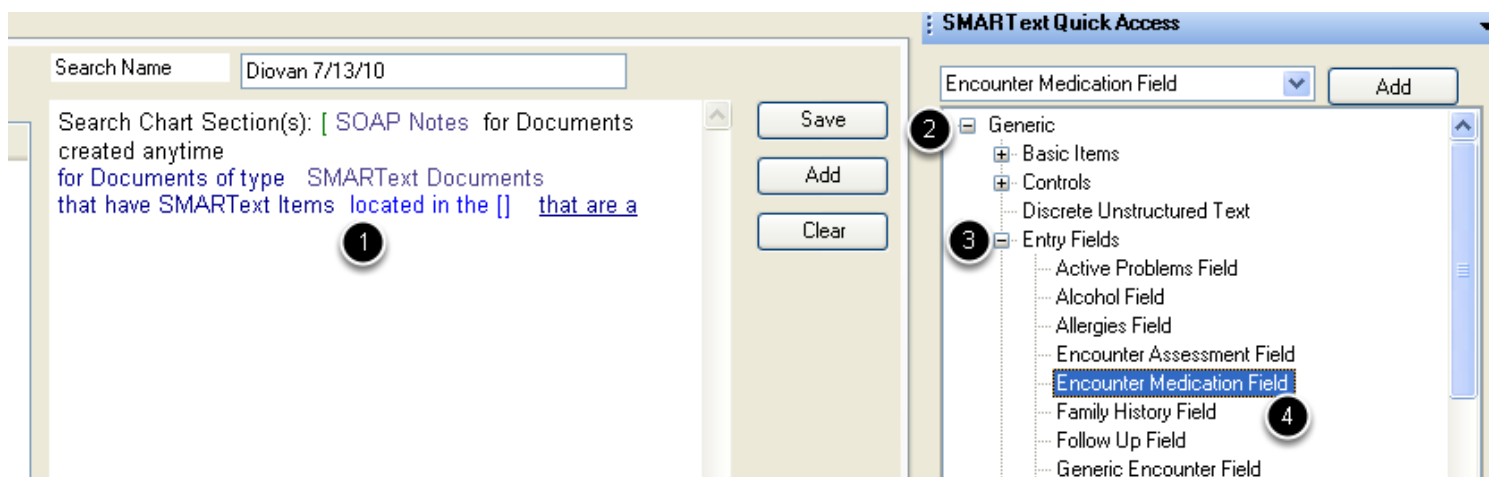
1. Left click over "Search Chart Sections"
2. Un-check "All Chart Sections" in the SMARText Quick Access
3. Click to place a check in the box next to Encounters - SOAP Notes

## Documents of Type

The screenshot shows the SMART Text Quick Access window. On the left, the search name 'Diovan 7/13/10' is entered. Below it, the search criteria are displayed: 'Search Chart Section(s): [ SOAP Notes for Documents created anytime for Documents of type ]'. To the right of this text are 'Save', 'Add', and 'Clear' buttons. On the right side of the window, a drop-down menu is open, showing a list of document types. The 'SMARText Document' option is selected. A callout box labeled '1' points to the search criteria text, and another callout box labeled '2' points to the 'SMARText Document' option in the drop-down menu. A black box labeled 'Left Click' is positioned over the search criteria text, and another black box labeled 'Double Click' is positioned over the 'SMARText Document' option.

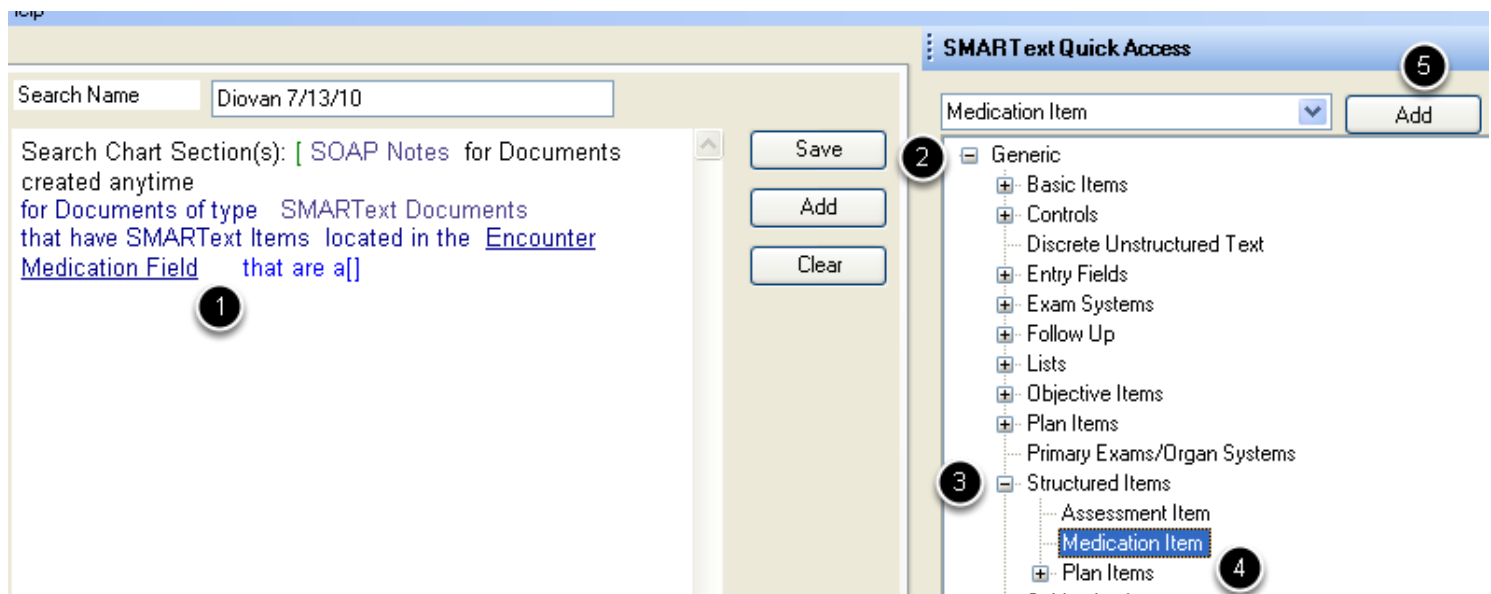
1. Left click over "for Documents fo type"
2. Using the drop down menu in the SMARText Quick Access, double click on "SMARText Document"

## Search Area



1. Left click over "located in the"
2. Using the drop down menu, click on the plus (expander node) next to Generic
3. Click on the expander node next to "Entry Fields"
4. Double click on "Encounter Medication Field"
5. Click the Add button

## Define the SMARTText Item Type



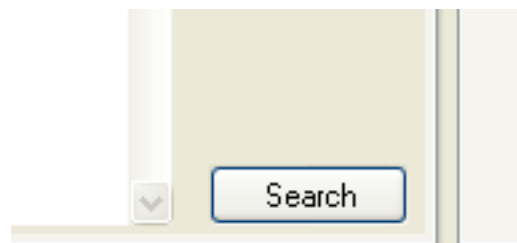
1. Left click over "that are a "
2. Using the drop down menu, click on the expander node next to "Generic"
3. Click on the expander node next to "Structured Items"
4. Double click on "Medication Item"
5. Click the Add button

## Choosing the Specific Medication

The screenshot shows the SMARTText interface. On the left, the 'Search Name' field contains 'Diovan 7/13/10'. Below it, the 'Search Chart Section(s):' field contains a complex query: '[[[[[[[[ SOAP Notes for Documents created anytime for Documents of type SMARTText Documents that have SMARTText Items located in the Encounter Medication Field that are a Medication Item ]]]]]]'. A red arrow points to the 'Medication Item' text in this query. To the right of the query are 'Save', 'Add', and 'Clear' buttons. On the far right, the 'SMARTText Quick Access' panel is visible, with the 'Basic' tab selected. Under the 'Header' section, 'Diovan' is entered in the text field.

1. Left click over "Medication Item"
2. On the Basic tab, type in the header (or name) of the medication

## Search



When your search is completed, click on the Search button to run the search. Remember, this can take quite some time, so it is recommended to run a search at the end of a workday.

## Search Results

SearchResults				
Patient	Birthdate	Age	Sex	Chart #
Clyde, Annie	5/21/1947	63	F	
Jim, Slim	3/21/1932	78	M	68332
Melt, Patty			F	
Babbit, Runny	2/27/1968	42	F	45654

The search results will be displayed when the search is complete. You can save these or discard the results.

## Data Explorer Summary Diagnosis Search

---

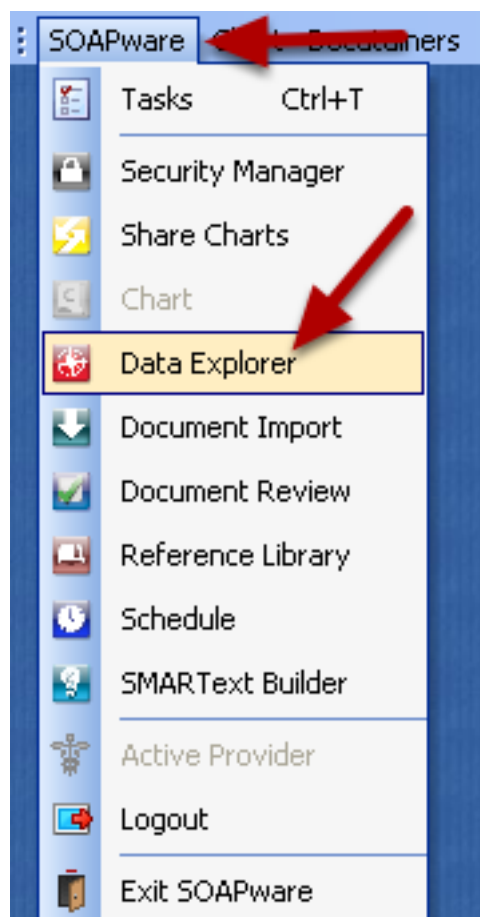
### **\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - DATA EXPLORER SEARCHES**

[Click here to view Meaningful Use Criteria](#)

This lesson will cover searching databases for structured SMARTText diagnosis located in the Summary Active Problems

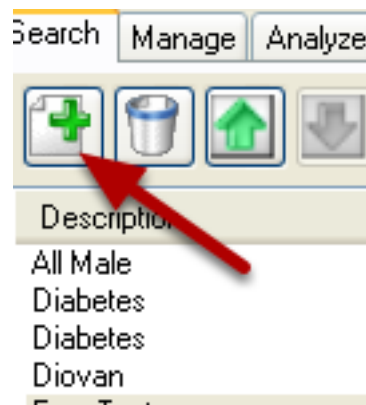
Depending on the size of the database, this search could take several minutes. We do not recommend running database searches during business hours.

### Accessing Data Explorer



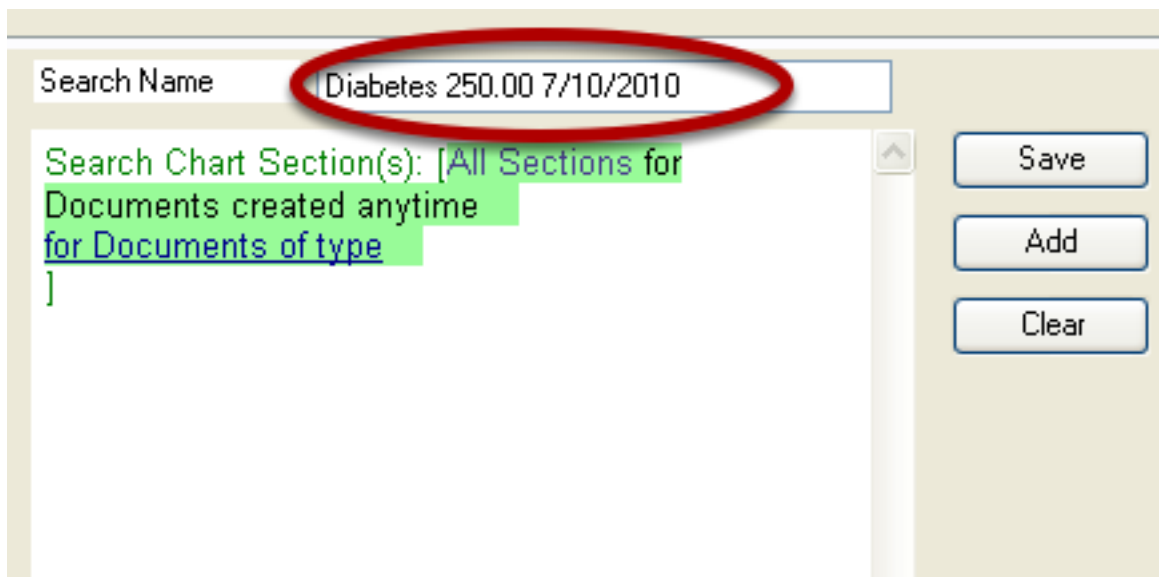
1. Click on SOAPware on the menu bar
2. Click on Data Explorer

## Create a New Query



To create a new search, click on the New Query button.

## Name the Query



Next, name the Query. It can also be helpful to place a date on the query name to differentiate between searches.



## Select Chart Sections to Search

Search Name: Diabetes 250.00 7/10/2010

Search Chart Section(s): [ Summary for Documents created anytime ] for Documents of type

Buttons: Save, Add, Clear

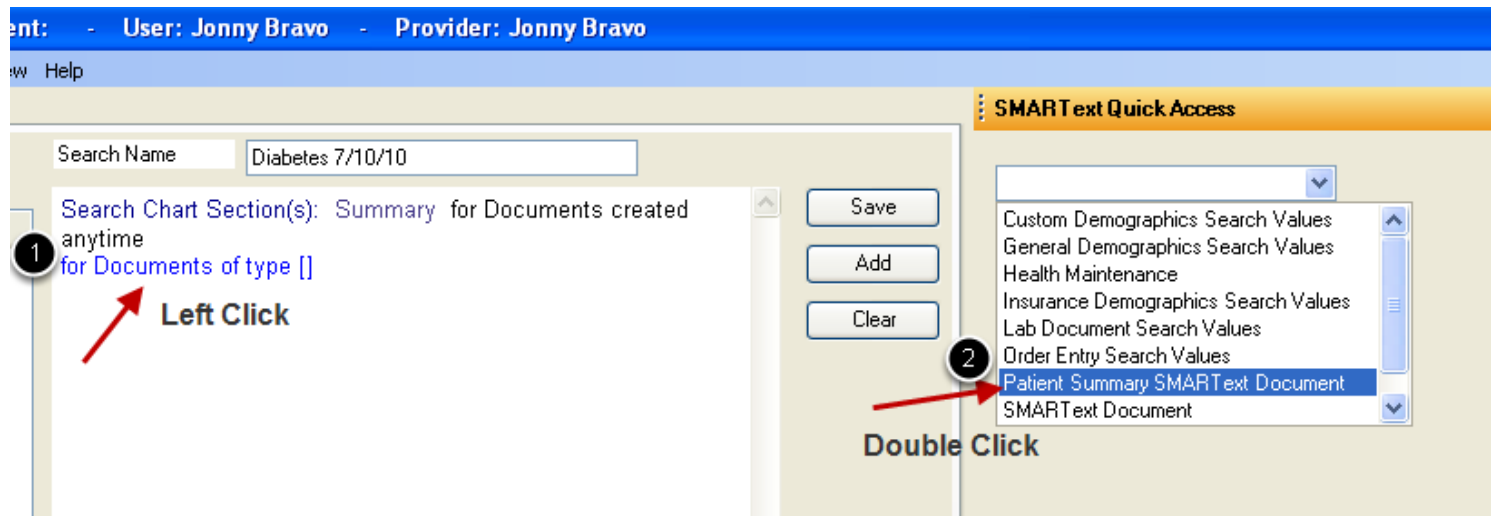
SMARText Quick Access

☐ All Chart Sections

- ☐ Billing Statements
- ☐ Demographics
- ☐ Documents - CCR
- ☐ Documents - Correspondence In
- ☐ Documents - Correspondence Out
- ☐ Documents - EKG
- ☐ Documents - HIPAA Disclosures
- ☐ Documents - History & Physicals
- ☐ Documents - Labs
- ☐ Documents - Misc.
- ☐ Documents - Pathology
- ☐ Documents - Printed Encounters
- ☐ Documents - Radiology
- ☐ Order Entry
- ☐ Drawings
- ☐ Encounters - Messages
- ☐ Encounters - SOAP Notes
- ☐ Order Entry
- ☐ Financial
- ☐ Flow Sheets
- ☐ Growth Charts
- ☐ Health Maintenance
- ☐ Memo
- ☒ Summary
- ☐ Unfiled
- ☐ Vital Signs
- ☐ Order Entry

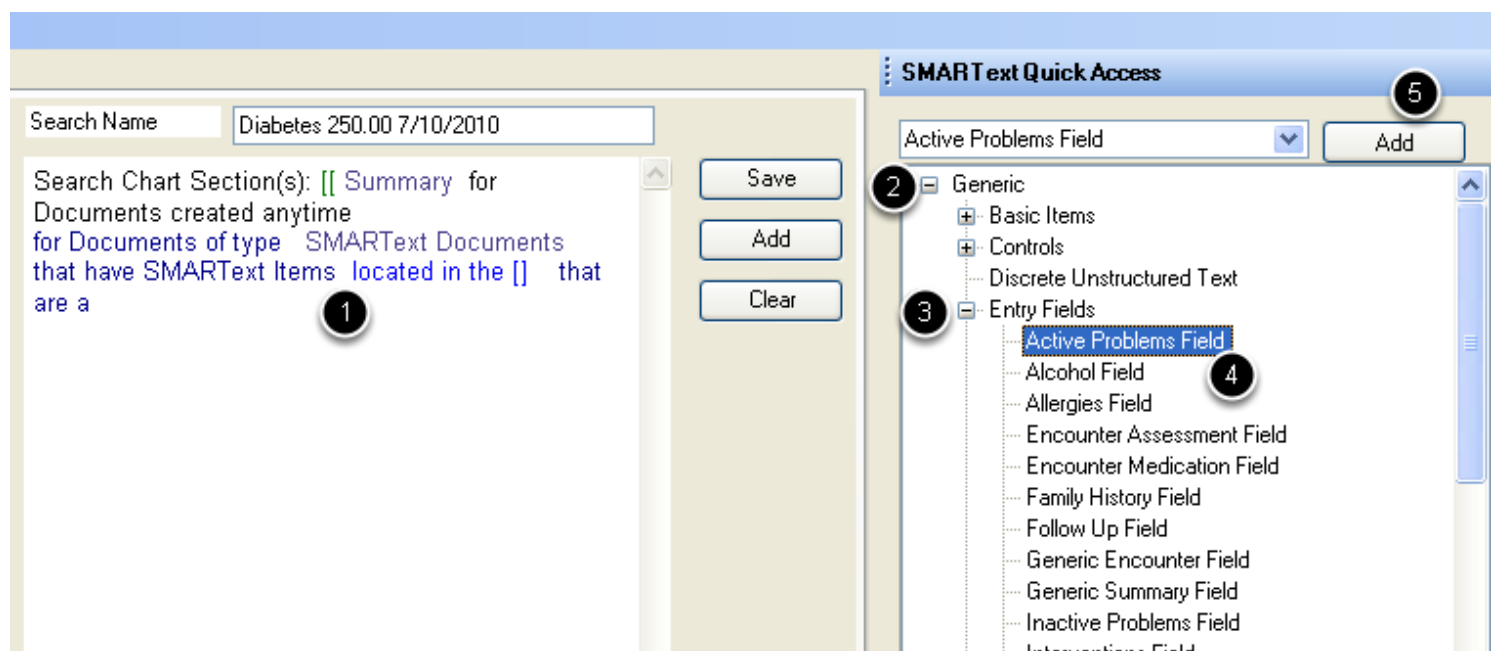
1. Left click over "Search Chart Sections"
2. Un-check "All Chart Sections" in the SMARText Quick Access
3. Click to place a check in the box next to Summary

## Document Type



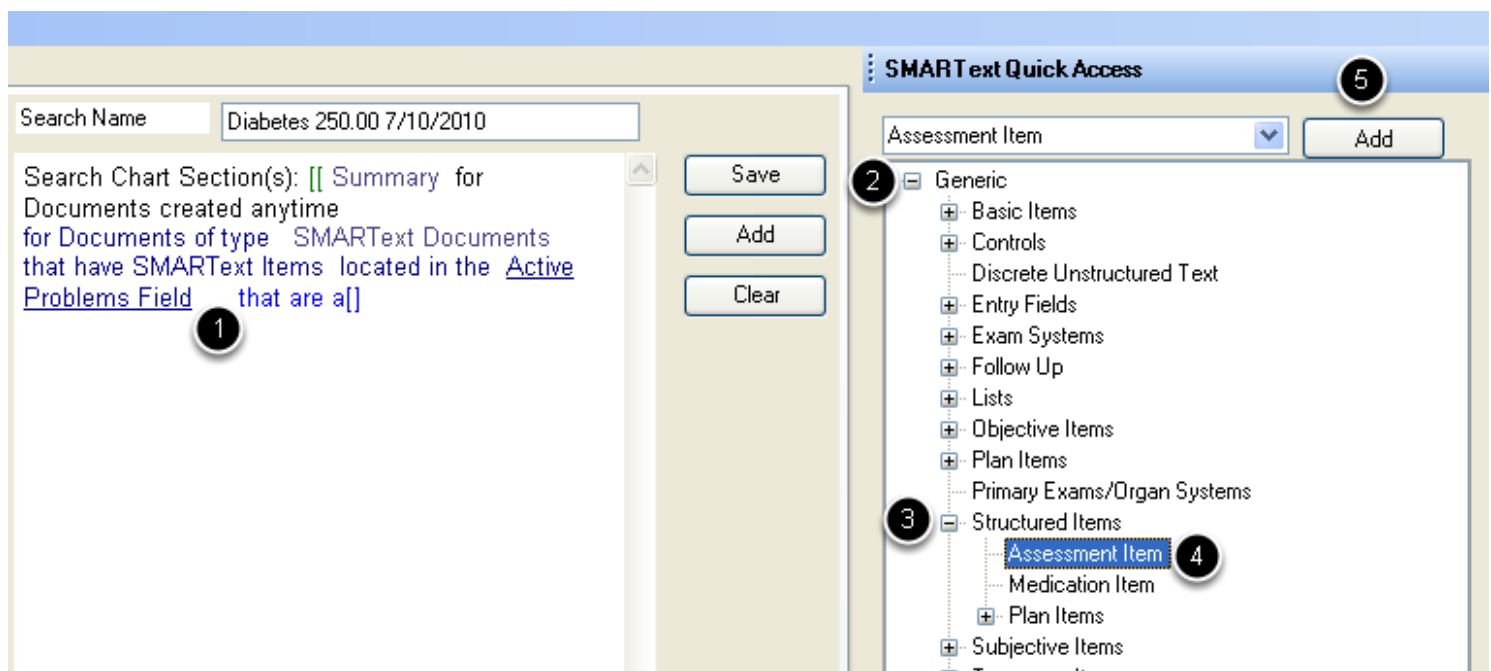
1. Left click over "for Documents of type"
2. Using the drop down menu in the SMARText Quick Access, double click on "Patient Summary SMARText Document"

## Area to Search



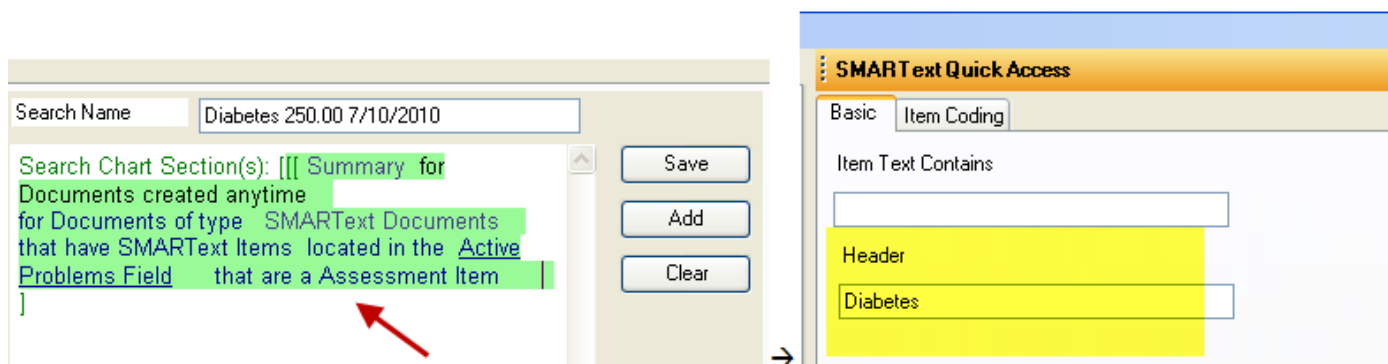
1. Left click over "located in the"
2. Using the drop down menu, click on the plus (the expander node) next to "Generic"
3. Click on the expander node next to "Entry Fields"
4. Double click on "Active Problems Field"
5. Click the Add button

## Defining the SMARTText Item Type



1. Left click over "that are a"
2. Using the drop down menu, click on the expander node next to "Generic"
3. Click on the expander node next to "Structured Items"
4. Double click on "Assessment Item"
5. Click the Add button

## Choose a Diagnosis



1. Left click over "Assessment Item"
2. On the Basic tab, type in the Header (or name) of the diagnosis

## Item Coding Tab (optional)

Search Name: Diabetes 250.00 7/10/2010

Search Chart Section(s): [ Summary for Documents created anytime  
for Documents of type SMARText Documents  
that have SMARText Items located in the Active  
Problems Field that are a Assessment Item[ whose  
header contains 'Diabetes' which is coded with {ICD-  
9 CM = }].

Buttons: Save, Add, Clear

SMARText Quick Access

Basic Item Coding

Coding System

- ICD 9
- ICD 9
- Multum
- ICD 10
- ICD 9 CM

SMARText Quick Access

Basic Item Coding

Coding System Value

ICD 9 250.00

1. Click on the Item Coding tab
2. Click on the Create tab
3. Using the drop down menu under "Coding System", click to select ICD 9
4. Click under the Value column and type in the ICD 9 being searched for

## Run the Search

Search

When you are finished setting up the search, click on the Search button to run the search.

## Search Results

SearchResults				
Patient	Birthdate	Age	Sex	Chart #
Jim, Slim	3/21/1932	78	M	68332
Melt, Patty			F	
Babbit, Runny	2/27/1968	42	F	45654

When the search is completed, the search results will be displayed. These can be saved for later viewing or discarded.

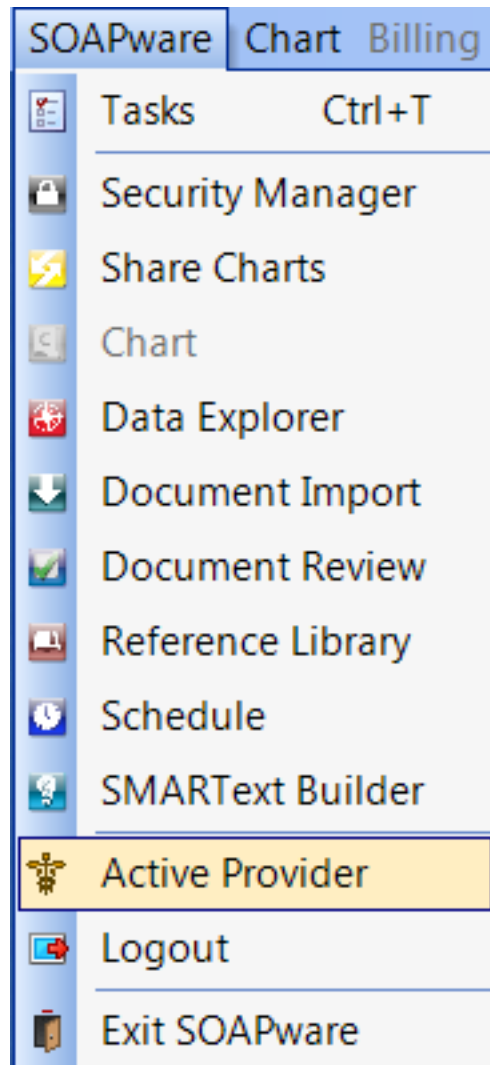
# **Workflow Considerations**

## Active Provider

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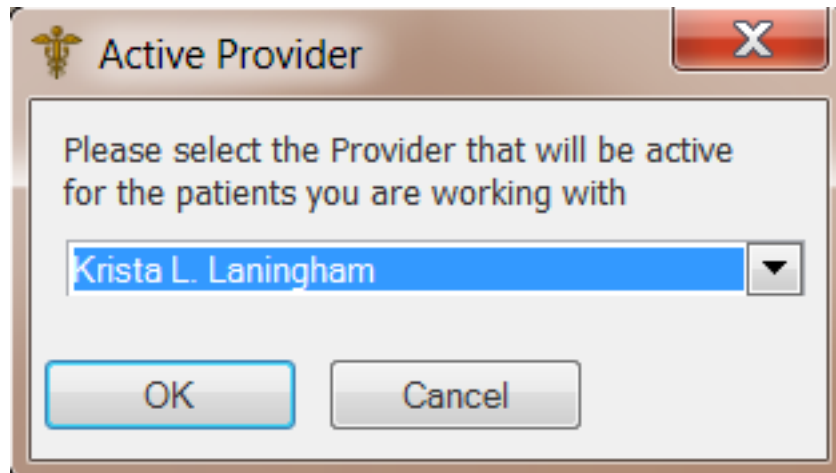
The Active Provider dialog allows the user to switch the currently selected Active Provider in SOAPware. Switching the Active Provider in SOAPware allows the user to access the selected Provider's Chart Rack, and the create, edit and sign off items in SOAPware created under the selected Provider's name.

### Open Active Provider



To access the Active Provider dialog, simply click SOAPware, Active Provider in the main menu bar

## Select Active Provider



Click the drop-down list box arrow and select the new Provider that you would like to use in SOAPware. Once the proper Provider has been selected, simply click OK.

After you have selected the new Active Provider in SOAPware, you will notice that the new Active Provider is displayed in the SOAPware title bar. In addition, any charts that you create or items within charts will be associated with the newly selected Provider.



## Docu-Portal

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Docu-Portal is a new module for SOAPware users which provides two major feature additions to the EMR: (1) inbound and outbound faxing which is integrated with the chart, and (2) a secure patient portal for providing records to patients. In addition, there are a host of additional communication, document editing, and document capturing features included in the Docu-Portal, such as secure messaging to non-patient contacts, screen capture, PDF editing and generation, and scanned document uploads. Docu-Portal provides tracking of fax and e-mail communications and provides configurable individual and shared views to inboxes and sent items. Docu-Portal has been developed for SOAPware by [Updox](#).

### Interface

Docu-Portal is viewed through popular browsers, such as Internet Explorer, Google Chrome, Firefox and Safari. Depending on your configuration, Docu-Portal is accessible anywhere on the Internet or only within your SOAPware VPN. An icon saved to your desktop will bring you to the sign-in screen after your set-up. You can also keep Docu-Portal running in your system tray, so that the screen can be hidden, except when being used. Small messages appear in the system tray to let you know that Docu-Portal has a new item for you to work. You can also choose to receive notifications on your desk or phone e-mail to alert you to certain items.

### Requirements

Requirements = [Java version](#) > 6, [SOAPwareXchange 2010.1.X or above](#)  
[Click Here](#), verify that you have all the aspects of the interface installed & configured.

### Docu-Portal Connector



When creating your Docu-Portal account, you will be prompted to select an EMR, in our case SOAPware & a custom connector will be created for this interfacing between your SOAPware & Docu-Portal, called the Docu-Portal Connector. The connector is a file (soapware\_hosted.jnlp) that is ran by Java, installed to Start > Programs > Docu-Portal Connector and has several settings that can be adjusted to assist you with your personal & EMR interaction with Docu-Portal.

## The Connector

**Docu-Portal Connector Settings**

**Connection Information**

1 User Name/Email Address: doctor@gmail.com

Password: [masked]

Confirm Password: [masked]

Server Location: https://www.myupdox.com/udb

**Save to Disk Options**

2 Patient Home Folder: ... PatientData

Patient Folder Pattern: @LI@/@LN@, @FN@

**Import Directory Options**

3 SOAPwareXchange 'In' Directory: ... IN

Report Download Directory: ... ImageFolder

**Other Options**

Run on Startup: ☒

OK Cancel Stop Help

The Connector creates the link between the Updox Service Database & SOAPwareXchange. The application logs into your account on Docu-Portal so that you can send & receive your requested documents/information from your local computer or SOAPware.

1. Connection Information is your personal login information so that the connector can interface with Docu-Portal. Server location (<https://www.myupdox.com/udb>) is generally never modified unless directed differently by SOAPware Technical Support.

2. Save to Disk Options Patient Home Folder is the location on your local computer where the Patient Chart Directory File will be created. The option "Send to Disk" in patient associated actions will automatically create a series of sub-folders within this folder, as configured by the "Patient Folder Pattern". The Patient Folder Pattern directs the filing order and file naming of patient-specific folders which are saved directly to your computer (in addition to saving them in SOAPware). When you select a category at the time of filing the record, that category will become (or populate an existing) sub directory under the patient folder. For example, assuming the home folder is C:\PatientData and the record is titled "Test File", and it is associated with patient "Joe Smith" and categorized as "Radiology", the default file pathway of (@LI@/@LN@, @FN@) will create the following file location:

C:\PatientData\S\Smith, Joe\Radiology\Test File.pdf

The following abbreviations are used to construct the actual folder path based on patient and action attributes:

- @LI@ – Labeled with the patient's last initial
- @FI@ – Labeled with the patient's first initial
- @LN@ – Labeled with the patient's last name
- @FN@ – Labeled with the patient's first name
- @ID@ – Labeled with the patient's account number
- @BD@ – Labeled with the patient's birth date

3. Import Directory Options SOAPwareXchange "In" Directory, ordinarily, users do not change this from the default. This must match the "In" folder location of SOAPwareXchange, specified in the SOAPwareXchange "Set Locations" settings. Report Download Directory, ordinarily, users do not change this from the default. This must match the location SOAPwareXchange expects to find the files to be imported, as specified in the file sent by the Docu-Portal Connector to SOAPwareXchange for processing.

## Docu-Portal for SOAPware



After your Docu-Portal Account is created, when you go to login at <http://www.Updox.com> you will be prompted to select your EMR, SOAPware in our case, then a file will begin to download (soapware\_hosted.jnlp). This file will be ran by Java & start the "Updox for SOAPware" Helper which includes all the same tools mentioned below in "Main Menu Explained" & a few others.

1. Open Docu-Portal Browser will take you to the login page of your practice Docu-Portal website or the main page if your already logged in.
2. Open Auto Upload Folder will open, on your local computer, the folder associated with the "auto upload to Docu-Portal" function (default = C:\Documents and Settings\USER\SendToDocu-Portal).

### Actions

[Compose](#) will allow you to create a document (w/ attachment) to send to a patient's chart in SOAPware, to fax to a contact in SOAPware, or send to another Docu-Portal enabled Practice.

[Add File](#) allows you to upload any file to the Docu-Portal so that it can be passed securely from patient, contact or SOAPware.

[Capture Screenshot](#) allows you to store a pre-selected area of what's displayed on your monitor in an image file; so that you may edit it or send securely through Docu-Portal.

[Open Image Editor](#) opens a window allowing you to create an image similar to Microsoft Paint; when a image is being viewed a menu will appear above the image allowing you to edit the image using the same tools found in Image Editor.

[Sign Out](#) will log out the current user that is logged into the Updox Docu-Portal.

### Tools

[Change Password](#) allows you create a new password for your Docu-Portal User ID.

[My Profile](#) allows you to edit the Name, Address, Time Zone, Email, & Signature Image of your Docu-Portal User ID.

[Usage Information](#) allows you to view the usage & limits associated with your Docu-Portal Monthly Plan; Chart Imports, Email, Fax Pages, Portal Messages, Saves, Secure Messages, User Accounts.

[Clear Cache](#)

### Admin

[Manage Users](#) allows you to manage users (view, edit or add) in your Docu-Portal Practice.

[Practice Profile](#) allows you to view or edit the practice information associated with Docu-Portal; Name, Address, Phone, Fax, & Settings.

[Practice Portal](#) allows you to enable or disable your Practice Portal; as well as view/edit the name

displayed & the web address (for example: [http://soapware\\_clinic.myupdox.com](http://soapware_clinic.myupdox.com)) used to access it from anywhere with web access.

## Manage Templates

Edit Fax Coversheet allows you to view/edit the default coversheet used by all faxes being sent by Docu-Portal. Certain Text, referred to as Marcos, are required for the coversheet to function correctly; {fromName}, {fromFax}, {toName}, {toFax}, {subject}, {instructions} are used by the faxing function so that it knows what fields to pull & where to place it in your coversheet.

Billing Information allows you to view the usage & limits associated with your Docu-Portal Monthly Plan, Bill Dates & amounts as well as edit Credit Card Information.

## Connect your EMR

## **Help**

General Overview links to the following PDF ([http://myupdox.com/udb/files/help/ov...w\\_soapware.pdf](http://myupdox.com/udb/files/help/ov...w_soapware.pdf)) for a document describing the Docu-Portals usage.

Setup References links to the following PDF ([http://myupdox.com/udb/files/help/setup\\_soapware.pdf](http://myupdox.com/udb/files/help/setup_soapware.pdf)) for a document describing how to link Outlook Mail, Gmail, Faxing Service, or MAC to you your Docu-Portal.

FAQ links to the following PDF ([http://myupdox.com/udb/files/help/faq\\_soapware.pdf](http://myupdox.com/udb/files/help/faq_soapware.pdf)) describing many functions of the Docu-Portal.

Have an Idea for Us? allows you to send question or comments directly to Updox for review; pertaining to an idea, question, problem or praise.

Contact Us gives you contact information for SOAPware Support (1-800-455-7627x3)

## **What's New?**

Takes you to the following address ([https://myupdox.com/udb/whats\\_new.html](https://myupdox.com/udb/whats_new.html)) where you can find new features & bug fixes being added to Updox.

## Changing Settings: User Specific, Computer Specific, and Global Settings

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### **Tools - Options: User Specific Customizations**

- Chart Rack
- Document Designer
- Docuplates
- Drug Interactions
- Pulled Charts
- SMARText
- SMARText Color Coding
- Structured CPT
- Structured Dx
- Structured Order Entry
- Structured Rx
- Summary to SOAP

### **Tools - Options: Network Specific Customizations**

- Billing Statement
- OCR Settings
- Scanning Settings
- Structured Billing
- Vital Signs

### **Other Customization Areas: User Specific Customizations**

- Customize Options
- Task Manager Columns View
- Chart Section Editor-Default Chart Section Docuplates may be customized per user or by network

### **Other Customization Areas: Network Specific Customizations**

- Creating/Editing SMARText and Docuplates
- List Options
- Custom Demographic Titles
- Flow Sheet Items
- Health Maintenance Rules and Sets
- Chart Section Editor-Default Chart Section Docuplates may be customized per user or by network

## Computer & User Specific Customizations

Toolbars

Docked Tabs

Chart Layout

# Introduction to Charts



## Understanding the Chart Workspace

---

The Chart Workspace is the main chart interface for SOAPware. It is the interface for all of the data in a patient's chart.

### Functionality

The chart view appears as an open file folder in the SOAPware window. In the lower right corner is the patient's name and other identifying information. The data areas consist of document managers that you can add, remove, or rearrange to meet your particular needs.

The Document Managers currently available in the chart are listed as tabs across the top of the chart area. Examples are Demographics, Summary, SOAPnote, etc.

To add new document managers to your view, open Chart Navigator (Chart-Chart Navigator), select a manager from the list, then drag and drop that manager onto the manager tab list at the top of the chart. To remove a manager, click to select it, then click the X at the right end of its tab list. You can rearrange the managers by clicking on their title tab and dragging it to another location. Managers can be dragged to another tab list, or to a new area in the chart view, thus creating a new tab group.

For information on the use of specific document managers, see the document manager section.

### Lock/Unlock View

If you have created a view that you would like to lock, click View-Lock Layout. This will prevent document sections and your layout from being rearranged.

### More on Layouts

Once you have created and saved several layouts, you can easily switch between them by clicking View-Chart Layouts and selecting the saved layout from the list.

## Chart Interface Basics - Chart Rack

---

The Chart Rack is used to search for a patient chart. To open the Chart Rack, use on of these 3 options:

1. Click the Chart Rack Docked Tab
2. Press Control + Shift + C keys
3. Click Chart in the Menu bar, and Click the Chart Rack Menu item

## Accessing the Chart Rack

SOAPware Chart Docuainers Edit Tools View Help

Summary Vital Signs Demograp SOAP Notes Labs Radi

Title First Middle Last  
SSN Chart # Birth Date  
Marital Status Gender  
Male Female  
Street  
City St. Zip Code  
Home Phone Work Phone Cell Phone  
Email

General

Drag a column header here to group by that color

Name  
Insurance  
General  
Custom

SOAP Notes  
Labs  
Radi

Drag a column header here to group by that color

Date/Time Owner Status Description

Sally, Mustang

Search Documentation Search

Chart Navigator Tasks Chart Rack Docuplates Available Document Designs

Click on the Chart Rack Docked Tab .

## Chart Retrieval

The screenshot shows the 'Chart Rack' window. At the top, there is a 'Search' text box and a 'Type' dropdown menu. The 'Type' menu is open, showing options: 'Name', 'Birth Date', 'Chart #', 'Name' (highlighted), 'Phone #', and 'Social Security #'. Below the search box is an 'Alphabet bar' with letters A through Z and a '#' symbol. The letters A through J are circled in red. Below the alphabet bar is a table with columns: 'Name', 'Chart Number', 'Birth Date', and 'Provider'.

A chart can be retrieved and opened by searching for patient:

1. Last Name
2. Birth Date
3. Chart #
4. Social Security #
5. Phone #

Also, a chart may be retrieved by using the Alphabet bar by clicking on the corresponding letter of the patient last name.

## Open Chart

The screenshot shows the 'Chart Rack' window with the search box containing 'Sally, Mustang'. The 'Type' dropdown is set to 'Name'. Below the search box is the 'Alphabet bar' with letters A through Z and a '#' symbol. Below the alphabet bar is a table with columns: 'Name', 'Chart Number', 'SSN', 'Birth Date', and 'Provider'.

Name	Chart Number	SSN	Birth Date	Provider
Sally, Mustang				Rena Thornton
Sally, Mustang			01/01/1972	Rena Thornton

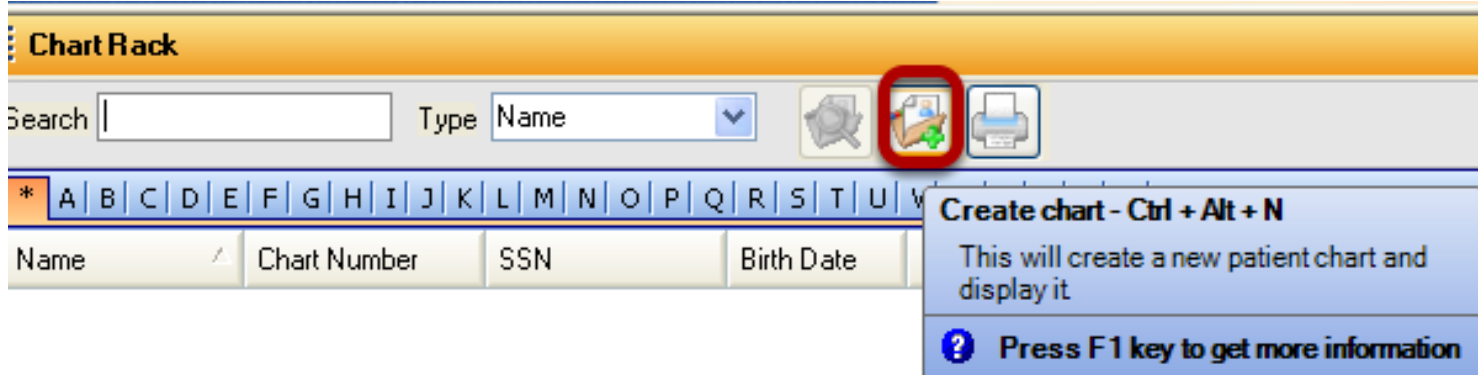
Double click on the highlighted patient name in list or press the enter key to open chart.

## Chart Interface Basics - Creating Charts

A new chart can be created within the Chart Rack.

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) CORE REQUIREMENT - SEE ENTERING DEMOGRAPHIC INFORMATION**

### How to Create a New Chart



To create a new chart you will click on the Create chart button.

### Creating a New Chart



The only required information for your patient will be a first and last name and click OK.

## New Chart has been Created

The screenshot shows a medical software interface with a blue header bar. The main window is divided into two panes. The left pane is titled 'Patient Information' and contains several sections: 'Patient Information' (Title, First, Middle, Last, Suffix), 'SSN', 'Birth Date', 'Age', 'Chart', 'Marital Status', 'Gender' (Female), 'Race', 'Ethnicity', 'Language', 'Address' (Street, City, State, Zip), and 'Contact Information' (Home Phone, Work Phone, Cell Phone, Email). The right pane is titled 'SOAP Notes' and 'Radiology'. The bottom of the interface features a 'General' tab and a search bar. The patient's name, 'Sally, Mustang', is displayed in a large font at the bottom right.

Patient Information				
Title	First	Middle	Last	Suffix
	Mustang		Sally	

SSN	Birth Date	Age	Chart

Marital Status	Gender	Related To
	Female	

Race	Ethnicity	Language

Address			
Street			
City	State	Zip	

Contact Information		
Home Phone	Work Phone	Cell Phone
( ) - -	( ) - -	( ) - -
Email		

Name
Insurance
General
Custom

Date/Time	Owner	Status	Description	Related Dx

A new chart will open immediately to the Demographics section of the chart. This feature allows the creator enter the demographic information or to defer the demographic information entry if needed due to limited time, or may not be the person that gathers demographic information.

## Entering General Demographic Information

The screenshot shows a medical software interface with a top navigation bar containing 'Vital Signs', 'Demographics', 'Drawings', and 'Lab'. The 'Demographics' tab is active. The form is divided into several sections:

- Personal Information:** Title, First (Mustang), Middle, Last (Sally), and Suffix.
- Identification:** SSN (999-99-9999), Birth Date (3/27/2170), Age, and Chart.
- Demographics:** Marital Status (Married), Gender (Female), Race (X Cherokee), Ethnicity, and Language.
- Address:** Street (3449 Apple Glen Lane), City (Smith), State (AR), and Zip (72701-\_\_\_\_).
- Contact Information:** Home Phone ((479) 521-4455), Work Phone, Cell Phone, and Email.

At the bottom, there is a tabbed interface with three tabs: 'General' (highlighted with a red rectangle), 'Insurance', and 'Custom'. Below the tabs is a message: 'Drag a column header here to group by that column.'

**\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - DEMOGRAPHICS**

[Click here to view Meaningful Use criteria](#)

You will notice three tabs under the Demographics chart section: (1) Insurance, (2) General, and (3)

Custom.

The General demographics section of the chart contains all of the basic identifying information about a patient. The patients' name, provider, and contact information can all be found in this section. You will also see several fields that are highlighted in yellow. These are required fields for e-prescribing. If you do not have all the necessary information entered for the patient, you will not be able to e-prescribe.

### General Demographics - PCP and Referring Provider

The screenshot shows the 'Demographics' tab in the SOAPware interface. The form includes fields for patient name (Middle, Last, Suffix), Age, Gender (set to Female), Ethnicity, Language, State (set to AR), and Zip (set to 72701-). On the right, there is a 'Patient Picture' section with a 'No image data' message and 'Load' and 'Clear' buttons. Below these are dropdown menus for 'Primary Provider' (currently showing 'Shannon Shores') and 'Referring Provider' (currently empty). Both dropdown menus have a red circle around the '...' button at the bottom right. A black callout box with white text says 'Click on the "..." to add to each list.' with a red arrow pointing to the '...' button in the 'Referring Provider' dropdown. Below the 'Referring Provider' dropdown is a 'PCP' dropdown menu, also with a red circle around its '...' button.

These two drop-down menus are used to select the patient's Primary Care Physician, and/or a Referring Physician.

SOAPware can maintain a list of frequently used contacts along with basic demographic information for each of them. SOAPware's document designs can then use this information to create personalized documents such as referral letters. The contact list is also used to maintain frequently used names and addresses. In this fashion it functions much as a Rolodex. This contacts list is used in the patient's demographics area to choose their PCP/Referring Provider.

If you would like to add a referring provider to the list on the fly (who is not listed in the drop-down menu), Click the + button and Contact Manager will open. Simply add the provider to the list and it will appear in the Referring Provider drop down list.



## Preferred Pharmacy

Description	Name	Street	Street 2	City	St:
	Walgreens-OptionCare, Ba...	5800 District Blvd	Suite 200	Bakersfi...	CA
	Walgreens-OptionCare, Da...	8150 Washingto...		Dayton	OH
	Walgreens-OptionCare, Eat...	6 Industrial Way ...	Ste C	Eatonto...	NJ
	Walgreens-OptionCare, Ft ...	11341 Lindberg...		Fort My...	FL
	Walgreens-OptionCare, La...	3900 W Charlest...	Ste Y	Las Veg...	NV
	Walgreens-OptionCare, Me...	9111 Broadway	Ste AA	Memilville	IN
	Walgreens-OptionCare, Mo...	1015 Aviation P...	Ste 700	Morrisville	NC
	Walgreens-OptionCare, Or...	40 Centre Drive		Orchard...	NV
	Walgreens-OptionCare, Qu...	114-02 15th Ave		College ...	NV
	Walgreens-OptionCare, Sa...	1989 Palomar O...	Suite A	Carlsbad	CA

This drop-down list box is used to select the patient's preferred pharmacy. This will automatically populate on this patient's Rx Manager when you e-prescribe medications. By setting a default preferred pharmacy in demographics, the Rx Manager will also have a default pharmacy. The drop-down list is populated from what is set up in the Pharmacy Manager.

If you would like to add to the list of pharmacies on the fly:

1. Click the + button and the Pharmacy Manager dialog window will open.
2. Choose the Directory tab to search for the pharmacy if they accept e-prescribing
3. Or Click the plus button to manually add to the list.

The new pharmacy will appear in the Preferred Pharmacy list as a new selection.

## Email

Contact Information

Home Phone: (479) 521-4455    Work Phone: ( ) - -    Cell Phone: ( ) - -

Email: [Redacted]

☐ Exclude From Data Explorer

This text box is used to enter the patient's email address. At this time, there is not a way to email patients from SOAPware, but demographics acts as a central place to store all information about this patient.

## Insurance Demographics

SOAPware 2010 - Patient: Jim, Slim - User: katie rogers - Provider: Krista L. Laningham

SOAPware Chart Docutainers Edit Tools View Help

Demographics Summary

Insurance Policy 3

Type:  Company:

Insured Information (as it appears on policy)

Relation to insured: Self

Name: (F M L) Slim  Jim

Address: 1539 COUNTY LINE RD

City: Home Town State: AR Zip: 72711

Birth Date: 3/21/1932 Phone: (501) 555-7110

Employer:  ☒ Male ☐ Female

Policy #:  Plan Name:

Group #:  Grp Name:


Effective: / / Expires: / /

Payment Options

☒ Co Pay: \$0.00 Status: Primary

☐ CoIns: 0 % Fee Sched:

Notes:

2  Show Inactive

Insurance

1

General

Custom

4 Save Close

68332 Age-78 3/21/1932 Jim, Slim

To add and edit patient's insurance information:

1. Click on the "Insurance" tab at the bottom of the demographics section.
2. Click the button with the green plus.

3. This will bring up a window where you will type in the insurance information.
4. Click Save and you will see the patient's insurance information listed at the top of the demographics window.

## Custom Demographics

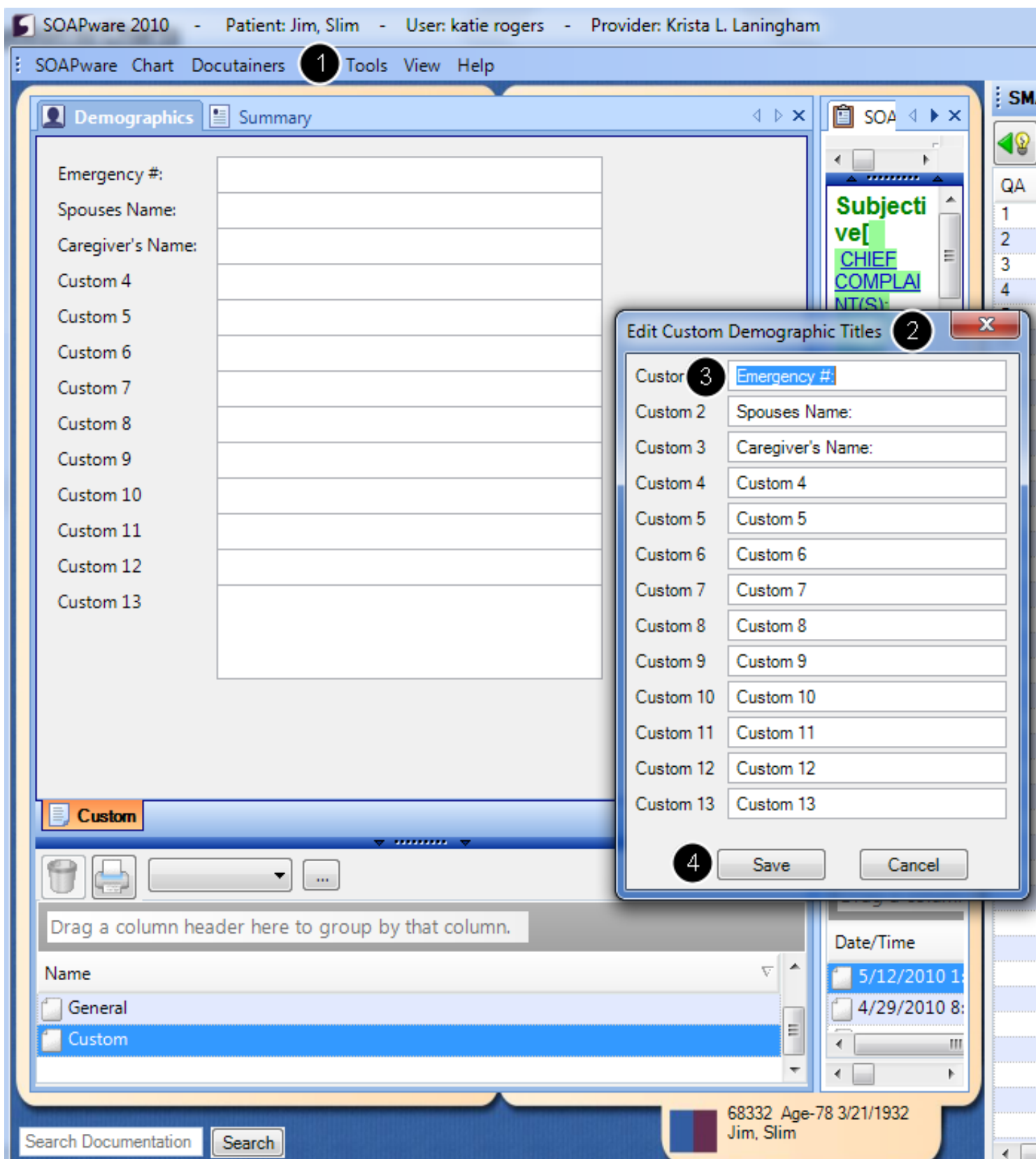
The screenshot shows a window titled "Demographics" with a "Summary" tab. The window contains a list of fields for entering patient information:

- Emergency #:
- Spouses Name:
- Caregiver's Name:
- Custom 4
- Custom 5
- Custom 6
- Custom 7
- Custom 8
- Custom 9
- Custom 10
- Custom 11
- Custom 12
- Custom 13

Below the list is a "Custom" tab. The "Custom" tab is active, showing a section with a trash icon, a printer icon, a dropdown menu, and a button. Below this is a text box with the instruction: "Drag a column header here to group by that column." Below the text box is a list of column headers: "Name", "General", and "Custom". The "Custom" header is selected and highlighted in blue.

The Custom Demographics section of the chart contains the information not otherwise contained elsewhere in the demographics area, but which may be needed in most patients' charts. Custom field 13 is a note or memo text box; it is used to store more information than the other fields.

## Setting Custom Demographics Titles



By editing custom demographics titles, you can add additional demographic fields to SOAPware, with names that you assign them. To modify the custom demographics headings:

1. Click Tools-Custom Demographic Titles
2. You will see a list of custom demographics text boxes. The current name of each field is shown in an edit box where you can enter the new name.
3. Fill in as many of these fields as you wish, then click Save to save your changes.
4. Click Save, then close SOAPware and restart to see the new titles displayed.

Note: This setting will change the titles of all custom demographic fields on all patients in the database.

## Chart Interface Basics - Closing Charts

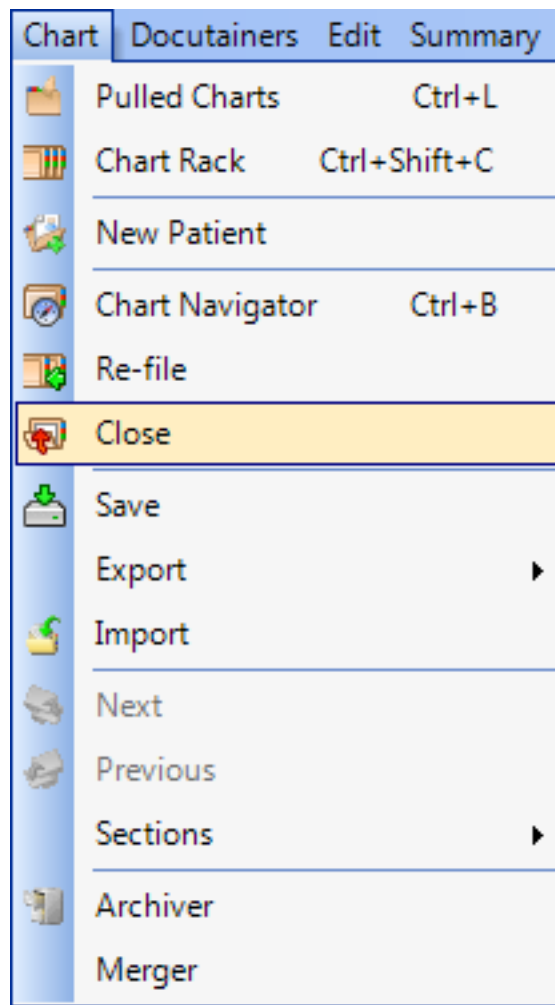
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### Closing Charts - Using the Toolbar



To close a chart, click on the Close button in the Common Toolbar.

## Closing Charts - Using the Menu Bar



You can also close the chart using the Menu Bar by selecting Chart > Close.

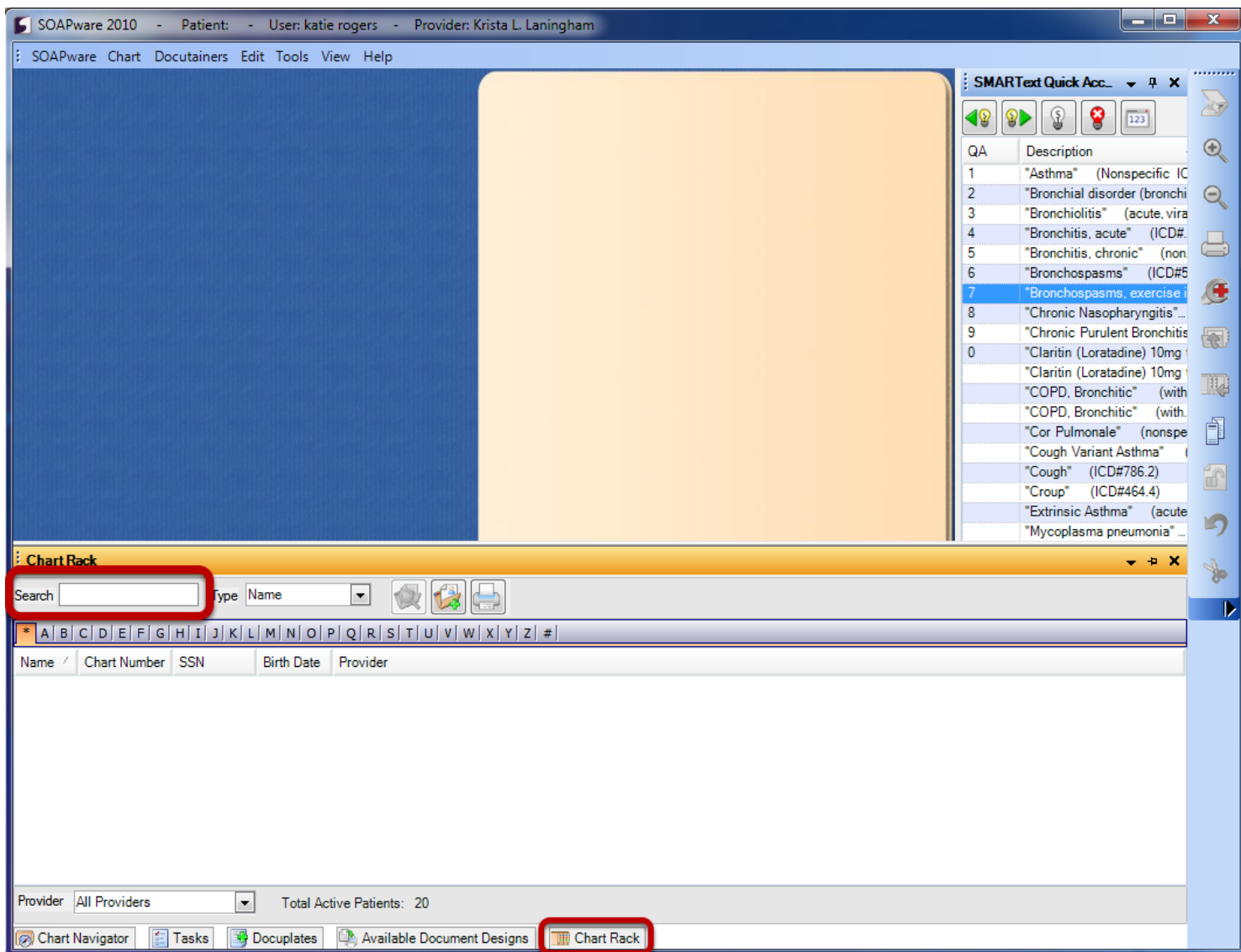
## Workflow Options

When closing a chart, workflow options are available that give you several options including Open Chart Rack, Open Pulled Charts, Open Task List. To set these options, see the section on [Tools - Options](#).

## Chart Interface Basics - Retrieving Charts

Your Chart Rack is very similar to your chart room.

### Open the Chart Rack



To reopen a chart, select the Chart Rack docked tab located at the bottom of the Chart workspace. At the top of the Chart Rack viewer is a field, or box, labeled Search, and the cursor should be blinking in it.



## Search for the Chart

Name	Chart Number	SSN	Birth Date	Provider
Jim, Slim	68332	999-99-9999	03/21/1932	**None**

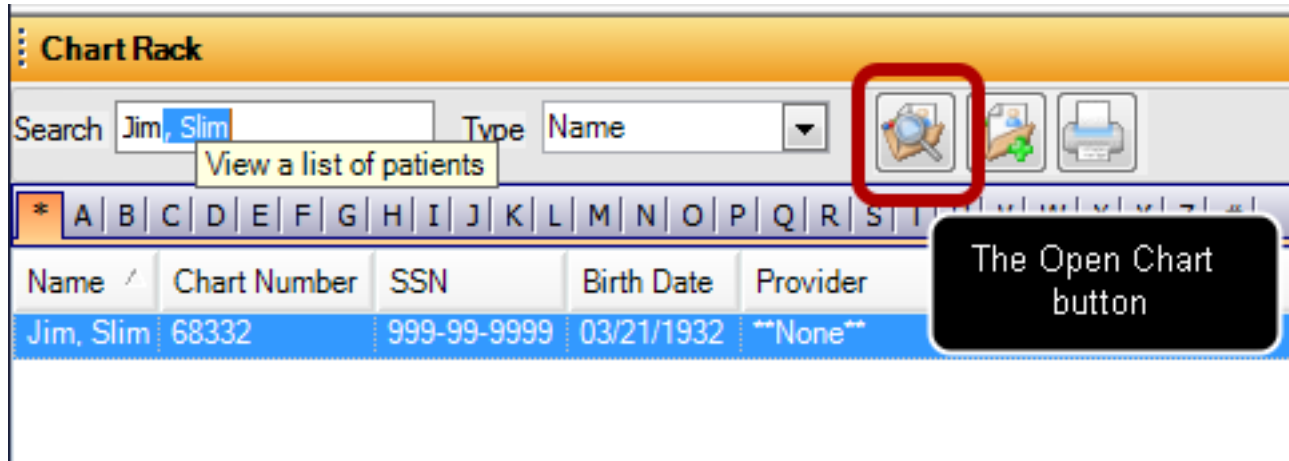
A specific chart can be retrieved via 5 methods:

1. Name (Last)
2. Birth Date
3. Chart #
4. Social Security #
5. Phone #

To retrieve the chart by Name, begin typing the name. As the letters in the last name are entered, notice the corresponding chart name is highlighted-selected in the list after entering the third letter.

To search using another method, use the Type drop-down menu to change the search Type to one of the others listed above.

## Open the Chart



Once the name is highlighted-selected, in order to actually retrieve the chart, there are 3 options:

1. Press the Enter key
2. Click the Open Chart button
3. Double-Click on the name

## Chart Interface Basics - Chart Navigator

Chart Navigator functions as the table of contents for charts. Chart Navigator allows a user to insert chart sections, as well as view documents in a patient's chart, in various chart sections.

### Access Chart Navigator

1. Click on the Chart Navigator tab docked at the bottom of the screen.
2. If Chart Navigator is not docked at the bottom, Click on Chart in your main menu toolbar, and Click on Chart Navigator.
3. Press Control + B on your keyboard.

### Two main regions

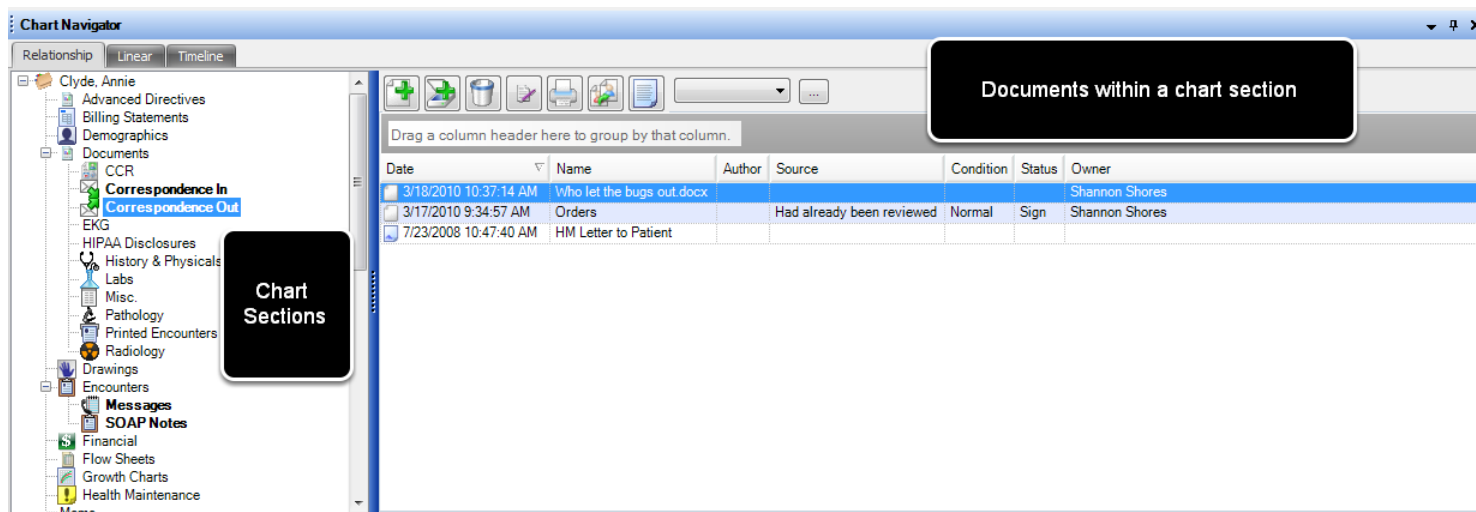
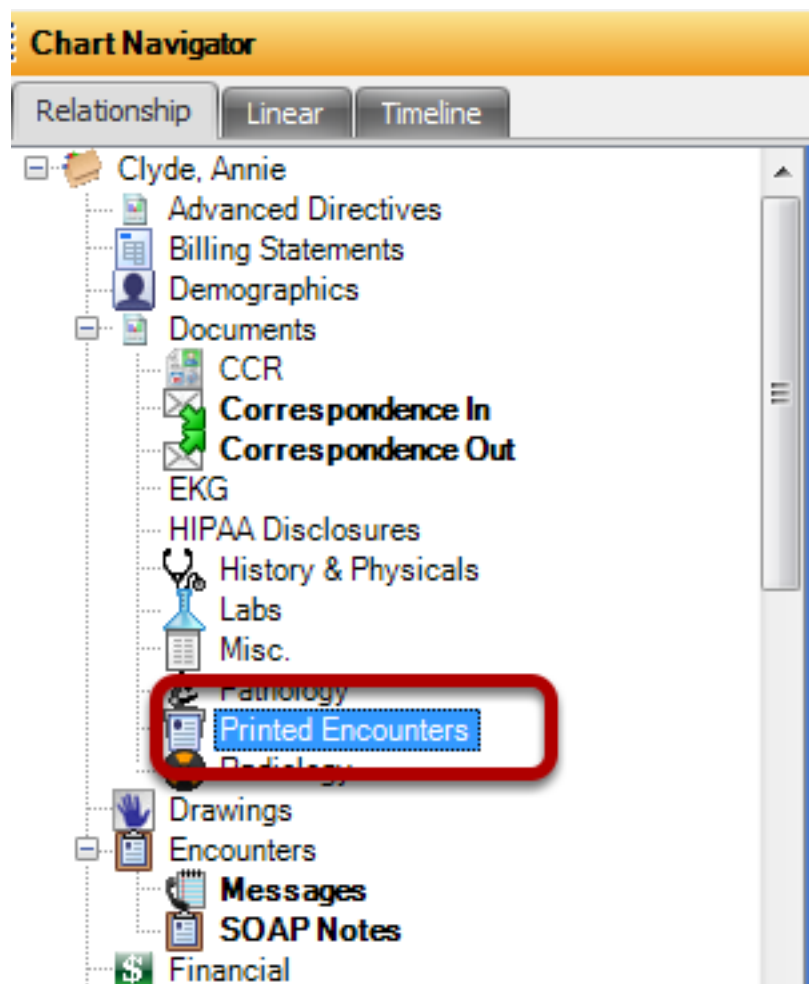


Chart Navigator is divided into two main regions: the left side is a list of all the chart sections, and the right side will display what documents are within a particular chart section.

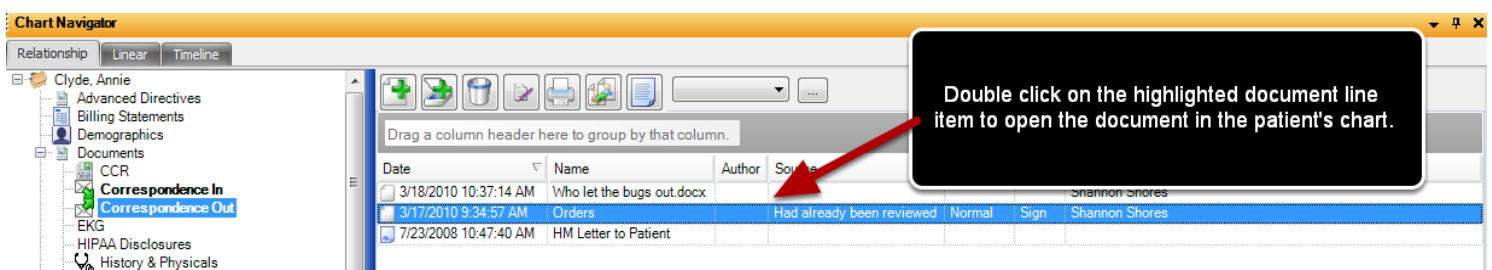
**Helpful hint to the user:** a chart section will be bold black if there are unsigned documents within the chart section.

## Open Chart Sections not currently displayed in Chart Layout



Double click on any chart section within Chart Navigator, and a new tab will be created in your chart layout. Remember, the chart section will appear on whichever side of the chart you last used-or which side of the chart your cursor was last placed on.

## Document List



To view a particular document within a chart section, double click on the line item.

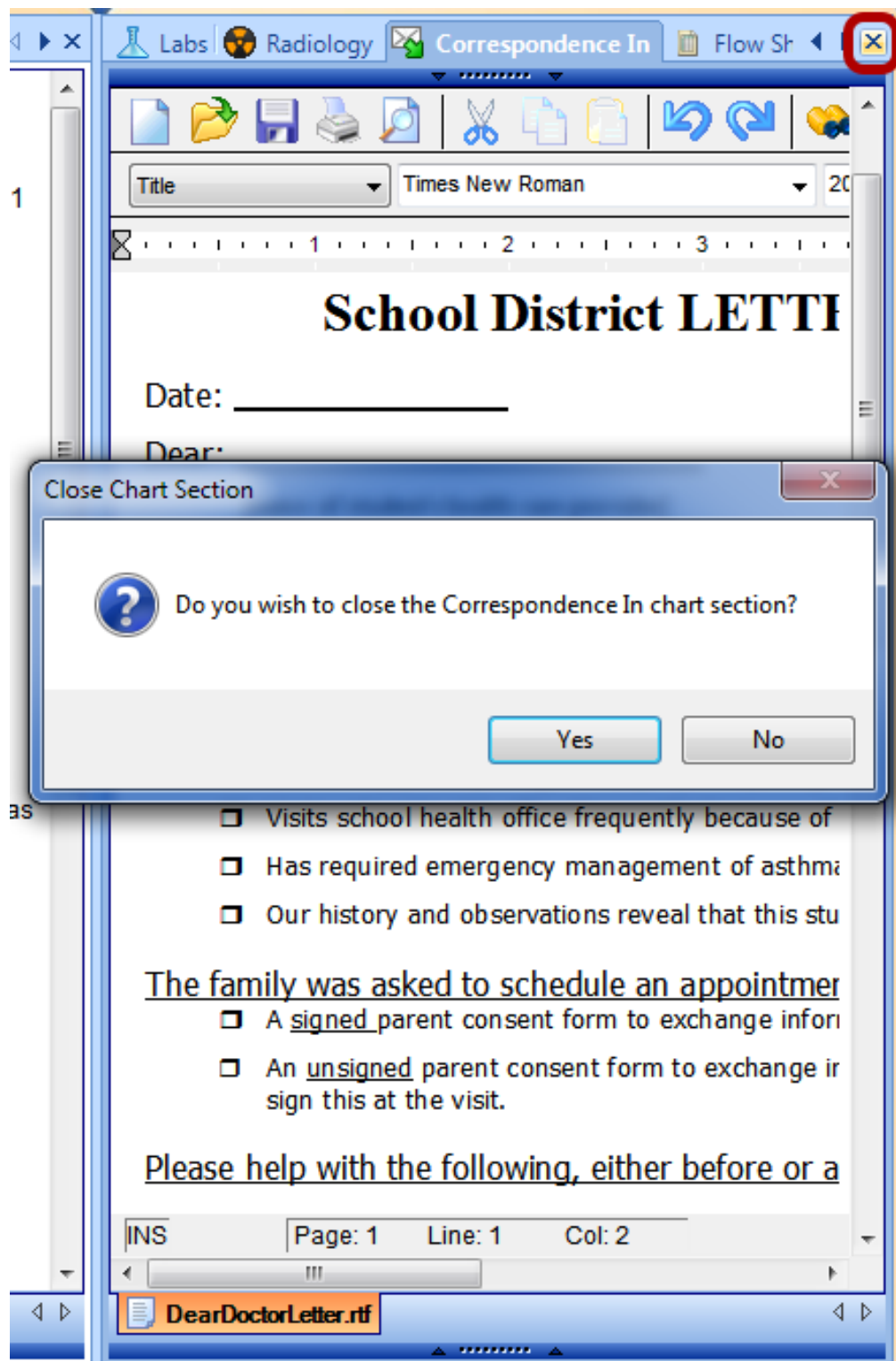
## Action buttons on mini toolbar within Chart Navigator



1. Create a new document in the chart section you have highlighted on the left side of Chart Navigator.
2. Scan in a new document in a chart section.
3. Remove a document from a chart section.
4. Sign off a document if you are a clinician.
5. Print off a document in a chart section.
6. Reassign a document to another clinician if the document is not already signed off.
7. View the selected document.

## Chart Interface Basics - Closing Chart Section Viewers

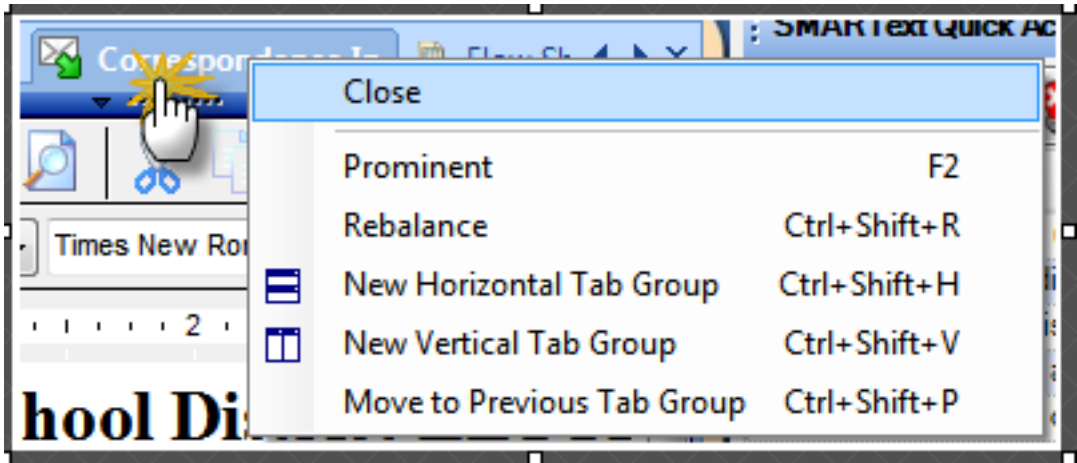
### Closing Chart Sections - Click on the X



In order to close out or remove a chart section viewer from a chart layout, Click on the X at the top right corner.

A window will appear asking for confirmation that you wish to close this section.

**Closing Chart Sections - Section Menu**



Alternatively, Right-click the Section tab, and Select Close.

## Chart Interface Basics - Docutainers

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Docutainers are areas within SOAPware where you can have a document container. These are essentially document managers and allow a hierarchy that keeps like documents organized together.

### Learning More

For detailed information on docutainers, see: [Intro to Docutainers](#).

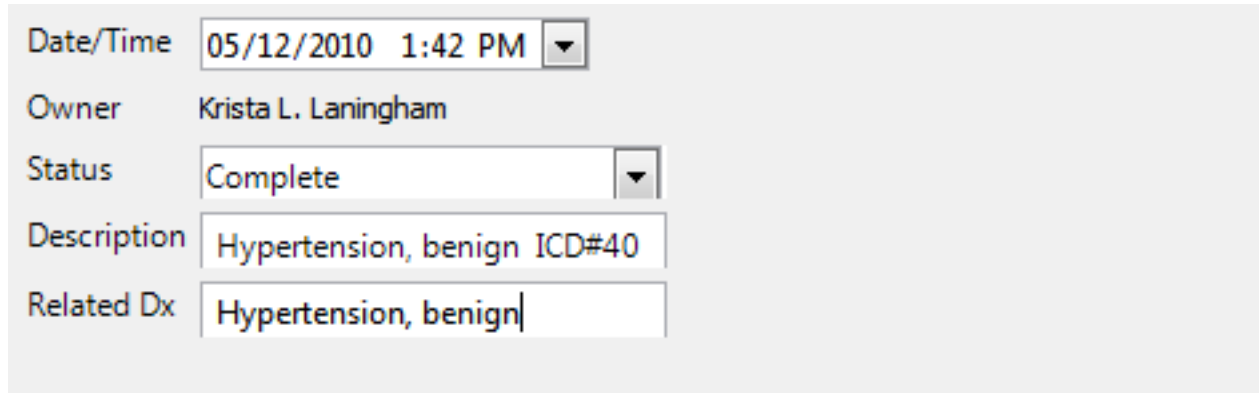


## Chart Interface Basics - Intro to Splitter Bars

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Splitter Bars are blue bars with arrows and dots in the center of them. When clicked on, they will collapse or expand to display more information, buttons, document lists, etc. They are also designed where you can click on them to resize them.

### Upper Splitter Bar

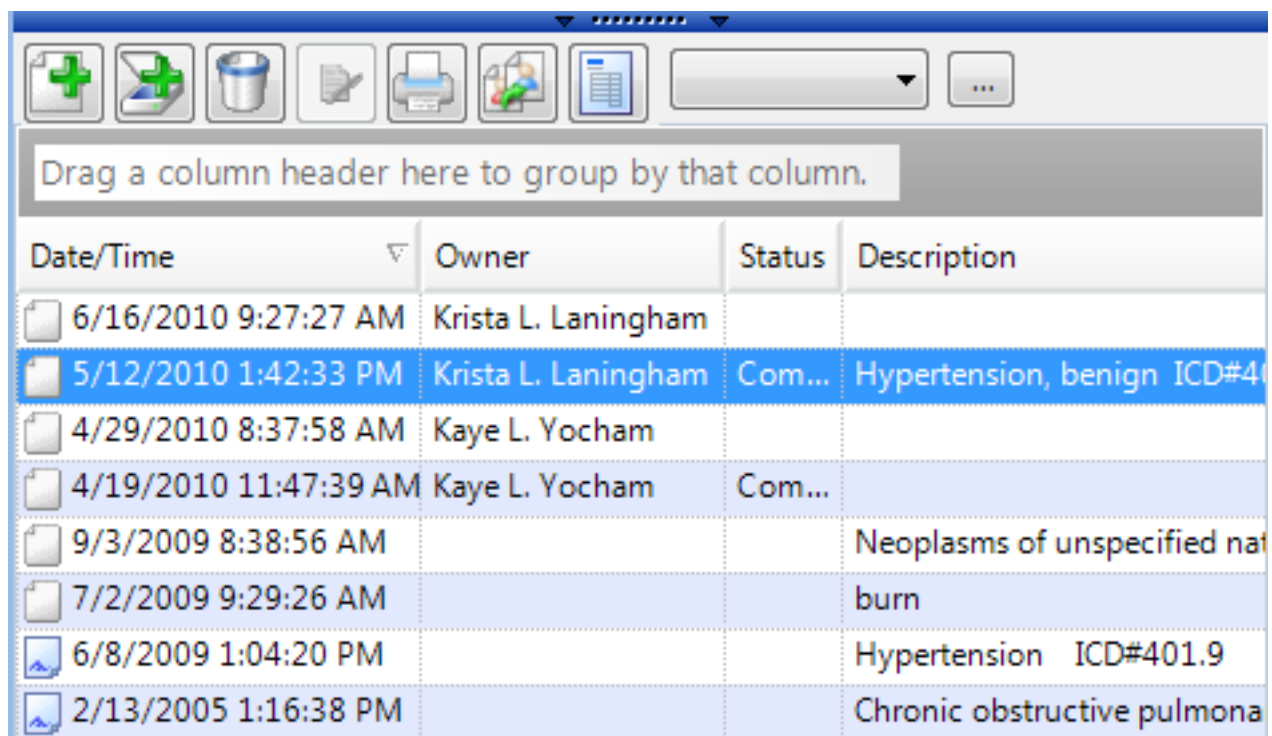
A screenshot of a medical chart interface showing the 'Upper Splitter Bar' expanded. The bar is light blue and contains several fields: 'Date/Time' with a value of '05/12/2010 1:42 PM' and a dropdown arrow; 'Owner' with the name 'Krista L. Laningham'; 'Status' with a value of 'Complete' and a dropdown arrow; 'Description' with the text 'Hypertension, benign ICD#40'; and 'Related Dx' with the text 'Hypertension, benign'. The bar is positioned at the top of a larger white area that contains the rest of the chart content.

Date/Time	05/12/2010 1:42 PM ▼
Owner	Krista L. Laningham
Status	Complete ▼
Description	Hypertension, benign ICD#40
Related Dx	Hypertension, benign

Near the top of most chart section viewers (e.g. SOAPnote) is a very narrow, horizontal, blue bar with a couple of black triangles near the center. This is the Upper Splitter Bar. Click-Hold down on the left mouse button on the Upper Splitter Bar, and drag the bar down to display the area above it. Click on it again to hide the area. Practice expanding, collapsing, and resizing the Upper Splitter Bar area. Of note is that the default state for its area is for it to not be completely closed in that it leaves the Date/Time within view.

The Upper Splitter Bar hides and displays the docutainer's demographic information such as Owner, Status, Description, and Related Dx.

## Lower Splitter Bar



As noted earlier, near the bottom of most chart section docutainer viewers (e.g. SOAPnote) is a very narrow, horizontal, blue bar with a couple of black triangles near the center called the Lower Splitter Bar. Left Click on the Lower Splitter Bar to hide the area beneath it. Click on it again to reopen the area. Practice expanding and collapsing the Lower Splitter Bar area with consecutive clicks. Just as with the Upper Splitter Bar, it can also be resized by clicking-dragging.

At the bottom of the viewer is the Docutainer/document List. It displays all the docutainers (i.e. documents) within a particular chart section's docutainer viewer. It should now list the single SOAPnote just created.

## Using Splitter Bars

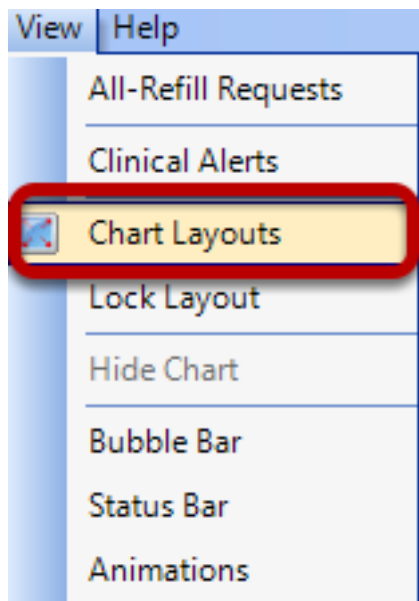
For more information on how to use splitter bars, see: [Intro to Splitter Bars](#).

## Preferred Chart Layout

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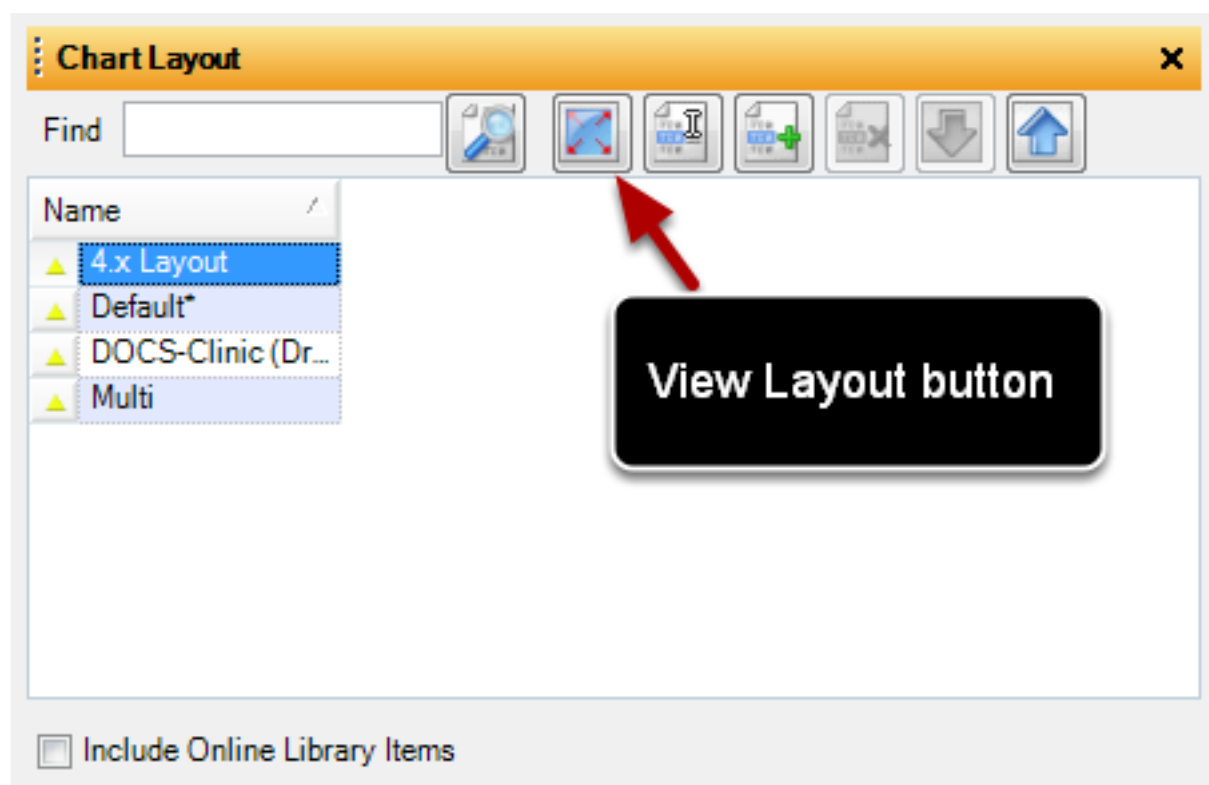
There are several different possible layouts a user can pick from for their chart layout. A user can even modify a chart layout and save it as their own.

### Pre-Defined Chart Layouts



To find these chart layouts, Click on View in the main menu bar at the top of the screen, and Click on Chart Layouts.

## View Layout



In the image above, you will see four chart layout choices that come defaulted with SOAPware. To preview each chart layout, the user will need to be sure to have a patient's chart open. If you want to preview the 4.x Layout--you will highlight that title from our list and Click on the "View Layout button."

## V4 Classic Layout

The screenshot displays the V4 Classic Layout interface, which is divided into two main panes: Summary (left) and SOAP Notes (right).

**Summary Pane:**

- Active Problems[]**  
[Starter - Active Problems:](#) ]
- Inactive Problems**  
[Starter - Inactive Problems:](#)
- Surgeries**  
[Pick List - Surgeries](#)
- Medications**
- Allergies**  
[Starter - Allergies - Summary:](#)
- Family History**  
[Positive family history for](#) -  
[Negative family history for](#) -  
[PARENTS:](#)  
[CHILDREN:](#)  
[GRANDPARENTS:](#)  
[SIBLINGS:](#)  
[UNCLES/AUNTS:](#)  
[OTHERS/DISTANT:](#)
- Tobacco**  
[Pick List - Tobacco - Summary](#)
- Alcohol**

**SOAP Notes Pane:**

**SOAP Notes**  
Date/Time: 05/07/2010 9:04 AM

**Subjective[]**  
**CHIEF COMPLAINT(S):**  
  
HPI: [SYMPTOMS/RELATED:](#) Reports symptoms of  
[LOCATION:](#) Reports area of involvement as  
[QUALITY/COURSE:](#) Reports condition is  
[INTENSITY/SEVERITY:](#) Reports measurement ( or degree) as  
[DURATION:](#) Reports the general length of symptoms to be  
[ONSET/TIMING:](#) Reports occurrence as  
[CONTEXT/WHEN:](#) Reports usually associated with  
[MODIFIERS/TREATMENTS:](#) Improved by

**ROS:**  
]

**Objective**  
[Exam:](#) [GENERAL:](#) [Appearance:](#) General appearance can be described as well-nourished, well-developed, and in no acute distress.

**Assessment**

**SOAPNote**

Drag a column header here to group by that column.

Date/Time	Owner	Status	Description	Related Dx
5/7/2010 9:04:27 AM	Shannon Shores			

Search Documentation Search

Chart Navigator Tasks Docuplates Chart Rack

Shores, Olive

This layout is one of the simplest options for users....as it only displays the Summary Chart Section to the left, and the SOAPnote Chart Section to the right.

## Default Layout

The screenshot displays a software interface for a patient chart. The left pane contains a 'Summary' tab with sections for Active Problems, Inactive Problems, Surgeries, Medications, Allergies, Family History, Tobacco, and Alcohol. The right pane shows a 'SOAP Notes' tab with a date/time selector (05/07/2010 9:04 AM) and sections for Subjective (Chief Complaint, HPI, LOCATION, QUALITY/COURSE, INTENSITY/SEVERITY, DURATION, ONSET/TIMING, CONTEXT/WHEN, MODIFIERS/TREATMENTS), ROS, Objective (Exam), Assessment, and Plan. Below these sections is a table with columns for Date/Time, Owner, Status, Description, and Related Dx. The table contains one entry: 5/7/2010 9:04:27 AM, Shannon Shores. The bottom of the interface features a search bar and the text 'Shores, Olive'.

**Summary** | Vital Signs | Demographics

**Active Problems**  
[Starter - Active Problems:](#)

**Inactive Problems**  
[Starter - Inactive Problems:](#)

**Surgeries**  
[Pick List - Surgeries](#)

**Medications**

**Allergies**  
[Starter - Allergies - Summary:](#)

**Family History**  
[Positive family history for -](#)  
[Negative family history for -](#)  
**PARENTS:**  
**CHILDREN:**  
**GRANDPARENTS:**  
**SIBLINGS:**  
**UNCLES/AUNTS:**  
**OTHERS/DISTANT:**

**Tobacco**  
[Pick List - Tobacco - Summary](#)

**Alcohol**

**SOAP Notes** | Labs | Radiology

Date/Time: 05/07/2010 9:04 AM

**Subjective**  
**CHIEF COMPLAINT(S):**  
HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) as  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

**ROS:**

**Objective**  
Exam: **GENERAL:** Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

**Assessment**

**Plan**

**SOAPNote**

Drag a column header here to group by that column.

Date/Time	Owner	Status	Description	Related Dx
5/7/2010 9:04:27 AM	Shannon Shores			

Search Documentation | Search

Shores, Olive

The Default Layout shows that a user can have multiple chart sections on the left and right of their chart layout.

## Multi-Layout

The screenshot displays a software interface with a multi-pane layout. The top-left pane (labeled 1) is titled 'Summary' and contains links for 'Active Problems', 'Inactive Problems', 'Surgeries', and 'Medications'. The top-right pane (labeled 3) is titled 'SOAP Notes' and shows a 'Date/Time' field set to '05/07/2010 9:04 AM'. Below this, it lists 'Subjective' information including 'CHIEF COMPLAINT(S)', 'HPI: SYMPTOMS/RELATED:', 'LOCATION:', 'QUALITY/COURSE:', 'INTENSITY/SEVERITY:', 'DURATION:', 'ONSET/TIMING:', 'CONTEXT/WHEN:', and 'MODIFIERS/TREATMENTS:'. The bottom-left pane (labeled 2) is titled 'Demographics' and contains fields for 'Title', 'First', 'Middle', 'Last', 'Suffix', 'SSN', 'Chart #', 'Birth', 'Age', and 'Patient Picture'. Below these fields is a 'General' tab and a list of categories: 'Insurance', 'General', and 'Custom'. The bottom-right pane (labeled 3) is titled 'SOAPNote' and contains a table with columns: 'Date/Time', 'Owner', 'Status', 'Description', and 'Related Dx'. The table has one row with the following data: '5/7/2010 9:04:27 AM', 'Shannon Shores', 'Status', 'Description', and 'Related Dx'. A black callout box with the text 'Notice the three panes.' is positioned over the center of the interface. The bottom of the screen features a search bar and a patient name 'Shores, Olive'.

1

2

3

Notice the three panes.

Summary

Active Problems  
Starter - Active Problems:

Inactive Problems  
Starter - Inactive Problems:

Surgeries  
Pick List - Surgeries

Medications

SOAP Notes

Date/Time 05/07/2010 9:04 AM

Subjective

CHIEF COMPLAINT(S):

HPI: SYMPTOMS/RELATED: Reports symptoms of

LOCATION: Reports area of involvement as

QUALITY/COURSE: Reports condition is

INTENSITY/SEVERITY: Reports measurement ( or degree) as

DURATION: Reports the general length of symptoms to be

ONSET/TIMING: Reports occurrence as

CONTEXT/WHEN: Reports usually associated with

MODIFIERS/TREATMENTS: Improved by

Demographics

Title First Middle Last Suffix

Olive Shores

SSN Chart # Birth Age Patient Picture

General

Drag a column header here to group by that column.

Name

Insurance

General

Custom

SOAPNote

Exam: GENERAL Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

Assessment

Plan

SOAPNote

Drag a column header here to group by that column.

Date/Time	Owner	Status	Description	Related Dx
5/7/2010 9:04:27 AM	Shannon Shores			

Search Documentation Search

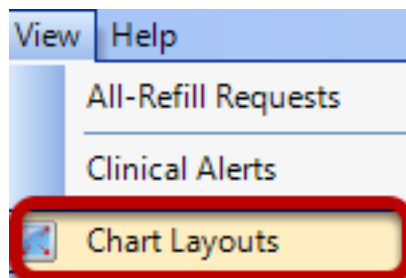
Shores, Olive

The Multi-Layout splits the chart workspace into 3 panes.

## View Chart Layouts from Online Library

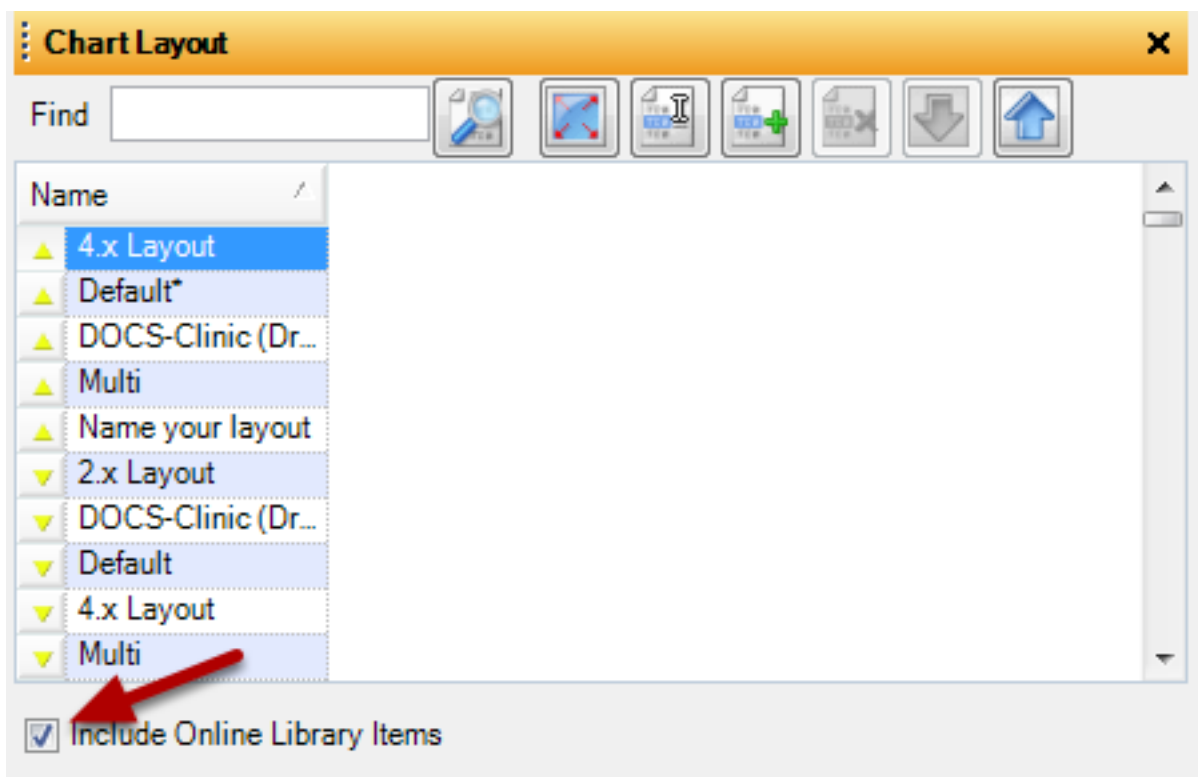
In this lesson, the user will learn how to view chart layouts from the online library.

### View Chart Layouts from online library



Click on View > Chart Layouts.

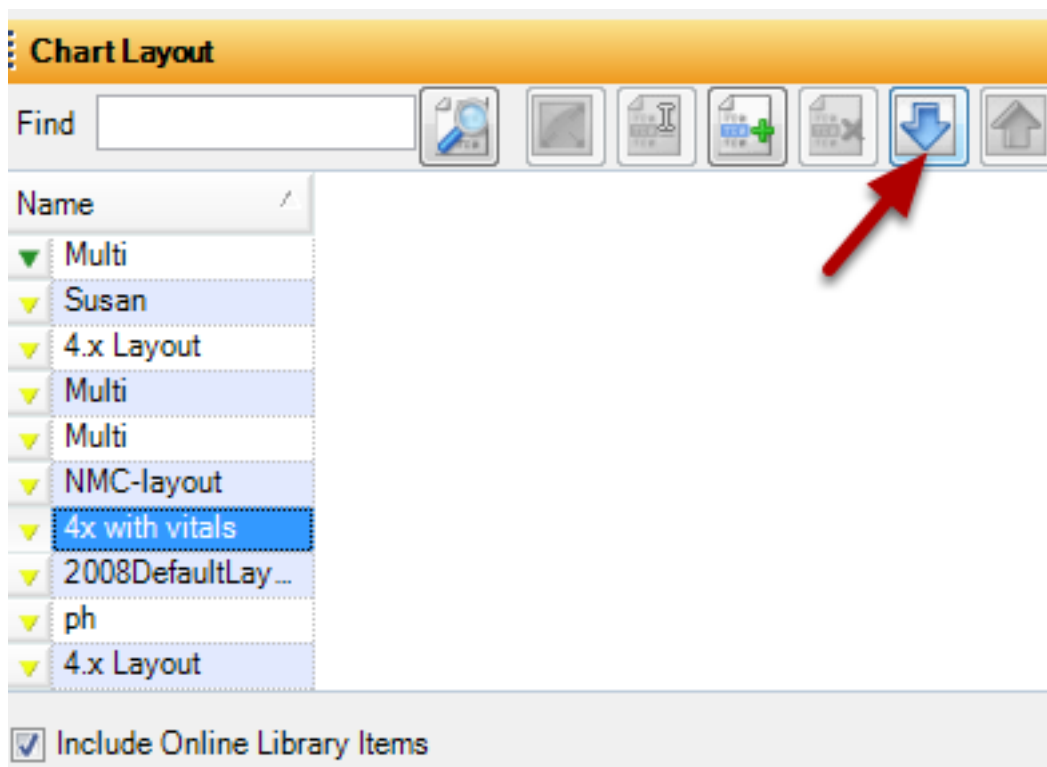
### Chart Layouts



Check the "Include Online Library Items" box. The user will now be able to view all the layouts created and uploaded to the online library.

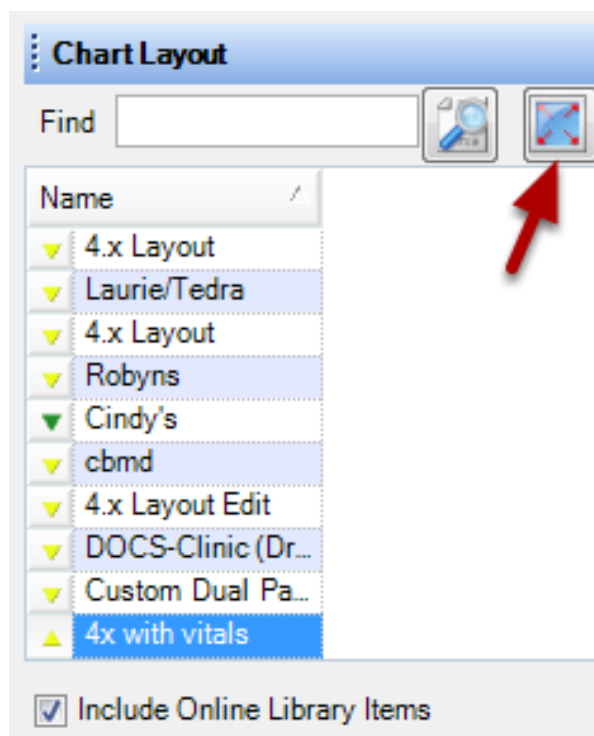


## Download Layouts



Should the user want to view one of the layouts from the online library, highlight the name of the layout and Click on the blue download button.

## View Layout

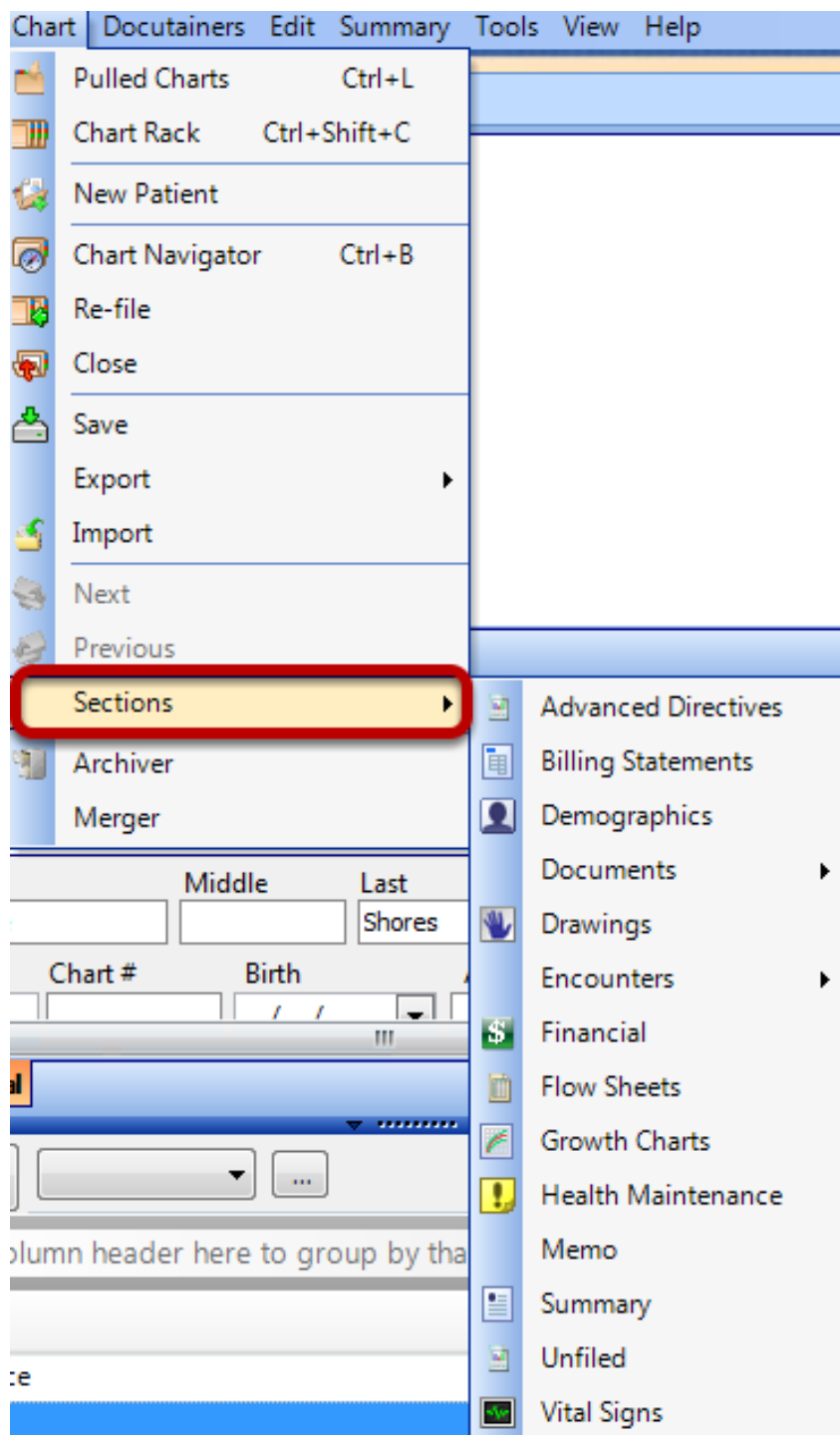


Lastly, Click on the view layout button.

## Add Chart Sections to a Layout

In this lesson, the user will learn how to add chart sections to a layout.

### Add Chart Sections to a layout



Click on Chart > Sections, and then choose from a variety of chart sections.

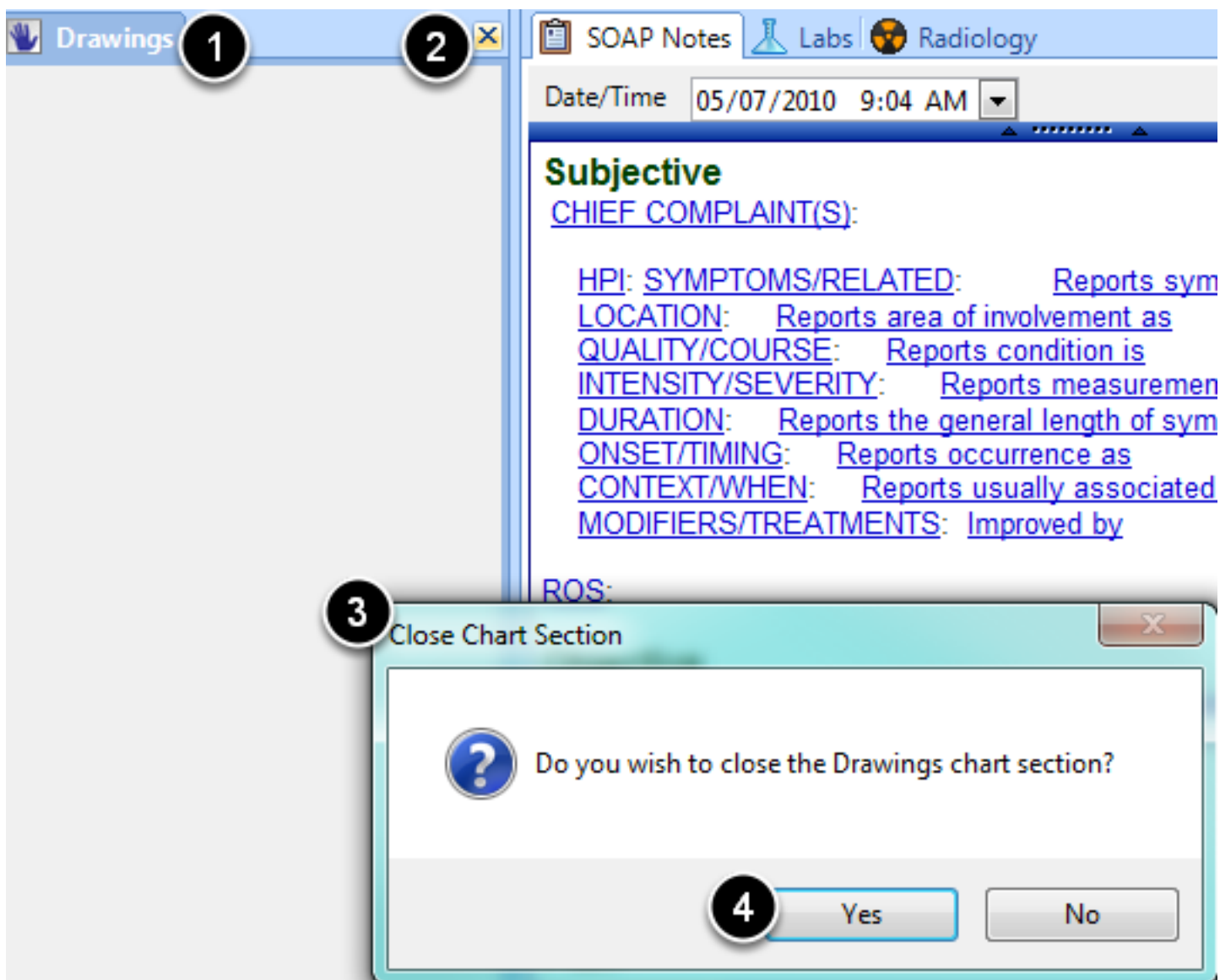
As a helpful hint for the user: the chart section will insert into your chart layout on the side where the

cursor was last placed.

## Remove a Chart Section

In this lesson, the user will learn how to remove a chart section.

### Remove a Chart Section

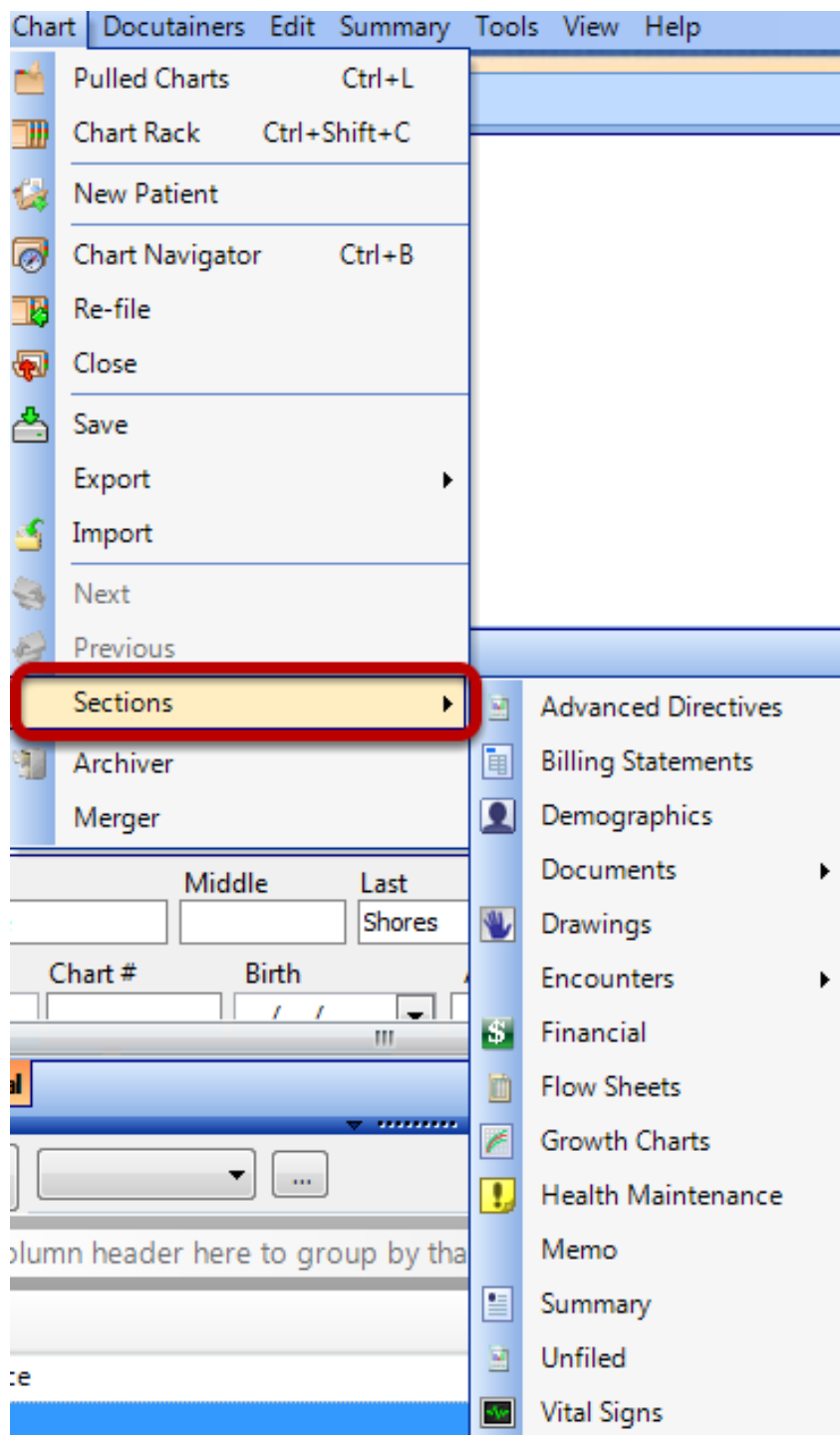


1. Click on the tab to be removed-notice the chart section tab will be blue when selected.
2. Click on the X.
3. The user will be prompted, "Do you wish to close the chart section"?
4. Click Yes.

## Move a Chart Section

In this lesson, the user will learn how to move a chart section.

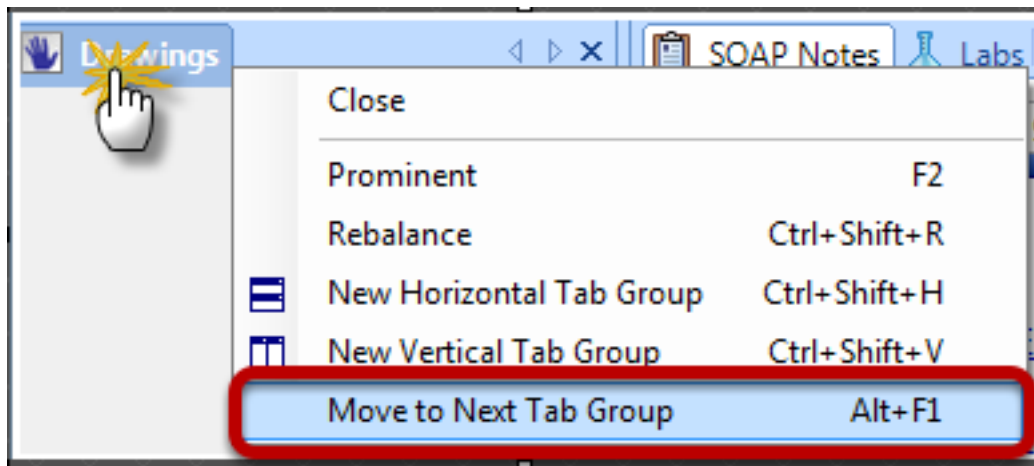
### Add Chart Sections to a layout



Click on Chart > Sections, and then choose from a variety of chart sections.

As a helpful hint for the user: the chart section will insert into your chart layout on the side where the cursor was last placed.

## Move a Chart Section



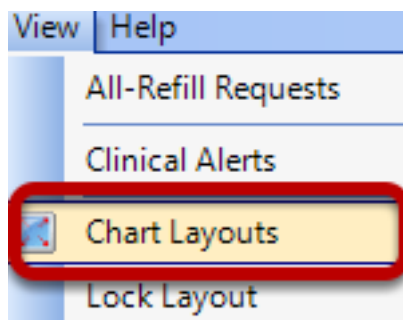
Once a chart section has been inserted, a user can RIGHT Click on the top chart section tab, and Click "Move to Next Tab Group." This action would take the chart section from the left side of your layout, to the right side of your layout. If a user wanted to make the chart section a new horizontal tab group, the user would RIGHT Click on the chart section tab and choose "New Horizontal Tab Group."

## Saving Chart Layouts

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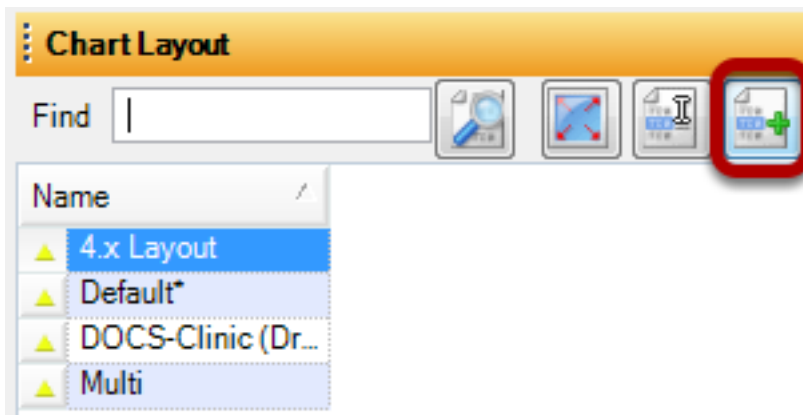
In this lesson, a user will learn how to save a chart layout.

### Save a Chart Layout



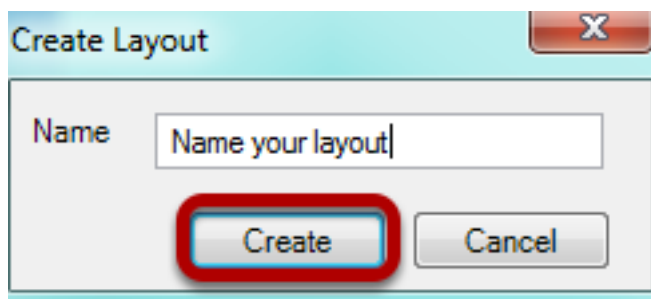
Once the preferred chart layout has been selected, Click View > Chart Layouts.

### Add the Layout



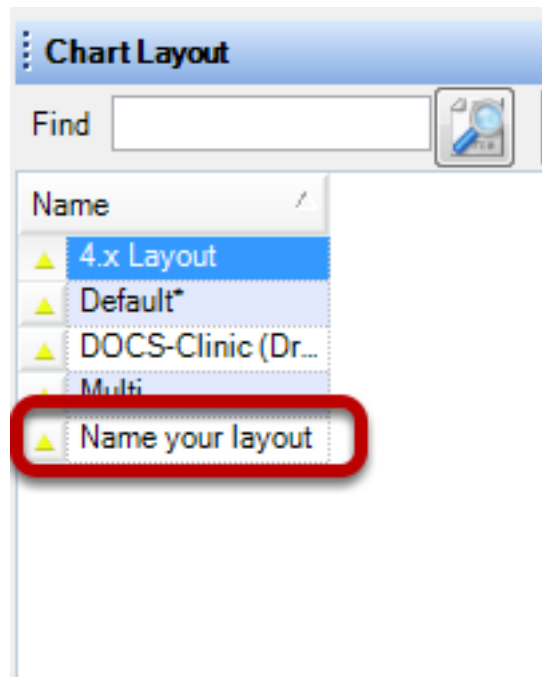
Click on the green plus.

### Name the Layout



Type in the name of your layout and Click "Create".

## Select the Layout



Your layout will now be listed with the four default layouts.

\*Helpful hint for the user: Do not X out of SOAPware (meaning do not hit the red X at the top right of the screen as a means to log off or exit SOAPware), as this could cause your user-specific layout to not automatically display when logged in each day.

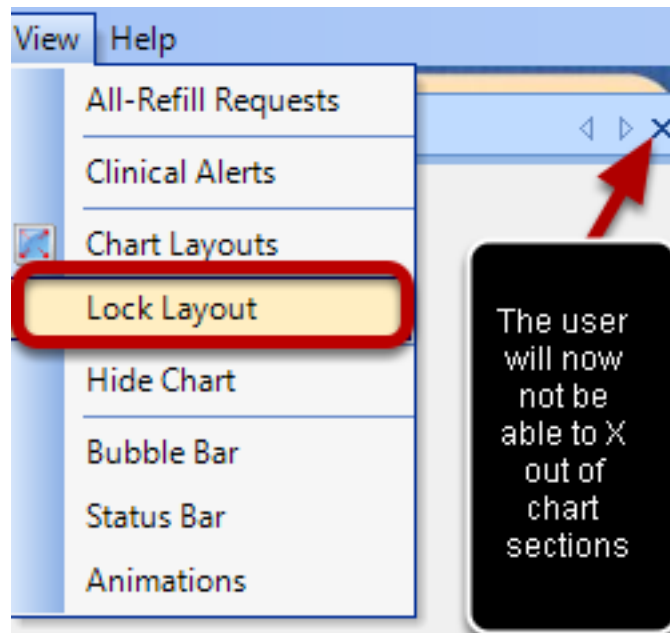


## Lock Chart Layouts

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In this lesson, the user will learn how to lock a chart layout.

### Lock Chart Layout



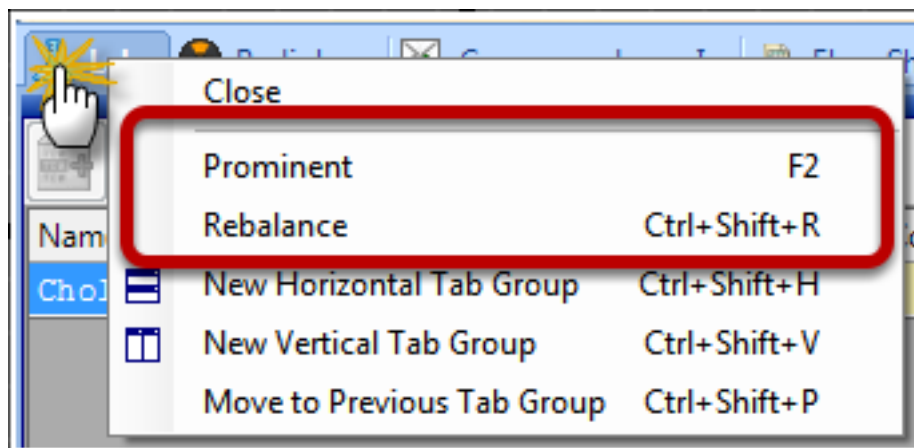
Click on View > Lock Layout. The X-as shown above-will be removed, and the user will not be able to remove chart sections from their layout.

## Custom Chart Views/Layouts

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There are some options for customizing the chart layout of tabs that are in addition to those previously discussed in the introduction. The individual, tabbed chart sections can be changed in a number of ways.

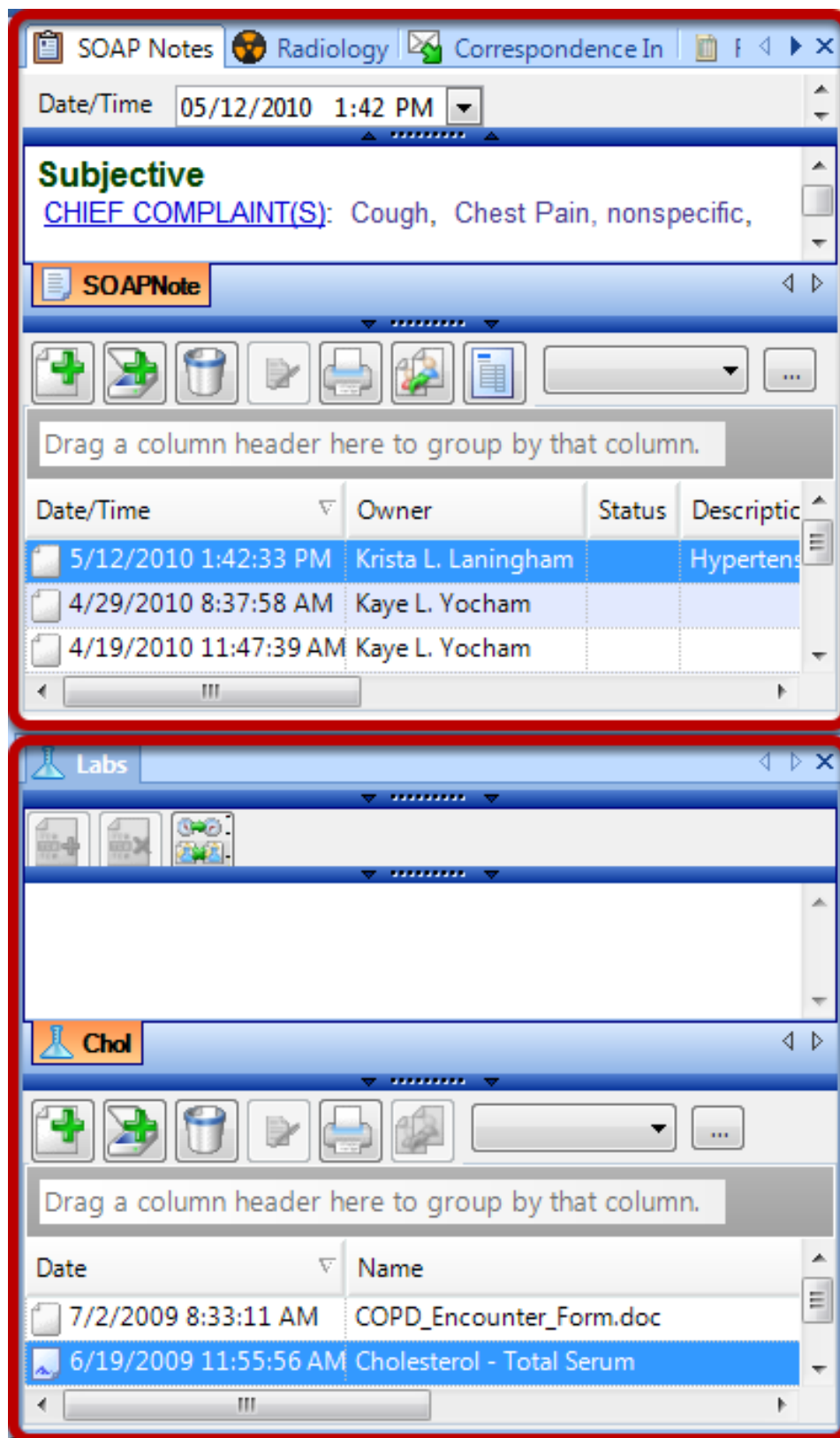
### Prominent and Rebalance



Right click on the Chart Section tab to view a list of options.

The "Prominent" function is used to make a chart section temporarily take up most of the screen. Choosing "Rebalance" will return it to the original setting.

## Add a Horizontal Separator to a Chart Layout



New Horizontal Tab Group splits the layout, horizontally. In the example above, Labs was selected as a New Horizontal Tab Group and it is displayed below in its original position.

To revert back to the original tab arrangement, Right-Click on the Demographics chart tab, and Click the Move to Previous Tab Group menu item.

## Add a Vertical Separator to a Chart Layout

The screenshot displays a medical software interface with three vertical tab groups. The first group, labeled 'Summary', contains sections for Active Problems (Neck Pain or Cervicalgia, Degenerative Disc Disease, Gastroesophageal reflux disease or GERD, Hypertension - Benign), Inactive Problems (Chronic obstructive pulmonary disease, Hemorrhoids, Weight loss, abnormal), Surgeries (No history of any major surgeries), Medications (albuterol, Hytrin (Terazosin), Albuterol (Proventil, Ventolin), Aspirin), and Allergies. The second group, labeled 'SOAP Notes', contains a 'Subjective' section with Chief Complaint(S), HPI, and various reports, followed by a 'SOAPNote' section and a table with columns for Date/Time and Owner. The third group, labeled 'Labs', contains a table with columns for Name, Flags, Value, Range, and Unit, showing a result for Cholesterol (Chol) with a value of 255.

New Vertical Tab Group will split the layout vertically. In the example above, Labs was selected as a new Vertical Tab Group so that now there are three vertical tab groups instead of two.

Once again, to revert back to the original tab arrangement, simply right-Click on the Labs chart section tab and Click Move to Previous Tab Group.

## Chart Navigator Views

In this lesson, the user will learn about the 3 different chart navigator view options.

### Access Chart Navigator

1. Click on the Chart Navigator tab docked at the bottom of the screen.
2. If Chart Navigator is not docked at the bottom, Click on Chart in your main menu toolbar, and Click on Chart Navigator.
3. Press Control + B on your keyboard.

### Chart Navigator Views: Relationship

Date/Time	Owner	Status	Description	Related Dx
4/28/2010 10:46:39 AM	Shannon Shores			
3/29/2010 10:05:56 AM	Shannon Shores		Diabetes - Type 2 - with complications ICD#250.	Diabetes - Type 2 - with complications
3/17/2010 9:34:57 AM	Shannon Shores		Acute venous embolism & thrombosis of superficial	Cardiac arrest
3/5/2010 4:43:40 PM	Shannon Shores		Hypertension with complications ICD#997.91	Hypertension with complications
12/1/2009 1:03:58 PM			Viral Gastroenteritis ICD#008.8	Viral Gastroenteritis
10/29/2009 2:36:10 PM			Influenza NOS ICD#487.1	Influenza NOS
10/29/2009 1:33:54 PM			Viral Gastroenteritis ICD#008.8	Viral Gastroenteritis
10/28/2009 10:16:41 AM				
7/1/2009 11:24:03 AM	Shannon Shores		Chronic obstructive pulmonary disease ICD#496	Chronic obstructive pulmonary disease
4/29/2009 3:17:49 PM			Benign hypertension ICD#401.1	Benign hypertension
4/29/2009 10:10:46 AM			Anticoagulant Use ICD#V58.61 Comment-	Anticoagulant Use
3/22/2009 3:10:56 PM			Anticoagulant Use ICD#V58.61 Comment-	Anticoagulant Use
2/26/2009 3:00:05 PM			Anticoagulant Use ICD#V58.61 Comment-	Anticoagulant Use

The Relationship view is the traditional, table of contents view. The patient's name will be displayed to the left, with a list of chart sections. The patient's list of documents within a chart section will be displayed to the right. See image above.

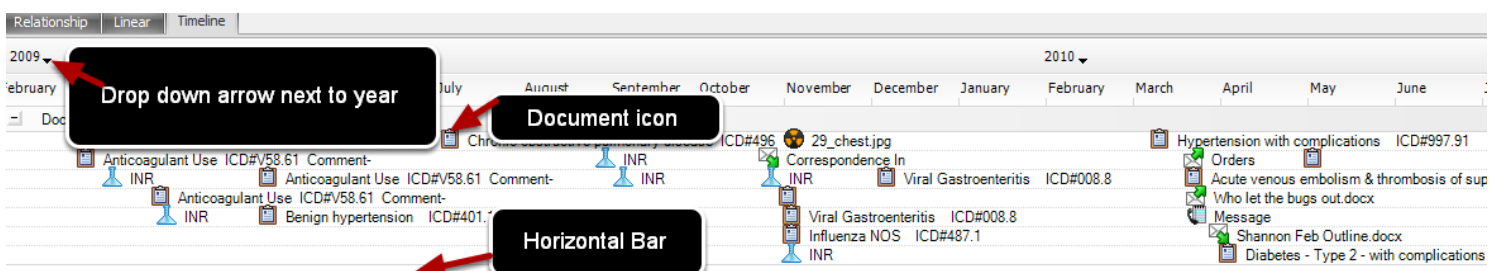
Helpful hints: 1. This view is most similar to Chart Browser, for those on a previous version of SOAPware. 2. A user can Click on a column header to help them sort through the document list.

## Chart Navigator Views: Linear

Chart Navigator				
Relationship Linear Timeline				
Date/Time	Section	Docutainer	Owner	Status
4/28/2010 10:46:39 AM	SOAP Notes		Shannon Shores	
3/29/2010 10:05:56 AM	SOAP Notes	Diabetes - Type 2 - with complications ICD#250.	Shannon Shores	
3/26/2010 3:19:19 PM	Correspondence In	Shannon Feb Outline.docx	Shannon Shores	
3/18/2010 10:43:21 AM	Messages	Message	Shannon Shores	
3/18/2010 10:37:14 AM	Correspondence Out	Who let the bugs out.docx	Shannon Shores	
3/17/2010 9:34:57 AM	Correspondence Out	Orders	Shannon Shores	Sign
3/17/2010 9:34:57 AM	SOAP Notes	Acute venous embolism & thrombosis of superficial	Shannon Shores	
3/5/2010 4:43:40 PM	SOAP Notes	Hypertension with complications ICD#997.91	Shannon Shores	

The Linear view is one consolidated list of all the documents in a patient's chart. This list is initially sorted by Date/Time, but remember, you can Click on another column header, like "section", to sort the document list. Double Click on a line item to open a document in a patient's chart.

## Chart Navigator Views: Timeline



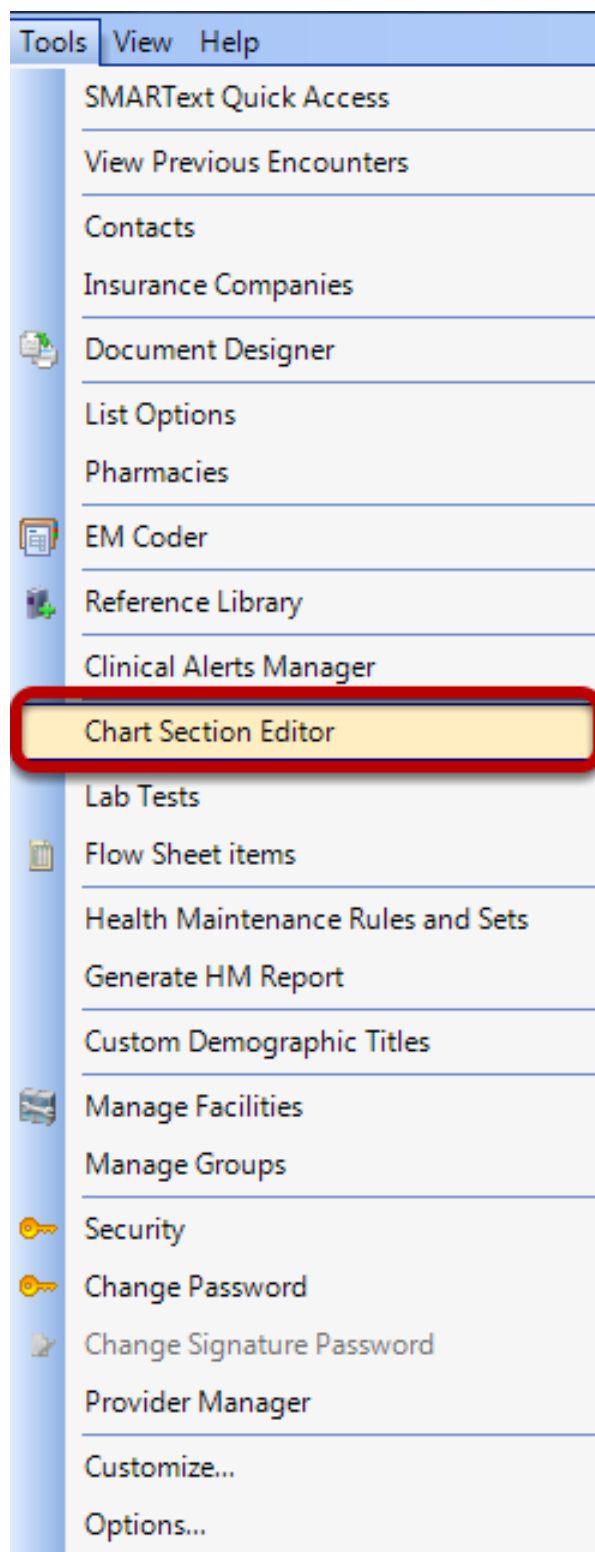
The Timeline view is mainly for viewing the relationship between documents over time. Click on the horizontal bar at the bottom to move forward/backward in time, or Click on the drop down arrow next to the year. This will then bring up a calendar, where you can select a month, date, and year. To view a document from this view, double Click on a document icon.

## Creating a New Chart Section

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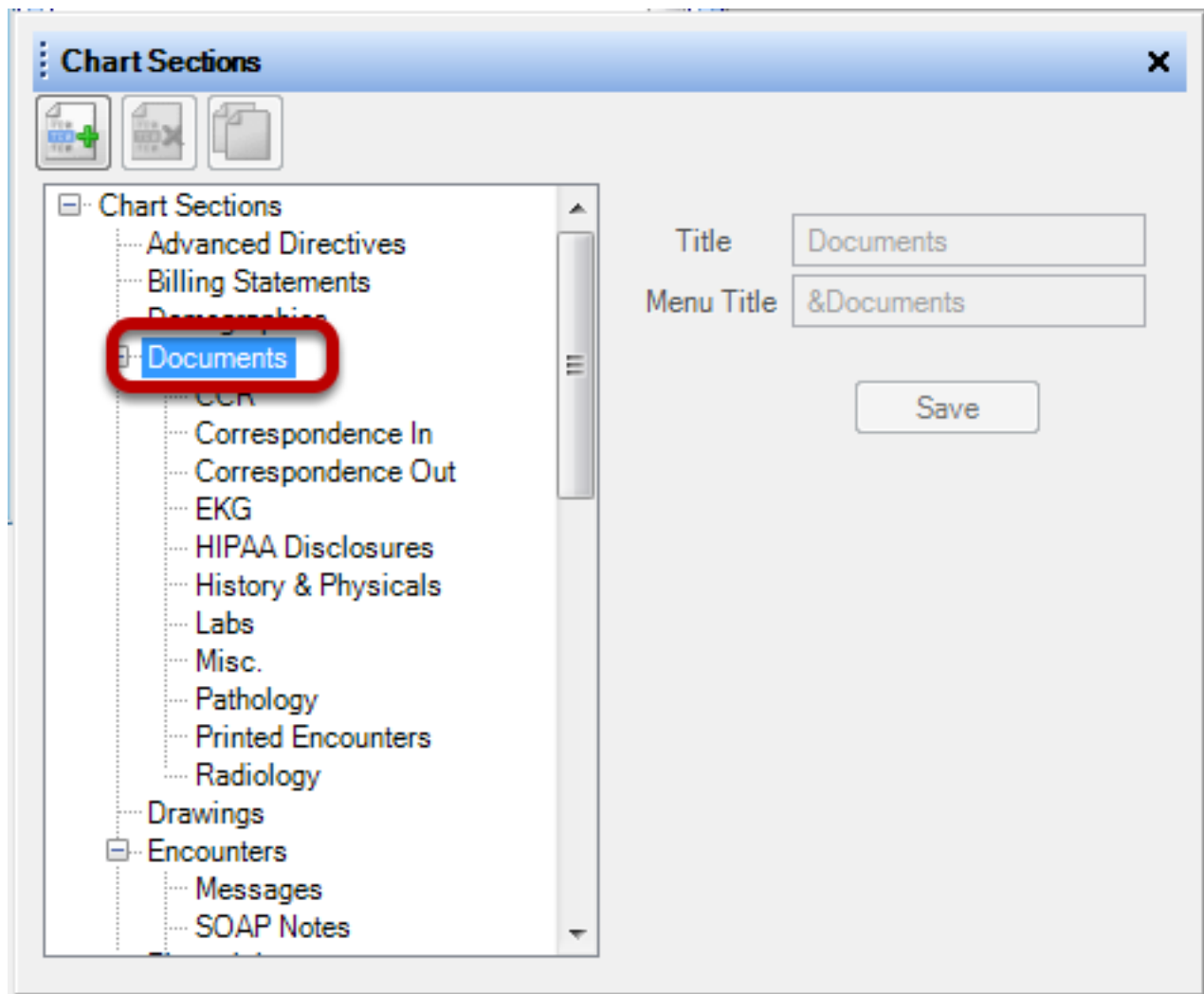
These instructions will show how to create new chart sections within Chart Navigator.

### Open the Chart Section Editor



Click Tools, and Click Chart Section Editor.

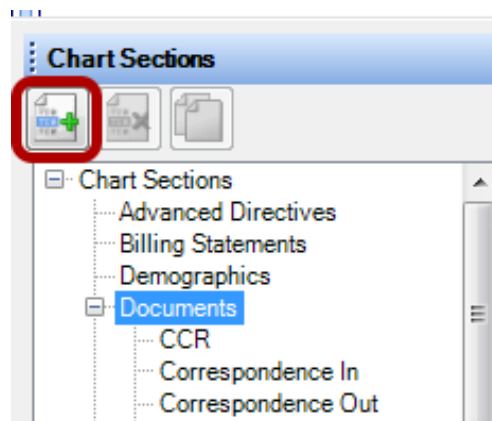
## Locate the Parent Section



Click on the area that you wish to add a Chart Section.

In this example we are adding to the Documents section.

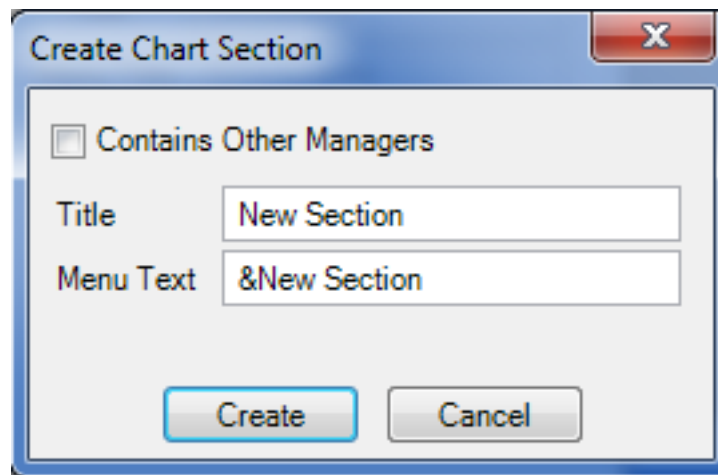
## Click the Add Button



Click the Add button (i.e. the green +).



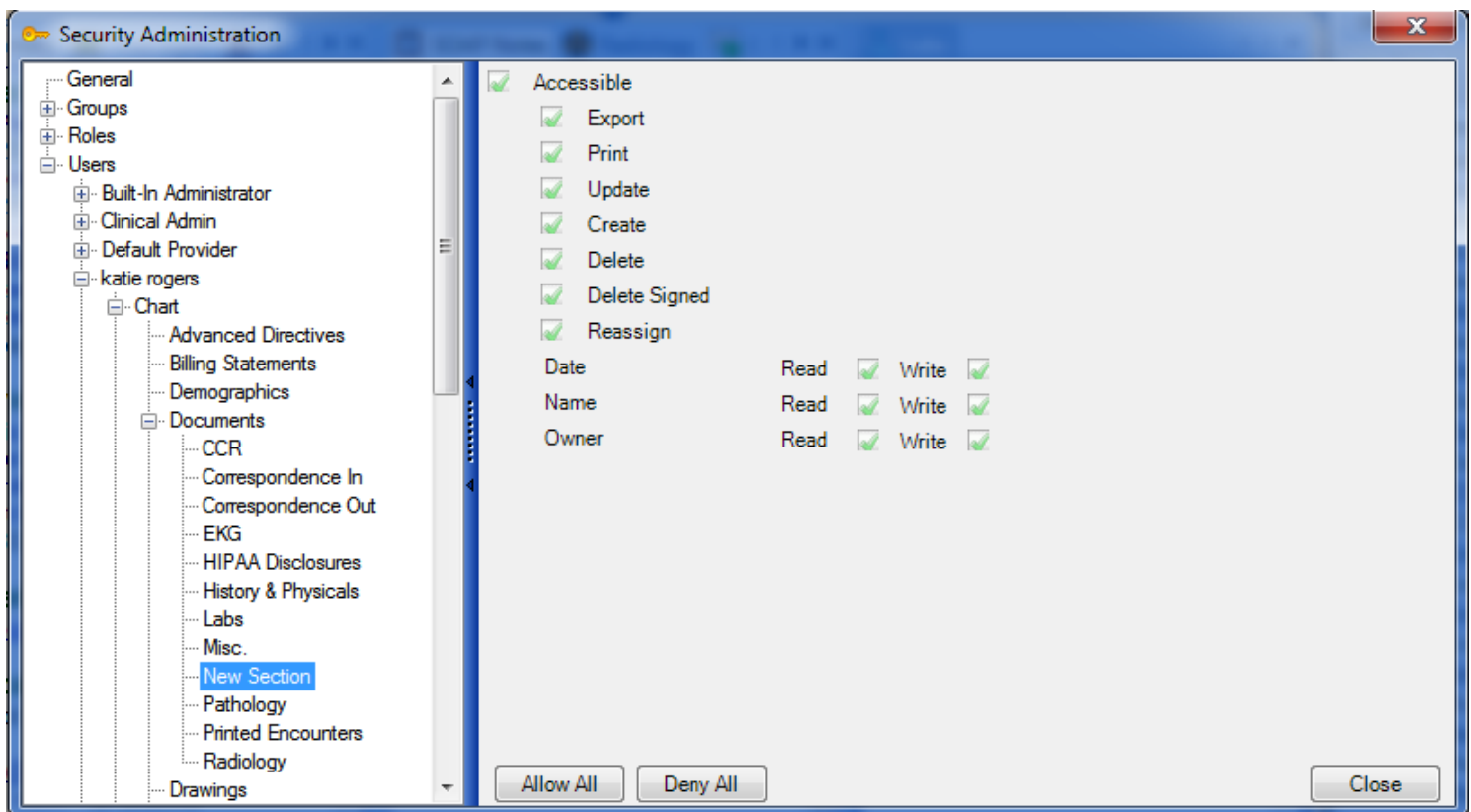
## Type the Name



Type the name of the new chart section to add in both the Title and the Menu field/boxes and Click Create.

A window will appear letting you know that you need to restart SOAPware.

## User Privileges



Now, using your Administrator login, Click Tools -> Security. Click the + sign next to a user's name. Click the + sign next to Charts. Click the + sign next to Documents. Click the new Chart Section name, and Click the Allow All button. Click the checkboxes that you do not wish the user to have access to and a red X will display. DO THIS FOR EACH USER THAT WILL NEED ACCESS TO THIS SECTION.

Click Close, and you are presented a prompt to logout of SOAPware for the new settings to take place.

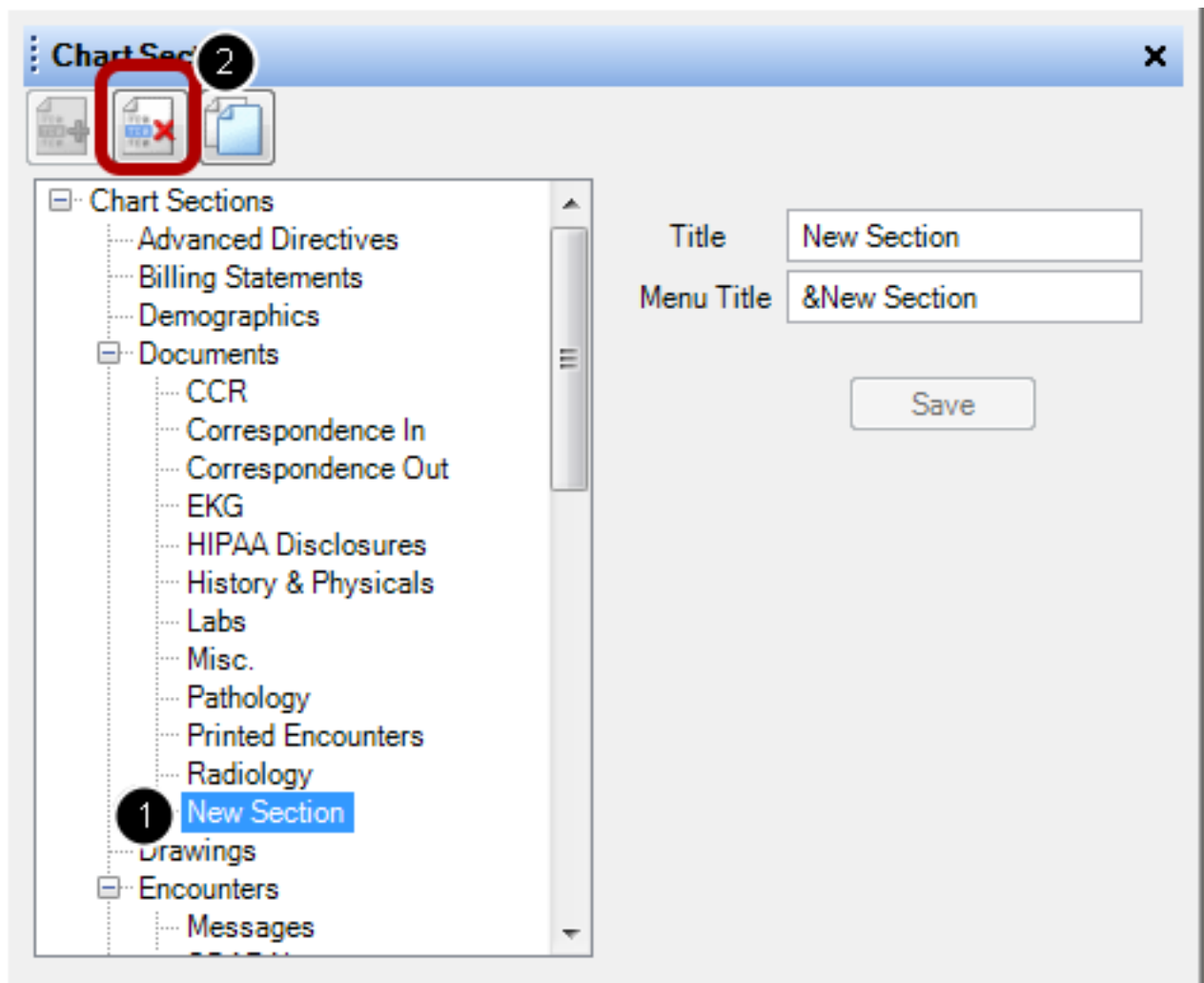
In order to be able to perform the above tasks the user must have proper access in the Security Section.

## Removing a Chart Section

Note: You cannot remove SOAPware's default Chart Sections. This action can only be performed on chart sections that you have created.

**WARNING: This operation should only be performed after you have assured that there are no other users currently working with patient charts. This will help to prevent the loss of patient data.**

## Removal Process

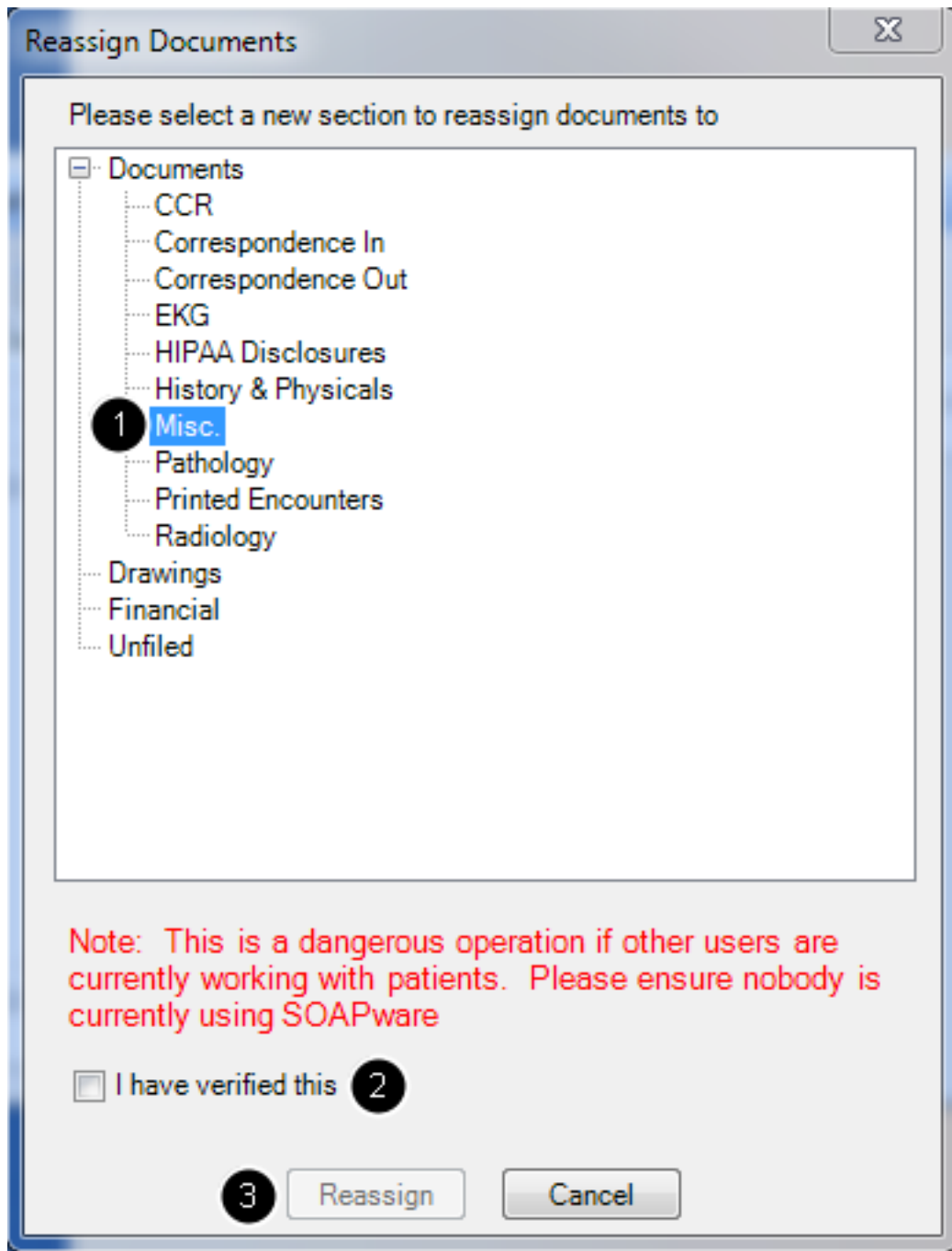


To remove a Chart Section:

1. Click to highlight it in the list.
2. Click the Remove Section Button (or Press Ctrl + Alt + R).

SOAPware will display a prompt to confirm this action. Click Yes or Click Cancel, and SOAPware will return to the Chart Sections Editor.

## Reassigning Documents



When a user wishes to remove a Chart Section, SOAPware will display a prompt for the location to place the Document(s) contained within that section. The Reassign Documents dialog box will open.

1. Choose the Section in which to place the documents by Clicking to highlight it in the list.
2. Because of the sensitive nature of performing this action, verification is requested that the user has

read the warning, and has ensured that no other users are working with patient charts. To perform this action, Click to check the box "I have verified this."

3. Then, Click the Reassign Button.

The documents contained within the section to be deleted will be moved, and the section will also be removed.

Click Cancel if this action needs to be stopped, and SOAPware will return to the Chart Sections editor.

# Docuplates

## Intro to Docuplates

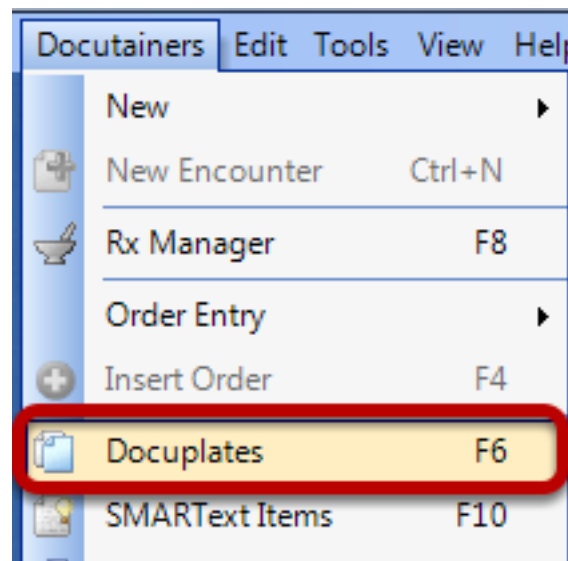
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Docuplates allow common sets of document items to be saved as a group so that they can be reused later. Similar in nature to templates, Docuplates can contain a pre-formatted SOAPnote for aiding in documenting an encounter. This capability is useful for documenting common conditions or frequently repeated encounters, eliminating the need to recreate the same collection of document items each time.

**User Tip:** Docuplates can be created from almost any document in SOAPware, including SOAPnotes; Flow Sheets; Labs; Drawings; Summary, etc.

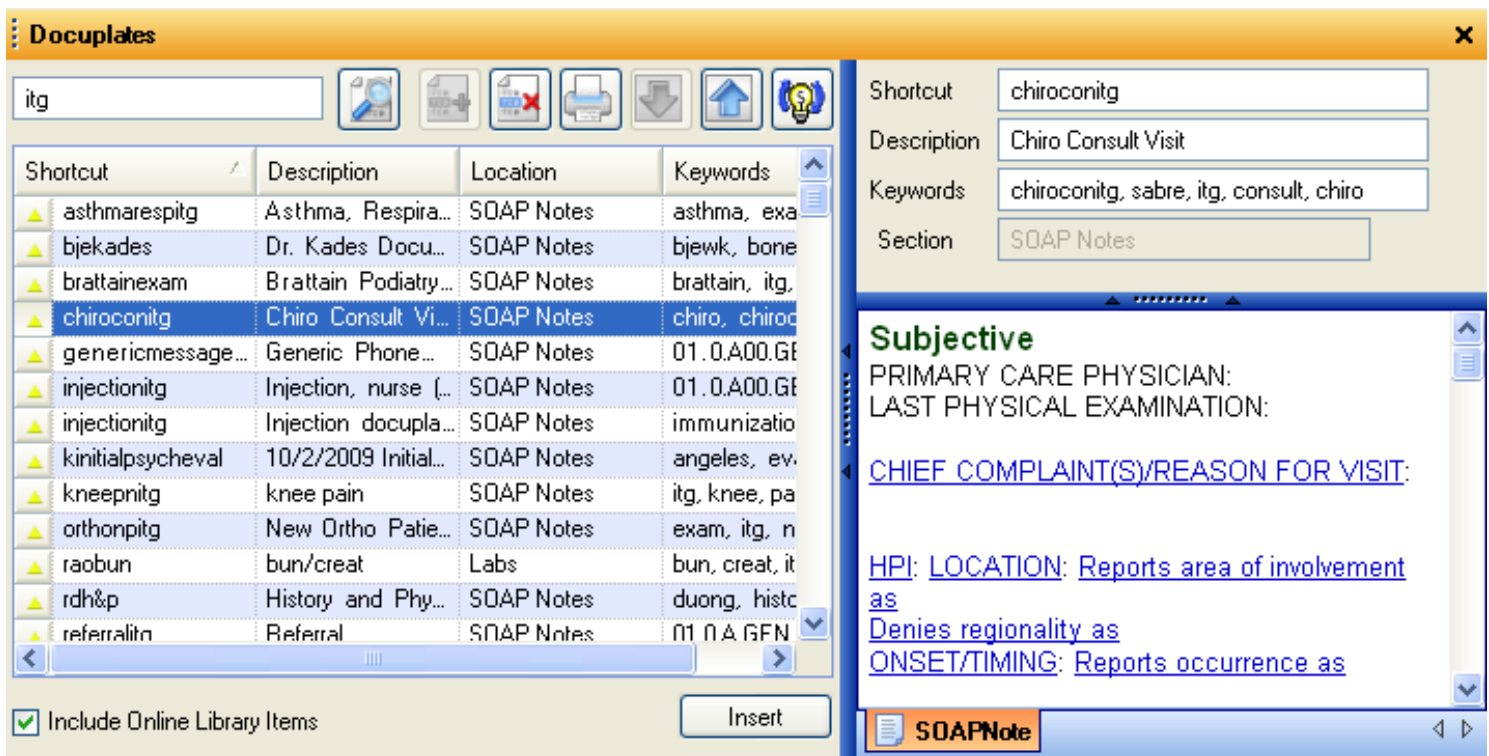
## Accessing Docuplates

### Finding Docuplates



1. Go to the Docutainers menu
2. Click on Docuplates (or press F6 on the keyboard)

### The Docuplates Interface

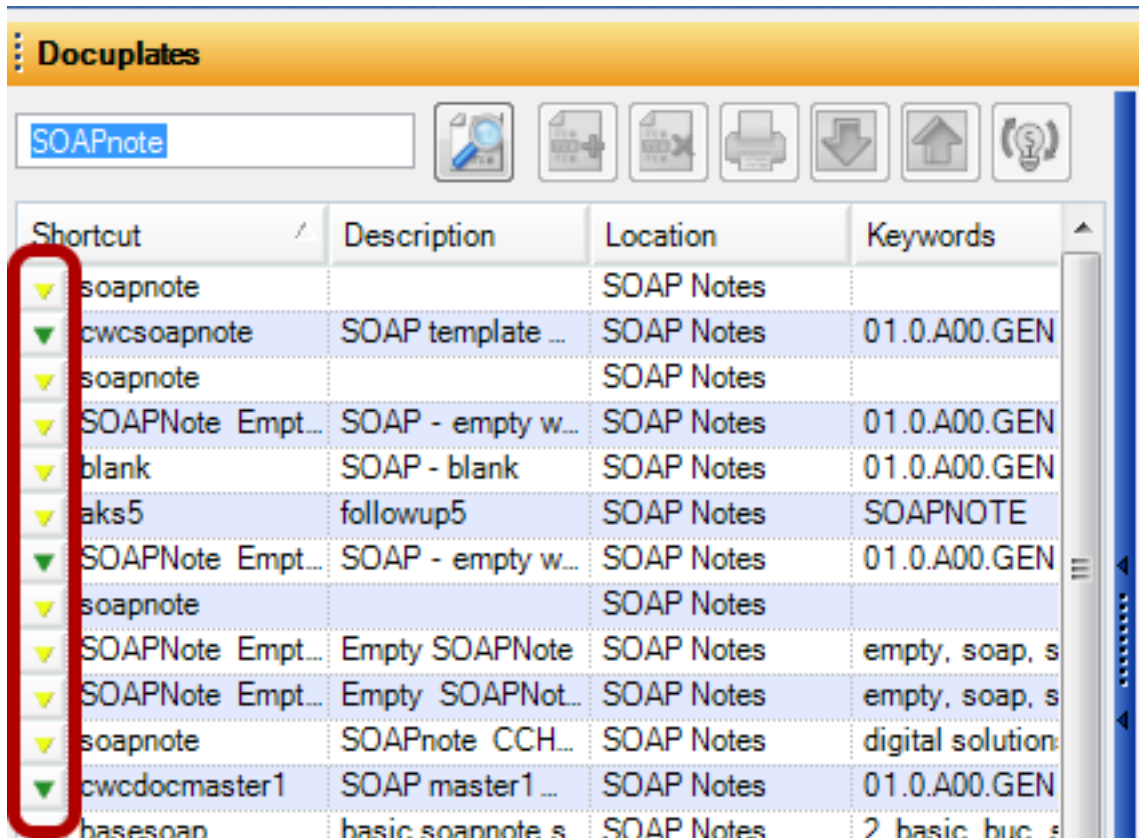


The interface has the ability to search for existing docuplates, including those online (by checking the Include Online Library Items box). Once docuplates have been downloaded on your local library, they may be previewed in the window to the right.

# Docuplate Controls

The docuplate library now contains thousands of docuplates, containing tens of thousands of keywords to assist with searching-finding. When reviewing docuplates, consider the following.

## Green and Yellow Triangles

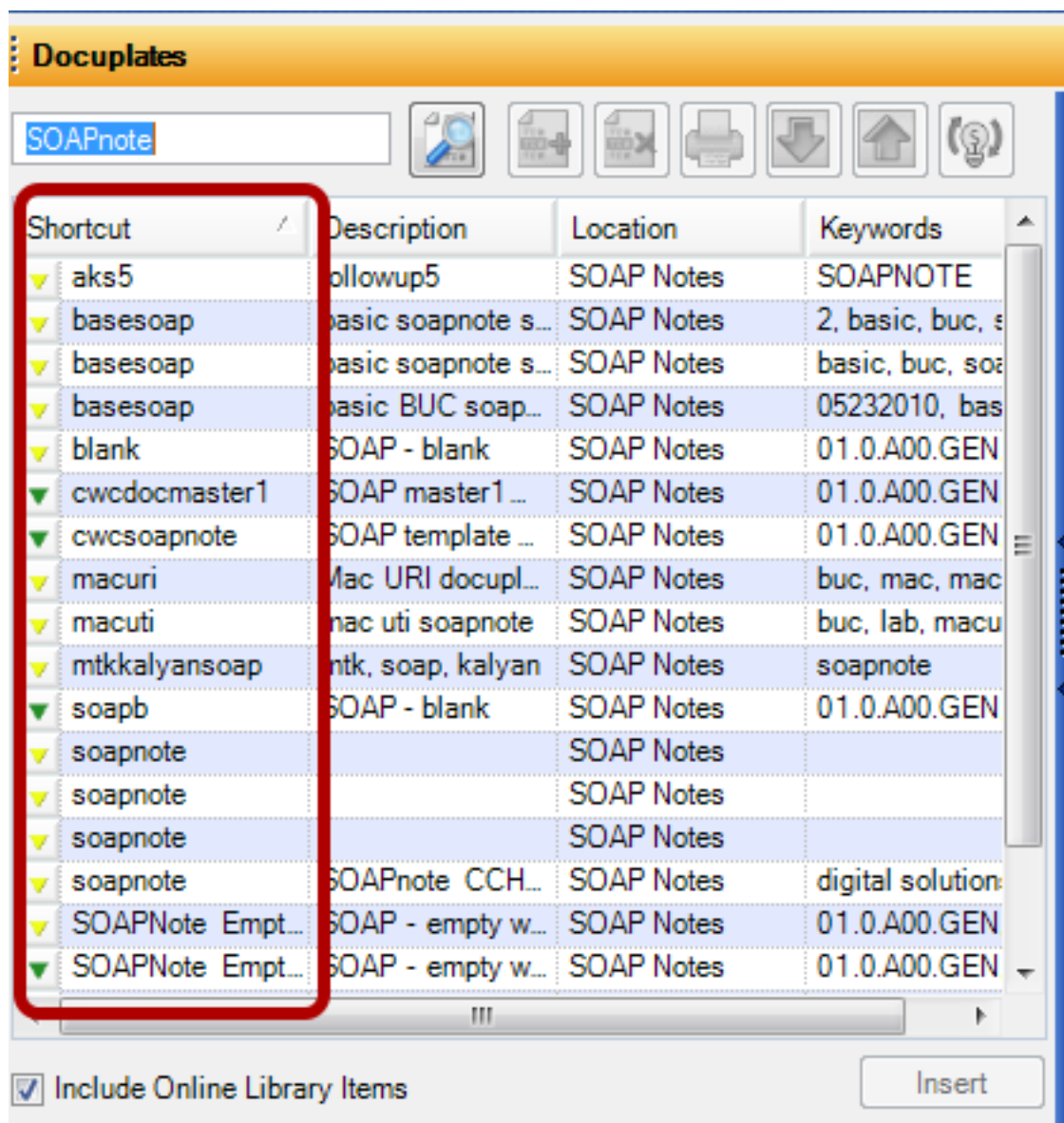


Docuplates			
SOAPnote			
Shortcut	Description	Location	Keywords
▼ soapnote		SOAP Notes	
▼ cwcsoapnote	SOAP template ...	SOAP Notes	01.0.A00.GEN
▼ soapnote		SOAP Notes	
▼ SOAPNote Empt...	SOAP - empty w...	SOAP Notes	01.0.A00.GEN
▼ blank	SOAP - blank	SOAP Notes	01.0.A00.GEN
▼ aks5	followup5	SOAP Notes	SOAPNOTE
▼ SOAPNote Empt...	SOAP - empty w...	SOAP Notes	01.0.A00.GEN
▼ soapnote		SOAP Notes	
▼ SOAPNote Empt...	Empty SOAPNote	SOAP Notes	empty, soap, s
▼ SOAPNote Empt...	Empty SOAPNot...	SOAP Notes	empty, soap, s
▼ soapnote	SOAPnote CCH...	SOAP Notes	digital solution:
▼ cwcdocmaster1	SOAP master1 ...	SOAP Notes	01.0.A00.GEN
▼ basesoan	basic soannote s	SOAP Notes	2 basic buc s

Docuplates with green triangles have been created by SOAPware, Inc. as appropriate for others to download. Docuplates with yellow triangles have been created or edited by a SOAPware user.

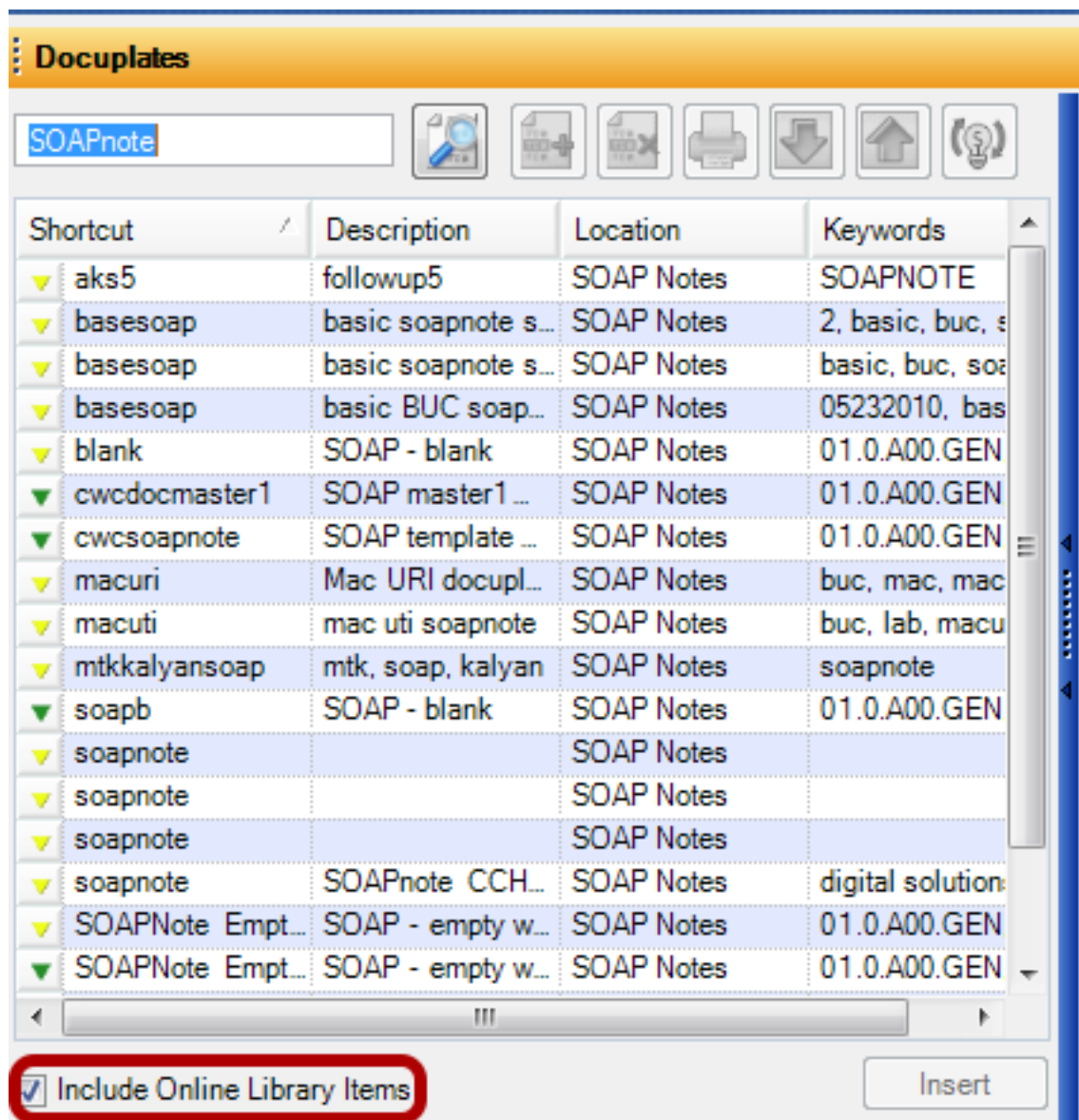


## Shortcut Column



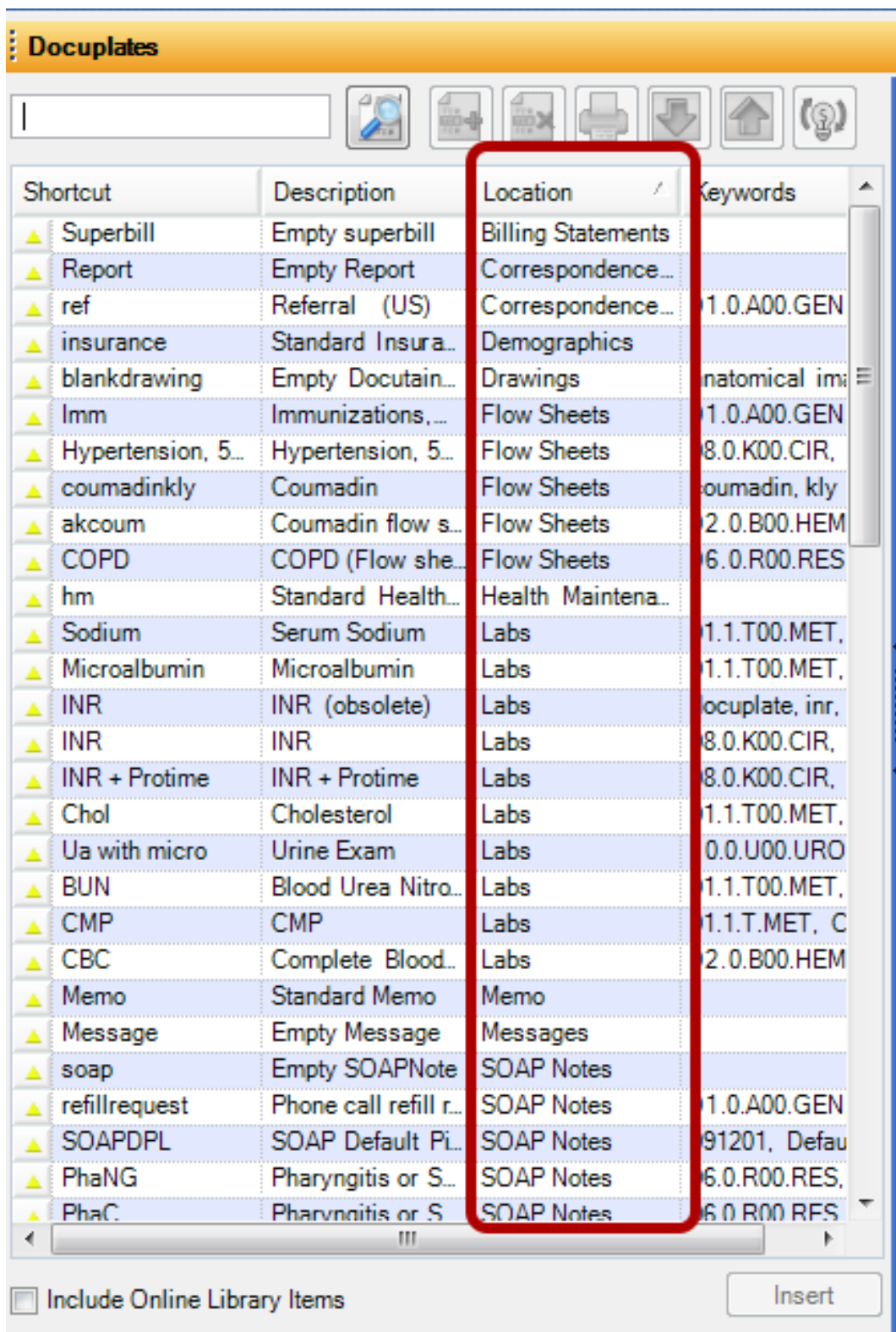
As users upload docuplates, SOAPware, Inc. avoids changing the shortcut's users have defined, but take liberty to modify descriptions, and to add keywords. For example, the words template and docuplate are usually removed from the descriptions and keywords because every item in the list is a template/docuplate.

## Include Online Library



By selecting the "Include Online Library" box at the bottom of the window, users will get results not only from their local database, but also from SOAPware and other SOAPware users.

## Sorting



**Docuplates**

Shortcut	Description	Location	Keywords
Superbill	Empty superbill	Billing Statements	
Report	Empty Report	Correspondence...	
ref	Referral (US)	Correspondence...	01.0.A00.GEN
insurance	Standard Insura...	Demographics	
blankdrawing	Empty Docutain...	Drawings	anatomical ima
Imm	Immunizations, ...	Flow Sheets	01.0.A00.GEN
Hypertension, 5...	Hypertension, 5...	Flow Sheets	08.0.K00.CIR,
coumadinkly	Coumadin	Flow Sheets	coumadin, kly
akcoum	Coumadin flow s...	Flow Sheets	02.0.B00.HEM
COPD	COPD (Flow she...	Flow Sheets	06.0.R00.RES
hm	Standard Health...	Health Maintena...	
Sodium	Serum Sodium	Labs	01.1.T00.MET,
Microalbumin	Microalbumin	Labs	01.1.T00.MET,
INR	INR (obsolete)	Labs	docuplate, inr,
INR	INR	Labs	08.0.K00.CIR,
INR + Protime	INR + Protime	Labs	08.0.K00.CIR,
Chol	Cholesterol	Labs	01.1.T00.MET,
Ua with micro	Urine Exam	Labs	00.0.U00.URO
BUN	Blood Urea Nitro...	Labs	01.1.T00.MET,
CMP	CMP	Labs	01.1.T.MET, C
CBC	Complete Blood...	Labs	02.0.B00.HEM
Memo	Standard Memo	Memo	
Message	Empty Message	Messages	
soap	Empty SOAPNote	SOAP Notes	
refillrequest	Phone call refill r...	SOAP Notes	01.0.A00.GEN
SOAPDPL	SOAP Default PL...	SOAP Notes	91201, Defau
PhaNG	Pharyngitis or S...	SOAP Notes	06.0.R00.RES,
PhaC	Pharyngitis or S...	SOAP Notes	06.0.R00.RFS

☐ Include Online Library Items Insert

In the screenshot above, the Location column header has been clicked. In this case, it sorted the list of docuplates into Labs and SOAPNotes. Presently, over 95% of docuplates are one of the following types, with over 90% being of the type SOAPNotes.

1. Drawings
2. Flow Sheets
3. Labs
4. SOAPnotes

## Docuplate Actions

At the top of the List view, above the list, are the control buttons for Docuplates. They are Edit, Add, and Remove the currently selected Docuplate.

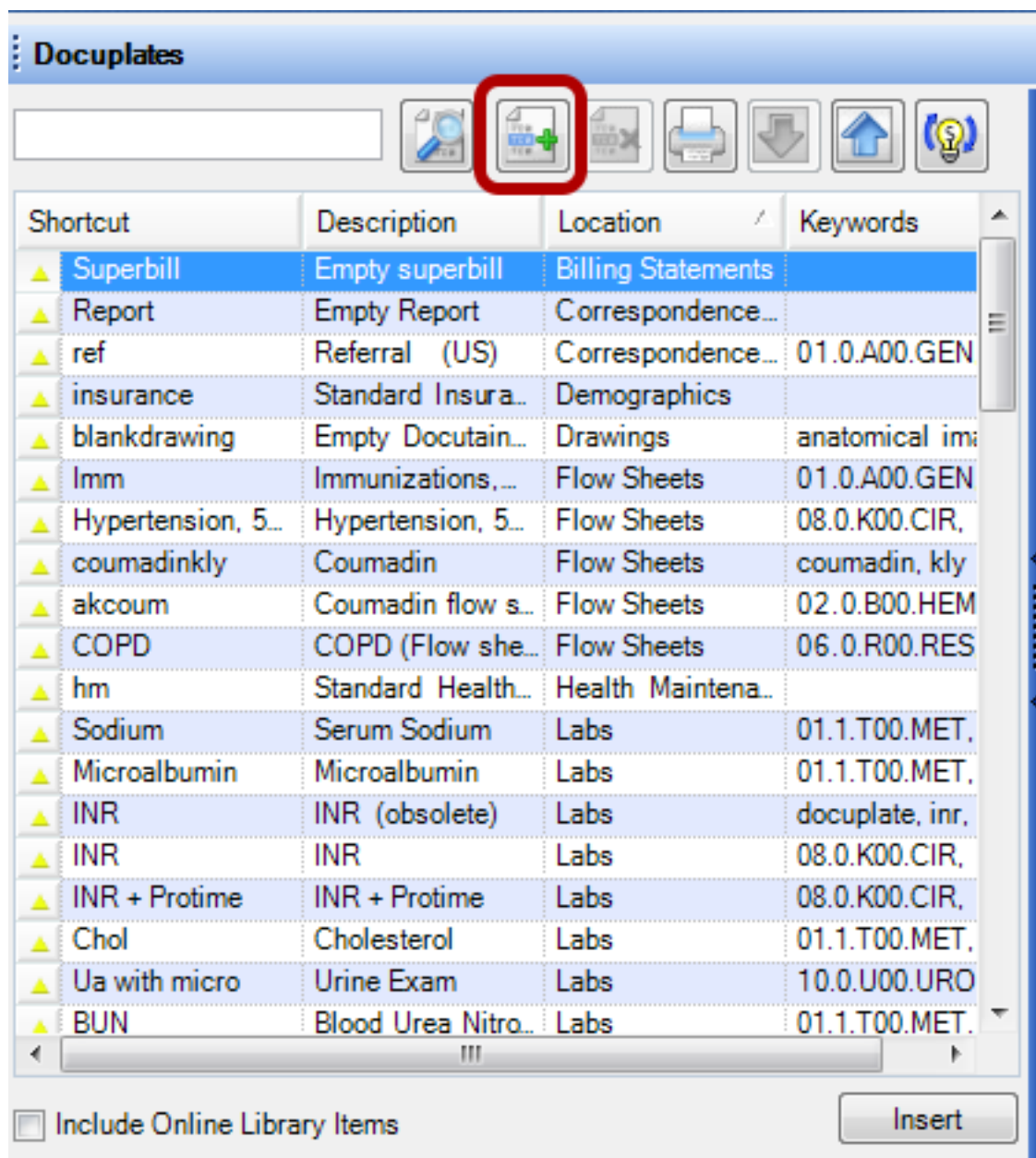
### Edit

The screenshot displays the 'Docuplates' application interface. On the left is a list of docuplates with columns for Shortcut, Description, Location, and Keywords. The 'Superbill' docuplate is selected. On the right is an edit window for the 'Superbill' docuplate. This window includes fields for Shortcut, Description, Keywords, and Section. Below these fields are tabs for 'Assessment' and 'Misc. Info'. The 'Assessment' tab is active, showing a table with columns for Description, CPT, Diagnoses, and Modifiers. The 'Notes' section is also visible at the bottom of the edit window.

Shortcut	Description	Location	Keywords
Superbill	Empty superbill	Billing Statements	
Report	Empty Report	Correspondence...	
ref	Referral (US)	Correspondence...	01.0.A00.GEN
insurance	Standard Insura...	Demographics	
blankdrawing	Empty Docutain...	Drawings	anatomical im...
Imm	Immunizations,...	Flow Sheets	01.0.A00.GEN
Hypertension, 5...	Hypertension, 5...	Flow Sheets	08.0.K00.CIR,
coumadinkly	Coumadin	Flow Sheets	coumadin, kly
akcoum	Coumadin flow s...	Flow Sheets	02.0.B00.HEM
COPD	COPD (Flow she...	Flow Sheets	06.0.R00.RES
hm	Standard Health...	Health Maintena...	
Sodium	Serum Sodium	Labs	01.1.T00.MET,
Microalbumin	Microalbumin	Labs	01.1.T00.MET,
INR	INR (obsolete)	Labs	docuplate, inr,
INR	INR	Labs	08.0.K00.CIR,
INR + Protime	INR + Protime	Labs	08.0.K00.CIR,
Chol	Cholesterol	Labs	01.1.T00.MET,
Ua with micro	Urine Exam	Labs	10.0.U00.URO
BUN	Blood Urea Nitro...	Labs	01.1.T00.MET,
CMP	CMP	Labs	01.1.T.MET, C
CBC	Complete Blood...	Labs	02.0.B00.HEM
Memo	Standard Memo	Memo	
Message	Empty Message	Messages	
soap	Empty SOAPNote	SOAP Notes	
refillrequest	Phone call refill r...	SOAP Notes	01.0.A00.GEN
SOAPDPL	SOAP Default Pl...	SOAP Notes	091201, Defau
PhaNG	Pharyngitis or S...	SOAP Notes	06.0.R00.RES,
PhaC	Pharyngitis or S...	SOAP Notes	06.0.R00.RFS,

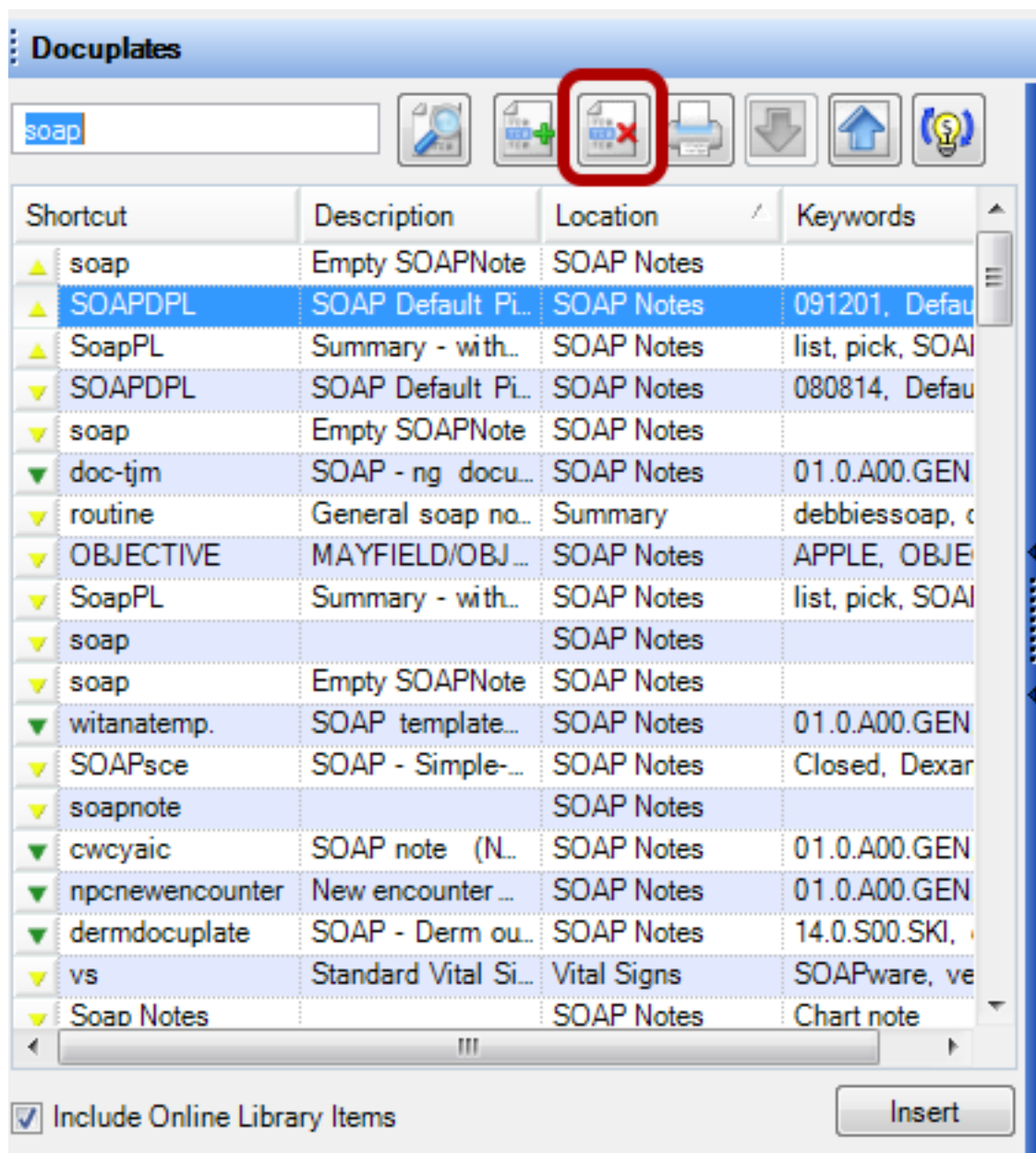
Selecting a docuplate on your local library opens the Docuplate for editing. The window to the right provides a preview of any docuplate selected once the docuplate has been downloaded. In this window, you can edit the docuplate and the changes will be auto-saved.

## Add Button



The button with the green plus allows users to create a docuplate from what has been created in a patient's chart.

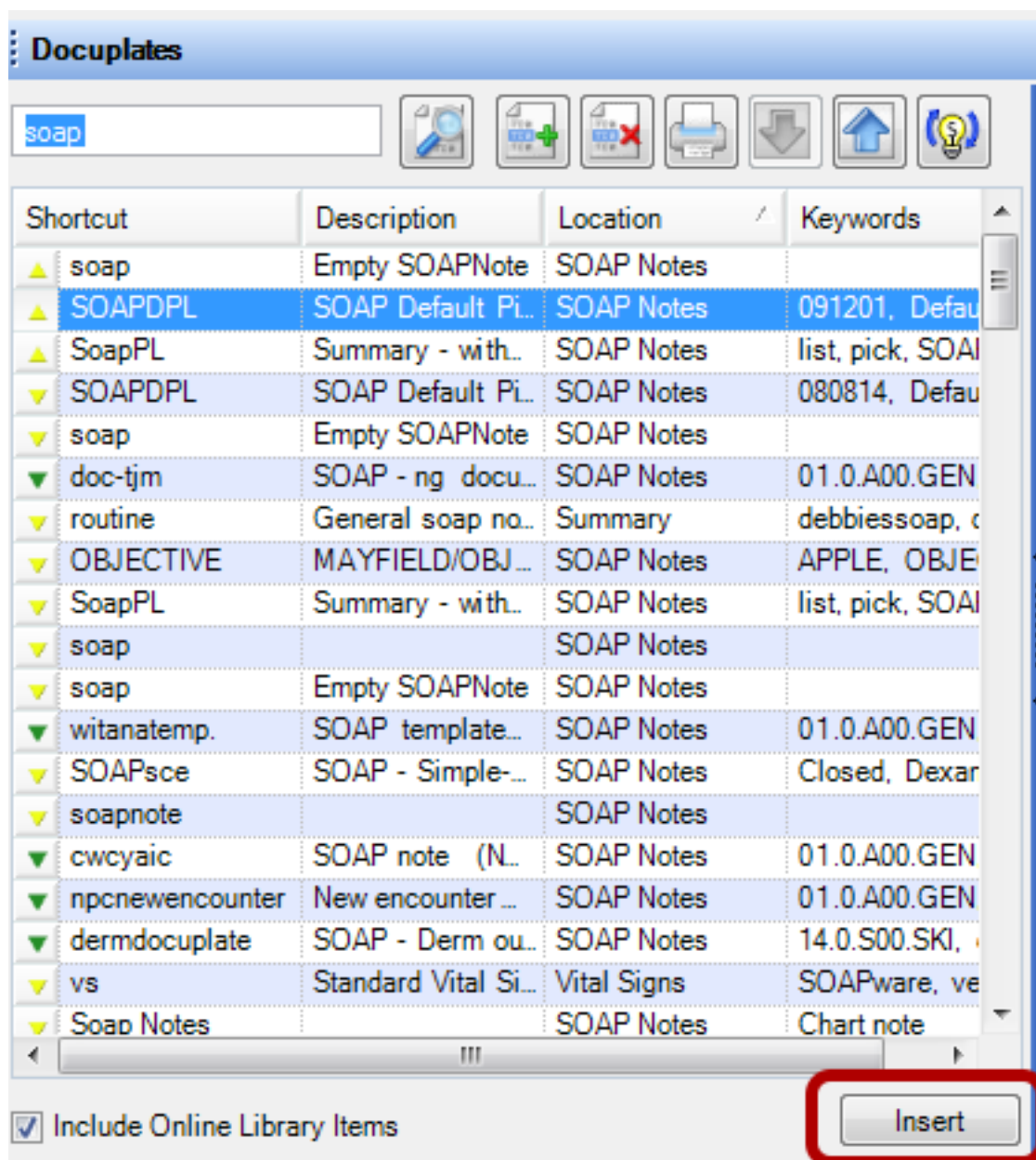
## Remove Button



To remove a docuplate from your local library, you can use the Remove Docuplate button.



## Insert Button



When selecting a docuplate and then Clicking Insert, the selected docuplate will be inserted in the active chart section of an open patient's chart.

## Docuplate Information

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### Shortcut

Shortcut	SOAPDPL
Description	SOAP Default Pick List - 091201
Keywords	SOAP, Default, Pick, List, 091201
Section	SOAP Notes

The Shortcut is a short code that can be typed to immediately add a Docuplate to a Document.

### Description

Shortcut	SOAPDPL
Description	SOAP Default Pick List - 091201
Keywords	SOAP, Default, Pick, List, 091201
Section	SOAP Notes

The Description provides a brief explanation of the intended use of the Docuplate.

### Keywords List

Shortcut	SOAPDPL
Description	SOAP Default Pick List - 091201
Keywords	SOAP, Default, Pick, List, 091201
Section	SOAP Notes

The Keywords list is a list of comma and space-separated keywords associated with that Docuplate. They can be used to provide additional searchable information about a Docuplate. Short phrases can also be used, provided they do not include commas or other punctuation. Spaces are allowed.



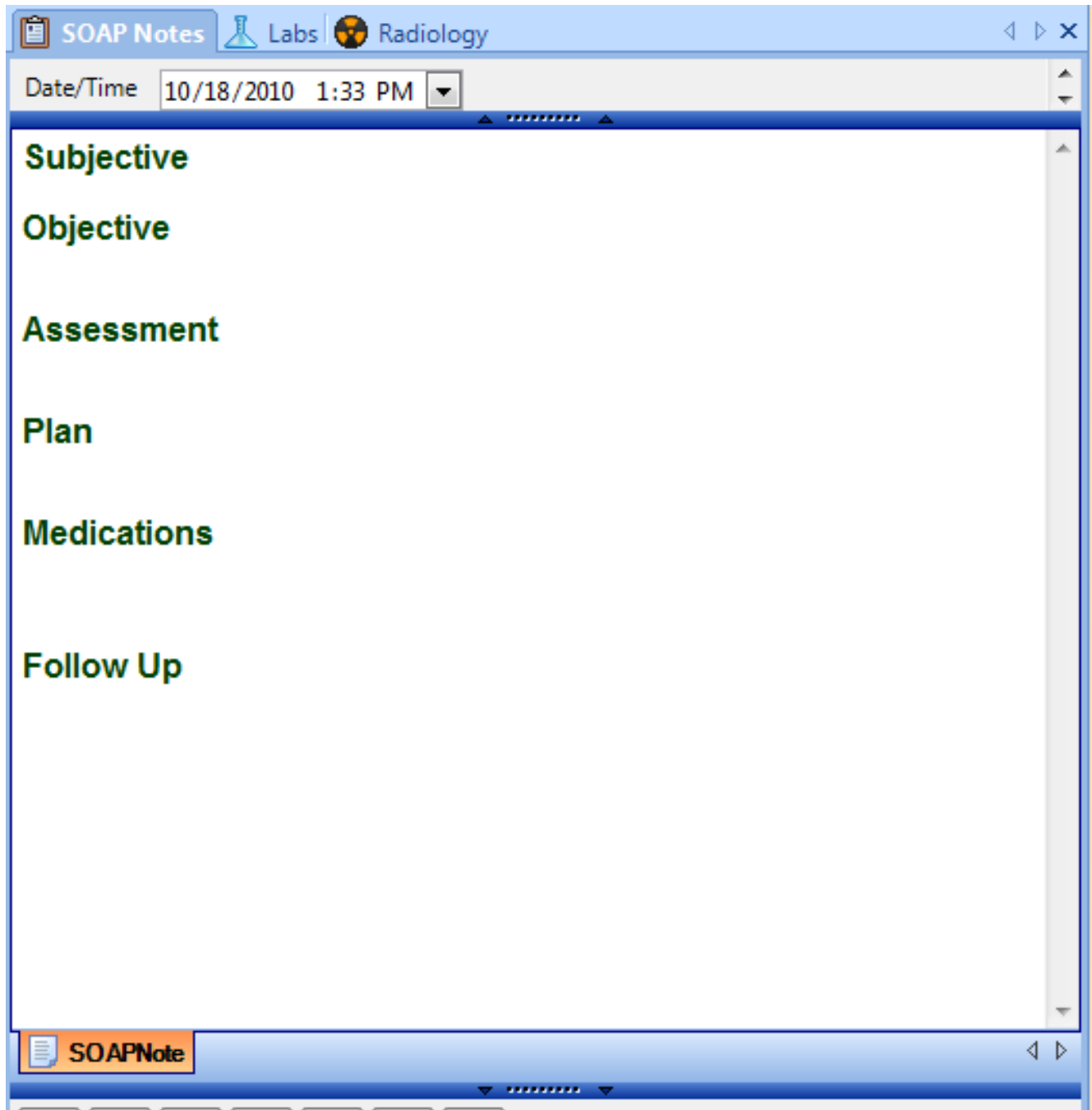
## Creating a Docuplate

---

Docuplates may be created either from scratch, or by using an existing docuplate and then edited or modified.

This lesson will explain how to create a docuplate using an existing docuplate, how to delete a docuplate, and how to build a docuplate from scratch.


### Create a Docuplate from an Existing Docuplate



The screenshot shows a software window titled "SOAP Notes" with tabs for "Labs" and "Radiology". Below the tabs is a "Date/Time" field showing "10/18/2010 1:33 PM". The main area of the window is a large text box divided into sections by bold green headers: "Subjective", "Objective", "Assessment", "Plan", "Medications", and "Follow Up". At the bottom of the window is a blue bar with a "SOAPNote" tab and navigation arrows.

Begin with an empty document in a test patient chart. To clear out the contents of a SOAPnote, Select Edit > Clear All SOAP Fields.


**Docuplates**

2 influenza 3 

No docuplate is currently s

Shortcut	Description	Location	Keywords
▲ InfC	Influenza (Comp...	SOAP Notes	06.0.R00.RE
▲ InfNG	Influenza (NG+...	SOAP Notes	06.0.R00.RE
▼ Influenza	Influenza	Labs	06.0.R00.RE
▼ cbinfluenza	Influenza Injectio...	SOAP Notes	cbinfluenza,
▼ fs08	Flu Shot 2008 (...)	SOAP Notes	01.0.A00.GE
▼ InfPro	Influenza, protoc...	SOAP Notes	06.0.R00.RE
▼ flu	Flu or Influenza...	SOAP Notes	06.0.R00.RE
▼ labflu	Lab - Influenza T...	Labs	Influenza, La
▼ flue vaccine	Flu vaccination n...	SOAP Notes	01.0.A00.GE
▼ InfProNP	Influenza - Proto...	SOAP Notes	06.0.R00.RE
▼ flumistprot	Flumist vaccinati...	SOAP Notes	01.0.A00.GE
▼ compflu	Influenza vaccin...	SOAP Notes	01.0.A00.GE
▼ Culture-Influenz...	Culture-Influenz...	Labs	06.0.R00.RE
▼ InfNG	Influenza (NG+...	SOAP Notes	06.0.R00.RE
▼ InfVac	Influenza Vaccin...	SOAP Notes	01.0.A00.GE
▼ Influenzatoggles	Influenza toggle...	SOAP Notes	01.0.A00.GE
▼ tvinfl	Influenza and re...	SOAP Notes	06.0.R00.RE
▼ npinf	NP - Influenza (...)	SOAP Notes	06.0.R00.RE
▼ InfC	Influenza (Comp...	SOAP Notes	06.0.R00.RE
▼ flumc	Influenza vaccin...	SOAP Notes	01.0.A00.GE
▼ flu	Influenza, brief (...)	SOAP Notes	06.0.R00.RE

☒ Include Online Library Items Insert

1  Available Document Designs Docuplates Chart Navigator Tasks Chart Rack

To insert an existing docuplate:

1. Open the Docuplates dialog. Click on the Docuplates docked tab at the bottom of the screen, Select Docutainers > Docuplates from the Menu Bar, or Press F6 on your keyboard.
2. Insert a keyword to find a desired docuplate.
3. Click Search.

**Docuplates**

influenza

Shortcut: InfNG  
Description: Influenza (NG++++)  
Keywords: R00, 06.0.R00.RES, 090128, generatio  
Section: SOAP Notes

Shortcut	Description	Location	Keywords
InfC	Influenza (Comp...	SOAP Notes	06.0.R00.RE
<b>InfNG</b>	<b>Influenza (NG+...</b>	<b>SOAP Notes</b>	<b>06.0.R00.RE</b>
influenza	influenza	Labs	06.0.R00.RE
cbinfluenza	Influenza Injectio...	SOAP Notes	cbinfluenza,
fs08	Flu Shot 2008 (...)	SOAP Notes	01.0.A00.GE
InfPro	Influenza, protoc...	SOAP Notes	06.0.R00.RE
flu	Flu or Influenza...	SOAP Notes	06.0.R00.RE
labflu	Lab - Influenza T...	Labs	Influenza, L
flue vaccine	Flu vaccination n...	SOAP Notes	01.0.A00.GE
InfProNP	Influenza - Proto...	SOAP Notes	06.0.R00.RE
flumistprot	Flumist vaccinati...	SOAP Notes	01.0.A00.GE
compflu	Influenza vaccin...	SOAP Notes	01.0.A00.GE
Culture-Influenz...	Culture-Influenz...	Labs	06.0.R00.RE
InfNG	Influenza (NG+...	SOAP Notes	06.0.R00.RE
InfVac	Influenza Vaccin...	SOAP Notes	01.0.A00.GE
Influenzatoggles	Influenza toggle...	SOAP Notes	01.0.A00.GE
tvinfl	Influenza and re...	SOAP Notes	06.0.R00.R
npinf	NP - Influenza (...)	SOAP Notes	06.0.R00.R
InfC	Influenza (Comp...	SOAP Notes	06.0.R00.R
flumc	Influenza vaccin...	SOAP Notes	01.0.A00.G
flu	Influenza, brief (...)	SOAP Notes	06.0.R00.R

**Subjective**  
COMPLAINT or ISSUE - Influenza.  
HPI: SYMPTOMS/RELATED: Reports symptoms of fever, Denies symptoms of +++++ cough | diarrhea | rhinorrhea | sore throat |  
QUALITY/COURSE: Reports condition is continuous, pers Denies, in general, +++++  
INTENSITY/SEVERITY: Reports measurement ( or degree Declines to define as

**Insert docuplate**  
 Inserts the selected docuplates to their default area.  
 You can drag/drop an item if you want it to be inserted in a different area.  
 ? Press F1 key to get more information

☒ Include Online Library Items

SOAPNote

Click to highlight the desired docuplate, and Click the "Insert" button .

SOAP Notes   Labs   Radiology

Date/Time 10/18/2010 1:33 PM

**Subjective**

COMPLAINT or ISSUE - Influenza.

HPI: SYMPTOMS/RELATED: Reports symptoms of  
Denies symptoms of  
 +++++ cough | diarrhea | rhinorrhea | sore throat | fatigue  
 (malaise or lethargy) | fever | muscle pain | headache |

QUALITY/COURSE: Reports condition is  
Denies, in general,  
 +++++ continuous | persisting | improving | unchanged |  
 worsening |

INTENSITY/SEVERITY: Reports measurement ( or degree) as  
 +++++ mild | moderate | severe | unremarkable |

ONSET/TIMING: Reports occurrence as sudden.  
Denies onset as  
 +++++ gradual | < 48 hours ago | > 48 hours ago | < 1 week  
 ago | > 1 week ago |

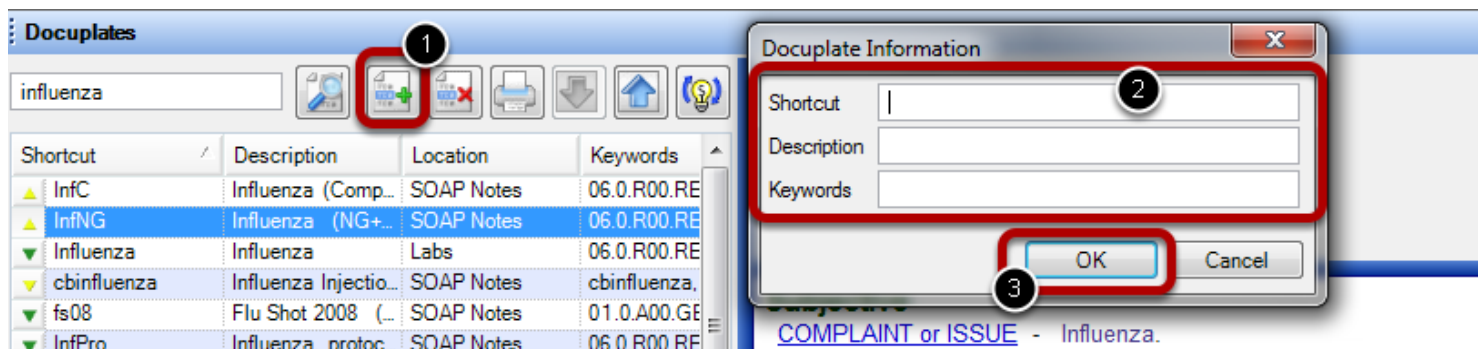
CONTEXT/WHEN: Reports usually associated with  
Denies association with  
 +++++ activity | smokers in home | irritant exposure  
 (smoke/dust/fumes) |

MODIFIERS/TREATMENTS: Improved by

SOAPNote

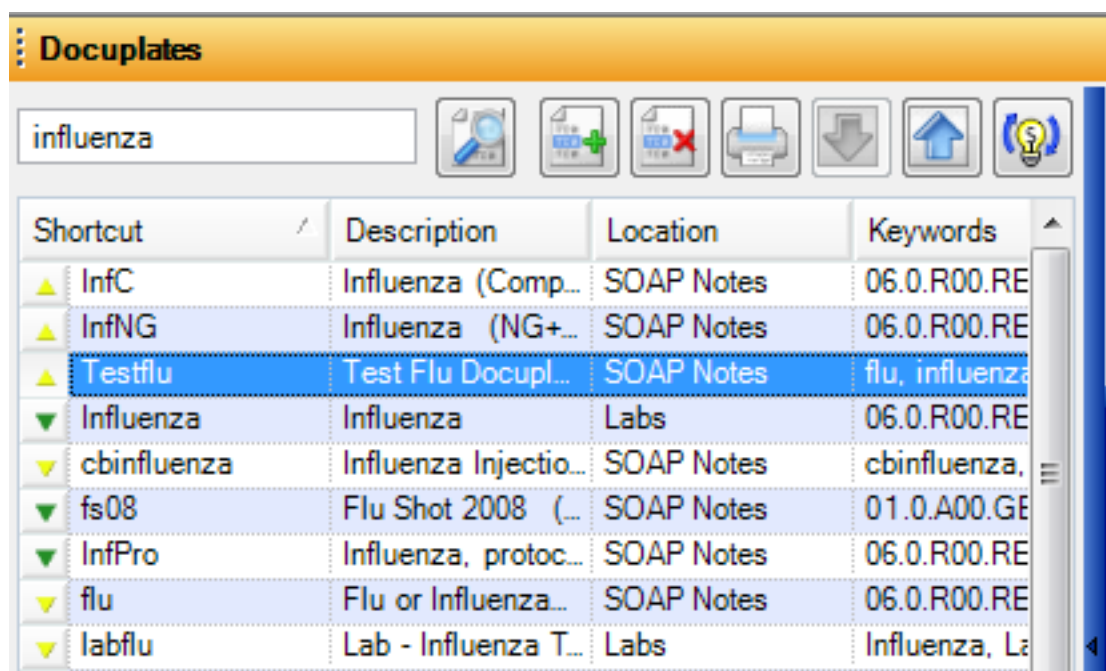
The selected docuplate will now be displayed in the desired chart section.

Edit the docuplate by entering or removing information as needed.



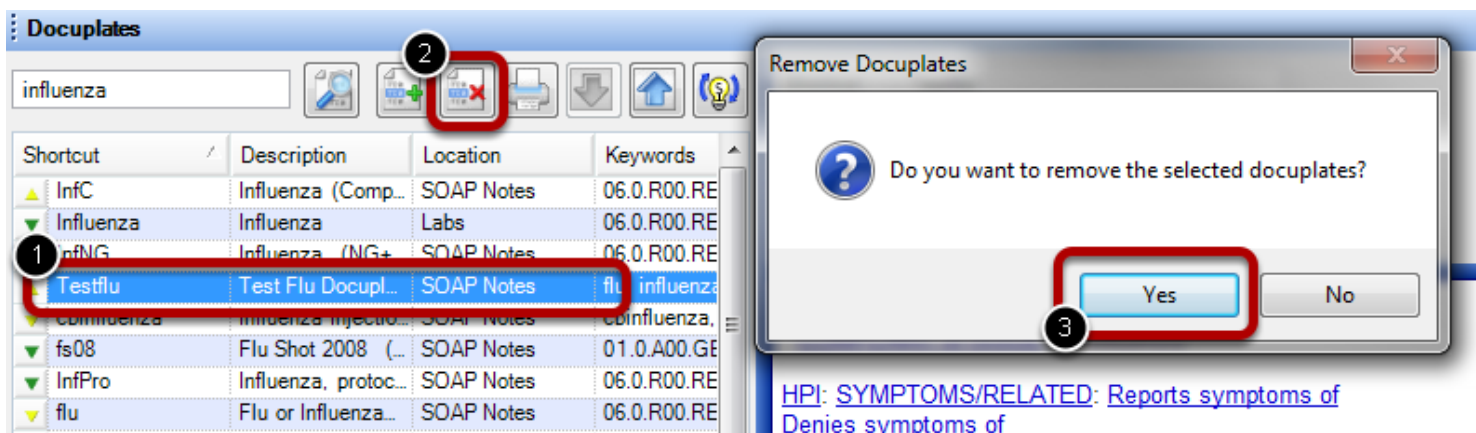
To save this as a new docuplate , be sure your cursor is active in the preferred chart section, and Open the Docuplates dialog. ( Use F6 or Click the Docuplates docked tab).

1. Click on the Green + to create the new docuplate.
2. Enter a Shortcut, Description and Keywords in the Docuplate Information dialog.
3. Select OK.



The new docuplate will display, as well as the original docuplate, within the Docuplates dialog.

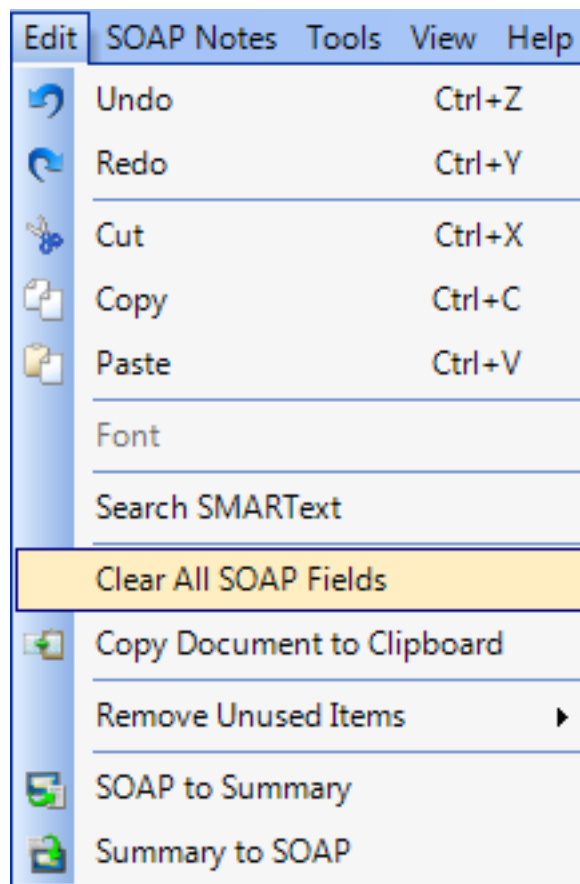
## Delete a Docuplate



To delete a docuplate:

1. Highlight the desired docuplate.
2. Click the delete button.
3. Confirm the action of removing the selected docuplate by Clicking the "Yes" button.

## Create a Docuplate from Scratch



To create a docuplate without using an existing docuplate, begin with an empty document in a test patient chart. Select Edit > Clear All SOAP Fields, from the Menu Bar.

SOAP Notes   Labs   Radiology

Date/Time 10/19/2010 1:00 PM

**Subjective**  
[Phone Call](#)

**Objective**

**Assessment**  
Phone Call: Refill Request

**Plan**  
[Answer for Refill Request](#)

**Medications**  
[Ibuprofen \(Motrin\)](#): 400 mg (tablet) [SIG-](#) 1 each 3 times a day  
Quantity- #30 Tablet(s) Refills- [\[PRN\]](#) Notes-

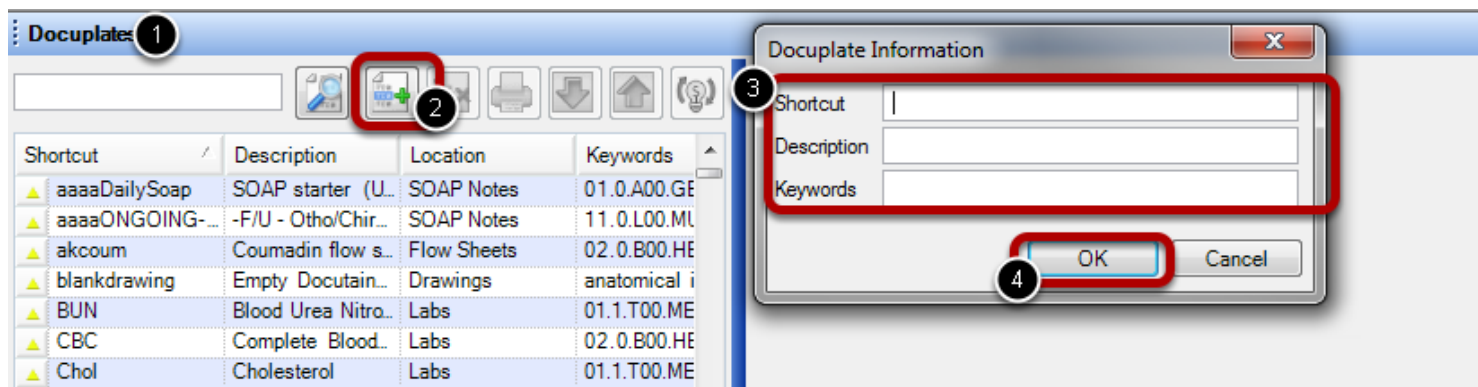
**Follow Up**

SOAPNote

Enter desired information in the SOAPnote. Docuplates may contain Free Text, SMARText, and Pick Lists.

Add the desired document items to be displayed in the docuplate. Docuplates may contain Free Text, SMARText, and Pick Lists.





To save the docuplate:

1. Open the Docuplates dialog. ( Use F6 or Click the Docuplates docked tab).
2. Click on the green + to create a new docuplate.
3. Enter a Shortcut, Description and Keywords in the Docuplate Information dialog.
4. Click OK .



## Inserting a Docuplate

### Open Document

The screenshot shows a web-based application window titled "SOAP Notes". The window has a blue header bar with three tabs: "SOAP Notes" (active), "Radiology", and "Correspondence In". Below the header is a "Date/Time" field showing "06/16/2010 9:27 AM". The main content area is a large white box with a vertical scrollbar on the right. It contains a template for a SOAP note with the following sections, each in green text: "Subjective", "Objective", "Assessment", "Plan", "Medications", and "Follow Up". The "Subjective" section has a green cursor at the end of the line. At the bottom of the window is a blue footer bar with a "SOAPNote" button on the left and navigation arrows on the right.

To insert a Docuplate, open the Document to insert the Docuplate. In a SOAPnote, clear out the default docuplate to insert an all-new docuplate. To do this, go to Edit > Clear All SOAP Fields.

If a blank document is not available, a prompt will display with several options on how to insert the docuplate.

## Search and Insert

**Active Problems**

- Neck Pain or Cervicalgia ICD#723.1
- Degenerative Disc Disease ICD#722.6
- Gastroesophageal reflux disease or GERD ICD#530.81
- Hypertension - Benign ICD#401.1
- Hypertension - Benign ICD#401.1 (possible)

**Inactive Problems**

- Chronic obstructive pulmonary disease ICD#496

**Docuplates**

Shortcut	Description	Location	Keywords
work status 2	work status 2	***Unknown***	itg
itgwetprelab	Wet Prep	Labs	itg, lab, prep, w
testresultsx	Test Results Do...	SOAP Notes	ITG, lab, result
genericmessage...	Generic Phone...	SOAP Notes	01.0.A00.GEN
rdh&p	History and Phy...	SOAP Notes	duong, history,
refillrequest	Phone call refill r...	SOAP Notes	01.0.A00.GEN
injectionitg	Injection, nurse (...)	SOAP Notes	01.0.A00.GEN
starterdefault	Starter Default D...	SOAP Notes	default, itg, sta
injectionitg	Injection docupla...	SOAP Notes	immunization,
testresultsx	Test Results Do...	SOAP Notes	ITG, lab, result
sonetest	Dr. Sondheimer...	SOAP Notes	itg, sondheime
refillrequest	Phone call refill r...	SOAP Notes	01.0.A00.GEN
buchananintialvi...	Buchanan Intial...	SOAP Notes	01.0.A00.GEN
schleefest	Schleef	SOAP Notes	itg, jamie, rita,
injectionitg	Injection, nurse (...)	SOAP Notes	01.0.A00.GEN
injectionitg	Injection, nurse (...)	SOAP Notes	01.0.A00.GEN
injectionitg	Injection docupla...	SOAP Notes	immunization,
rao	Rena O'Dell, L.P.	SOAP Notes	itg, O'Dell, ren
starterdefault2	Starter Default D...	SOAP Notes	default, itg, sta
saganintialintake	Well adult, intial i...	SOAP Notes	01.0.A00.GEN
starterdefault2	Starter Default D...	SOAP Notes	default, itg, starter
yimsh&p	1/5/2010 YIMS...	SOAP Notes	h&P, itg, jaure
refillrequest	Phone call refill r...	SOAP Notes	01.0.A00.GEN
starterdefault2	Starter Default D...	SOAP Notes	default, itg, sta
Dr. A Default	Starter Default D...	SOAP Notes	default, dra, itg
referralitg	Referral	SOAP Notes	01.0.A.GEN, 0

**SOAP Notes**

Date/Time: 06/16/2010 9:27 AM

**Subjective**

**Objective**

**Assessment**

**Subjective**

**CHIEF COMPLAINT(S)/REASON FOR VISIT:**

**HPI: SYMPTOMS/RELATED:** Reports symptoms of

**ONSET/TIMING:**

**QUALITY/COURSE:**

**MODIFIERS/TREATMENTS:** Has tried

**PROBLEM #2:**

**COMPLAINT or ISSUE:**

**HPI: SYMPTOMS/RELATED:** Reports symptoms of

**ONSET/TIMING:**

**QUALITY/COURSE:**

**MODIFIERS/TREATMENTS:** Has tried

**ROS: GEN- Constitutional:**

**HENT:**

**EYES:**

**LUNGS/Respiratory:**

**HEART/Cardiovascular:**

**ABD/Gastrointestinal:**

**GENT/Genitourinary:**

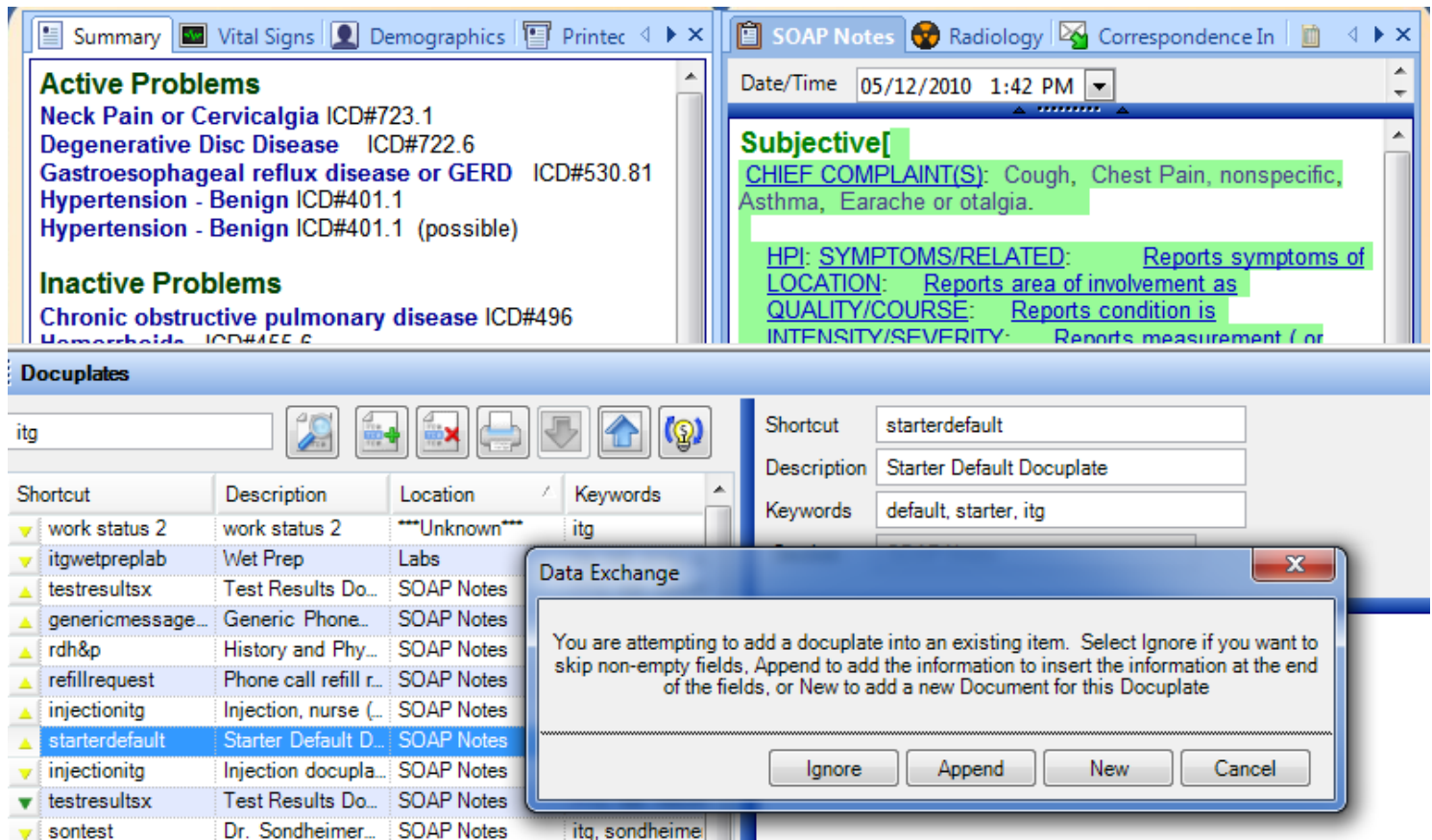
**Musculoskeletal (BJE):**

**NEURO/Neurological:**

**PSYCH/Psychiatric:**

1. Open the Docuplates panel using the Docked Tab, or press F6.
2. Then, select the Docuplate(s) to insert from the list.
3. Click the Insert button.

## If the Document is Not Empty



If the document is not empty when inserting the docuplate, a prompt will display with several options on how to insert the docuplate..

**Ignore** to not insert any docuplate information into any SOAPnote fields that already have content.

**Append** to add the docuplate information after any existing content in SOAPnote fields.

**New** to create a new, empty/blank SOAPnote next to the existing one. This could be useful if seeing the patient for a sore throat and a workman's comp appointment at the same visit.

**Cancel** to exit the dialog and not perform any information insertion into the SOAPnote.

## Editing a Docuplate

### Search

**Docuplates**

Search: starter

Buttons: [Search] [Add] [Delete] [Print] [Download] [Up] [Help]

Shortcut	Description	Location	Keywords
EMCs	Starter (E&M C...	SOAP Notes	2008+, coding
StaD	Starter For Docu...	SOAP Notes	090227, 2008+
StaE	Starter - Extend...	SOAP Notes	090210, 2008+
starterdefault	Starter Default D...	SOAP Notes	default, itg, sta
Sta	Start - Routine o...	SOAP Notes	090226, 2008+
Sta2	Start #2 (NG+...	SOAP Notes	090225, 2008+
StaO	StaO - Starter O...	SOAP Notes	090222, 2008+
gyns	Gynecology, Sta...	SOAP Notes	Gynecology, S
Sta2	Start #2 (NG+...	SOAP Notes	090225, 2008+
gyns	Gynecology, Sta...	SOAP Notes	Gynecology, S
msoap	StaO - Starter O...	SOAP Notes	090222, 2008+
cwcyaic	SOAP note (N...	SOAP Notes	01.0.A00.GEN
dermdocuplate	SOAP - Derm ou...	SOAP Notes	14.0.S00.SKI,
cwcsoapnote	SOAP template ...	SOAP Notes	01.0.A00.GEN
starterdefault2	Starter Default D...	SOAP Notes	default, itg, sta
basesoap	Basic Soapnote	SOAP Notes	05042010, bas
jcr basic	SOAP starter, g...	SOAP Notes	01.0.A00.GEN
Sta2	Start #2 (NG+...	SOAP Notes	090225, 2008+
EMCo	Starter Outline (...)	SOAP Notes	2008+, Coding
starterdefault2	Starter Default D...	SOAP Notes	default, itg, sta
blank2	Soap-blank with...	SOAP Notes	blank, eab, sch
Sta2	Start #2 (NG+...	SOAP Notes	090225, 2008+
Gen Allergy - cw...	Allergy, new (N...	SOAP Notes	090702, exten
cwcmaster1	SOAP master (...)	SOAP Notes	01.0.A00.GEN
starterdefault2	Starter Default D...	SOAP Notes	default, itg, sta
GynSta	Well adult, femal...	SOAP Notes	01.0.A00.GEN
Dr. A Default	Starter Default D...	SOAP Notes	default, dra, itg
basesoap	basic soapnote s...	SOAP Notes	2, basic, buc, s
copyag	SOAP starter (...)	SOAP Notes	01.0.A00.GEN

☒ Include Online Library Items Insert

**Shortcut:** starterdefault

**Description:** Starter Default Docuplate

**Keywords:** itg, starter, default

**Section:** SOAP Notes

**Subjective**

**CHIEF COMPLAINT(S)/REASON FOR VISIT:**  
**HPI: SYMPTOMS/RELATED:** Reports symptoms of  
**ONSET/TIMING:**  
**QUALITY/COURSE:**  
**MODIFIERS/TREATMENTS:** Has tried

**PROBLEM #2:**  
**COMPLAINT or ISSUE:**  
**HPI: SYMPTOMS/RELATED:** Reports symptoms of  
**ONSET/TIMING:**  
**QUALITY/COURSE:**  
**MODIFIERS/TREATMENTS:** Has tried

**ROS: GEN- Constitutional:**  
**HENT:**  
**EYES:**  
**LUNGS/Respiratory:**  
**HEART/Cardiovascular:**  
**ABD/Gastrointestinal:**  
**GEN/Genitourinary:**  
**Musculoskeletal (BJE):**  
**NEURO/Neurological:**  
**PSYCH/Psychiatric:**

**Objective**

**Exam: GENERAL:** Appearance: General appearance can be

**SOAPNote**

Click Docutainers in the menu bar, and Click Docuplates (or Press the F6 key).

When the Docuplates viewer appears, Type a shortcut or keyword in the Search field/box that is associated with the desired docuplate. Only single words can be entered into the Search field/box. Then, Click the search button.

## Search Results

Shortcut	Description	Location	Keywords
▲ EMCs	Starter (E&M Coding) 02-25-2...	SOAP Notes	2008+, coding, E&M, emcs, starter
▲ StaD	Starter For Docuplates (NG++...	SOAP Notes	090227, 2008+, Docuplates, NG++++, StaD
▲ StaE	Starter - Extended (NG) 02-10...	SOAP Notes	090210, 2008+, extended, ng, StaE, starter
▲ starterdefault	Starter Default Docuplate	SOAP Notes	default, itg, starter
▲ Sta	Start - Routine or Default (NG...	SOAP Notes	090226, 2008+, Default, emc, NG++++, Routine...
▲ Sta2	Start #2 (NG++++)	SOAP Notes	090225, 2008+, emc, NG++++, Sta2, Starter
▲ StaO	StaO - Starter Outline (2-22-...	SOAP Notes	090222, 2008+, Outline, StaO, Starter
▼ gys	Gynecology, Starter	SOAP Notes	Gynecology, Starter, Txxg
▼ Sta2	Start #2 (NG++++)	SOAP Notes	090225, 2008+, emc, NG++++, Sta2, Starter
▼ gys	Gynecology, Starter	SOAP Notes	Gynecology, Starter, Txxg
▼ msoap	StaO - Starter Outline (2-22-...	SOAP Notes	090222, 2008+, Outline, StaO, Starter
▼ cwcyaic	SOAP note (NG+++ ) YAIC	SOAP Notes	01.0.A00.GEN, A00, cwc.note, NG+++ , soap, st...
▼ dermdocuplate	SOAP - Derm outline (NG+++)	SOAP Notes	14.0.S00.SKI, dcox, derm, NG+++ , S00, soap, s...
▼ cwcsoapnote	SOAP template (NG - Starter)	SOAP Notes	01.0.A00.GEN, A00, cwc, NG, soapnote, starter...
▼ starterdefault2	Starter Default Docuplate	SOAP Notes	default, itg, starter

Docuplates having matching keywords will be list items in the area below the Search field/box on the left side of the Docuplates viewer.



## Edit Using the Preview Window

The screenshot shows a software window titled "SOAPNote" with a "Preview Window" on the right. The main editing area on the left contains the following text:

Shortcut: starterdefault  
Description: Starter Default Docuplate  
Keywords: itg, starter, default  
Section: SOAP Notes

**Subjective**  
CHIEF COMPLAINT(S)/REASON FOR VISIT:  
HPI: SYMPTOMS/RELATED: Reports symptoms of  
ONSET/TIMING:  
QUALITY/COURSE:  
MODIFIERS/TREATMENTS: Has tried

PROBLEM #2:  
COMPLAINT or ISSUE:  
HPI: SYMPTOMS/RELATED: Reports symptoms of  
ONSET/TIMING:  
QUALITY/COURSE:  
MODIFIERS/TREATMENTS: Has tried

ROS: GEN- Constitutional:  
HENT:  
EYES:  
LUNGS/Respiratory:  
HEART/Cardiovascular:  
ABD/Gastrointestinal:  
GENT/Genitourinary:  
Musculoskeletal (BJE):  
NEURO/Neurological:  
PSYCH/Psychiatric:

**Objective**  
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed,

The "Preview Window" on the right displays the rendered HTML of the above text, with all underlined text appearing as blue hyperlinks. A red rectangular border highlights the entire "Preview Window" area.

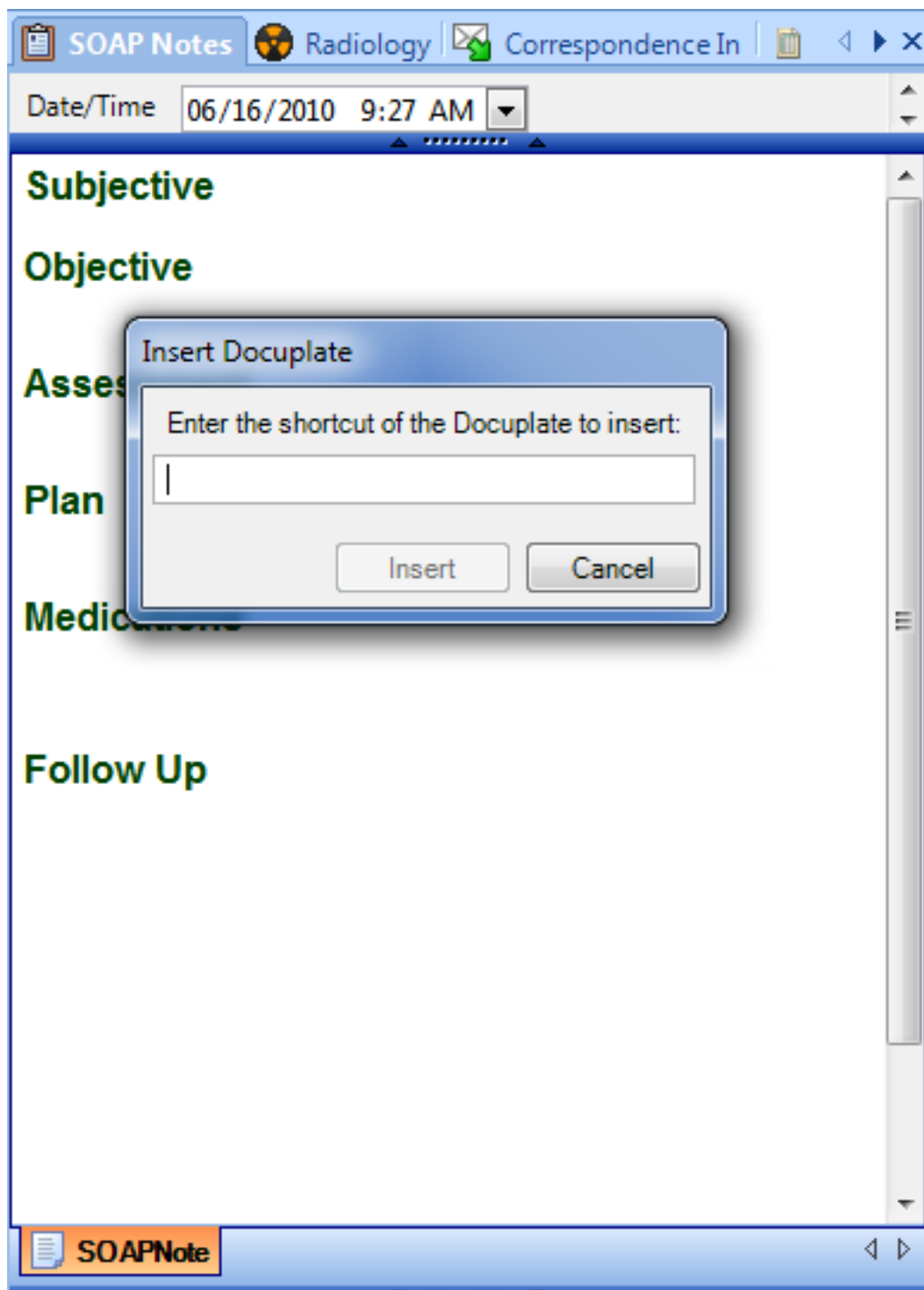
Click the docuplate list item for the desired docuplate, and the docuplate is displayed on the right side of the Docuplates viewer. Edit the docuplate's data elements as needed.

## **Autosave**

The information within the docuplate is always, automatically saved without having to issue a save command. There is no save button. Simply Clicking anywhere outside of the Docuplates viewer or viewing another docuplate causes any edits to be saved automatically.

## F5 Quick Entry of a Docuplate

### Quick Entry



For those docuplates used on a regular basis, any SOAPware users find it convenient to use a keyboard shortcut to enter those most commonly-used - Press the F5 key, and type the Shortcut for the docuplate.

Then, Click the Insert button, or Press the Enter key to insert the docuplate. If you know the shortcut to










a docuplate, this is the fastest method to enter the docuplate in a document.

## Search for Docuplates

The Docuplate Library now contains thousands of docuplates, containing tens of thousands of keywords to assist with searching-finding. SOAPnote docuplates reviewed by SOAPware, Inc. have often had some qualifiers added to their descriptions. SOAPware docuplates vary in sophistication from those containing only unstructured, free-text to those that contain mostly structured items. To reflect this, a convention is being followed to assist with ranking, sorting, and retrieving.

### Continuum of Unstructured (US) to New Generation (NG)

Docuplates			
<input type="text" value="influenza"/>       			
Shortcut	Description	Location	Keywords
▲ InfNG	Influenza (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, emc
▲ InfC	Influenza (Compressed) (NG++++)	SOAP Notes	06.0.R00.RES, 090626, 2008+, cor
▼ Influenza	Influenza	Labs	06.0.R00.RES, Influenza, lab, NWMC
▼ cbinfluenza	Influenza Injection Template	SOAP Notes	cbinfluenza, flulot, influenza, injectio
▼ fs08	Flu Shot 2008 (NG+++)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, 2008
▼ InfPro	Influenza, protocol from v4 (US)	SOAP Notes	06.0.R00.RES, influenza, nurse, pra
▼ flu	Flu or Influenza Template (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, eab,
▼ labflu	Lab - Influenza Test	Labs	Influenza, Lab, Test
▼ flue vaccine	Flu vaccination note (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ InfProNP	Influenza - Protocol (US) NP	SOAP Notes	06.0.R00.RES, Influenza, NP, R00
▼ flumistprot	Flumist vaccination (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ compflu	Influenza vaccination (US/NG)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ Culture-Influenz...	Culture-Influenza A	Labs	06.0.R00.RES, 730, Culture-Influenz
▼ InfNG	Influenza (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, emc
▼ InfVac	Influenza Vaccine (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ Influenzatoggles	Influenza toggle docuplate (NG+++ - for de...	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ tvinfl	Influenza and respiratory inf (NG++)	SOAP Notes	06.0.R00.RES, flu, influenza, NG++,
▼ npinf	NP - Influenza (US)	SOAP Notes	06.0.R00.RES, Influenza, R00
▼ InfC	Influenza (Compressed) (NG++++)	SOAP Notes	06.0.R00.RES, 090626, 2008+, cor
▼ flumc	Influenza vaccine, Medicare (NG/US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ flu	Influenza, brief (US)	SOAP Notes	06.0.R00.RES, flu, influenza, R00
▼ Influenza A & B	Influenza A & B	Labs	06.0.R00.RES, A & B, Influenza, lab
▼ 1in vac	Influenza vaccine given	SOAP Notes	given, Influenza, Txx1, vaccine
▼ Flu Preferred	Influenza and respiratory inf (NG++)	SOAP Notes	06.0.R00.RES, flu, influenza, NG++,
▼ InfNG	Influenza (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, emc
▼ cberi	Upper Respiratory Infection	SOAP Notes	cberi, influenza, uri
▼ A: RAPID INFLU...	Influenza A / B, rapid	Labs	06.0.R00.RES, A, B, INFLUENZA, li
▼ jevflu	vickery influenza	SOAP Notes	flu, influenza, jev, Txxj, vickery--
▼ FR FLU SYNDR...	Influenza visit (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ STEVEN INFLU...	Influenza, minimal (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,
▼ fluprot	Flu shot (US)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, A00,

☒ Include Online Library Items Insert

(US) – Unstructured, free-text.

(US/NG) – Mostly unstructured, but some New Generation structured items are included.

(NG/US) – Mostly New Generation, structured content, but much unstructured, free-text is present.

(NG) – Mostly New Generation, but often highly customized to a specific user or user type.

(NG+) - Mostly New Generation, but some free-text is present.

(NG++) - Less free-text.

(NG+++) - Little remaining, free-text.

(NG++++) - Majority of content is New Generation.

**Note:** Most official SOAP encounter docuplates are those with green triangles retrieved by searching on NG++++. Also, notice that searching on NG+++ will retrieve docuplates having keywords containing NG++++ as well as NG+++.








### Retrieve Docuplates Based on Organ System

Codes	17 Systems Categories
<b>A00</b>	General
<b>T00</b>	Metabolic, Endocrine
<b>B00</b>	Blood, Blood Forming
<b>H00</b>	Ear
<b>F00</b>	Eye
<b>R00</b>	Respiratory
<b>K00</b>	Circulatory
<b>D00</b>	Digestive
<b>U00</b>	Urinary
<b>W00</b>	Pregnancy, Family Planning
<b>X00</b>	Female genital
<b>Y00</b>	Male genital
<b>L00</b>	Musculoskeletal
<b>N00</b>	Neurological
<b>P00</b>	Psychological
<b>Z00</b>	Social
<b>S00</b>	Skin

Use one of these codes to review docuplates by one of 17 systems.

## Searching by System

**Docuplates**

Shortcut	Description	Location	Keywords
InfNG	Influenza (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, emc
PhaNG	Pharyngitis or Sore Throat (NG++++)	SOAP Notes	06.0.R00.RES, 090128, 2008+, emc
PhaC	Pharyngitis or Sore Throat (Compressed) ...	SOAP Notes	06.0.R00.RES, 090128, 2008+, com
hentj	ENT Problems (NG+++)	SOAP Notes	03.1.H00.EAR, 06.0.R00.RES, ear, ,
5 uri - sinus	Sinus problems (US)	SOAP Notes	06.0.R00.RES, 5, R00, sinus, uri
zast	Asthma protocol (US/NG)	SOAP Notes	06.0.R00.RES, asthma, protocol, R00
Bro	Bronchitis (US/NG)	SOAP Notes	06.0.R00.RES, bronchitis, CFP, R00
npresp	NP - Resp Protocol (US)	SOAP Notes	06.0.R00.RES, NP, Protocol, R00, R
2w/Koatemplate	Snoring-Seep Apnea (US)	SOAP Notes	06.0.R00.RES, 2w/Koatemplate, ap
npltb	NP - Laryngotracheobronchitis (croup) (US)	SOAP Notes	06.0.R00.RES, croup, Laryngotrach
jhassthm	Asthma- Peds Initial Evaluation (US)	SOAP Notes	06.0.R00.RES, asthma, pediatric, R0
fs08	Flu Shot 2008 (NG+++)	SOAP Notes	01.0.A00.GEN, 06.0.R00.RES, 2008
aanpffast	Respiratory/Asthma (US)	SOAP Notes	06.0.R00.RES, ASTHMA, COOK, P
FCFP	Cough (US)	SOAP Notes	06.0.R00.RES, COUGH, R00
zsin	Sinusitis (US/NG)	SOAP Notes	06.0.R00.RES, protocol, R00, sinusit
npbro	NP - Bronchitis (US)	SOAP Notes	06.0.R00.RES, Bronchitis, NP, R00
BronchitisN	Bronchitis ST (NG+++)	SOAP Notes	06.0.R00.RES, Bronchitis, NG+++ , R
cwcnotesob	Dyspnea (NG) cwc	SOAP Notes	06.0.R00.RES, copd, cough, cwc, d
hmeval2	Initial Eval Pulmonology (US)	SOAP Notes	06.0.R00.RES, hmeval2, pulmonary
ConStrep-1	Strep Throat (US)	SOAP Notes	06.0.R00.RES, GABHS, R00, strep
nptons	NP - Tonsillitis, strep (exudative) (US)	SOAP Notes	06.0.R00.RES, exudative, R00, strep
chestpainx	Chest pain, brief (US/NG)	SOAP Notes	06.0.R00.RES, 08.0.K00.CIR, 11.0.1
zc	Cough protocol (US/NG)	SOAP Notes	06.0.R00.RES, bronchitis, cough, R0
URlcrosby	URI (US) TC's	SOAP Notes	06.0.R00.RES, crosby, infection, R0
npast	NP - Asthma (US)	SOAP Notes	06.0.R00.RES, Asthma, NP, R00
jbepistaxis	Epistaxis, nosebleed (NG+++)	SOAP Notes	06.0.R00.RES, epistaxis, jbepistaxis
tsinNG	Sinusitis (NG++) tv's	SOAP Notes	06.0.R00.RES, NG++, R00, sin, sinu
FR LARYNGOM.	Laryngomalacia (US) KR's	SOAP Notes	06.0.R00.RES, LARYNGOMALACIA,
zcopd	COPD (US/NG)	SOAP Notes	06.0.R00.RES, copd, protocol, R00
.uri2	Upper resp infection (US)	SOAP Notes	.uri2.scw.witana, 06.0.R00.RES, 07
npbroc	NP - Bronchitis, chronic (US)	SOAP Notes	06.0.R00.RES, Bronchitis, chronic, M

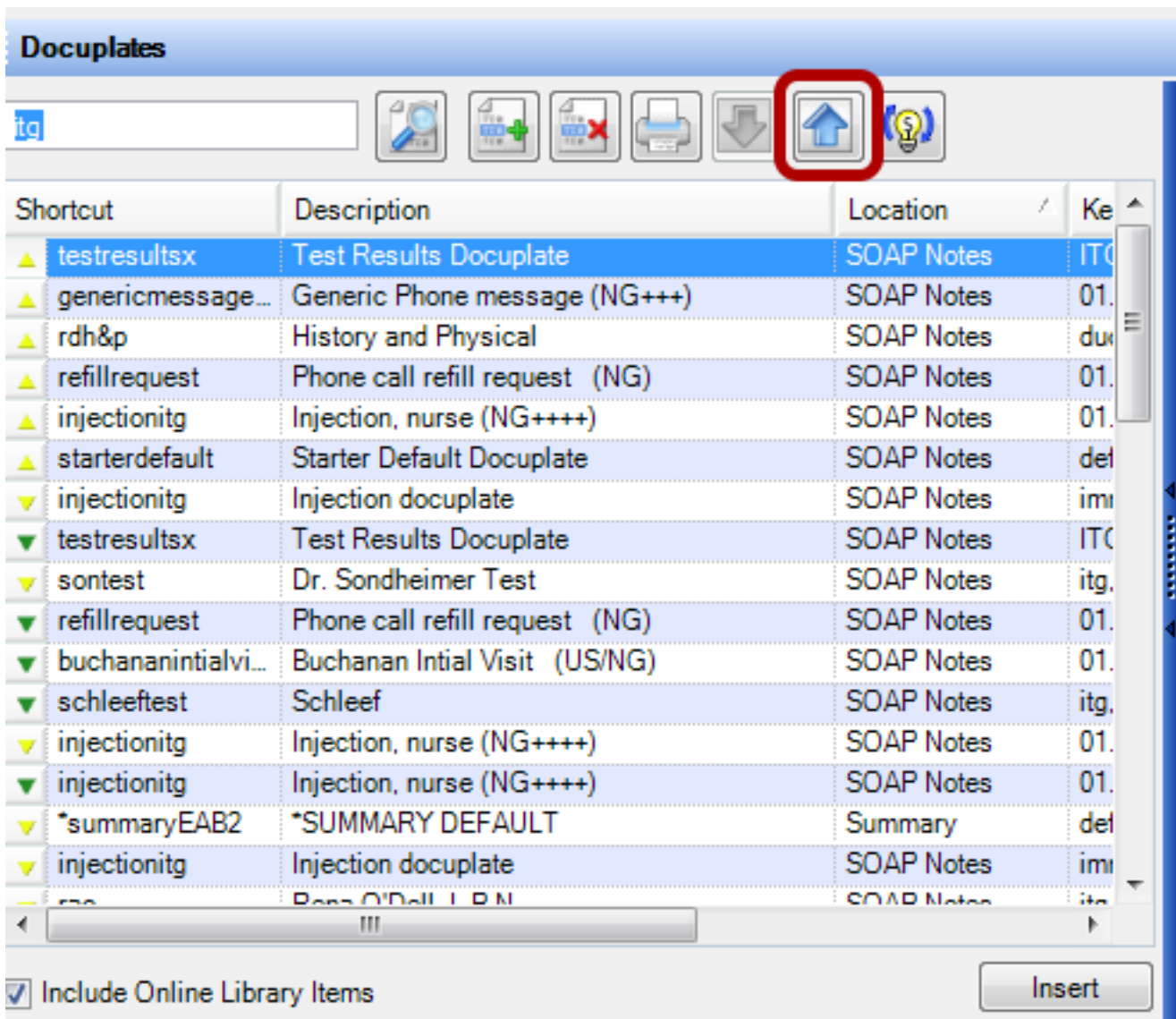
For example, a Pulmonologist or Allergist would like to only retrieve respiratory docuplates, search with R00 (R + zero + zero).

## Sharing and Downloading Docuplates

Checking the box to Include Online Library Items at the top of the Docuplates panel will expand your Docuplates list to include additional items available in the SOAPware Online Customizations Library.

Time saver Tip: Before creating a docuplate from scratch, it can be beneficial to review existing Library Items to see if another user has shared a docuplate that meets your needs, or can serve as a template from which to base your own customized docuplate. To help expand the Online Library content, please consider sharing your docuplate designs with the rest of the SOAPware community.

### Upload



The screenshot shows the 'Docuplates' panel in a software interface. At the top, there is a search bar with the text 'itg'. Below the search bar is a row of icons: a magnifying glass, a document with a green plus sign, a document with a red minus sign, a printer, a download arrow, an upload arrow (highlighted with a red circle), and a lightbulb. Below the icons is a table with four columns: 'Shortcut', 'Description', 'Location', and 'Key'. The table contains several rows of docuplates, including 'testresultsx', 'genericmessage...', 'rdh&p', 'refillrequest', 'injectionitg', 'starterdefault', and others. At the bottom of the panel, there is a checkbox labeled 'Include Online Library Items' which is checked, and an 'Insert' button.

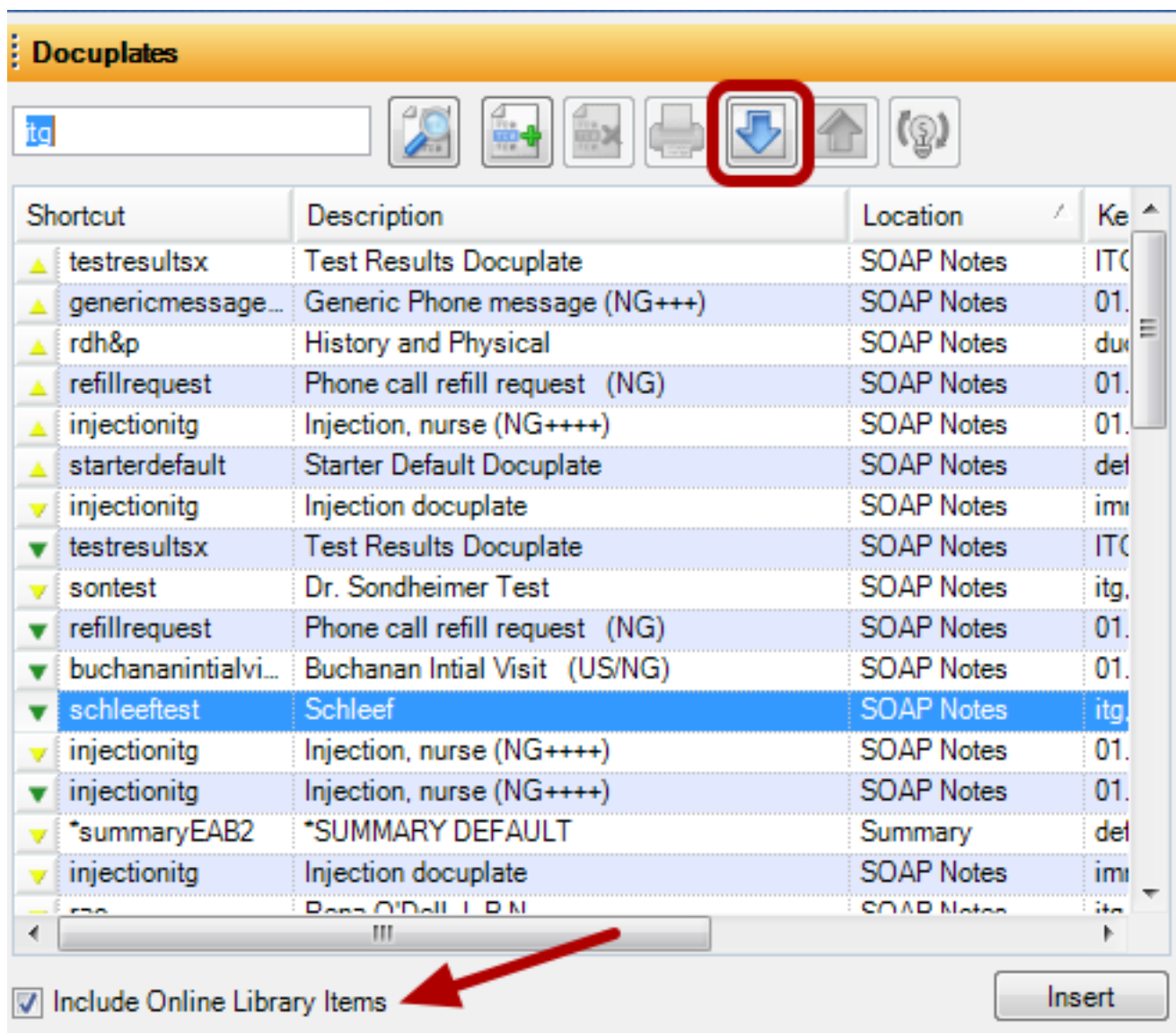
Shortcut	Description	Location	Key
testresultsx	Test Results Docuplate	SOAP Notes	ITC
genericmessage...	Generic Phone message (NG+++)	SOAP Notes	01.
rdh&p	History and Physical	SOAP Notes	du
refillrequest	Phone call refill request (NG)	SOAP Notes	01.
injectionitg	Injection, nurse (NG+++)	SOAP Notes	01.
starterdefault	Starter Default Docuplate	SOAP Notes	def
injectionitg	Injection docuplate	SOAP Notes	im
testresultsx	Test Results Docuplate	SOAP Notes	ITC
sontest	Dr. Sondheimer Test	SOAP Notes	itg.
refillrequest	Phone call refill request (NG)	SOAP Notes	01.
buchananintialvi...	Buchanan Intial Visit (US/NG)	SOAP Notes	01.
schleefest	Schleef	SOAP Notes	itg.
injectionitg	Injection, nurse (NG++++)	SOAP Notes	01.
injectionitg	Injection, nurse (NG++++)	SOAP Notes	01.
*summaryEAB2	*SUMMARY DEFAULT	Summary	def
injectionitg	Injection docuplate	SOAP Notes	im
...	...	...	...

☒ Include Online Library Items Insert

To share a docuplate, select the docuplate and Click the Upload button. It will be uploaded to the Online Library. Before sharing a docuplate, please make sure that no patient data is present in the docuplate.



## Download

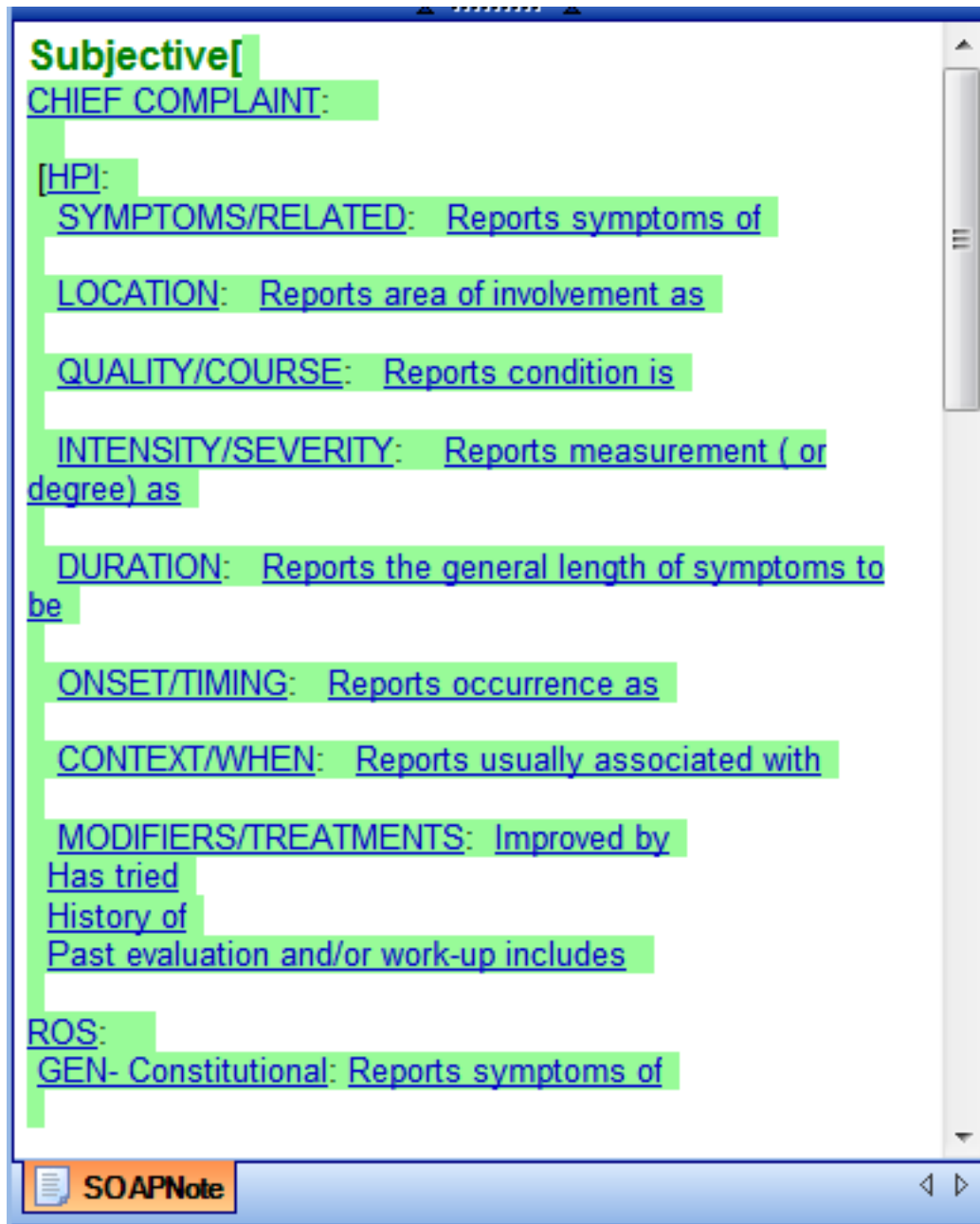


To download a docuplate, Click the Download button in the library column of the desired docuplate. Include Online Library Items must be checked in order to view and download online docuplates.

## Docuplate Toolkit - Getting Started with Your Own Documentation

The following segments introduce some more realistic items that may be used when creating documentation. Taking time to familiarize yourself with this feature by playing/practicing can help provide context, making further learning faster and easier.

### Starter Shortcuts



**Subjective**

CHIEF COMPLAINT:

[HPI:

SYMPTOMS/RELATED: Reports symptoms of

LOCATION: Reports area of involvement as

QUALITY/COURSE: Reports condition is

INTENSITY/SEVERITY: Reports measurement ( or degree) as

DURATION: Reports the general length of symptoms to be

ONSET/TIMING: Reports occurrence as

CONTEXT/WHEN: Reports usually associated with

MODIFIERS/TREATMENTS: Improved by  
Has tried  
History of  
Past evaluation and/or work-up includes

ROS:

GEN- Constitutional: Reports symptoms of

**SOAPNote**

Subjective: Sub-  
Objective: Obj-  
Plan Pla-  
Follow Up: Fol-

Active Problems:	Act+
Inactive Problems	Ina-
Surgeries	Sur-
Allergies	All-
Family History	Fam-
Tobacco	Tobmu
Alcohol	Alc-
Social History	Soc-

## Using Starters

To use these shortcuts, simply type the shortcut into the corresponding field, then press the spacebar. This will expand the shortcut.

**Note:** This guide is about getting started; the focus is on simple demonstration, not full support of comprehensive charting. These abbreviated terms are provided only to assist in getting started. *They are not comprehensive, and are not intended to contain all the items you will use.*

## Additional Starter Shortcuts

Subjective: Sub-, Sub--, Sub=, Subt, ROSX, ChiX, nexc, nextd and nexs  
 Objective: Obj-, Objs, Objn, ObjX, ObjX1c, ObjX1n and ObjHA  
 Plan: Pla-  
 Follow Up: Fol-



## Starter Docuplates

Docuplates				
2008+				
Shortcut	Description	Location	/	Ke
▼ InfC	Influenza (Compressed) (NG++++)	SOAP Notes		06.
▼ DM2	Diabetes - Type 2 (NG++++)	SOAP Notes		01.
▼ Sta2	Start #2 (NG++++)	SOAP Notes		09.
▼ Sta	Start - Routine or Default (NG++++)	SOAP Notes		09.
▼ IngToe	Ingrown Toenail (NG++++)	SOAP Notes		09.
▼ BacPaiNG	Back Pain (NG++++)	SOAP Notes		09.
▼ GasC	Gastroenteritis (Compressed) (NG++++)	SOAP Notes		09.
▼ UriC	Upper Respiratory Infection (Compressed)...	SOAP Notes		09.
▼ PhaNG	Pharyngitis or Sore Throat (NG++++)	SOAP Notes		06.
▼ dmeab3	Diabetic Visit Template (NG+++)	SOAP Notes		01.
▼ DysNG	Dysuria (NG) 02-19-2009	SOAP Notes		09.
▼ Uritsp	Upper Respiratory Infection (Compressed)...	SOAP Notes		09.
▼ InfNG	Influenza (NG++++)	SOAP Notes		06.
▼ DM2	Diabetes - Type 2 (6-9-2009)	SOAP Notes		2, .
▼ Sta2	Start #2 (NG++++)	SOAP Notes		09.
▼ DM2	Diabetes - Type 2 (6-9-2009)	SOAP Notes		2, .
▼ BacPaiC	Back pain (Compressed) (NG++++)	SOAP Notes		09.
▼ IngToe	Ingrown Toenail, custom (NG++++)	SOAP Notes		09.
▼ URlcustomA	URlcustomA - URI encounter form demo	SOAP Notes		09.
▼ uri	URI Template (NG++++)	SOAP Notes		09.
▼ GasC	Gastroenteritis (Compressed) (NG++++)	SOAP Notes		09.
▼ sthroat	Sore Throat Template (NG++++)	SOAP Notes		06.
▼ UriC	Upper Respiratory Infection (Compressed)...	SOAP Notes		09.
▼ Hea	Headache (NG++++)	SOAP Notes		09.
▼ GasC	Gastroenteritis (Compressed) (NG++++)	SOAP Notes		09.
▼ EMCs	Starter (E&M Coding) (NG++++)	SOAP Notes		09.

Click Docutainers in the menu bar, then Click Docuplates (or Press F6). In the Docuplates Viewer, Type 2008+ in the Search field/box, and Click the Search button.

### Additional Starters - Comparing New Generation Docuplates

PhaC - Pharyngitis or Sore Throat (Compressed)  
 GasC - Gastroenteritis (Compressed)  
 InfC - Influenza (Compressed)








URIC - URI - Upper Respiratory Infection (Compressed)  
DysC - Dysuria (Compressed) Female Cystitis  
IngToe - Ingrown Toenail (Compressed)

Click on the docuplate description to select-highlight, then Click the Download button. Even though many of these docuplates may be associated with disorders rarely/never treated in your practice, they may be useful in helping provide insight into complementary/alternative work flows.

PhaNG - Pharyngitis or Sore Throat (NG)  
GasNG - Gastroenteritis (NG)  
InfNG - Influenza (NG)  
URIC - URI - Upper Respiratory Infection (NG)  
DysC - Dysuria (NG) Female Cystitis  
IngToe - Ingrown Toenail (NG)

It may be helpful to reduce the complexity of a downloaded docuplate item. After inserting the NG docuplate/template, Press Control + F9 to perform a Remove Unused Items command. This will immediately simplify the docuplate/template encounter format, revealing the basic organization/framework suggested for the documentation process.

## General Purpose Starters

Docuplates				
sta				
				
				
Shortcut	Description	Location	Ke	
▼ MMST	Mini Mental Status Test (US)	SOAP Notes	12.	
▼ msoap	StaO - Starter Outline (2-22-2009)	SOAP Notes	09	
▼ Ovw	Obesity (NG++)	SOAP Notes	01.	
▲ Sta	Start - Routine or Default (NG++++)	SOAP Notes	09	
▼ Sta	Start - Routine or Default (NG++++)	SOAP Notes	09	
▲ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▼ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▼ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▼ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▼ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▼ Sta2	Start #2 (NG++++)	SOAP Notes	09	
▲ StaD	Starter For Docuplates (NG++++) 02-27-2...	SOAP Notes	09	
▼ StaD	Starter For Docuplates (NG++++) 02-27-2...	SOAP Notes	09	
▲ StaE	Starter - Extended (NG) 02-10-2009	SOAP Notes	09	
▲ StaO	StaO - Starter Outline (2-22-2009)	SOAP Notes	09	
▲ starterdefault	Starter Default Docuplate	SOAP Notes	def	
▼ starterdefault	Starter Default	SOAP Notes	def	
▼ starterdefault	Starter Default Docuplate (7/13/2009)	SOAP Notes	itg,	
▼ starterdefault2	Starter Default Docuplate	SOAP Notes	def	
▼ starterdefault2	Starter Default Docuplate	SOAP Notes	def	
▼ starterdefault2	Starter Default Docuplate	SOAP Notes	def	
▼ STATEMENT P...	STATEMENT PROCEDURE	SOAP Notes	PA	
▼ Sutures	Sutures/staples (US)	SOAP Notes	14.	
▼ suzigahlpt	Physical Therapy (NG)	SOAP Notes	NG	
▼ suzigahlpt	Physical Therapy (NG)	SOAP Notes	NG	
▼ UIRI-1	UIRI docuplate created from UIRIcustom	SOAP Notes	de	

Also download the docuplate/template that has "Sta" as a Shortcut and Start-Routine or Default as the Description. This can serve as a plain or generic starter for any type of encounter.

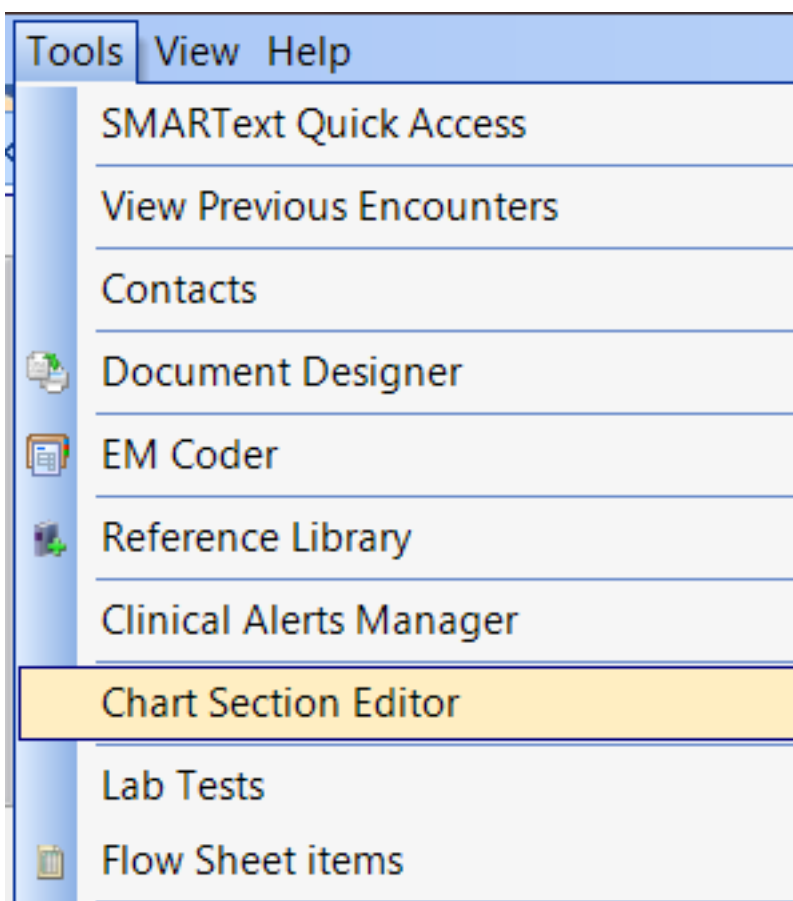
## Setting the Default Docuplate

---

Docuplates allow common sets of document items for various chart sections to be saved and reused later. This capability is particularly useful for documenting common conditions seen repeatedly. They are also great tools for implementing Best Practice Guidelines and more consistency in documentation.

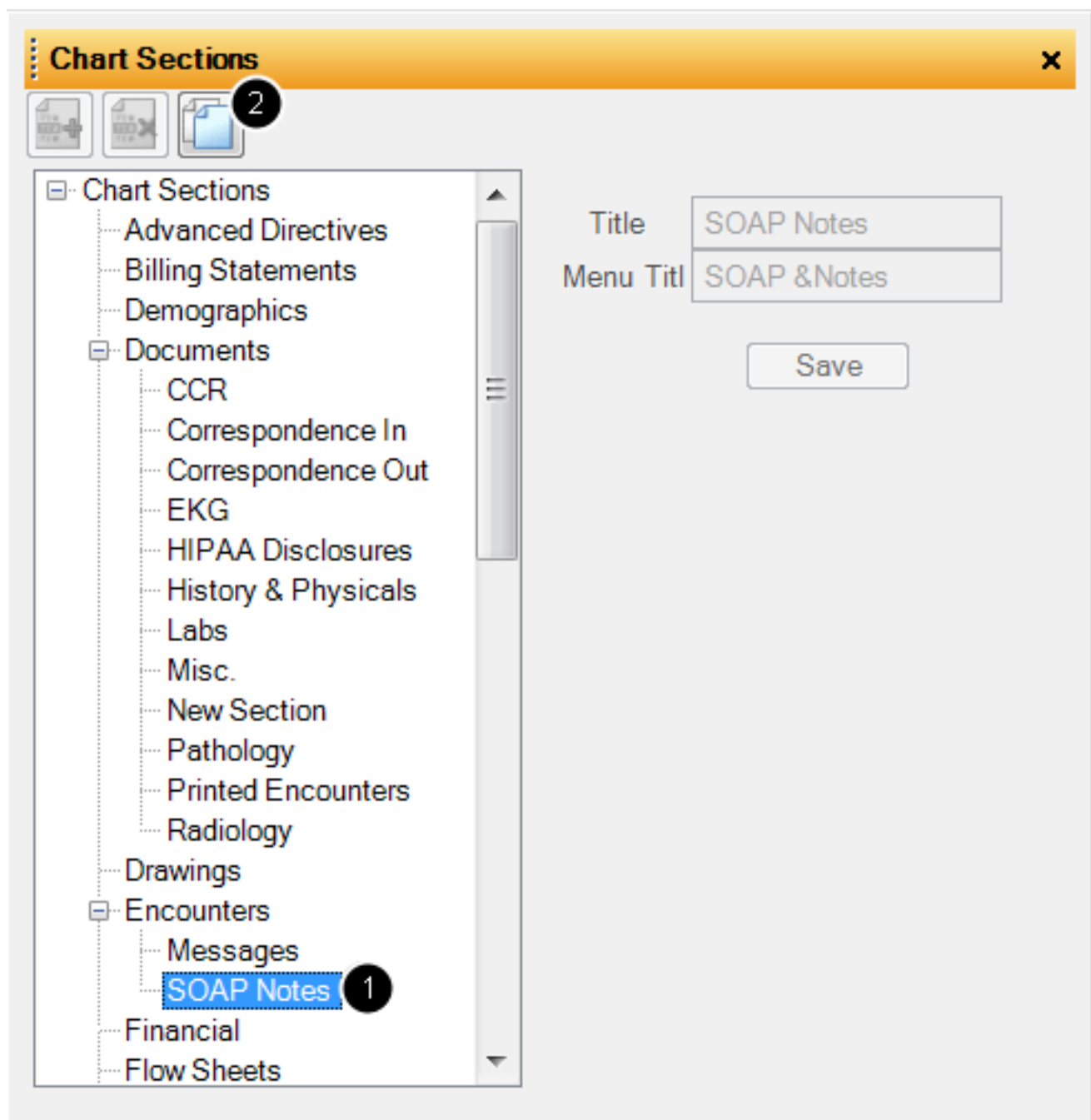
**NOTE:** The default SOAPnote docuplate when SOAPware is installed is for Getting Started or Introduction purposes only. It needs replacement once users have completed the initial Introduction to SOAPware.

### Open the Chart Section Editor



Click Tools > Chart Section Editor

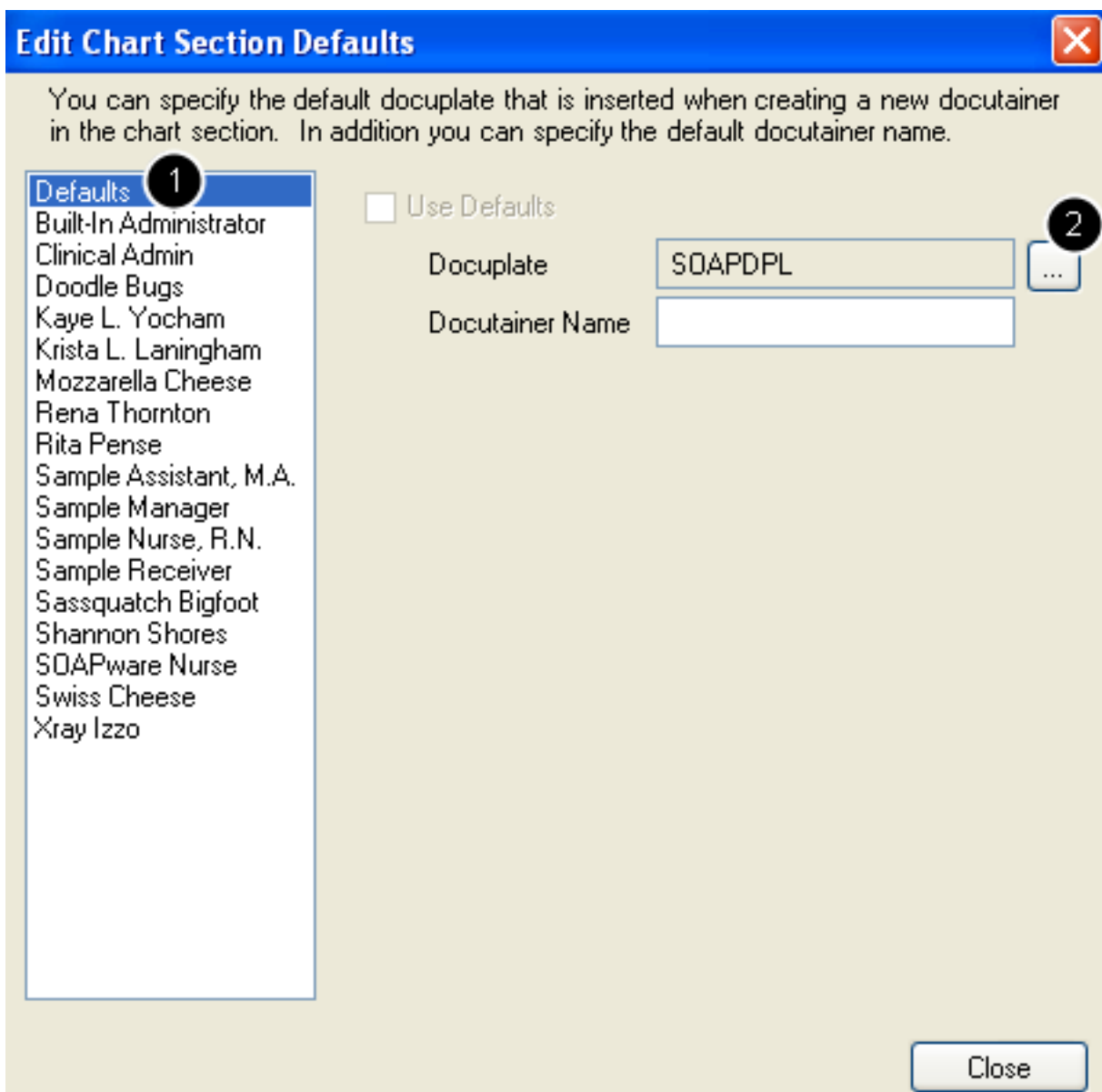
## Select the Chart Section



In order to select a chart section for editing

1. Click the chart section list item of choice.
2. Then, Click Edit Section Defaults.

## Set Defaults

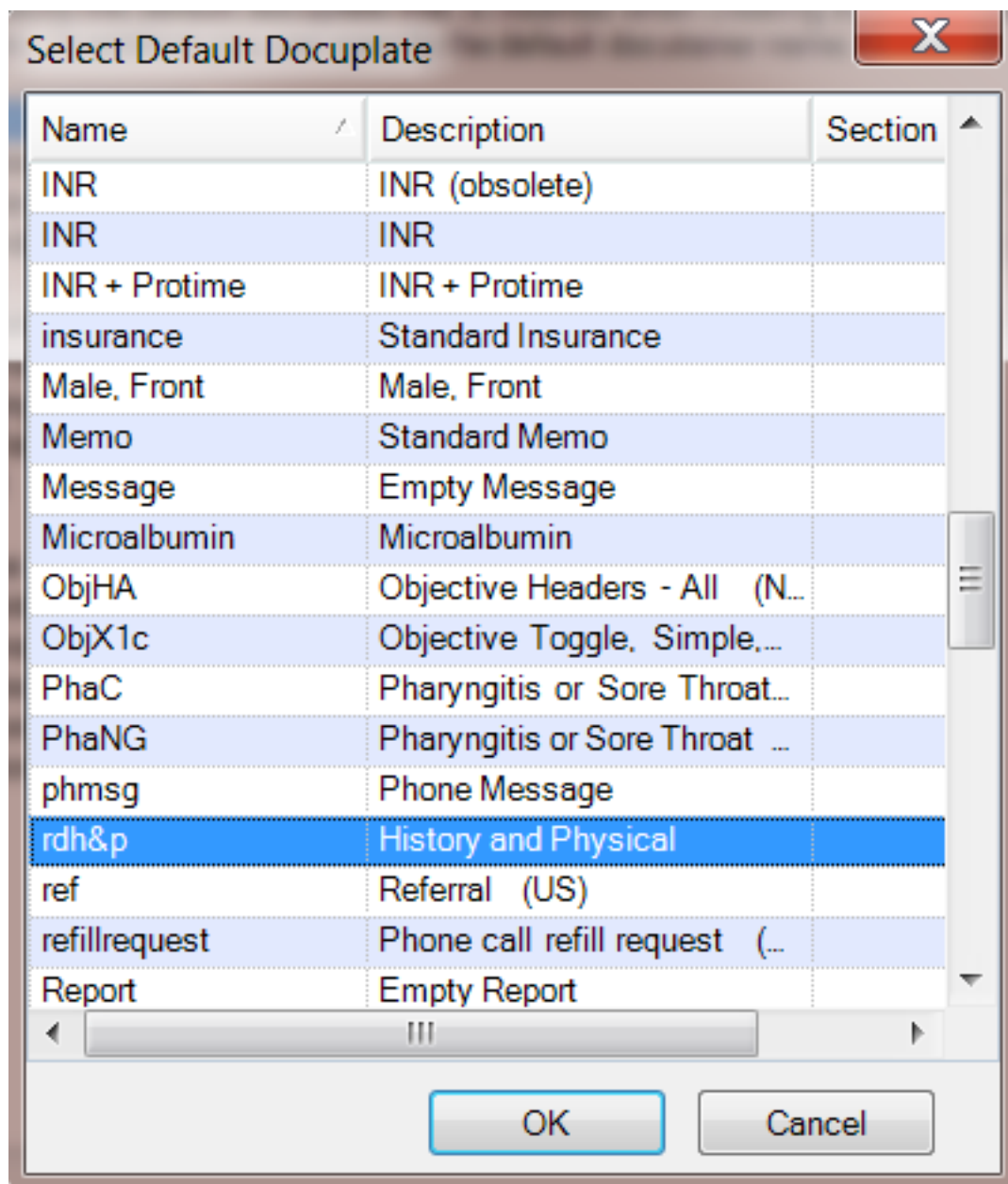


1. Click on the Defaults list item on the left to establish the default docuplates for the entire network (all users).

2. Click the Browse button to the right as shown in the screenshot above, to open Select Default Docuplates dialog.

**NOTE:** If you Click a User list item from the list, it is the route to establish the default docuplates for that user only.

## Select Docuplate



1. Click the docuplate name list item to select as a default, and then Click OK.
2. In the subsequent dialog, Click Close.
3. Exit and restart SOAPware to activate the changes.

# Docutainers



## Intro to Docutainers

---

Docutainers are document managers used to control the display and editing of groups of similar Documents, e.g. Encounters or Reports. Docutainers correspond to sections of a paper chart that contain different kinds of patient information, similar to having separate folders inside a chart for encounter notes, x-rays, lab results, and other information.

The Docutainer List section exists in each Chart Section. It is located below the main docutainer viewer and is separated from the docutainer by a horizontal Splitter Bar.

## Functionality

1 SOAP Notes Radiology Correspondence In Flow Sheets

Date/Time 07/02/2009 9:29 AM

Owner Default Provider

Status

Description burn

Related Dx

2 **Objective**

COMPLAINT or ISSUE - Influenza.

HPI: SYMPTOMS/RELATED: Reports symptoms of fever, headache, fatigue (malaise or lethargy), muscle pain.

QUALITY/COURSE: Reports condition is continuous, persisting.

INTENSITY/SEVERITY: Reports measurement ( or degree) as moderate.

ONSET/TIMING: Reports occurrence as sudden.

ROS: LUNGS/Respiratory: Denies symptoms such as sputum/phlegm production that is purulent.

**Objective**

Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

HEAD/EARS/NOSE/THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.

SOAPNote

3

Drag a column header here to group by that column.

Date/Time	Owner	Status	Description
5/12/2010 1:42:33 PM	Krista L. Laningham		Hypertension, benign ICD
4/29/2010 8:37:58 AM	Kaye L. Yocham		
4/19/2010 11:47:39 AM	Kaye L. Yocham		
9/3/2009 8:38:56 AM			Neoplasms of unspecified
7/2/2009 9:29:26 AM			burn
6/8/2009 1:04:20 PM			Hypertension ICD#401.9
2/13/2005 1:16:38 PM			Chronic obstructive pulmo

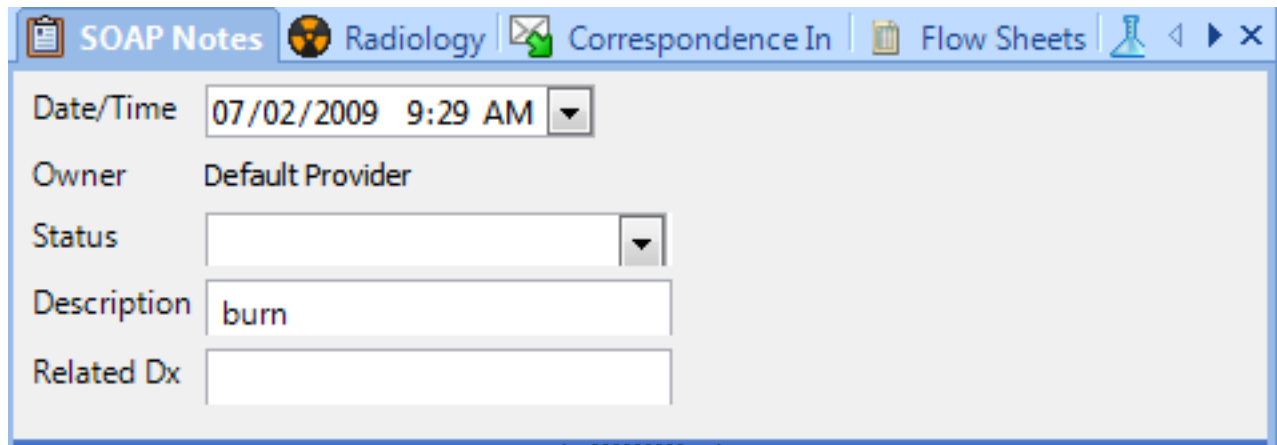
Although the exact functionality of a docutainer varies depending on the specific type and purpose, the one thing all docutainers have in common is that they act as containers and managers for documents.

Most Docutainers consist of three parts:

1. A document info sliding panel at the top
2. A document list sliding panel at the bottom
3. A document viewer area in the middle.

Depending on the type of document, one or more of the parts listed above may not be available, or their appearance may differ slightly.

### Document Info Panel



The screenshot shows a software window titled "Document Info Panel" with a tabbed interface. The active tab is "SOAP Notes", with other tabs including "Radiology", "Correspondence In", and "Flow Sheets". The panel contains several input fields: "Date/Time" is set to "07/02/2009 9:29 AM" with a dropdown arrow; "Owner" is set to "Default Provider"; "Status" is an empty dropdown menu; "Description" contains the text "burn"; and "Related Dx" is an empty text field.

The document demographic panel displays information about the specific document that is currently open. It appears as a bar at the top of the Docutainer.

Pointing the cursor at the bar will cause it to expand, and Clicking the pin will lock it in the open position. The information displayed depends upon the specific document type. (For details, refer to the documentation for the specific type of document.)

## Document Viewer

### Subjective

COMPLAINT or ISSUE - Influenza.

HPI: SYMPTOMS/RELATED: Reports symptoms of fever, headache, fatigue (malaise or lethargy), muscle pain.

QUALITY/COURSE: Reports condition is continuous, persisting.

INTENSITY/SEVERITY: Reports measurement ( or degree) as moderate.

ONSET/TIMING: Reports occurrence as sudden.

ROS: LUNGS/Respiratory: Denies symptoms such as sputum/phlegm production that is purulent.

### Objective

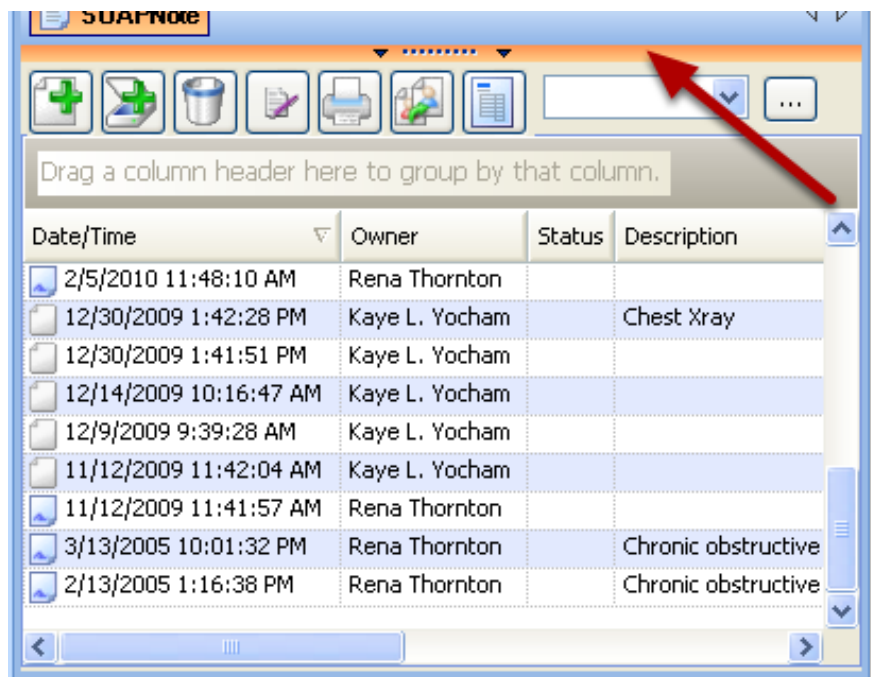
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

HEAD/EARS/NOSE/THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or

SOAPNote

The document viewer area displays the document content, in the appropriate format for that particular document type. (Refer to the Document instructions for full details.)

## Document List



Drag a column header here to group by that column.

Date/Time	Owner	Status	Description
2/5/2010 11:48:10 AM	Rena Thornton		
12/30/2009 1:42:28 PM	Kaye L. Yocham		Chest Xray
12/30/2009 1:41:51 PM	Kaye L. Yocham		
12/14/2009 10:16:47 AM	Kaye L. Yocham		
12/9/2009 9:39:28 AM	Kaye L. Yocham		
11/12/2009 11:42:04 AM	Kaye L. Yocham		
11/12/2009 11:41:57 AM	Rena Thornton		
3/13/2005 10:01:32 PM	Rena Thornton		Chronic obstructive
2/13/2005 1:16:38 PM	Rena Thornton		Chronic obstructive

The document list panel displays a list of documents along with some basic document details. This list is used to select and display document details, the document list panel appears as a bar at the bottom of the Docutainers, with the name of the document type.

Pointing the cursor at the splitting bar will cause it to expand. The column headings in the list depend on the type of document being displayed, but they typically include information such as document names, dates, and authors. Clicking on a document in the list will display that document in the viewer. (For details, refer to the documentation for specific documents.)

## Document Control



Above the docutainer list is a set of action buttons in a mini-toolbar.

## Create Document



The button highlighted above is used to add a new docutainer of the current type (chart section).

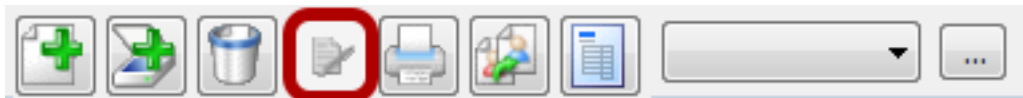
## Remove Documents



Used to remove one or more selected docutainers from the list or current docutainer. You can select multiple docutainers by holding down the control or shift key while Clicking on docutainers in the list.

**Note:** Only unsigned docutainers may be removed.

## Sign Documents



Used to sign one or more selected docutainers from the list. You can select multiple docutainers by holding down the control or shift key while Clicking on docutainers in the list.

## Print Documents



Prints the currently selected docutainer item.

## Reassign Documents



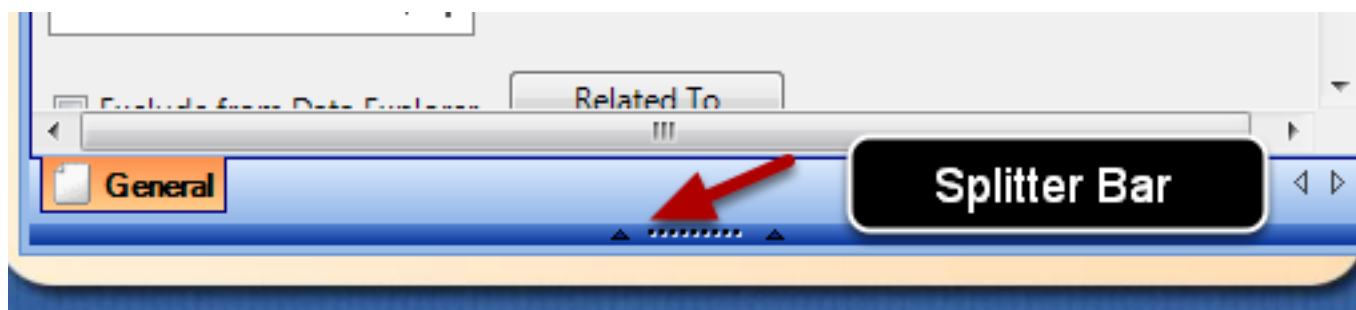
Used to assign one or more selected docutainers from the list to another provider. You may select multiple docutainers by holding down the control or shift key while Clicking on docutainers in the list.

## Splitter Bars

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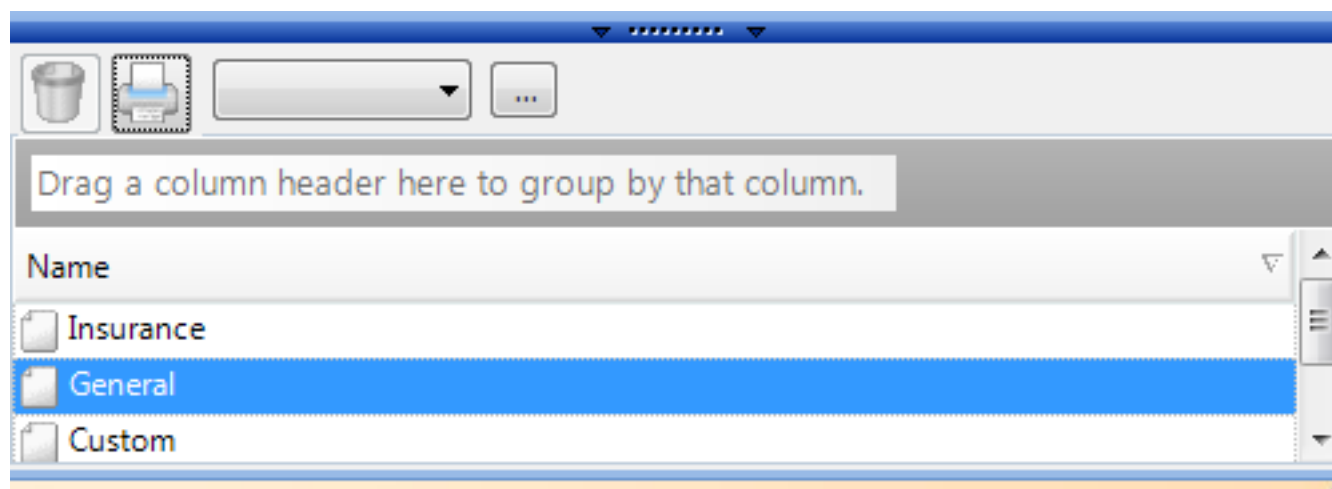
Splitter Bars are blue bars with arrows and dots in the center of them. When clicked on, they will collapse or expand to display more information, buttons, document lists, etc. They are also designed where you can click on them to resize them.

### Lower Splitter Bar



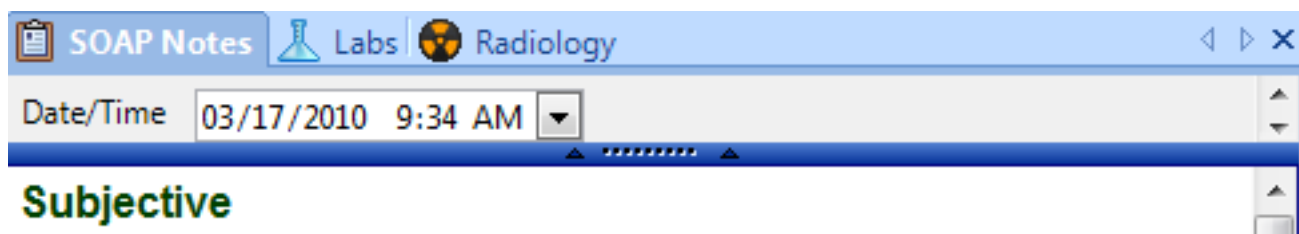
In the image above, we are looking at the lower splitter bar at the bottom of the Demographics chart section. Notice that the arrows in the center of the splitter bar are pointed upwards. This is a visual indicator that when we left click on the splitter bar, the bar will move upwards, and will display hidden features. See image below.

### Change Docutainer View



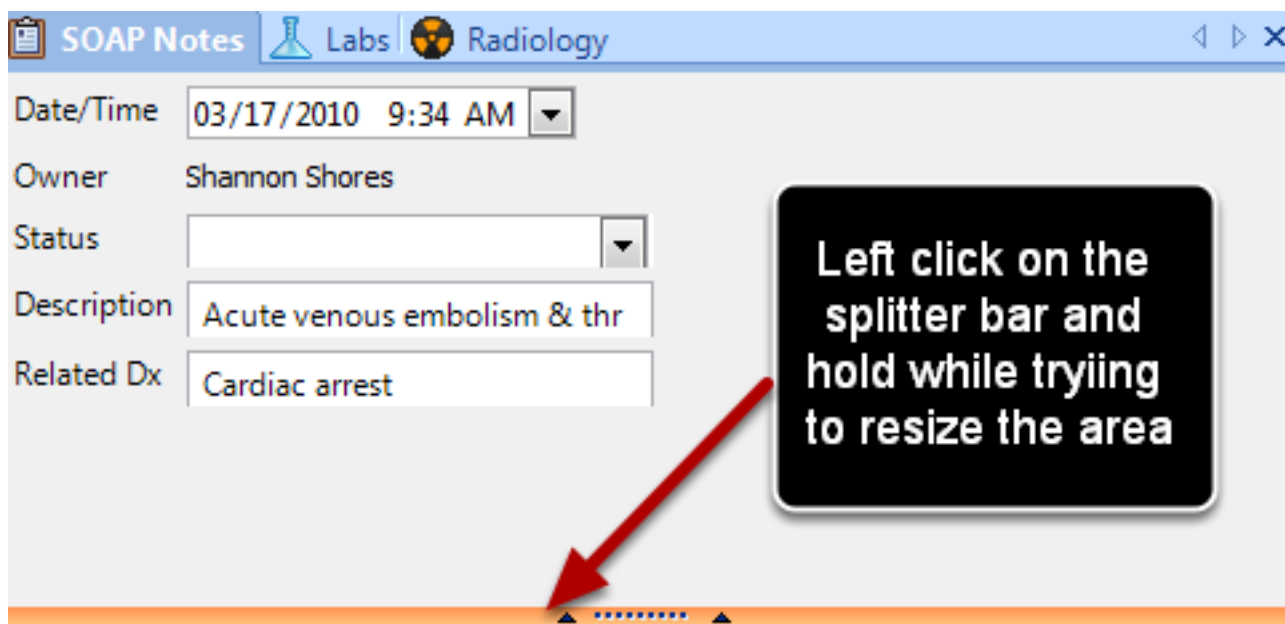
We are now able to change the Demographics view from "General" to "Insurance" or "Custom", and can even print out Demographics. Notice that the arrows on the lower splitter bar are now pointed down. This is a visual indicator that when we left click on the splitter bar, the bar will collapse back down.

## Upper Splitter Bar



The above image displays an upper splitter bar in the SOAPnotes chart section. Currently, we are able to view the date and time this encounter note was created. If we left click once on the splitter bar, the splitter bar will move upwards and hide this information. If we left click on the splitter bar and drag our mouse down, we will resize the area and be able to view more document/doctainer information on the encounter note. View image below.

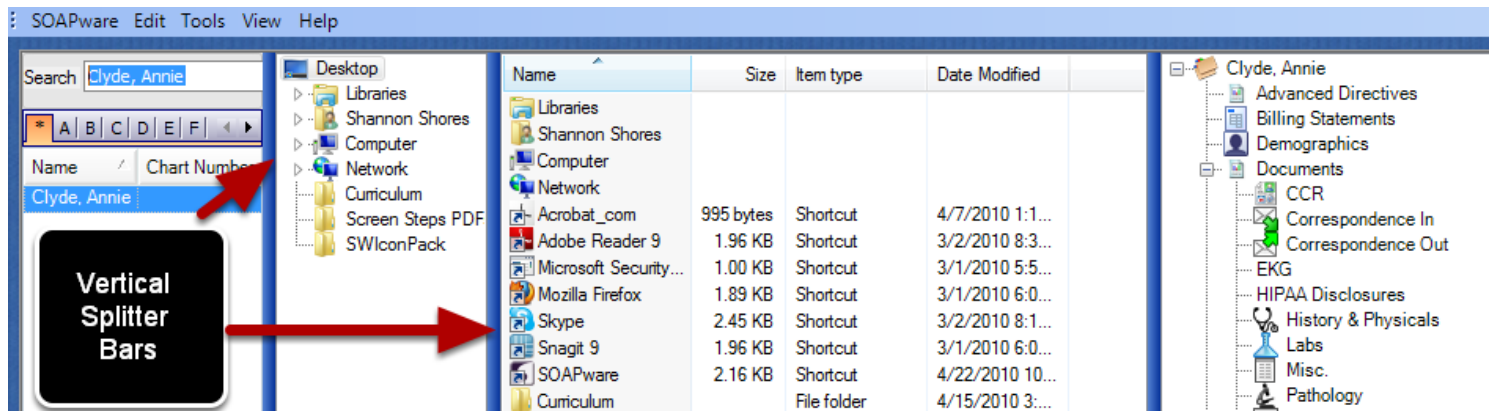
## View/Hide Document Information



This image displays more document/docutainer information after the splitter bar was drag downwards and resized. Notice that when a splitter bar is being resized, the bar will change from the color blue, to the color orange.



## Vertical Splitter Bar



There are also vertical splitter bars. These bars mainly respond to resizing.

## Finding Docutainer Documents via Chart Navigator

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There will be times when documents need to be viewed that are contained within chart sections other than the ones currently visible in the Chart Layout. Chart Navigator provides a complete table of contents for the entire chart and all chart sections.

### Chart Navigator

The Chart Navigator is divided into two main areas. The left side lists the Chart Sections, and the right displays Docutainer-Document Lists. Click a Chart Section (on the left) in order to display (on the right) a list of docutainers/documents for that section.

To learn about Chart Navigator, see: [Chart Interface Basics - Chart Navigator](#).

### Chart Navigator Views

To learn more about Chart Navigator Views, see: [Chart Navigator Views](#).

# **Data Entry in SOAPware**

## SMARTText Introduction

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Exclusive to SOAPware, SMARTText is the backbone for medical documentation using our EMR. SMARTText entries replaces and extends macros to auto-enter blocks of text data that are specially designed to be searchable by computer.

Because SMARTText items contain much more data than plain (free) text, these entries make it possible for items used in documentation to have underlying relationships to other items in the medical record. Using SMARTText structured items will prepare clinics for important quality measure reporting linked to Meaningful Use data, as well as to the requirements related to the Patient Centered Medical Home.

### What is SMARTText

Pieces of information or objects, including text; CPT codes; medication items; images; photos; videos and audio files; can be combined to form SMARTText items. Entered using a combination of shortcuts and keystrokes, multiple SMARTText items can be placed together to form new and useful structures.

### Unstructured Text

Assessment[  
hypertension  
]

Shortcuts that, when expanded, display a single word or statement. These items are displayed in Black text.

Examples:

htn = hypertension

ver = verbalizes understanding at this time

### Structured Text

Assessment[  
Hypertension, benign ICD#401.1  
]

"Bar-Coded" text (data that is computer-readable), specially formatted to allow communication between computers. These items are displayed in **Blue** text.

## Pick List

Medications[  
medications]

Pick Lists may contain both Structured and Unstructured SMARTText. When clicked-on, these items will display a list of choices in the SMARTText Quick Access Guide located on the right side of the monitor screen. These items are displayed in underlined **Blue** text.

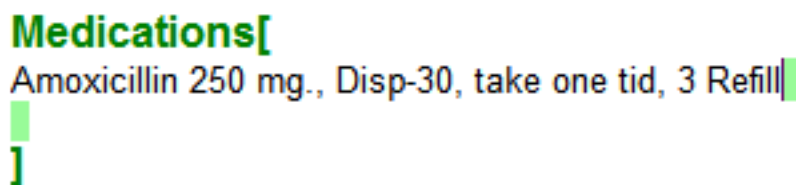
## Examples of Free Text vs. Structured Text

With free-text, each letter is actually an independent object. As far as the computer is concerned, no individual letter or number has any relationship to any other letter or number.

### Meaning Behind the Words

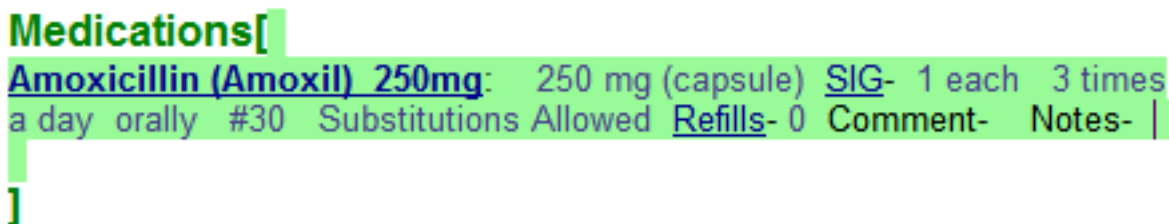
When typed using free-text, Amoxicillin and moAcXllicin appear the same to the computer -- both letter groupings are equally meaningless. In contrast, objects in SOAPware can include multiple letters and/or numbers that as a group have been identified and are recognizable to the computer. SOAPware displays the start and end points of a SMARText item (i.e. object) with an open bracket followed by a close bracket. Everything inside those brackets is considered to be part of the item.

### Free Text

A screenshot of a free-text medication entry in a software interface. The text "Medications[" is in green. Below it, "Amoxicillin 250 mg., Disp-30, take one tid, 3 Refill" is in blue. The closing bracket "]" is also in green. The text is not grouped together as a single object.

The image above is a free-text medication. While this entry is functional, it is not considered "meaningful data."

### Structured Text

A screenshot of a structured text medication entry in a software interface. The text "Medications[" is in green. Below it, "Amoxicillin (Amoxil) 250mg: 250 mg (capsule) SIG- 1 each 3 times a day orally #30 Substitutions Allowed Refills- 0 Comment- Notes- |" is in blue. The closing bracket "]" is also in green. The text is grouped together as a single object.

The image above shows the same information, but in a SMARText format that allows the information to easily be inserted into the chart, e-Prescribed, and read by a computer.

### Added Value

With SMARText, you will be able to:

Quickly and easily associate information that needs to be grouped together (i.e. a SMARText item of the appropriate type)

Do it all in one location (i.e. a SMARText item of the appropriate type)

Save the item for reuse in the future (save it in the SMARText library)

## Free Text or Structured Data?

---

### Text Entry Choices

SOAPware offers a variety of different charting methods, permitting great flexibility for information entry. Most use a combination of data entry methods for each section of the encounter and with each patient. One solution will not be sufficient for all chart sections -- just as one shoe does not fit all, one charting method does not fit every type of visit or patient.

Choices of data entry methods include:

- Free Text (Typing or dictation)
- SMARTText Pick Lists and Docuplates/Templates
- Speech Recognition (Dragon Naturally Speaking)
- Scan in paper encounter forms
- Dictate and have transcriptionist type into electronic notes
- Scan in your handwritten documentation
- Use a Tablet-PC and record the "digital ink"

### Free Text or Structured Data?

The way in which you actually enter data and document your patient's visits will be one of the most important issues you will address...

Where do you start?  
What are your options?

SOAPware recommends taking time for a short 3-question analysis before making this important decision:

- What charting method do you currently use?
- What are your resources?
- What is reasonable and feasible for you and in the best interest of your practice?

### Reasons to Use Structured Data

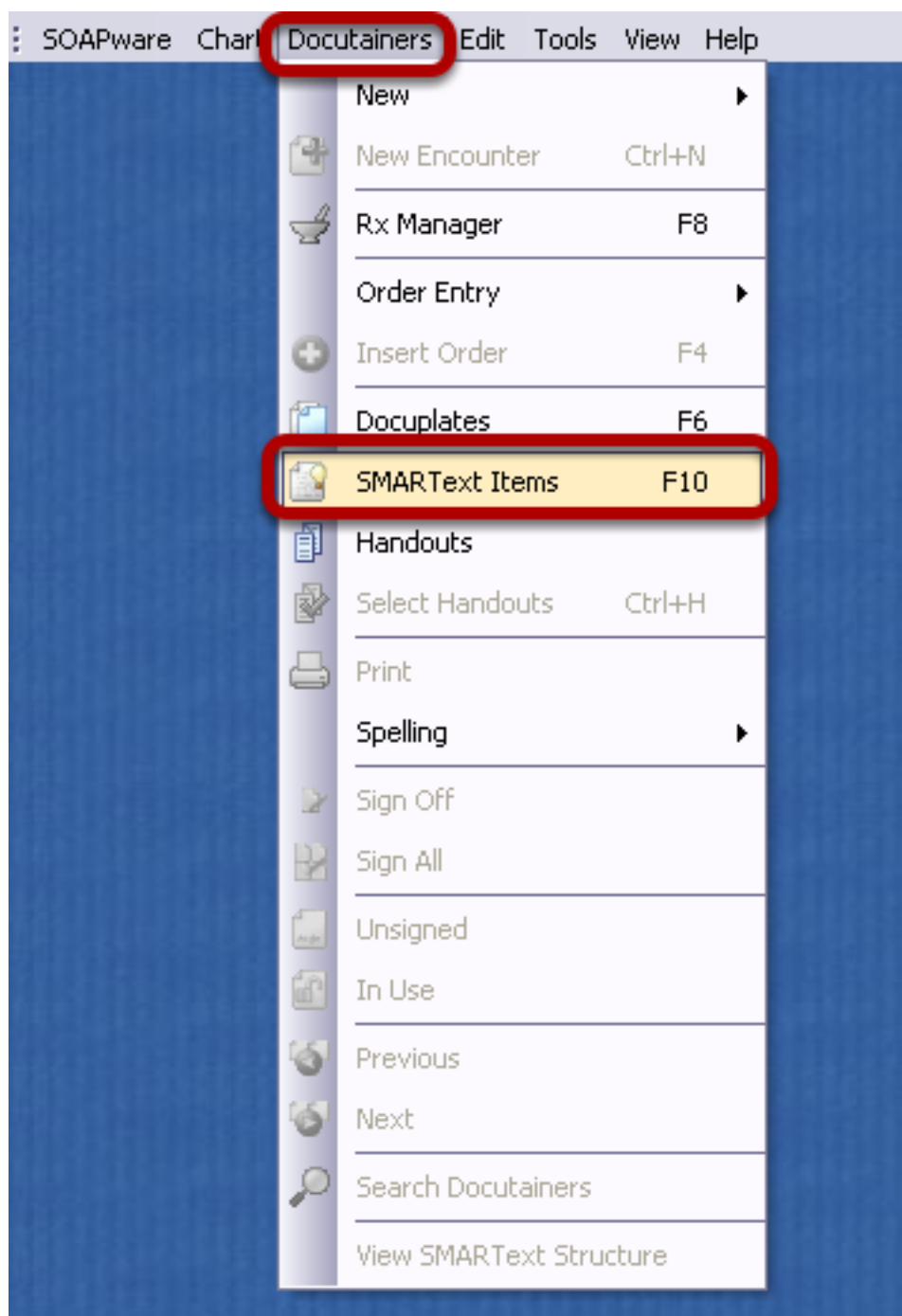
If you desire to participate in "Meaningful Use" and "Pay for Performance" (P4P) initiatives, to engage in practice quality improvements, and/or electronic prescribing, then you will need to use structured data.

Note: It is not mandatory that you use structured documentation in your patient charting procedures. However, while using free text may be familiar and seem easier, taking the time to learn more about the benefits associated with using structured data entry could greatly benefit your practice on many levels. Structured data entry not only makes you more efficient, it will also be more likely to allow you to receive greater reimbursement in the near future. In fact, it appears those physicians who choose not to participate in Meaningful Use and P4P initiatives will likely be penalized.



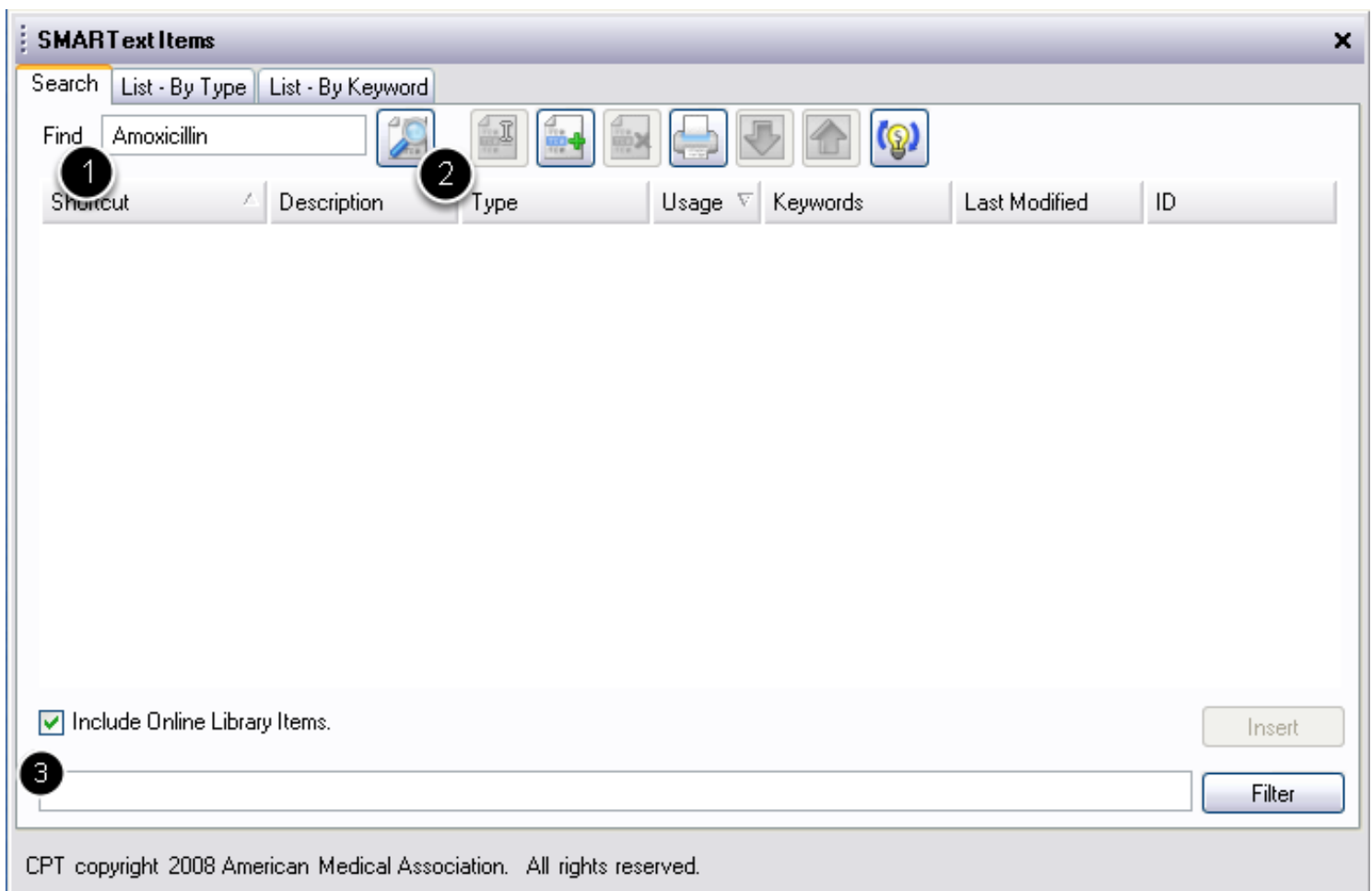
## Find SMARText Items

### Accessing SMARText Items Manager



To access the SMARText Items Manager click on the Docutainers menu and select "SMARText Items" or press F10 on your keyboard.

## Searching within SMARText Items Manager



SMARText items can have a single Shortcut and multiple Keywords associated with them. To search for a SMARText Item complete the following steps:

1. Type in a Keyword (single word or medical abbreviation).
2. Click on the Find button as shown above.
3. You can also filter a search using this box to narrow down the results.

## SMARText Items Manager Interface

Shortcut	Description	Type	Usage	Keywords	Last Modified	ID
▼ AmoS115	"Amoxicillin (Amoxil) 125/5...	Rx	0	01.O.A.GEN, 081022...		3be8eda0-ac27-
▲ AmoS11	"Amoxicillin (Amoxil) 125/5...	Rx	0	01.O.A.GEN, 081022...	4/23/2010 10:22...	c5f84f74-c61f-41
▲ AmoS11	"Amoxicillin (Amoxil) 125/5...	Rx	0	01.O.A.GEN, 081022...		c5f84f74-c61f-41
▲ AmoS4	"Amoxicillin (Amoxil) 400/...	Rx	0	01.O.A.GEN, 080812...	5/3/2010 2:12 PM	d1817095-0208-

### Column #1: Triangles

- \* **Upward facing triangle:** Indicates the SMARText item is located on your local database.

- \* **Downward facing triangle:** Indicates the SMARTText item is located on the SOAPware Online Library.
- \* **Green triangle:** Indicates that the SMARTText item was created by SOAPware.
- \* **Yellow triangle:** Indicates that the SMARTText item has been edited or created by a SOAPware user.
- \* **Red triangle:** Indicates that the SMARTText item is not available for use.

### **Column #2: Shortcut**

- \* This is the Shortcut code that is assigned to the SMARTText item. The Shortcut code can be used to enter the item into the documentation (see "Shortcut Code Entry Method" below).

### **Column #3: Description**

- \* This column gives a description of the SMARTText item. In a description that includes text with quotes, the text within quotes **will be** inserted into the documentation. In a description that includes text with parenthesis, the text within parenthesis **will not be** inserted into the documentation.

### **Column #4: Type**

- \* There are several different types of SMARTText items. This column will indicate the item type (ie: Dx, Rx, Multi-Sel List, Chief Finding, etc.).

### **Column #5: Usage**

- \* This column indicates the number of times the SMARTText item has been inserted by the User.

### **Column #6: Keywords**

- \* This column will list all of the keywords that are associated with the SMARTtext item. When you search for a SMARTText item, it will search for all SMARTText items containing the keyword you entered.

### **Column #7: Last Modified**

- \* This column indicates the date that the SMARTText item was last modified or updated.

### **Column #8: ID**

- \* The column contains an identifier for the location where the SMARTText item was created or modified.

## Inserting Items with SMARTText Items Manager

To insert a SMARTText Item into an active field using SMARTText Items Manager:

1. With a chart open, place your cursor into the desired field (ie: Active Problems, Medications, etc.).
2. Left click on the SMARTText Item to highlight.
3. Double click on the item to insert it into the field or press "Insert".

## SMARText Data Entry Methods

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This lesson will demonstrate the various ways to search for and use SMARText in your documentation.

The various data entry methods include:

- \* SMARText Items Manager
- \* Shift + F11
- \* F11
- \* Shortcut Code
- \* Quick Access Location Pick List
- \* Quick Access SMARText Pick List

*Note: For purposes of demonstration we will be using a limited number of fields within SOAPware. The data entry methods discussed can be used in all fields within the Summary and SOAPnote.*

### "AMP" Up Your Documentation

Using SMARText structured items for documentation in the fields listed below will best prepare clinics for reporting on quality measures in the future.

A - Assessment

M - Medications

P - Plan

SMARText is a type of data entry that was created by associating hidden information to the words and phrases used in documentation. As a result, the documentation is able to be identified electronically and read by the computer thus making your documentation more searchable.

## Inserting Items with SMARText Items Manager

**Double click on the SMARText item**

**The item will be inserted into the field**

Medications[  
Amoxicillin (Amoxil) 125/5 Susp 125 mg/5 mL (powder for reconstitution)  
SIG: 5 3 times a day ]

SMARText Items Manager window showing a list of items. The first item is highlighted.

Shortcut	Description	Type	Usage	Keywords	Last Modified	ID
EndAmo	"Endocarditis Rx with Amo...	Rx	0	080812, Amoxicillin, En...	8/19/2008 1:41 P...	7d...
AmoS11	"Amoxicillin (Amoxil) 125/5...	Rx	0	01.0.A.GEN, 080812...	4/23/2010 10:22...	c5...
AmoS4	"Amoxicillin (Amoxil) 400/...	Rx	0	01.0.A.GEN, 080812...	5/3/2010 2:12 PM	d1...
AmoS4	"Amoxicillin (Amoxil) 400/...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	0fc...
AmoS47	"Amoxicillin (Amoxil) 400/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	b4...
AmoS43	"Amoxicillin (Amoxil) 400/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	02...
AmoS42	"Amoxicillin (Amoxil) 400/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	d1...
AmoS41	"Amoxicillin (Amoxil) 400/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	30...
AmoS27	"Amoxicillin (Amoxil) 200/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	19...
AmoS25	"Amoxicillin (Amoxil) 200/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	31...
AmoS23	"Amoxicillin (Amoxil) 200/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	75...
AmoS23	"Amoxicillin (Amoxil) 200/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	bc...
AmoS22	"Amoxicillin (Amoxil) 200/5...	Rx	0	01.0.A.GEN, 080812...	8/19/2008 1:36 P...	86...

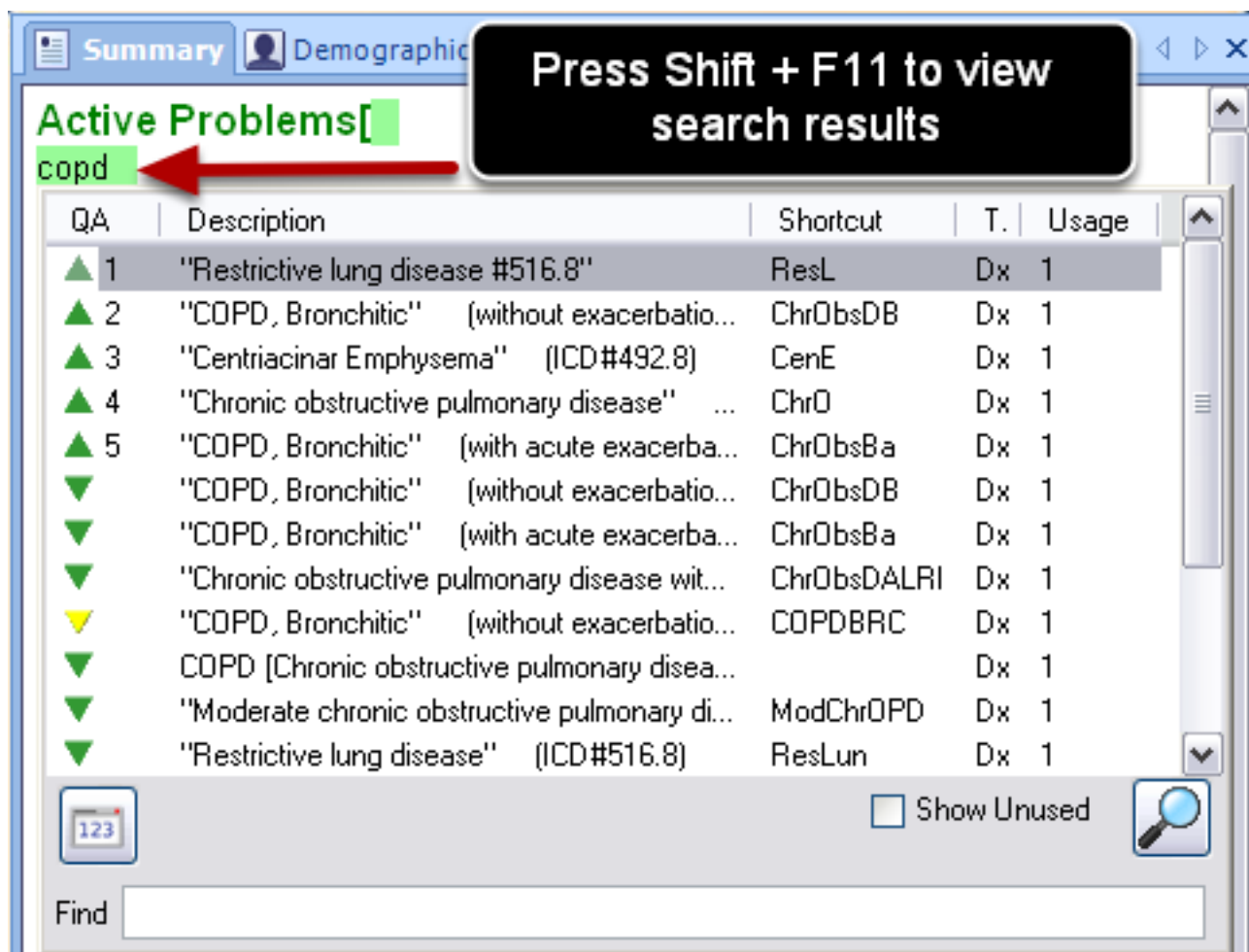
Include Online Library Items. [Insert] [Filter]

CPT copyright 2008 American Medical Association. All rights reserved.

To insert a SMARText Item into an active field using SMARText Items Manager:

1. With a chart open, place your cursor into the desired field (ie: Active Problems, Medications, etc.).
2. Left click on the SMARText Item to highlight.
3. Double click on the item to insert it into the field or press "Insert".

## Shift + F11 Entry Method



You can search for SMARText items within each field. A "Shift + F11" search will display a list of SMARText items that are located on the SOAPware Online Library and your local database. To conduct a "Shift + F11" search:

1. With a chart open, place your cursor into the desired field.
2. Type in a single keyword or medical abbreviation.
3. On your keyboard, press Shift plus the F11 key to conduct a search.

Notice the items in the pop-up dialog box include triangles that point both up and down and also includes many of the headers discussed above.

## Inserting an Item From a Shift + F11 Search

### Active Problems[

copd

Double click the  
SMARText Item

The item will be  
inserted into the field

QA	Description		T.	Usage
▲ 1	"Restrictive lung disease #516.8"	ResL	Dx	1
▲ 2	"COPD, Bronchitic" (without exacerbatio...	ChrObsDB	Dx	1
▲ 3	"Centriacinar Emphysema" (ICD#492.8)	CenE	Dx	1
▲ 4	"Chronic obstructive pulmonary disease" ...	ChrO	Dx	1
▲ 5	"COPD, Bronchitic" (with acute exacerba...	ChrObsBa	Dx	1
▼	"COPD, Bronchitic" (without exacerba...	ChrObsDB	Dx	1

### Active Problems[

COPD, Bronchitic ICD#491.20

→ ]

To insert a SMARText Item into an active field using a Shift + F11 search:

1. Left click on the desired SMARText Item to highlight it.
2. Double click on the item to insert it into the field.

## F11 Entry Method

### Inactive Problems[

bronchitis

Press F11 to view search results

QA	Description	Shortcut	T.	Usage
▲ 1	"Croup" (ICD#464.4)	Cro	Dx	1
▲ 2	"Asthma" (nonspecific - 493.10)	Ast	Dx	1
▲ 3	"Chemical Bronchitis" (acute - ICD#506.0)	CheB	Dx	1
▲ 4	"Bronchitis, acute" (viral - ICD#466.0)	BroA	Dx	1
▲ 5	"COPD, Bronchitic" (without exacerbatio...	ChrObsDB	Dx	1
▲ 6	"Chronic bronchitis" (nonspecific - ICD#4...	ChrB	Dx	1
▲ 7	"COPD, Bronchitic" (with acute exacerba...	ChrObsBa	Dx	1

Find

☐ Show Unused

### Inactive Problems[

Bronchitis, acute ICD#466.0

→ ]

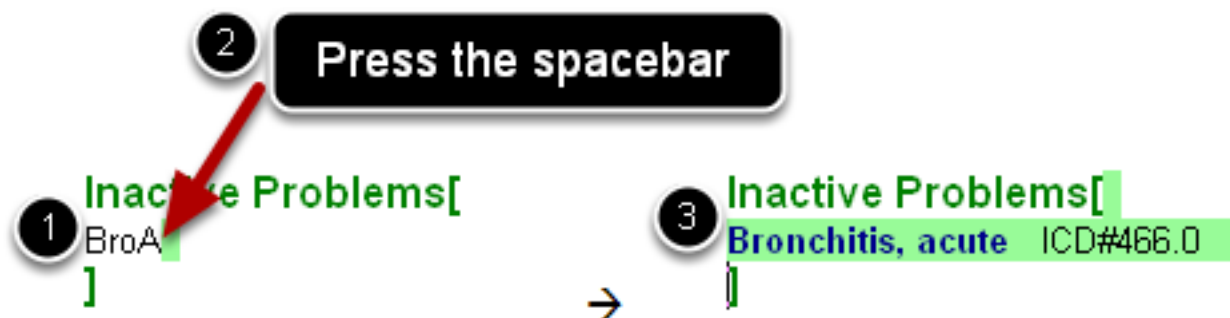
An "F11" search will display a list of SMARText items that are located on your local database. To conduct an "F11" search:

1. With a chart open, place your cursor into the desired field.
2. Type in a single keyword or medical abbreviation.
3. On your keyboard, press the F11 key to conduct a search.
4. Insert the SMARText item into the desired field by double clicking on the item.

Notice the items in the pop-up dialog box include triangles that point only up denoting the items are located on your local database.



## Shortcut Code Entry Method

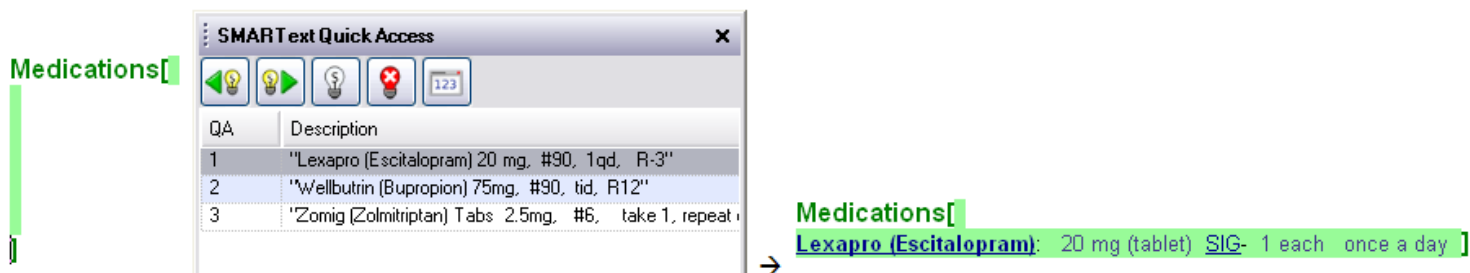


If the shortcut code to a SMARTText item is known, it can be inserted by following the steps below:

With a chart open, place your cursor into the desired field.

1. Type in the shortcut code for the SMARTText item that you wish to insert.
2. Press the spacebar on your keyboard.
3. The SMARTText item will expand.

## Quick Access Location Pick List Entry Method



Clicking in most fields causes a list of SMARTText items that were previously used in that field (in any patients chart) to be presented in the SMARTText Quick Access dialog box. The Quick Access Location pick list is User specific and allows for inserting a previously used item without conducting a search.

To insert a item from the Quick Access Location Pick List, simply double click on the item in the SMARTText Quick Access dialog box.

**NOTE:** If you do not see the SMARTText Quick Access window, please see: [Docking SMARTText Quick Access](#).

## Quick Access SMARText Pick List Entry Method

The list displayed to the right is attached to the pick list below.

**Active Problems[**  
[Starter - Active Problems:](#)  
**]**

SMARText Quick Access					
Active Item - (Starter - Active Problems with ICD Displayed:)					
Selected	Description	Short	Typ	Usa	
<input type="checkbox"/>	- "Unremarkable"	Unr	Mul...	1	
<input type="checkbox"/>	"Alcohol problems" (chronic - ICD#303...	AlcP...	Dx	2	
<input type="checkbox"/>	"Anemia" (ICD#285.9)	Ane	Dx	1	
<input type="checkbox"/>	"Asthma" (nonspecific - 493.10)	Ast	Dx	1	
<input type="checkbox"/>	"Bleeding problems" (nonspecific - ICD...	BleD	Dx	1	
<input type="checkbox"/>	"Blindness" (partial or complete, both e...	Bli	Dx	1	
<input type="checkbox"/>	"Breast cancer" (nonspecific - ICD#174...	Bre...	Dx	1	
<input type="checkbox"/>	"Cancer" (nonspecific - ICD#199.1)	CanX	Dx	1	
<input type="checkbox"/>	"Cerebrovascular accident (CVA or strok...	CerA	Dx	1	
<input type="checkbox"/>	"Cervical cancer" (nonspecific - ICD#1...	Cer...	Dx	1	
<input type="checkbox"/>	"Chemical dependency" (nonspecific, a...	Che...	Dx	1	
<input type="checkbox"/>	"Colon cancer" (nonspecific - ICD#153...	Col...	Dx	1	
<input type="checkbox"/>	"Congenital anomaly" (birth defect, uns...	ConA	Dx	1	
<input type="checkbox"/>	"Congestive heart failure" (nonspecific...	ConH	Dx	1	

Many SMARText items have lists associated with them which allow you to choose a desired item (ie: list of common diagnosis or surgeries). SOAPware refers to these items as "Pick Lists". In SOAPware, text that appears [Blue](#) and [Underlined](#) indicates that a Pick List is attached to the SMARText Item (as shown above).

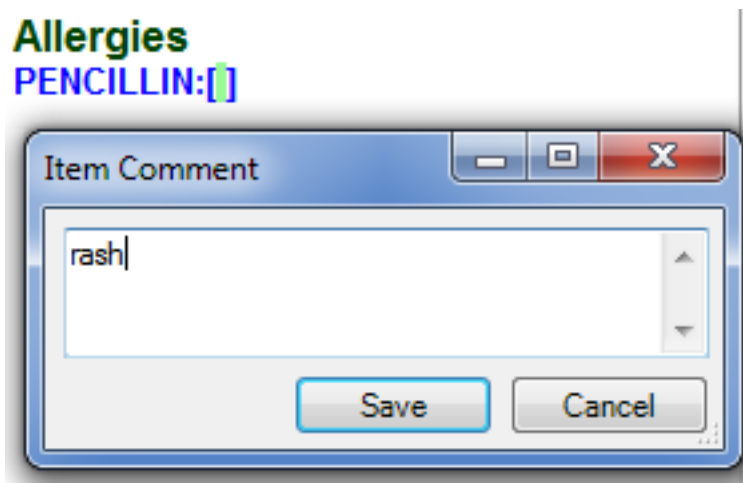
SOAPware has created numerous Starter Pick Lists, such as the one shown above. To learn how to insert and use the Starter Pick Lists, please follow the links below:

- \* [Active Problems](#)
- \* [Inactive Problems](#)
- \* [Surgeries](#)
- \* [Medications](#)
- \* [Allergies](#)
- \* [Family History](#)
- \* [Tobacco](#)
- \* [Alcohol](#)
- \* [Interventions](#)
- \* [Social History](#)
- \* [ROS & Physical](#)

## Editing SMARText Items

For information on how to copy, move, and delete SMARText, see: [Entering Text in SOAPware](#).

## Click and Type



All SMARText items can have free-text comments attached to them. You can edit/add a comment by clicking on a ST item, and start typing. The typing is displayed in the Item Comment dialog.

It is not wise to simply click after a SMARText item, and just start typing. Anything typed in this fashion is not associated with the chief complaint, but is freely floating somewhere in Subjective. This lowers the value of the information, and can causes some formatting problems when issuing the Remove Unused command.

## Editing Text in SOAPware

---

In this lesson we will describe how to edit SMARText items within your documentation.

Even though SMARText appears similar to free-text, SMARText has hidden information associated with the words and phrases used in documentation. As a result, the documentation is able to be identified electronically and read by the computer thus making your documentation more searchable. Therefore, when editing SMARText items you should follow the rules described in this lesson.

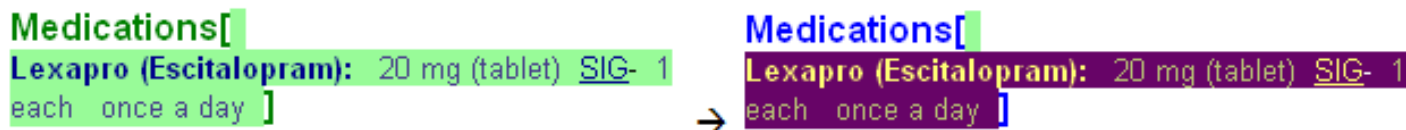
### Highlighting & Selecting SMARText Items

At times you may find it necessary to highlight a SMARText item so you can drag & drop it into another field. When highlighting and selecting a SMARText item it is important that your cursor be at the beginning or end of the SMARText item, rather than on or in the middle of the item.

**NOTE:** Many users find it easier to use the double-click method to highlight a SMARText item. We will discuss this method below.

### Double-Click Method for Selecting SMARText Items

After double-clicking on the "Lexapro" header, note that the entire SMARText item has been highlighted.



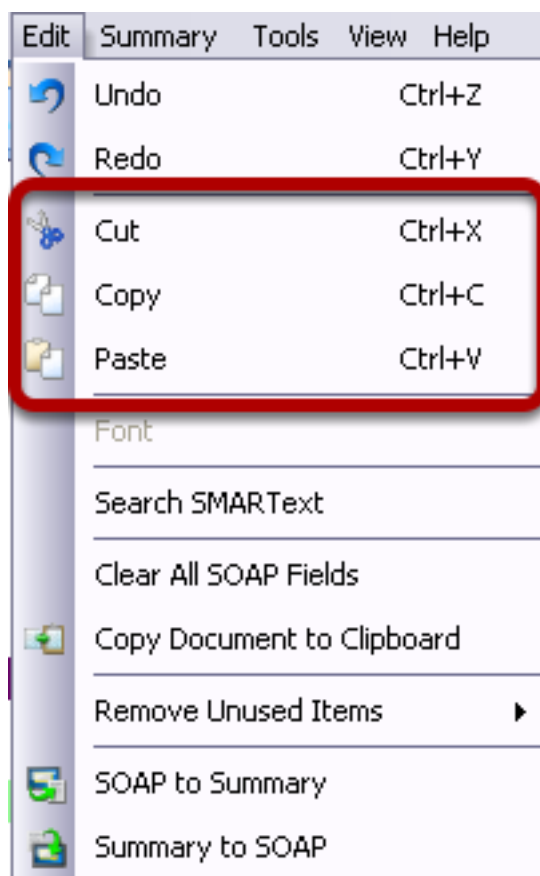
Medications[ Lexapro (Escitalopram): 20 mg (tablet) SIG- 1 each once a day ] → Medications[ Lexapro (Escitalopram): 20 mg (tablet) SIG- 1 each once a day ]

To select the SMARText item, double-click on the item header (ie: the name of the medication, name of the diagnosis, etc.).

This will highlight all of the items associated with the SMARText header (ie: the strength and dose of a medication or the ICD9 code of a diagnosis, etc.).

\*This is the recommended method to select a SMARText item.

## Cut/Copy/Paste SMARTText Items



SOAPware will only cut/copy/paste items that are fully contained in the highlighted selection. Before attempting to cut/copy/paste a SMARTText item, select the entire item using the double-click method as described above.

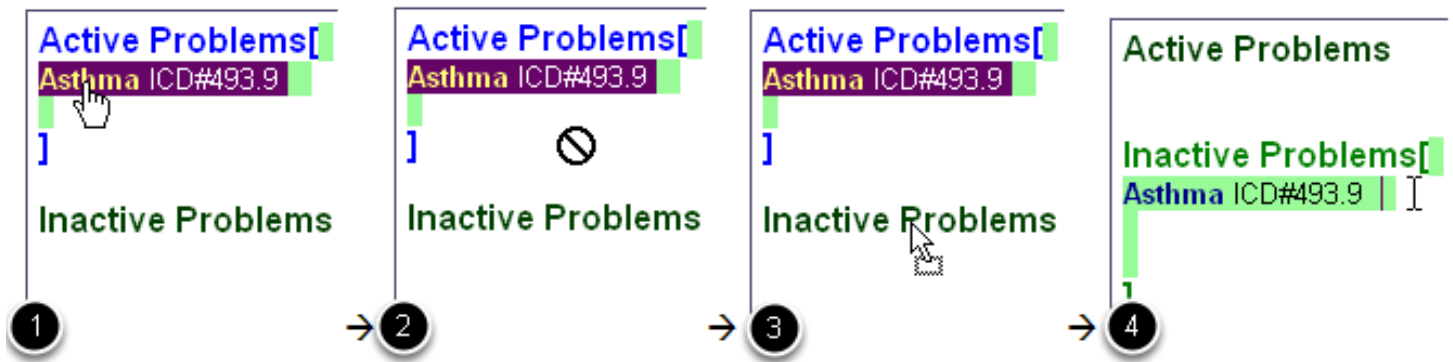
- \* To cut a SMARTText item, select Edit then Cut from your Menu bar or press Ctrl + X on your keyboard.
- \* To copy a SMARTText item, select Edit then Copy from your Menu bar or press Ctrl + C on your keyboard.
- \* After cutting or copying an item you can then paste the item into a field. To paste a SMARTText item, select Edit then Paste from your Menu bar or press Ctrl + V on your keyboard.

## Deleting SMARTText Items

SOAPware will only delete items that are fully contained in the highlighted selection. When a SMARTText item is selected using the double-click method, simply press Backspace or Delete on your keyboard to delete the SMARTText item.

If the SMARTText item is not previously selected, to delete the item you can also click on the item header once and press the delete key. The first press of your delete key will select the entire SMARTText item. Press the delete key a 2nd time to delete the entire SMARTText item.

## Move or Drag & Drop SMARTText Items



SOAPware will only drag & drop items that are fully contained in the highlighted selection. You can only drag & drop items into a different field (ie: from Active Problems to Inactive Problems). You cannot drag & drop an item within the same field. To drag & drop, follow the steps below:

1. Highlight and select the item by using one of the methods that was previously described.
2. While holding your left click, begin dragging the item to another field. You will see a circle with a line through it indicating that you can not yet drop the item.
3. Place your cursor directly over the field header in which you wish to drop the item (ie: Inactive Problems, as shown above). Your cursor will have a gray rectangle indicating that you can drop the item into that field.
4. With your cursor still **directly over the field header** let go of your left click. The item will be placed into that field.

## SMARText Items in Pick Lists

SMARText Items (except for Order Entry) can be arranged into pick lists, and can be selected by simple clicking. These function much like a paper superbill, where you either circle or check boxes.

Customized pick lists are one of the most efficient data entry methods. Creating custom pick lists that contain the items that you commonly and repeatedly utilize, allows data entry to be performed quickly and efficiently via a click for insertion into documentation.

### Pick Lists

The screenshot shows the SMARText Quick Access window. On the left, the SOAP Notes form is visible with sections for Subjective, Objective, Assessment, Plan, Medications, and Follow Up. The Subjective section is active, and the text 'CHIEF COMPLAINT(S)/REASON FOR VISIT:' is entered. On the right, the SMARText Quick Access window is open, displaying a pick list for 'CHIEF COMPLAINT(S):'. The pick list contains a table with columns 'Select', 'Description', and 'S'. The first row is selected, showing '( A - GENERAL and Unspecified )'.

Select	Description	S
<input checked="" type="checkbox"/>	( A - GENERAL and Unspecified )	
<input type="checkbox"/>	( B - BLOOD and IMMUNE )	
<input type="checkbox"/>	( D - DIGESTIVE )	
<input type="checkbox"/>	( F - EYE )	
<input type="checkbox"/>	( H - EAR )	
<input type="checkbox"/>	( K - CARDIOVASCULAR )	
<input type="checkbox"/>	( N - NEUROLOGICAL )	
<input type="checkbox"/>	( P - PSYCHOLOGICAL )	
<input type="checkbox"/>	( R - RESPIRATORY )	
<input type="checkbox"/>	( S - SKIN )	
<input type="checkbox"/>	( T - ENDOCRINE/METABOLIC/...	
<input type="checkbox"/>	( U - UROLOGICAL )	
<input type="checkbox"/>	( W - PREGNANCY/CHILDBIRT...	
<input type="checkbox"/>	( X - FEMALE GENITAL )	
<input type="checkbox"/>	( Y - MALE GENITAL )	
<input type="checkbox"/>	( Z - SOCIAL PROBLEMS )	
<input type="checkbox"/>	( L - MUSCULOSKELETAL )	
<input type="checkbox"/>	( Most Common Chief Complaint...	

In the example above, you will see that when you click in the picklist, a list of choices comes into view within the SMARText Quick Access window. Frequently used items can be grouped into Pick Lists to make them easy and efficient to find and use.

# Patient Visit Documentation



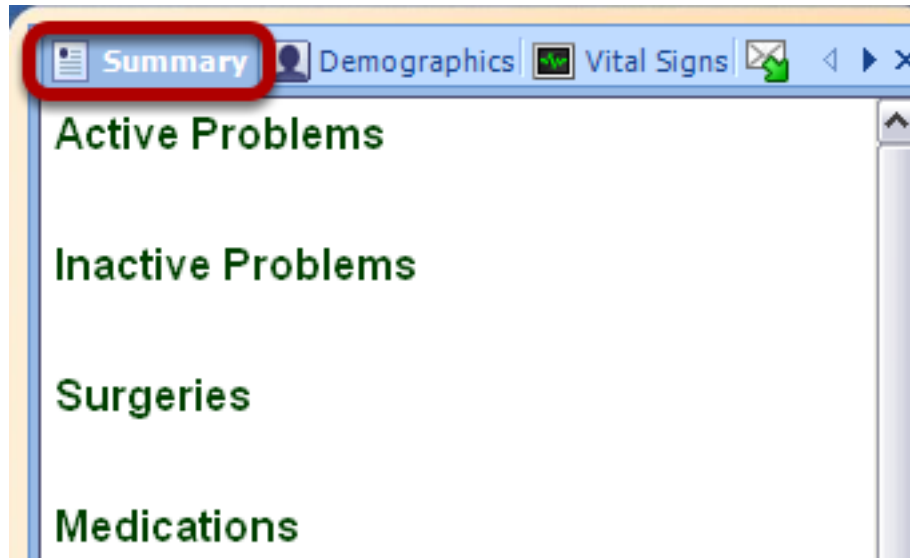
## Intro to Summary

---

This lesson will cover how to access the Summary chart section and a description of each of the fields contained within the Summary.

The Summary chart section is used for documenting the patients medical history.

### Accessing the Summary Chart Section



1. Within the Chart Workspace, open a patients chart.
2. Click on the Summary chart tab to display the Summary chart section (as shown above).

### Summary Fields

By default the Summary chart section contains the following fields:

- \* **Active Problems:** Current or active medical problems.
- \* **Inactive Problems:** Previous or inactive medical problems.
- \* **Surgeries:** List of surgeries and/or procedures.
- \* **Medications:** Current or active medications.
- \* **Allergies:** List of drug and non-drug allergies.
- \* **Family History:** Family medical history.
- \* **Tobacco:** Past and present tobacco use history.
- \* **Alcohol:** Past and present alcohol use history.
- \* **Intervention:** Miscellaneous field that may include things such as last significant medial testing and/or lab work.
- \* **Social History:** List of social issues such as living situation, support systems, etc.

The following fields are from previous versions of SOAPware and are rarely used in more current

versions of SOAPware:

- \* **ROS:** Stores a review of systems related to the various organ systems.
- \* **Physical:** Stores a physical examination for easy retrieval.

The screenshot shows a web-based interface for a medical summary document. At the top, there is a navigation bar with three tabs: 'Summary' (selected), 'Demographics', and 'Vital Signs'. Below the navigation bar, the main content area is titled 'Active Problems' in green. Underneath, there is a link 'Starter - Active Problems:'. This pattern repeats for 'Inactive Problems', 'Surgeries', 'Medications', 'Allergies', 'Family History', 'Tobacco', 'Alcohol', 'Interventions', 'Social History', 'ROS', and 'Physical'. Each section has a corresponding link starting with 'Starter -'. The 'Family History' section includes additional links for 'Positive family history for -', 'Negative family history for -', 'PARENTS:', 'CHILDREN:', 'GRANDPARENTS:', 'SIBLINGS:', 'UNCLES/AUNTS:', and 'OTHERS/DISTANT:'. The interface is clean and professional, with a light blue border around the content area.

**Summary** Demographics Vital Signs

**Active Problems**  
[Starter - Active Problems:](#)

**Inactive Problems**  
[Starter - Inactive Problems:](#)

**Surgeries**  
[Starter - Surgeries:](#)

**Medications**

**Allergies**  
[Starter - Allergies - Summary:](#)

**Family History**  
[Positive family history for -](#)  
[Negative family history for -](#)  
[PARENTS:](#)  
[CHILDREN:](#)  
[GRANDPARENTS:](#)  
[SIBLINGS:](#)  
[UNCLES/AUNTS:](#)  
[OTHERS/DISTANT:](#)

**Tobacco**  
[Starter - Tobacco:](#)

**Alcohol**  
[Starter - Alcohol:](#)

**Interventions**

**Social History**  
[Starter - Social History:](#)

**ROS**

**Physical**

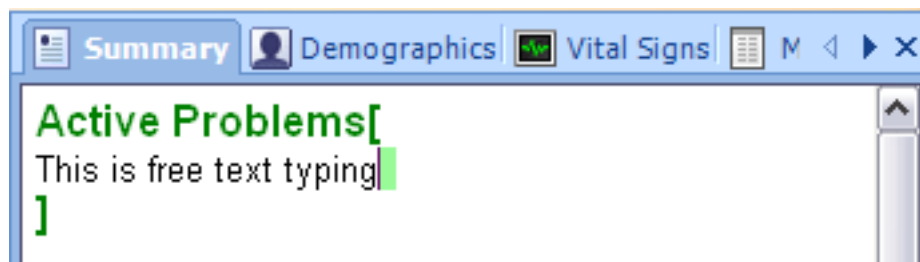
When SOAPware 2010 is installed, the default Summary docuplate will be set to "Summary-DPL" which you can see above. This is a good starter docuplate to use that also allows for an introduction to using SMARText Items and Pick Lists in your Summary documentation. You can modify or set the default to another docuplate if you wish.

## Summary Documentation

There are many different methods and styles for creating documentation within SOAPware. In this introduction to Summary documentation, we will demonstrate the two most common methods of documenting in the Summary chart section.

1. Free Text or Unstructured Data
2. SMARText or Structured Data

### Free Text or Unstructured Data



It is not mandatory that you use structured documentation for your patients. You can always document in the Summary chart section as though it was a word processor by just typing the documentation manually. To do this, simply click within one of the Summary fields and type between the bold green brackets as shown above. You can highlight, delete, backspace, and insert text easily using this method of data entry.

Free text data entry is not searchable nor is it reportable for meaningful use. It would be to your advantage to start structuring more of your documentation because it will make you more efficient and give you data that is both searchable and reportable.

## **TIP: Docking SMARText Quick Access**

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It is recommended that you keep SMARText Quick Access docked and pinned open on the right side of the your SOAPware screen to view Pick Lists. See this link for instructions - [Docking SMARText Quick Access](#)

## Active Problems Documentation

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This lesson will demonstrate how to insert the Active Problems Starter Pick List if your Summary docuplate does not already contain the Starter Pick List. This lesson will also describe how to use the Active Problems Starter Pick List.

The Active Problems field in the Summary is for recording all medical problems the patient is currently being treated for.

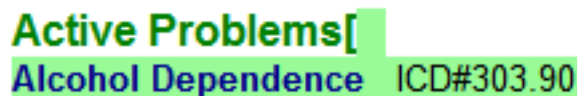
### **\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - PROBLEM LISTS FOR PATIENT CONDITIONS**

[Click here to view Meaningful Use criteria](#)

### **\*REQUIRED FOR MEANINGFUL USE OPTIONAL MENU SET (CHOOSE 5 OF 10) - PATIENT LISTS BY CONDITION**

[Click here to view Meaningful Use Criteria](#)

#### Entering a Diagnosis Using Shortcuts



The screenshot shows a text input field with the label 'Active Problems['. Inside the field, the text 'Alcohol Dependence ICD#303.90' is entered. The text is highlighted in green, indicating it is selected or being edited.

Click somewhere just below the Active Problems field header in the Summary. Type AlcDep (a shortcut code for a Structured Dx SMARText item that indicates alcohol dependence), and Press the space bar.

Regarding Shortcuts:

1. A SMARText item can only have one Shortcut.
2. Not all SMARText items have Shortcuts.
3. Users can add and change Shortcuts to meet their preferences

## Entering a Diagnosis Using Keywords

**Active Problems[**  
**Alcohol Dependence** ICD#303.90  
 depre

Q	Description	Shortcut	Type	U
▲	"Depression with Anxiety" (ICD#300.4)	DepAnx	Dx	1
▲	"Recurrent major depression" (NOS - ICD#296.30)	c296.30	Dx	1
▲	"Severe recurrent major depression with psychotic behavior" (ICD#...	c236.34	Dx	1
▲	"Severe recurrent major depression without psychotic behavior" (IC...	c296.33	Dx	1
▲	"Moderate recurrent major depression" (ICD#296.32)	c296.32	Dx	1
▲	"Cyclothymia" (ICD#301.13)	Cyclot	Dx	1
▲	"Major Depressive Disorder, single episode, severe with psychotic beh...	c296.24	Dx	1
▲	"Bipolar affective disorder, depressed" (moderate - ICD#296.52)	BipD	Dx	1
▲	"Depression with Psychosis" (ICD#296.20) **	DepP	Dx	1
▲	"Mild recurrent major depression" (ICD#296.31) **	c296.31	Dx	1
▲	"Depression, Major, Single Episode" (ICD#296.22) **	DepM	Dx	1
▲	"Affective psychosis" (ICD#296.90)	AffP	Dx	1
▲	"Depressive Type Psychosis" (ICD#298.0)	DepTypP	Dx	1
▲	"Mild major depression, single episode" (ICD#296.21) **	c296.21	Dx	1
▲	"Depressive Reaction, Brief or Self-Limited" (ICD#309.0)	DepB	Dx	1
▲	"Severe major depression, single episode, without psychotic behavior"...	c296.23	Dx	1

In order to search/find the pre-built SMARTText items for depression, and enter one into the chart, Press Enter again to create a new line under Active Problems, and Type depre. This time, in order to perform a search both locally and in the online library, add the SHIFT key to the previous key-command (i.e. Shift + F11).

Regarding Keywords:

1. A SMARTText item can have an unlimited number of Keywords.
2. No SMARTText item has every possible Keyword that users prefer.
3. Users can add Keywords to meet their preferences.
4. The longer the Keyword (i.e. typed entry to search), the faster the search.

## Selecting a Diagnosis from a Shift+F11 List

When items in the online library are selected from the pop-up list and inserted (as shown above with depression), SOAPware automatically:

1. Downloads the item.
2. Adds the item to your local library.
3. Inserts into the field at the insertion point.

## Entering a Diagnosis using a Starter Pick List

Active Problems[  
Starter - Active Problems: |  
]

The Active Problems starter Pick List contains a list of some of the most common diagnosis.



## Accessing the Active Problems Pick List

**1**

**Active Problems**  
Starter - Active Problems:

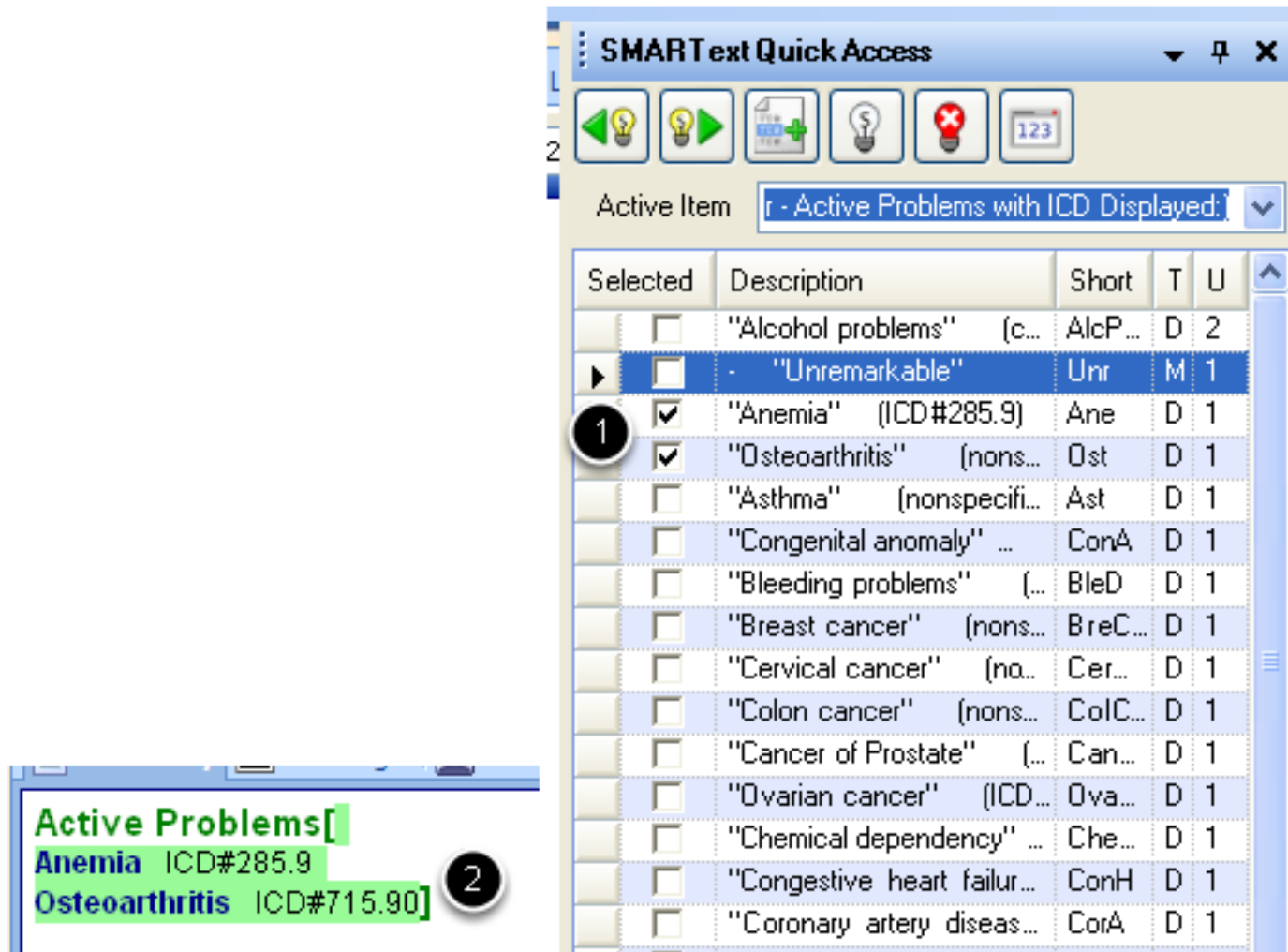
2

Selected	Description	Short	T	U
<input type="checkbox"/>	"Alcohol problems" (c...	AlcP...	D	2
<input checked="" type="checkbox"/>	- "Unremarkable"	Unr	M	1
<input type="checkbox"/>	"Anemia" (ICD#285.9)	Ane	D	1
<input type="checkbox"/>	"Osteoarthritis" (nons...	Ost	D	1
<input type="checkbox"/>	"Asthma" (nonspecific...	Ast	D	1
<input type="checkbox"/>	"Congenital anomaly" ...	ConA	D	1
<input type="checkbox"/>	"Bleeding problems" (...	BleD	D	1
<input type="checkbox"/>	"Breast cancer" (nons...	BreC...	D	1
<input type="checkbox"/>	"Cervical cancer" (non...	Cer...	D	1
<input type="checkbox"/>	"Colon cancer" (nonsp...	ColC...	D	1
<input type="checkbox"/>	"Cancer of Prostate" (...	Can...	D	1
<input type="checkbox"/>	"Ovarian cancer" (ICD...	Ova...	D	1
<input type="checkbox"/>	"Chemical dependency" ...	Che...	D	1
<input type="checkbox"/>	"Congestive heart failure...	ConH	D	1
<input type="checkbox"/>	"Coronary artery disease...	CorA	D	1
<input type="checkbox"/>	"Depression" (nonspe...	Dep	D	1
<input type="checkbox"/>	"Diabetes - Type 1" (n...	Dia1	D	1

In SOAPware, text that appears Blue and Underlined indicates that a Pick List is attached to the SMARTText Item.

1. Left click on the Pick List header (ie: Starter - Active Problems)
2. A list of items will appear in the SMARTText Quick Access Dialog.

## Choosing Items from the Active Problems Pick List



SMARText Quick Access

Active Item: r - Active Problems with ICD Displayed

Selected	Description	Short	T	U
<input type="checkbox"/>	"Alcohol problems" (c...	AlcP...	D	2
<input type="checkbox"/>	- "Unremarkable"	Unr	M	1
<input checked="" type="checkbox"/>	"Anemia" (ICD#285.9)	Ane	D	1
<input checked="" type="checkbox"/>	"Osteoarthritis" (nons...	Ost	D	1
<input type="checkbox"/>	"Asthma" (nonspecifi...	Ast	D	1
<input type="checkbox"/>	"Congenital anomaly" ...	ConA	D	1
<input type="checkbox"/>	"Bleeding problems" (...)	BleD	D	1
<input type="checkbox"/>	"Breast cancer" (nons...	BreC...	D	1
<input type="checkbox"/>	"Cervical cancer" (no...	Cer...	D	1
<input type="checkbox"/>	"Colon cancer" (nons...	ColC...	D	1
<input type="checkbox"/>	"Cancer of Prostate" (...)	Can...	D	1
<input type="checkbox"/>	"Ovarian cancer" (ICD...	Ova...	D	1
<input type="checkbox"/>	"Chemical dependency" ...	Che...	D	1
<input type="checkbox"/>	"Congestive heart failur...	ConH	D	1
<input type="checkbox"/>	"Coronary artery diseas...	CorA	D	1

Active Problems[  
Anemia ICD#285.9  
Osteoarthritis ICD#715.90]

With the Active Problems Pick List displayed in the SMARText Quick Access Dialog:

1. Click in the box in the "Selected" column next to each of the items that you wish to insert into the Active Problems field.
2. When the items are inserted, the Starter Active Problems header will disappear.

## SOAPware Learns Your Preferences

---

After some time, and the insertion of several SMARText items into some of the Summary fields, go back and see how SOAPware has learned your preferences. In order to see choices you have made in the past, simply click in a field and SOAPware Quick Access displays the items you have previously used. SOAPware actually counts your usage, automatically ranking the items in the list accordingly.

### Train and Practice Your Summary Fields

Consider taking some time to teach SOAPware a little bit about your preferred items. The simplest way to do this is to create a practice chart, then find/insert your most commonly used items into the appropriate fields.

**NOTE:** SOAPware stores each user's usage patterns separately so that the list in Quick Access is unique to each user.

## Inactive Problems

---

This lesson will demonstrate how to insert the Inactive Problems Starter Pick List if your Summary docuplate does not already contain the Starter Pick List.

The Inactive Problems field in the Summary is for recording all the medical problems the patient has had in the past but is not currently being treated for at this time.

### Placing of the Insertion Point



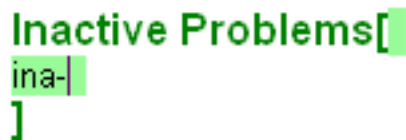
The image shows the text "Inactive Problems" in a bold green font. To the right of the text, there is a large, bold green opening square bracket "[". Below the text, there is a large, bold green closing square bracket "]".

With a patient's chart open and the Summary chart section visible:

1. Place your insertion point to the right of the field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), the the field is active and ready for you to begin entering data.

### Inserting the Starter Pick List for Inactive Problems



The image shows the text "Inactive Problems" in a bold green font. To the right of the text, there is a large, bold green opening square bracket "[". Below the text, there is a large, bold green closing square bracket "]". The text "ina-" is typed into the field, and a cursor is visible at the end of the text.

To insert the Starter Pick List for the Inactive Problems:

1. Type ina- into the Inactive Problems field (as shown above)
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. After you have used the Pick List once, you will be able to expand it using the Spacebar method.*

See this link for searching instructions: [SMARText Data Entry Methods](#).

## Inactive Problems Starter Pick List

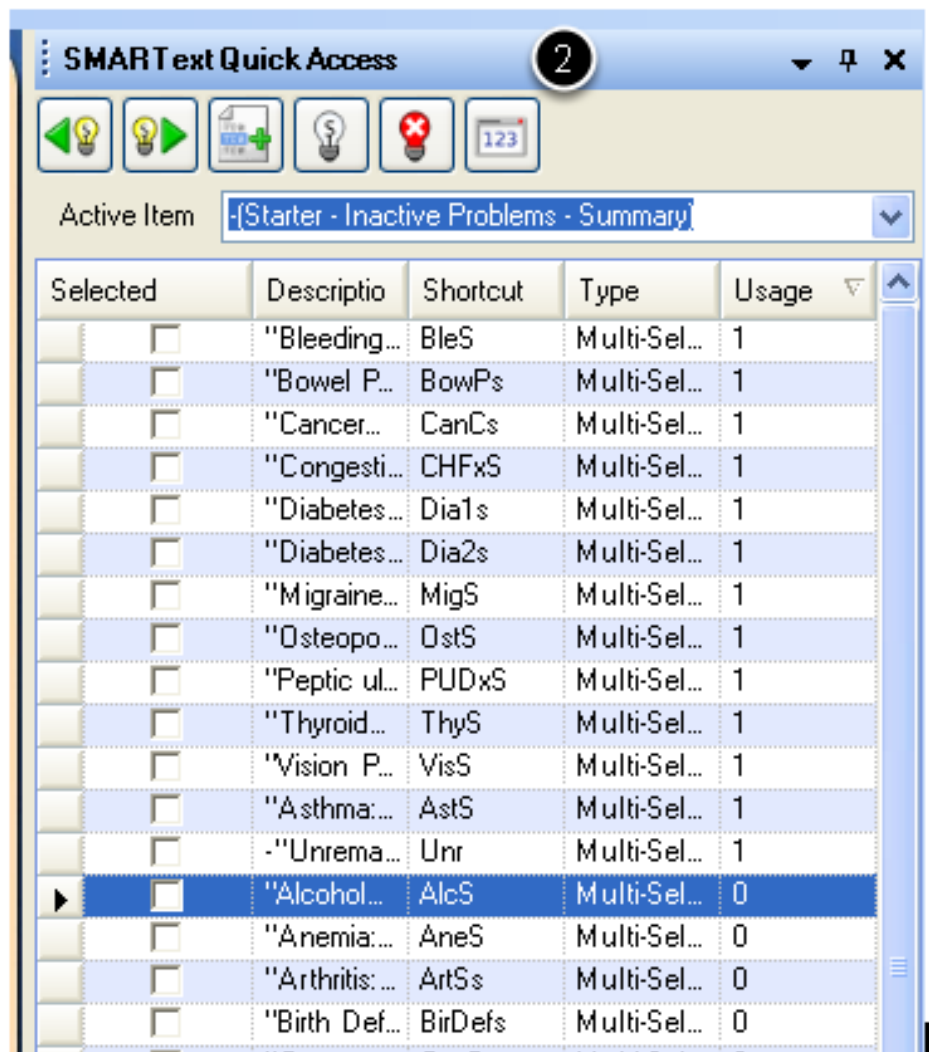
### Inactive Problems[ Starter - Inactive Problems:]

The Inactive Problems Starter Pick List contains a list of some of the most common diagnosis. It may not contain all items you will use in your charting.

## Accessing the Inactive Problems Pick List

Left click on  
Starter -  
Inactive  
Problems

Inactive Problems  
Starter - Inactive Problems:[]



Selected	Description	Shortcut	Type	Usage
<input type="checkbox"/>	"Bleeding...	BleS	Multi-Sel...	1
<input type="checkbox"/>	"Bowel P...	BowPs	Multi-Sel...	1
<input type="checkbox"/>	"Cancer...	CanCs	Multi-Sel...	1
<input type="checkbox"/>	"Congesti...	CHFxs	Multi-Sel...	1
<input type="checkbox"/>	"Diabetes...	Dia1s	Multi-Sel...	1
<input type="checkbox"/>	"Diabetes...	Dia2s	Multi-Sel...	1
<input type="checkbox"/>	"Migraine...	MigS	Multi-Sel...	1
<input type="checkbox"/>	"Osteopo...	OstS	Multi-Sel...	1
<input type="checkbox"/>	"Peptic ul...	PUDxs	Multi-Sel...	1
<input type="checkbox"/>	"Thyroid...	ThyS	Multi-Sel...	1
<input type="checkbox"/>	"Vision P...	VisS	Multi-Sel...	1
<input type="checkbox"/>	"Asthma:...	AstS	Multi-Sel...	1
<input type="checkbox"/>	"Unrema...	Unr	Multi-Sel...	1
<input type="checkbox"/>	"Alcohol...	AlcS	Multi-Sel...	0
<input type="checkbox"/>	"Anemia:...	AneS	Multi-Sel...	0
<input type="checkbox"/>	"Arthritis:...	ArtSs	Multi-Sel...	0
<input type="checkbox"/>	"Birth Def...	BirDefs	Multi-Sel...	0

In SOAPware, text that appears, Blue and Underlined indicates that a Pick List is attached to the SMARText Item.

1. Left click on the Pick List header (ie: Starter Inactive Problems)
2. A list of item will appear in the SMARText Quick Access

## Choosing Items from the Inactive Problems Pick List

The screenshot shows the SMARTText Quick Access Dialog with the 'Inactive Problems' pick list. The 'Active Item' dropdown is set to '-(Starter - Inactive Problems - Summary)'. The table below lists various medical conditions with checkboxes in the 'Selected' column. Two items, 'Diabetes - Type 2' and 'Migraine', are selected. On the left, the 'Inactive Problems' field shows 'Diabetes - Type 2' and 'Migraine' as selected items.

Selected	Description	Shortcu	Type	Usag
<input type="checkbox"/>	"Bleeding Disorder" ...	BleS	Multi-S ...	1
<input type="checkbox"/>	"Bowel Problems:" ...	BowPs	Multi-S ...	1
<input type="checkbox"/>	"Cancer of Cervix:" ...	CanCs	Multi-S ...	1
<input type="checkbox"/>	"Congestive Heart F...	CHFxS	Multi-S ...	1
<input type="checkbox"/>	"Diabetes - Type 1:" ...	Dia1s	Multi-S ...	1
<input checked="" type="checkbox"/>	"Diabetes - Type 2:" ...	Dia2s	Multi-S ...	1
<input checked="" type="checkbox"/>	"Migraine:" (SIMP...	MigS	Multi-S ...	1
<input type="checkbox"/>	"Osteoporosis:" (S...	OstS	Multi-S ...	1
<input type="checkbox"/>	"Peptic ulcer diseas...	PUDxS	Multi-S ...	1
<input type="checkbox"/>	"Thyroid Problems:" ...	ThyS	Multi-S ...	1
<input type="checkbox"/>	"Vision Problems:" ...	VisS	Multi-S ...	1
<input type="checkbox"/>	"Asthma:" (SIMP...	AstS	Multi-S ...	1

**Inactive Problems**  
Diabetes - Type 2: [ ☒ ]  
Migraine: [ ☒ ]

With the Inactive Problems Pick List displayed in the SMARTText Quick Access Dialog, click in the box in the "Selected" column next to each of the items that you wish to insert into the Inactive Problems field.

When the items are inserted, the Starter Inactive Problems header will disappear.

## Surgeries

---

This lesson will demonstrate how to insert the Surgeries Starter Pick List if your Summary docuplate does not already contain the Starter Pick List. This lesson will also described how to use the Surgeries Starter Pick List.

The Surgeries field in the Summary is for recording the patients past Surgical and procedural history.

### Placing of the Insertion Point



Surgeries[  
]

With a patient's chart open and the Summary chart section visible:

1. Place your insertion point to the right of the field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ready for you to being entering data.

### Inserting the Starter Pick List for Surgeries



Surgeries[  
sur-  
]

To insert the Starter Pick List for the Surgeries field:

1. Type sur- into the Surgeries Field (as shown above)
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. After you have used the Pick List once, you will be able to expand it using the Spacebar method.*

## Surgeries Starter Pick List

Surgeries[  
Starter - Surgeries:  
]

The Surgeries Starter Pick List contains a list of some of the most common surgeries. It may not contain all the items you will use be using your charting.

## Accessing the Surgery Pick List

Click on Starter - Surgeries

1

2

Selected	Description	Shortcu	Type	Usag
<input type="checkbox"/>	Adenoidectomy:	SurAde	Multi-S...	1
<input type="checkbox"/>	Appendectomy,	SurApp	Multi-S...	1
<input type="checkbox"/>	Arthroscopy,	SurArt	Multi-S...	1
<input type="checkbox"/>	Bladder repair.	SurBla...	Multi-S...	1
<input type="checkbox"/>	Breast biopsy,	SurBre...	Multi-S...	1
<input type="checkbox"/>	Cataract removal,	SurCat	Multi-S...	1
<input type="checkbox"/>	Cystoscopy.	SurCys	Multi-S...	1
<input type="checkbox"/>	D & C:	SurDC	Multi-S...	1
<input type="checkbox"/>	Gall bladder remov...	SurGB	Multi-S...	1
<input type="checkbox"/>	Hemorrhoidectomy:	SurHem	Multi-S...	1
<input type="checkbox"/>	Knee surgery:	SurKne	Multi-S...	1
<input type="checkbox"/>	Mastectomy:	SurMas	Multi-S...	1
<input type="checkbox"/>	No history of any m...	SurNo	Multi-S...	1
<input type="checkbox"/>	Skin cancer removal:	SurSki...	Multi-S...	1
<input type="checkbox"/>	Tonsillectomy and...	SurTA	Multi-S...	1

In SOAPware, text that appears Blue and Underlined indicates that a Pick List is attached to the SMARText Item.

1. Left click on the Pick List header (ie Starter - Surgeries)
2. A list of items will appear in the SMARText Quick Access Dialog.



## Choosing Items from the Starter Surgeries Pick List

SMARText Quick Access

Active Item: (Starter - Surgeries - Summary)

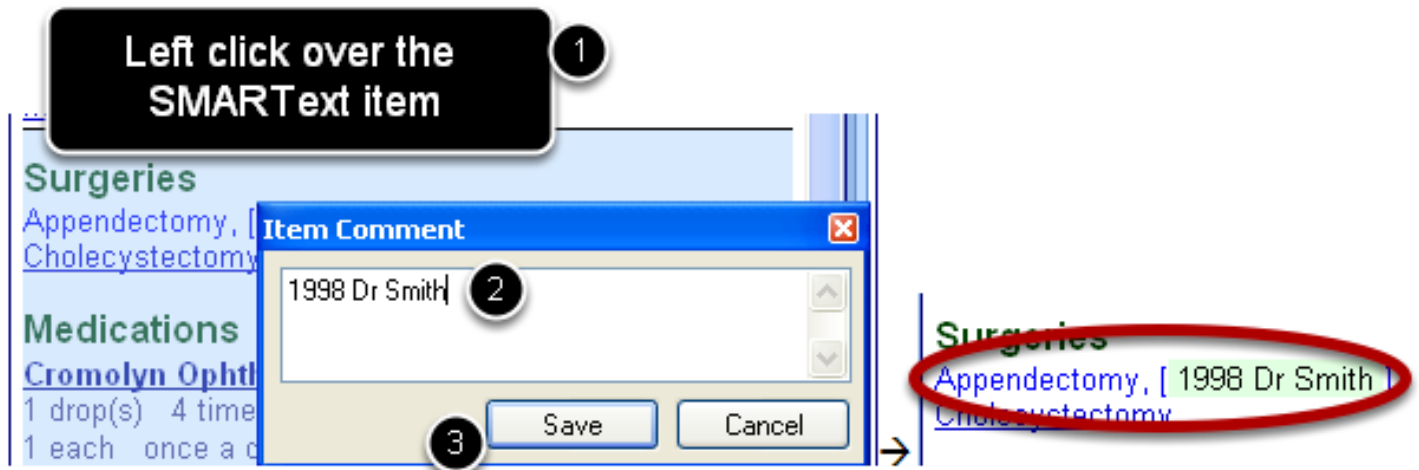
Selected	Description	Shortcu	Type	Usag
<input type="checkbox"/>	Adenoidectomy:	SurAde	Multi-S ...	1
<input checked="" type="checkbox"/>	Appendectomy,	SurApp	Multi-S ...	1
<input type="checkbox"/>	Arthroscopy,	SurArt	Multi-S ...	1
<input type="checkbox"/>	Bladder repair.	SurBla...	Multi-S ...	1
<input type="checkbox"/>	Breast biopsy,	SurBre...	Multi-S ...	1
<input type="checkbox"/>	Cataract removal,	SurCat	Multi-S ...	1
<input type="checkbox"/>	Cystoscopy.	SurCys	Multi-S ...	1
<input type="checkbox"/>	D & C:	SurDC	Multi-S ...	1
<input type="checkbox"/>	Gall bladder remov...	SurGB	Multi-S ...	1
<input type="checkbox"/>	Hemorrhoidectomy:	SurHem	Multi-S ...	1
<input type="checkbox"/>	Knee surgery:	SurKne	Multi-S ...	1
<input type="checkbox"/>	Mastectomy:	SurMas	Multi-S ...	1
<input type="checkbox"/>	No history of any m...	SurNo	Multi-S ...	1
<input type="checkbox"/>	Skin cancer removal:	SurSki...	Multi-S ...	1
<input type="checkbox"/>	Tonsillectomy and...	SurTA	Multi-S ...	1
<input type="checkbox"/>	Brainectomy		Structur...	1
<input type="checkbox"/>	Carpal tunnel relea...	SurCTS	Multi-S ...	0
<input checked="" type="checkbox"/>	Cholecystectomy.	SurCho	Multi-S ...	0

Surgeries  
Appendectomy, [  
Cholecystectomy.]

With the Surgery Pick List displayed in the SMARText Quick Access Dialog, click in the box in the "Selected" column next to each of the items that you wish to insert in the Surgeries field.

When the items are inserted, the Starter Surgeries header will disappear.

## Attach Comments to a Pick List Item



To attach a free text comment to the SMARText item:

1. Left click on top of the SMARText item (ie: Appendectomy - see above)
2. Begin typing your desired comments (ie: 1998 by Dr. Smith, as shown above). The Item Comment box will not appear until **after** you start typing.
3. Click Save to insert the comments or you can press Enter on your keyboard.

## Medications

---

This lesson will demonstrate how to insert the patients current medications in the Medications field on the Summary side using the Shift + F11 searching method.

The Summary Medications field is for all the medications the patient is currently taking.

### **\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - MAINTAIN ACTIVE MEDICATIONS LIST & MEDICATION ORDER ENTRY**

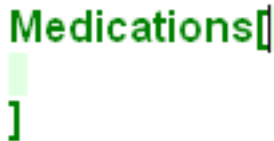
[Click here to view Meaningful Use criteria - Maintain Active Medications List](#)

[Click here to view Meaningful Use criteria - Medication Order Entry](#)

### **\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - MEDICATION RECONCILIATION**

[Click here to view Meaningful Use Criteria](#)

#### Placing of the Insertion Point



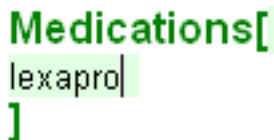
Medications[

With the patients chart open and the Summary chart section visible:

1. Place your insertion point to the right of the Medications field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), the field is active and ready for you to begin entering data.

#### Entering the Medication Keyword



Medications[  
lexapro]

Type the name of the medication you wish to enter into the Medications field, leaving the cursor at the end of word (as shown above)

## Conducting the Shift + F11 Search

Medications[

lexapro

Press Shift + F11 to view  
search results

QA	Description			
▲ 1	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1
▼	Lexapro		Rx	1
▼	Lexapro (Escitalopram)	Lex2	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	- "Lexapro 20 mg #30 1qd R-0"	Lexapro20...	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	Lexapro tabs	LEXAPRO	Rx	1
▼	(Allergy) "Lexapro (Escitalopram)"	AllLex	Rx	1
▼	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1
▼	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1

- 1) Press the Shift plus the F11 key on the keyboard to conduct the search.
- 2) A search results dialog box will be displayed (as shown above).

## Search Results Dialog Box Interface

Medications[		Medications		
1	2	3	4	5
QA	Description	Shortcut	Type	Usage
▲ 1	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1
▼	Lexapro		Rx	1
▼	Lexapro (Escitalopram)	Lex2	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	- "Lexapro 20 mg #30 1qd R-0"	Lexapro20...	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1
▼	Lexapro tabs	LEXAPRO	Rx	1
▼	(Allergy) "Lexapro (Escitalopram)"	AllLex	Rx	1
▼	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1
▼	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1

### Column #1: Triangles

\* **Upward facing triangle:** Indicates the SMARText item is located on your local database.

- \* **Downward facing triangle:** Indicates the SMARTText item is located on the SOAPware On line Library.
- \* **Green triangle:** Indicates that the SMARTText item was created by SOAPware.
- \* **Yellow triangle:** Indicates that the SMARTText item has been edited or created by a SOAPware user.
- \* **Red triangle:** Indicates that the SMARTText item is not available for use.

## Column #2: Description

- \* This column gives a description of the SMARTText item. In a description that includes text with quotes, the text within quotes **will be** inserted into the documentation. In a description that includes text with parenthesis, the text within parenthesis **will not be** inserted into the documentation.

## Column #3: Shortcut

- \* This is the Shortcut code that is assigned to the SMARTText item. The Shortcut code can be used to enter the item into the documentation.

## Column #4: Type

- \* There are several different types of SMARTText items. This column will indicate the item type (ie: Rx)

## Column #5: Usage

- \* This column indicates the number of times the SMARTText item has been inserted by the User.

## Inserting the Medication

**1 Double click on the medication item**

QA	Description	Shortcut	Type	Usage
▲ 1	"Lexapro (Escitalopram) 20 mg, #90, ...	Lex2	Rx	1
▼	Lexapro		Rx	1
▼	Lexapro (Escitalopram)	Lex2	Rx	1
▼	- "Lexapro 10 mg, #30, 1 daily R - 3"	lexapro10...	Rx	1

**2 The medication will be inserted into the field**

Medications[ Lexapro (Escitalopram): 20 mg (tablet)  
1 each once a day ]

1. Double click on the medication item you wish to insert.
2. The item will be inserted into the Medications field.

## Allergies

---

This lesson will demonstrate how to insert the Allergy Starter Pick List if your Summary document does not already contain the Starter Pick List. This lesson will also describe how to use the Allergy Starter Pick List and how to insert Allergies that are not drug related allergies.

The Allergy field in the Summary chart section is used to record a list of the patient's allergies and intolerances. This list is used when e-Prescribing to alert the physician of any possible allergy to drug interactions.

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) CORE REQUIREMENT - SEE ALLERGIES STARTER PICK LIST**

**\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - MEDICATION ALLERGY LIST**

[Click here to view Meaningful Use criteria](#)

### Placing of the Insertion Point

Allergies[  
]

With a patient chart open and the Summary chart section visible:

1. Place your insertion point to the right of the field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Inserting the Starter Pick List for Allergies

Allergies[  
all-  
]

To insert the Starter Pick List for Allergies:

1. Type all- into the Allergies field (as shown above).
2. Press the spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. Once you have used the Pick List once, you will*

be able to expand it using the Spacebar method.

## Allergies Starter Pick List

Allergies[

Starter - Allergies - Summary: |

]



The allergies Starter Pick List is used to record a list of the patients allergies and intolerances. This list is used when e-Prescribing to alert the physician of any possible allergy to drug interactions.

### **\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - MEDICATION INTERACTIONS/ALERTS**

[Click here to view Meaningful Use Criteria.](#)

## Accessing the Allergy Starter Pick List

In SOAPware, text that appears [Blue](#) and [Underlined](#) indicates that a Pick List is attached to the SMARText item.

Left click on the Pick List header (ie: Starter - Allergies - Summary) and a list of items will appear in the SMARText Quick Access Dialog.

## Choosing Items from the Allergy Pick List

**SMARText Quick Access**

Active Item: (Starter - Allergies - Summary:)

Selected	Description	Shor	Typ	Usa
<input type="checkbox"/>	(Allergy) "AUGMENTIN:"	AlIA...	Rx	2
<input checked="" type="checkbox"/>	(Allergy) "ERYTHROMCYIN:"	AlIE...	Rx	2
<input type="checkbox"/>	(Allergy) "THORAZINE:"	AlIT...	Rx	2
<input type="checkbox"/>	- "Drug Allergies. No Known."	NK...	Str...	1
<input type="checkbox"/>	(Allergy) "ANTIHISTAMINE (e.g. BEN...	AlIB...	Rx	1
<input type="checkbox"/>	(Allergy) "BIAXIN:"	AlIB...	Rx	1
<input checked="" type="checkbox"/>	(Allergy) "CODEINE:"	AlIC...	Rx	1
<input type="checkbox"/>	(Allergy) "DARVOCET:"	AlID...	Rx	1
<input type="checkbox"/>	(Allergy) "HYDROCODONE - (e.g. VI...	AlIV...	Rx	1
<input checked="" type="checkbox"/>	(Allergy) "IODINE"	AlII...	Rx	1
<input type="checkbox"/>	(Allergy) "LEXAPRO:"	AlIL...	Rx	1
<input type="checkbox"/>	(Allergy) "MACRODANTIN / Nitrofur...	AlI...	Rx	1
<input checked="" type="checkbox"/>	(Allergy) "PENCILLIN:"	AlIP...	Rx	1
<input type="checkbox"/>	(Allergy) "QUININE:"	AlI...	Rx	1
<input type="checkbox"/>	(Allergy) "TALWIN:"	AlIT...	Rx	1
<input type="checkbox"/>	(Allergy) "AMOXICILLIN:"	AlIa...	Rx	1
<input type="checkbox"/>	(Allergy) "ASPIRIN:"	AlIA...	Rx	0

**Allergies[**  
**CODEINE:[**  
**PENCILLIN:**  
**IODINE**  
**ERYTHROMCYIN:**  
**]**

With the Allergy Pick List displayed in the SMARText Quick Access dialog, click to place a check in the box in the "Select" field next to each of the items that you wish to insert into the Allergy field.

When the items are inserted, the Allergy Pick List header will disappear.

The Allergy Pick List only contains drug related allergies. To enter non-drug related allergies, such as food intolerances, see the step titled Entering Non-Drug Related Allergies below.



## Attaching Item Comments to Allergies

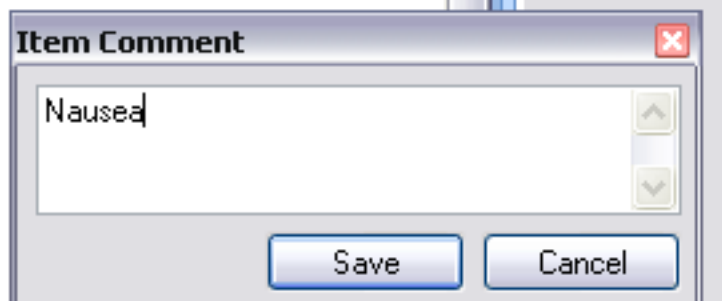
### Allergies

CODEINE: Rash

PENCILLIN:

IODINE

ERYTHROMCYIN:



To attach a free text comment to the SMARText item:

1. Left click on top of the SMARText item (ie: Codeine - see above).
  2. Begin typing your desired comments (ie: Nausea - as shown above). An "Item Comment" box will appear for you to type in.
- Save your comments.

The item comment will be inserted next to the SMARText item (see Codeine example above).

## Entering Non-Drug Related Allergies

Allergies[  
Peanuts  
]

The Allergy Pick List only contains SMARText items for drug related allergies. As a result, there will be a need to add non-drug related allergies such as food intolerances, in a free text fashion. To enter free text non-drug related allergies, simply free-text type the intolerance into the allergy field (as shown above).

## Adding SMARText Code to Non-Drug Related Allergies

1 Allergies[  
Peanuts id-  
]

2 Allergies[  
Peanuts (ID-Ignore)  
]

→

After adding the free-text non-drug related allergy, we suggest that you add a SMARText code so the system won't recognize it as a drug interaction when performing the e-Prescribing function.

The SMARText item that you will want to attach enters the text **(ID-Ignore)** next to the free-text allergy.

This will allow the sentence or line of text to be ignored in the drug interaction check. If you do not enter this SMARTText item next to a free-text allergy the system will see the item as uncoded and will alert you that there is an item it doesn't recognize, when you are e-Prescribing.

To insert the (ID-Ignore) SMARTText item:

1. Type the shortcut code id- next to the free-text allergy.
2. Press the spacebar key on your computer to expand the SMARTText item to read (ID-Ignore).

## Family History

---

This lesson will demonstrate how to insert the Family History Starter Pick List if your Summary docuplate does not already contain the Starter Pick List. This lesson will also describe how to use the Family History Starter Pick List and how to insert an Item Comment.

The Family History field in the Summary chart section is used to record the patients family medical history.

### Placing of the Insertion Point

The image shows the text 'Family History' in a green font. To the right of the text, there is a large, bold, green opening square bracket '[' and a large, bold, green closing square bracket ']' stacked vertically, indicating the insertion point for data.

With a patient chart open and the Summary chart section visible:

1. Place your insertion point to the right of the field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Inserting the Starter Pick List for Family History

The image shows the text 'Family History' in a green font. Below it, the text 'fam-' is entered in a smaller green font. To the right of 'fam-', there is a large, bold, green opening square bracket '[' and a large, bold, green closing square bracket ']' stacked vertically, indicating the insertion point for data.

To insert the Starter Pick List for Family History:

1. Type fam- into the Family History field (as shown above).
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. Once you have used the Pick List once, you will be able to expand it using the Spacebar method.*

## Family History Starter Pick List

**Family History[**  
PARENTS:  
CHILDREN:  
GRANDPARENTS:  
SIBLINGS:  
UNCLES/AUNTS:  
OTHERS/DISTANT:  
Positive family history for -  
Negative family history for -  
**]**

The Family History Starter Pick List will expand to include the information shown above.

The Family History Starter Pick List should be used as a guide. It may not contain all the items you will use in your charting.

## Choosing Items from the Family History Pick List

### Family History

PARENTS:  
CHILDREN:  
GRANDPARENTS:  
SIBLINGS:  
UNCLES/AUNTS:  
OTHERS/DISTANT:  
Positive family history for - [ Cancer of Colon ; Diabetes - Type 2 ; Asthma : ]  
Negative family history for -

SMARText Quick Access 2

Active Item - "Positive family history for -"

Selected	Description	Sho	Type	Usa
<input type="checkbox"/>	- "Unremarkable"	Unr	Mult...	1
<input type="checkbox"/>	"Alcohol problems" (SIMPL...	AlcS	Mult...	1
<input type="checkbox"/>	"Anemia:" (SIMPLE - Dx ...	An...	Mult...	1
<input type="checkbox"/>	"Arthritis:" (SIMPLE - Nons...	Art...	Mult...	0
<input checked="" type="checkbox"/>	"Asthma:" (SIMPLE - Dx ...	AstS	Mult...	2
<input type="checkbox"/>	"Birth Defect:" (SIMPLE ...	Bir...	Mult...	1
<input type="checkbox"/>	"Bleeding Disorder" (SIMPL...	BleS	Mult...	1
<input type="checkbox"/>	"Bowel Problems:" (SIMPL...	Bo...	Mult...	1
<input type="checkbox"/>	"Cancer of Breast:" (SIMP...	Ca...	Mult...	1
<input type="checkbox"/>	"Cancer of Cervix:" (SIMP...	Ca...	Mult...	1
<input checked="" type="checkbox"/>	"Cancer of Colon" (SIMPL...	Ca...	Mult...	2
<input type="checkbox"/>	"Cancer of Prostate:" (SIM...	Ca...	Mult...	1
<input type="checkbox"/>	"Cancer, Ovarian:" (SIMPL...	Ca...	Mult...	0
<input type="checkbox"/>	"Cancer:" (SIMPLE - Dx - n...	Ca...	Mult...	1
<input type="checkbox"/>	"Chemical Dependency" (...	Ch...	Mult...	1
<input type="checkbox"/>	"Congestive Heart Failure:" ...	CH...	Mult...	1
<input type="checkbox"/>	"Coronary artery disease:" ...	CA...	Mult...	0
<input type="checkbox"/>	"Depression:" (SIMPLE - N...	De...	Mult...	1
<input checked="" type="checkbox"/>	"Diabetes - Type 2:" (SIM...	Dia...	Mult...	2
<input type="checkbox"/>	"Diabetes - Type I:" (SIMP...	Dia...	Mult...	2

In SOAPware, text that appears Blue and Underlined indicates that a Pick List is attached to the SMARText Item.

To select items from a Pick List:

1. Left click on top of the item (ie: "Positive family history for").
2. A list of items will appear in your SMARText Quick Access dialog.
3. Place a check box in the "Selected" field next to each of the items that you wish to insert into the Family History field.

### Attaching Item Comment to Family History

#### Family History

[PARENTS:](#)

[CHILDREN:](#)

[GRANDPARENTS:](#)

[SIBLINGS:](#)

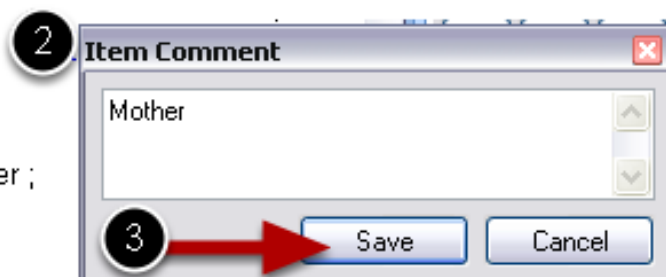
[UNCLES/AUNTS:](#)

[OTHERS/DISTANT:](#)

Positive family history for - Cancer of colon Grandmother ;

Diabetes - Type 2: Grandfather ; Asthma: []

Negative family history for -



To attach a free text comment to the SMARText item:

1. Left click on top of the SMARText item (ie: Asthma - see above).
2. Begin typing your desired comments (ie: Mother, as shown above). An "Item Comment" box will appear for you to type in.
3. Save your comments.

The item comment will be inserted next to the SMARText item (see Diabetes - Type 2 example above).

## Tobacco

---

This lesson will demonstrate how to insert the Tobacco Starter Pick List if your Summary docuplate does not already contain the Starter Pick List. This lesson will also describe how to use the Tobacco Starter Pick List.

The Tobacco field in the Summary chart section is used to record the past and present tobacco use history.

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) CORE REQUIREMENT - SEE TOBACCO STARTER PICK LIST**

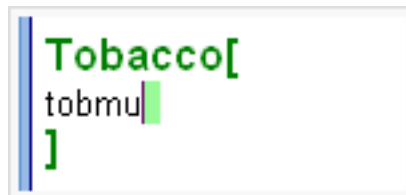
### Placing of the Insertion Point

Tobacco[  
]

1. Place your insertion point to the right of the Tobacco field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Inserting the Starter Pick List for Tobacco

A screenshot of a software interface showing the 'Tobacco' field. The text 'Tobacco[' is at the top in bold green. Below it, the text 'tobmu' is entered in a standard font, followed by a green cursor. Below 'tobmu', a green bracket '[' is visible, indicating the Starter Pick List is expanded. The entire field is enclosed in a light gray border.

To insert the Starter Pick List for Tobacco:

1. Type tobmu into the Tobacco field (as shown above).
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. After you have used the Pick List once, you will be able to expand it using the shortcut code method.*

## Tobacco Starter Pick List



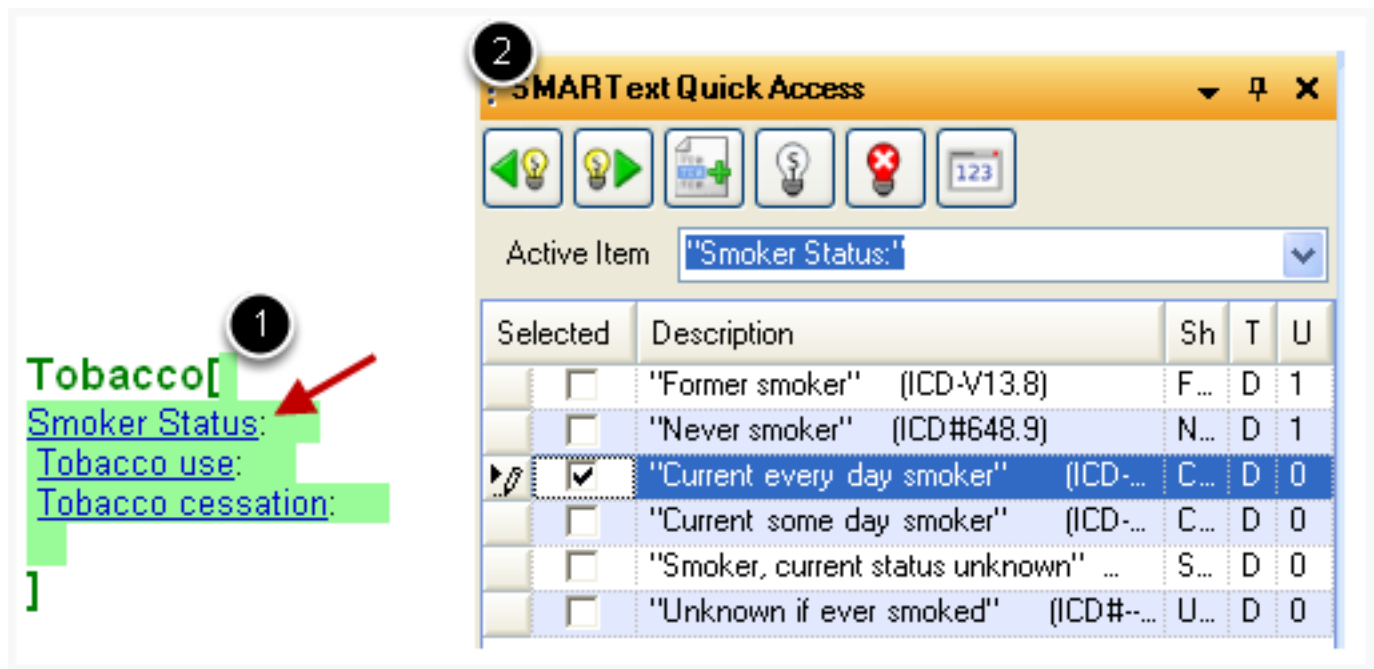
### \*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENTS

[Click here for Meaningful Use Criteria - Smoking Status](#)

[Click here for Meaningful Use Criteria - Report Quality Measures to CMS/States](#)

The Tobacco Starter Pick List is used to record past and present tobacco use. This list is prepared by SOAPware to record all three requirements (smoking status, tobacco use, and tobacco cessation) for Meaningful Use criteria. It may not contain all the items you will use in your charting.

## Accessing the Tobacco Pick List

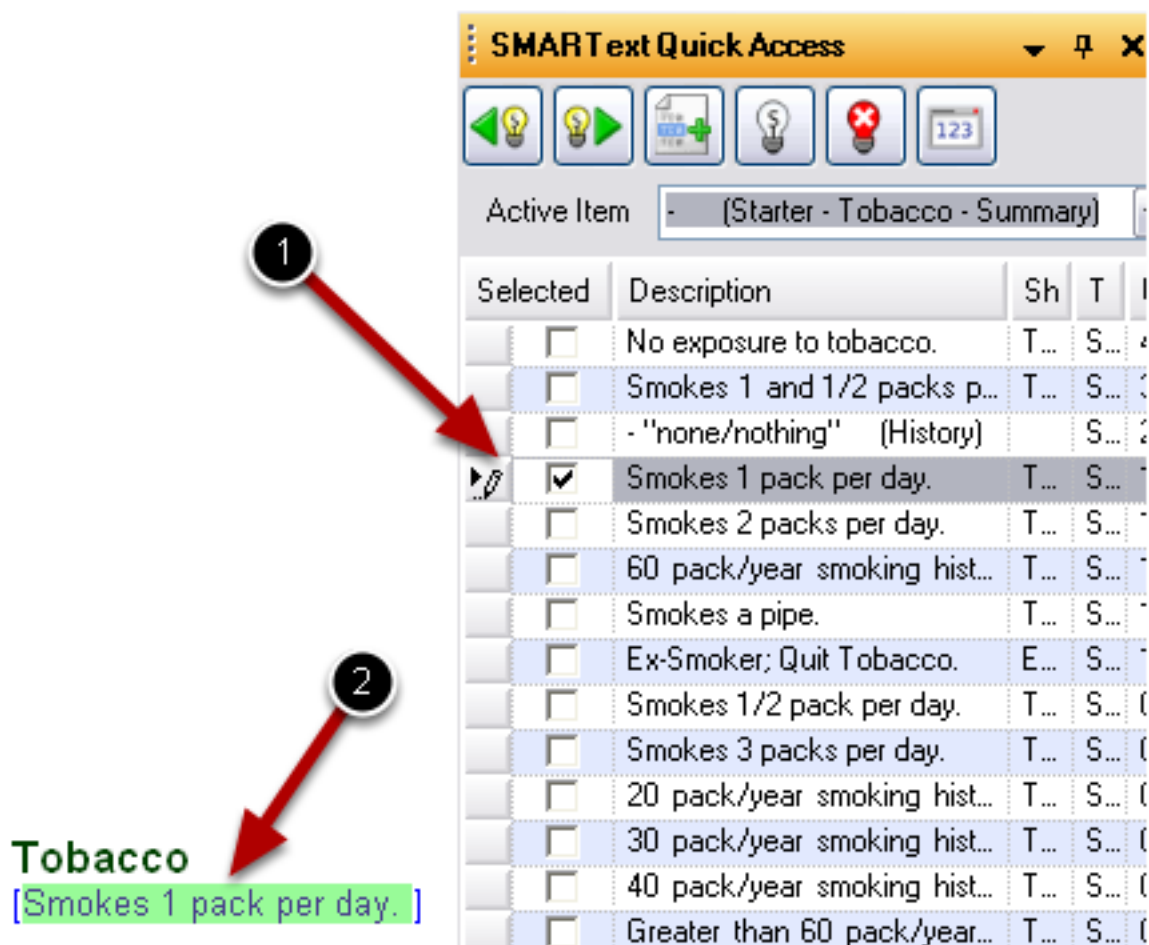


In SOAPware, text that appears Blue and Underlined indicates that a Pick List is attached to the SMARTText item.

1. Left click on the Pick List header (ie: Smoker Status)
2. A list of items will appear in the SMARTText Quick Access Dialog.

Left clicking on each Pick List header seen above, will display a list of items in the SMARTText Quick

## Choosing Items from the Tobacco Pick List



With the Tobacco Pick List displayed in the SMARTText Quick Access dialog, click to place a check in the box in the "Selected" field next to each of the items that you wish to insert into the Tobacco field.

After the items are inserted, the starter Tobacco Pick List header will disappear.



## Alcohol

---

This lesson will demonstrate how to insert the Alcohol Starter Pick List if your Summary docuplate does not already contain the Starter Pick List. This lesson will also describe how to use the Alcohol Starter Pick List.

The Alcohol field in the Summary chart section is used to record the past and present alcohol use history.

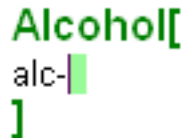
### Placing of the Insertion Point

A screenshot showing the word "Alcohol" in a green font. To its right, there is a green bracket-like cursor icon consisting of a vertical line and a horizontal bar, indicating the insertion point.

1. Place your insertion point to the right of the Alcohol field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Inserting the Starter Pick List for Alcohol

A screenshot showing the word "Alcohol" in a green font. Below it, the text "alc-" is entered in a smaller green font. To the right of "alc-", there is a green bracket-like cursor icon, indicating the insertion point.

To insert the Starter Pick List for Alcohol:

1. Type alc- into the Alcohol field (as shown above).
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. After you have used the Pick List once, you will be able to expand it using the Spacebar method.*

## Alcohol Starter Pick List

Alcohol[  
Starter - Alcohol:  
]

The Alcohol Starter Pick List is used to record past and present alcohol use. It may not contain all the items you will use in your charting.

## Accessing the Alcohol Pick List

2 SMARTText Quick Access

Active Item: (Starter - Alcohol - Summary)

Select	Description	S	T	U
<input type="checkbox"/>	No alcohol consumed.		St	1
<input type="checkbox"/>	Beer at least once a mon...		St	1
<input type="checkbox"/>	1. Classifies self as not b...		St	1
<input type="checkbox"/>	Beer every day.		St	0
<input type="checkbox"/>	Beer at least once a wee...		St	0
<input type="checkbox"/>	Beer more than once a y...		St	0
<input type="checkbox"/>	Beer once a year or less.		St	0
<input type="checkbox"/>	Wine (i.e. 3 oz) every da...		St	0
<input type="checkbox"/>	Wine (i.e. 3 oz) at least o...		St	0
<input type="checkbox"/>	Wine (i.e. 3 oz) at least o...		St	0
<input type="checkbox"/>	Wine (i.e. 3 oz) more tha...		St	0
<input type="checkbox"/>	Wine (i.e. 3 oz) once a y...		St	0
<input type="checkbox"/>	Mixed drink every day.		St	0
<input type="checkbox"/>	Mixed drink at least once...		St	0
<input type="checkbox"/>	Mixed drink at least once...		St	0
<input type="checkbox"/>	Mixed drink more than o...		St	0
<input type="checkbox"/>	Mixed drink once a year...		St	0
<input type="checkbox"/>	Average of more than on...		St	0
<input type="checkbox"/>	Average of 5 or 6 cans of...		St	0
<input type="checkbox"/>	Average of 3 or 4 cans of...		St	0
<input type="checkbox"/>	Average of 1 or 2 cans of...		St	0

1

Alcohol Starter - Alcohol:[]

In SOAPware, text that appears Blue and Underlined indicates that a pick list is attached to the SMARTText item.

Left click on the pick list header (ie: Starter - Alcohol:) and a list of items will appear in the SMARTText Quick Access Dialog.

### Choosing Items from the Alcohol Pick List

The SMARTText Quick Access dialog is shown with the 'Active Item' set to '(Starter - Alcohol - Summary)'. The dialog displays a list of items for selection. The first item, '1. Classifies self as not b...', is selected, indicated by a checkmark in the 'Selected' column. A red arrow labeled '1' points to the 'Selected' column header. Below the dialog, the text area shows the header 'Alcohol' and the selected item '1. Classifies self as not being a normal drinker. (2)' highlighted in green. A red arrow labeled '2' points to the 'Alcohol' header.

Selected	Description	S	T	U
<input checked="" type="checkbox"/>	1. Classifies self as not b...		St	1
<input type="checkbox"/>	10. Has arrested for drun...		St	0
<input type="checkbox"/>	2. Friends or relatives st...		St	0
<input type="checkbox"/>	3. Has lost friends or girlf...		St	0
<input type="checkbox"/>	4. Has gotten into troubl...		St	0
<input type="checkbox"/>	5. Has neglected obligati...		St	0
<input type="checkbox"/>	6. Has had DT's, severe...		St	0
<input type="checkbox"/>	7. Has attended a meetin...		St	0
<input type="checkbox"/>	8. Has gone to anyone fo...		St	0
<input type="checkbox"/>	ALCOHOL RISK SCALE ...		St	0
<input type="checkbox"/>	All negative.		St	0
<input type="checkbox"/>	All negative.		St	0
<input type="checkbox"/>	Annoyed at times by oth...		St	0
<input type="checkbox"/>	Average of 1 or 2 cans of...		St	0
<input type="checkbox"/>	Average of 3 or 4 cans of...		St	0
<input type="checkbox"/>	Average of 5 or 6 cans of...		St	0
<input type="checkbox"/>	Average of less than 1 c...		St	0
<input type="checkbox"/>	Average of more than on...		St	0
<input type="checkbox"/>	Beer at least once a mon...		St	1
<input type="checkbox"/>	Beer at least once a wee...		St	0
<input type="checkbox"/>	Beer every day.		St	0
<input type="checkbox"/>	Beer more than once a u...		St	0

Alcohol

[1. Classifies self as not being a normal drinker. (2)]

With the Alcohol pick list displayed in the SMARTText Quick Access dialog, click to place a check in the box in the "Selected" field next to each of the items that you wish to insert into the Alcohol field.

When the items are inserted, the Alcohol Pick List header will disappear.

## Interventions

---

This lesson will demonstrate how to enter information into the Interventions field using free text data entry.

The Interventions field in the Summary chart section can be used as a miscellaneous field that may include things such as last significant medical testing and/or lab work.

### Placing the Insertion Point

**Interventions[  
]**

1. Place your insertion point to the right of the Interventions field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Entering Free Text Data into the Interventions field

**Interventions[  
Interventions field can be used to enter  
miscellaneous data.]**

The Interventions field is a miscellaneous field that can be used to document many items such as, last significant medical testing and/or lab work.

At this time there is not a Pick List available for the Interventions field, however you can enter data into this field by free text typing. To free text type into the field, simply place your insertion point and begin typing information.

## Social History

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This lesson will demonstrate how to insert the Social History Starter Pick List if your Summary docuplate does not already contain the starter pick list. This lesson will also describe how to use the Social History Starter Pick List.

The Social History field in the Summary chart section is used to record a list of social issues including such things as living situation, support systems, etc..

### Placing of the Insertion Point

The image shows the text "Social History" in a bold green font. To the right of the text, there is a bold green opening square bracket "[". Below the text, there is a bold green closing square bracket "]".

1. Place your insertion point to the right of the Social History field header.
2. Left click your mouse to insert your cursor.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.

### Inserting the Starter Pick List for Social History

The image shows the text "Social History" in a bold green font. Below it, the text "soc-" is typed in a smaller font. To the right of "soc-", there is a bold green opening square bracket "[". Below the text, there is a bold green closing square bracket "]".

To insert the Starter Pick List for Social History:

1. Type soc- into the Social History field (as shown above).
2. Press the Spacebar to expand the Pick List.

*Note: If the Pick List does not expand when you press the Spacebar, you may need to do a Shift + F11 search to download the item to your local database. After you have used the Pick List once, you will be able to expand it using the Spacebar method.*

See this link for searching instructions: [SMARText Data Entry Methods](#).

## Social History Starter Pick List

### Social History[ Starter - Social History: ]

The Social History Starter Pick List can be used to record a list of social issues including things such as living situation, support systems, etc. It may not contain all the items you will use in your charting.

## Accessing the Social History Pick List

**2 SMARText Quick Access**

Active Item: [Starter - Social History - Summary]

Selected	Description	Sh	Ty	U
<input type="checkbox"/>	Employed.	E...	St...	3
<input type="checkbox"/>	Completed high school.	Ed...	St...	2
<input type="checkbox"/>	Drives.	Driv	St...	2
<input type="checkbox"/>	No major economic difficulties.	Ec...	St...	2
<input type="checkbox"/>	Single.	Ma...	St...	1
<input type="checkbox"/>	Married.	Ma...	St...	1
<input type="checkbox"/>	Completed college.	Ed...	St...	1
<input type="checkbox"/>	Lives in private home.	Liv...	St...	1
<input type="checkbox"/>	Works more than 40 hours weekly.	W...	St...	1
<input type="checkbox"/>	Good social support network.	Su...	St...	1
<input type="checkbox"/>	Divorced.	Ma...	St...	0
<input type="checkbox"/>	Separated.	Ma...	St...	0
<input type="checkbox"/>	Widow.	Ma...	St...	0
<input type="checkbox"/>	Widower.	Ma...	St...	0
<input type="checkbox"/>	Did not complete high school.	Ed...	St...	0
<input type="checkbox"/>	Completed Trade School Program.	Ed...	St...	0
<input type="checkbox"/>	Completed graduate school.	Ed...	St...	0
<input type="checkbox"/>	Lives in apartment.	Liv...	St...	0
<input type="checkbox"/>	Lives in condo.	Liv...	St...	0
<input type="checkbox"/>	Lives in public housing unit.	Liv...	St...	0
<input type="checkbox"/>	Lives in college dorm.	Liv...	St...	0
<input type="checkbox"/>	Is currently homeless.	Liv...	St...	0
<input type="checkbox"/>	Lives alone.	Liv...	St...	0
<input type="checkbox"/>	Lives with children	Liv	St	0

**1**

**Social History**  
Starter - Social History:[]

In SOAPware, text that appears Blue and Underlined indicates that a Pick List is attached to the SMARText item.

Left click on the Pick List header (ie: Starter - Social History:) and a list of items will appear in the

Choosing Items from the Social History Pick List

SMARText Quick Access

123

Active Item

(Starter - Social History - Summary)

Selected	Description	Sh	Ty	Us
<input checked="" type="checkbox"/>	Employed.	E...	St...	3
<input type="checkbox"/>	Completed high school.	Ed...	St...	2
<input type="checkbox"/>	Drives.	Driv	St...	2
<input checked="" type="checkbox"/>	No major economic difficulties.	Ec...	St...	2
<input type="checkbox"/>	Single.	Ma...	St...	1
<input checked="" type="checkbox"/>	Married.	Ma...	St...	1
<input type="checkbox"/>	Completed college.	Ed...	St...	1
<input checked="" type="checkbox"/>	Lives in private home.	Liv...	St...	1
<input type="checkbox"/>	Works more than 40 hours weekly.	W...	St...	1
<input checked="" type="checkbox"/>	Good social support network.	Su...	St...	1
<input type="checkbox"/>	Divorced.	Ma...	St...	0
<input type="checkbox"/>	Separated.	Ma...	St...	0
<input type="checkbox"/>	Widow.	Ma...	St...	0
<input type="checkbox"/>	Widower.	Ma...	St...	0
<input type="checkbox"/>	Did not complete high school.	Ed...	St...	0
<input type="checkbox"/>	Completed Trade School Program.	Ed...	St...	0
<input type="checkbox"/>	Completed graduate school.	Ed...	St...	0
<input type="checkbox"/>	Lives in apartment.	Liv...	St...	0
<input type="checkbox"/>	Lives in condo.	Liv...	St...	0
<input type="checkbox"/>	Lives in public housing unit	Liv	St	0

1

2

Social History

[Employed. No major economic difficulties. Married. Lives in private home. Strong social support network. ]

With the Social History Pick List displayed in the SMARText Quick Access dialog, click to place a check in the box in the "Selected" field next to each of the items that you wish to insert into the Social History field.

When the items are inserted, the Starter Social History Pick List header will disappear.

## ROS & Physical

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### Getting Started with Your Own Documentation - SUMMARY - ROS & Physical Documentation

The ROS field in the Summary chart section can be used to store a review of systems related to the various organ systems.

The Physical field in the Summary chart section can be used to store a physical examination for easy retrieval.

The ROS & Physical fields are from previous versions of SOAPware and are rarely used in more current versions of SOAPware.

#### Placing of the Insertion Point



**ROS**  
**]**

If you wish to enter data in the ROS and/or Physical field, follow the steps below:

1. Place your insertion point to the right of the ROS or Physical field header.
2. Left click your mouse to insert your cursor.
3. Begin entering desired data.

If the bold green brackets appear (as shown above), then the field is active and ok for you to begin entering data.



# Customized Field Headers

## Remove or Hide Field Headers

It is possible to hide field/headers in the SOAP or Summary chart sections (i.e. such as hiding the Subjective field in SOAP encounter notes)

### Manage Sub-Items

The screenshot shows the 'Docuplates' manager window. On the left is a table listing various docuplates. The 'Summary-DPL' docuplate is selected. On the right, the details for 'Summary-DPL' are shown, including its shortcut, description, keywords, and section. Below the details, there is a list of sub-items: 'UNCLES/AUNTS:', 'OTHERS/DISTANT:', 'Tobacco', 'Alcohol', 'Interventions', and 'Social History'. A right-click context menu is open over the 'Social History' sub-item, showing options like 'Add Word to Dictionary', 'Cut', 'Copy', 'Paste', 'Search FIRST Consult', 'Search MD Consult', 'Manage SMARTText Items', 'Remove Item', 'Review', 'Item History', and 'Manage Sub Items'. A red arrow points from a text box to the 'Manage Sub Items' option in the menu.

Shortcut	Description	Location	Keywords
SoapPL	Summary - with...	SOAP Notes	list, pick, SC
summary	Empty Summary	Summary	
Summary-DPL	Summary Default...	Summary	090603, Def
SumPL	Summary - with...	Summary	lists, pick, S
SumPL	Summary - with...	Summary	lists, pick, S
DrugFailSum	Summary Pick-L...	Summary	Allergy, Drug
evertsonsum	Geriatric summa...	Summary	01.0.A00.GE
summaryOURS	Custom Summar...	Summary	summary he
summary	Summary 2/16/2...	Summary	famdcc, surr
summary	DR.J #1	Summary	FEMALE
summary	summary - 9/09	Summary	summary
arp summary	arp summary	Summary	arp, summar
*summaryEAB2	*SUMMARY DE...	Summary	default, eab,
summary2	summary	Summary	summary
tfmpedsum	Pediatric summa...	Summary	01.0.A00.GE
Summary-DPL	Summary Default...	Summary	090603, Def
famdccsum	Default Summar...	Summary	Allerv. Drug
*summaryEAB	*SUMMARY D...	Summary	
SumPL	Summary - wit	Summary	
jbsummary	Summary	Summary	
summaryEAB	Summary Defa	Summary	
summary	Empty Summar	Summary	
summary	summary - 9/09	Summary	CFP, summa

Right-Click at the very bottom of the docuplate ...

Manage Sub Items

Press F6 to open the Docuplate manager, and Click the docuplate to modify (i.e. usually the choice is the default docuplate for that chart section).

With the docuplate to be edited in view, Right-click just underneath the last field in the docuplate (see screen-shot below). Positioning your cursor can be a little tricky because the right-click has to be in a location just after the last close bracket.

In the right-click menu, Click Manage Sub Items as seen below. (If you see a different menu when you right-click, move your mouse down just a little bit and try again.)

## Hide the Header

The screenshot displays the SMARTText Quick Access interface. On the left, a document editor window titled 'Summary-DPL' shows a document with the following content:

UNCLES/AUNTS:  
OTHERS/DISTANT:

**Tobacco**  
[Pick List - Tobacco - Summary](#)

**Alcohol**  
[Starter - Alcohol - Summary](#)

**Interventions**

**Social History**  
[Starter Pick List - Social History](#)

**ROS**

**Physical**

At the bottom of the document editor, a tab labeled 'Summary' is visible.

On the right, the 'SMARTText Quick Access' sidebar is shown. It contains a checklist with the following items:

Select	Description
<input checked="" type="checkbox"/>	Active Problems
<input checked="" type="checkbox"/>	Inactive Problems
<input checked="" type="checkbox"/>	Surgeries
<input checked="" type="checkbox"/>	Medications
<input checked="" type="checkbox"/>	Allergies
<input checked="" type="checkbox"/>	Family History
<input checked="" type="checkbox"/>	Tobacco
<input checked="" type="checkbox"/>	Alcohol
<input checked="" type="checkbox"/>	Interventions
<input checked="" type="checkbox"/>	Social History
<input checked="" type="checkbox"/>	ROS
<input checked="" type="checkbox"/>	Physical

In the SMARTText Quick Access, all the fields in the docuplate should be displayed. To hide one, Click its Check-box to UN-check it. This doesn't actually remove the field, but has the same functional purpose.

**NOTE:** To reactivate the hidden field, simply re-check the field's check-box.

## The Result

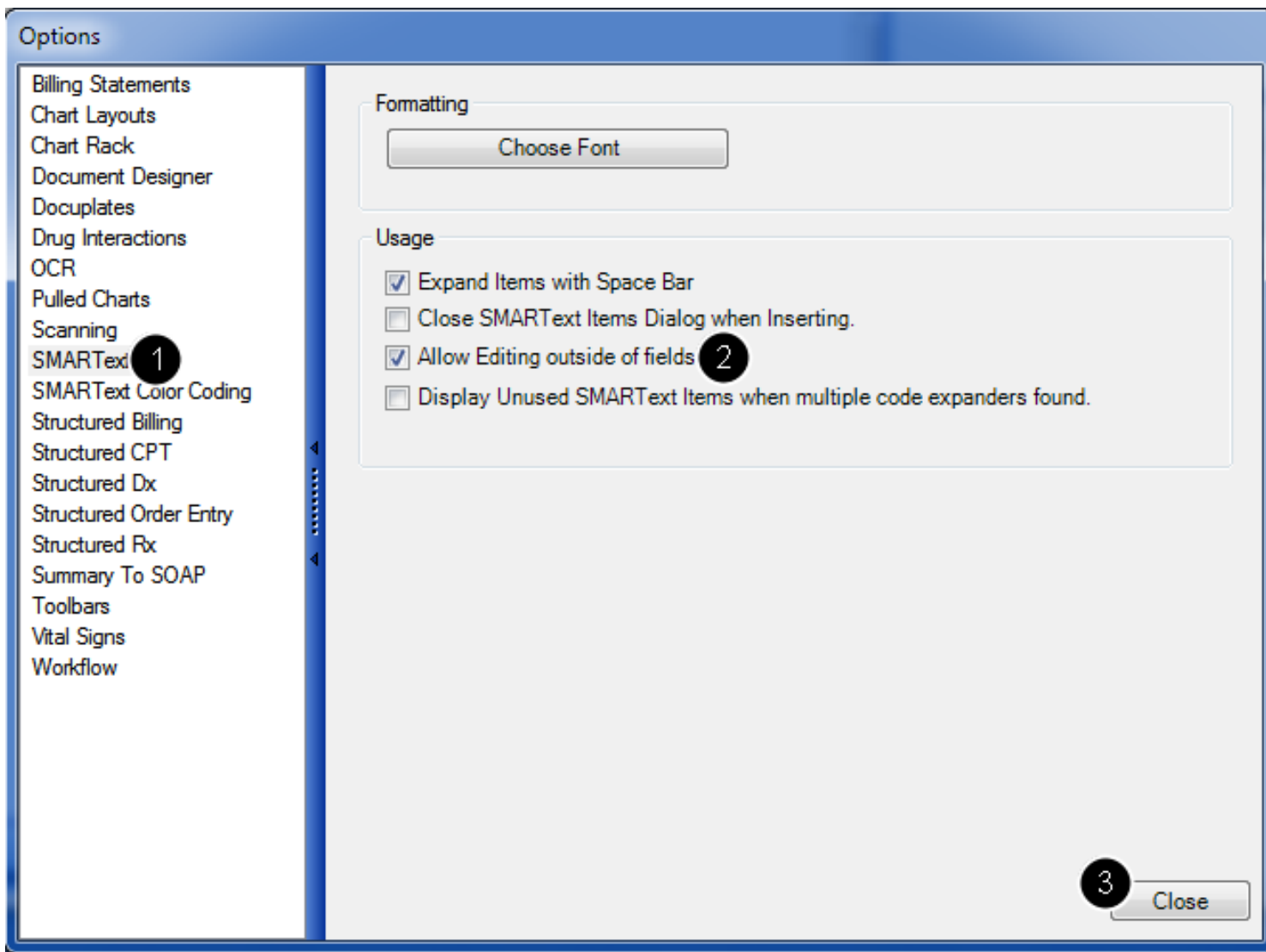
The screenshot displays a medical software interface. On the left, a document titled 'Summary' is open, showing a list of medical topics: 'UNCLES/AUNTS:', 'OTHERS/DISTANT:', 'Tobacco' (with a link to 'Pick List - Tobacco - Summary'), 'Alcohol' (with a link to 'Starter - Alcohol - Summary'), 'Interventions', and 'Social History' (with a link to 'Starter Pick List - Social History'). On the right, the 'SMARText Quick Access' panel is visible, featuring a table of medical categories with checkboxes for selection.

Select	Description
<input checked="" type="checkbox"/>	Active Problems
<input checked="" type="checkbox"/>	Inactive Problems
<input checked="" type="checkbox"/>	Surgeries
<input checked="" type="checkbox"/>	Medications
<input checked="" type="checkbox"/>	Allergies
<input checked="" type="checkbox"/>	Family History
<input checked="" type="checkbox"/>	Tobacco
<input checked="" type="checkbox"/>	Alcohol
<input checked="" type="checkbox"/>	Interventions
<input checked="" type="checkbox"/>	Social History
<input type="checkbox"/>	ROS
<input type="checkbox"/>	Physical

With ROS and Physical Un-Checked, they are no longer visible in the docuplate.

## Create Custom Field Headers

### Enable Editing of SMARText Outside of the Fields



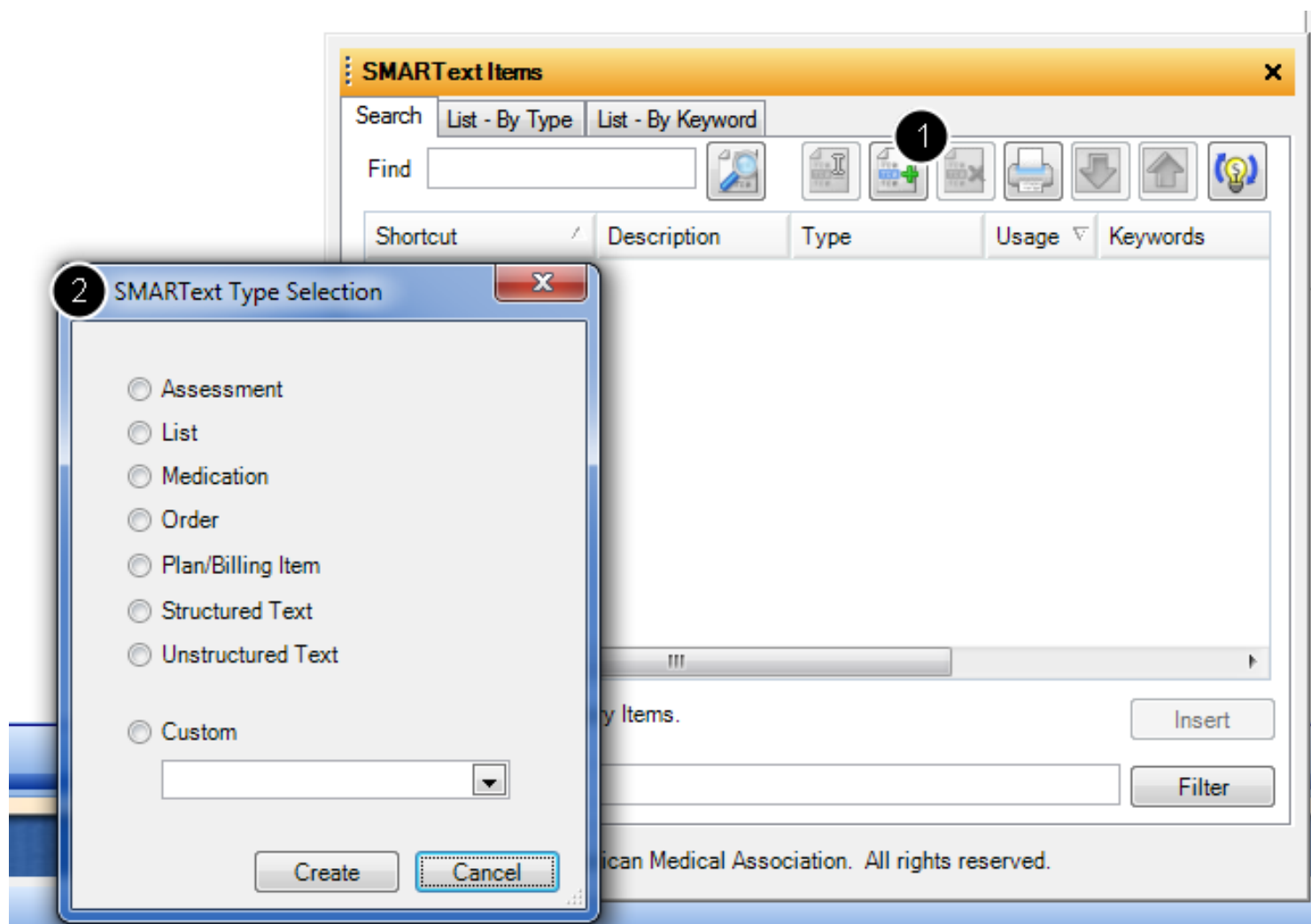
Click Tools in the menu bar, and Click the Options menu item.

1. Click the SMARText list item
2. Click the Allow Editing outside of fields checkbox
3. Click Close.

Then, log out of SOAPware and log back in.

**NOTE:** Your changes will not take place until you have completed the log out/log in process.

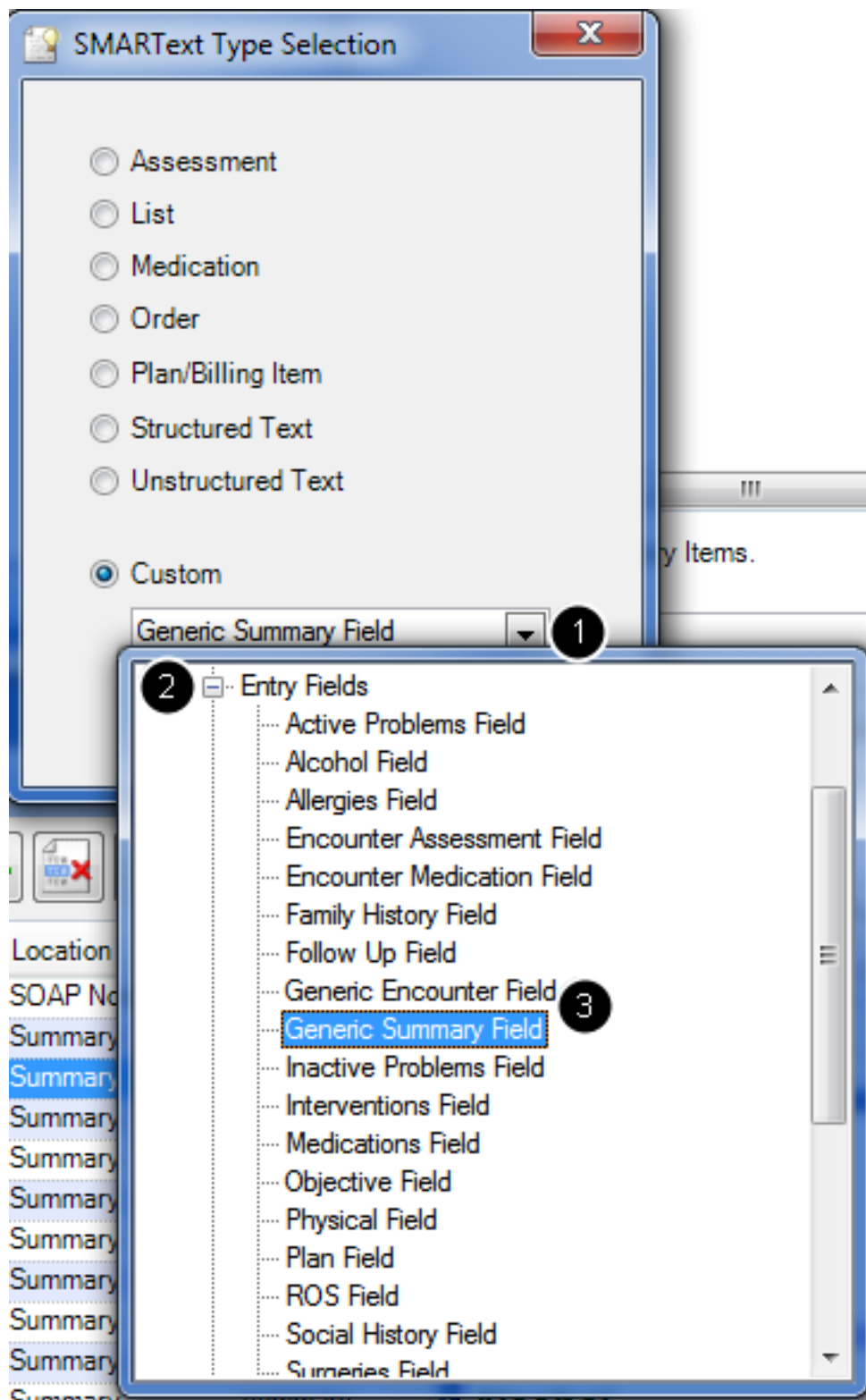
## Create the New Field Item



Click Docutainers in the menu bar, and Click the SMARText Items menu item

1. When the SMARText Items dialog opens, Click the Create button.
2. This will bring up the SMARText Type Selection window.

## Select the Item Type



1. Click the Item Type drop-down menu near the bottom of the SMARTText Type Selection dialog.
2. Click the Entry Fields plus-box.
3. Double-click the appropriate type of field name (i.e. Generic Summary Field or Generic Encounter Field).

Click Create.

## SMARText Designer

The screenshot shows the SMARText Designer window with the following configuration:

- Shortcut:** dismeds
- Description:** Discontinued Medications Field (marked with a circled 1)
- Keywords:** discontinued, meds, field
- Display Header:** ☒ Display Header: Discontinued Medications (marked with a circled 2) ☐ only when item is empty.
- Advanced:** General tab selected.
- Item Type:** Generic Summary Field
- Item Properties:**
  - Item Settings:** (Empty text box)
  - Item Separators:**
    - ☒ As Is
    - ☐ Separate with [ ]
    - ☐ Separate Lines
    - ☐ English List (and)
    - ☐ English List (or)
    - ☐ End with [ ]

At the bottom right, there are **Save** and **Cancel** buttons. The **Save** button is marked with a circled 3.

1. At the top of the SMARText Designer window, Type a Shortcut, Description and Keywords.
2. Type the Name of the Field Header in the Display Header box.
3. Click the Display Header checkbox. Click Save.



## Insert the New Field

### Medications

[  
dismeds

### ]Allergies

[Starter - Allergies - Summary:](#)

1. Open the docuplate you would like to wish to change.
2. Click at the location where you want to insert the new field name/header. A set of small green brackets will appear, indicating that you are working outside of the fields within the docuplate. Hit enter three or four times to create some space for your new field.
3. Type the Shortcut for the new field.

## Insert the Field Header

### Medications

### Discontinued Medications

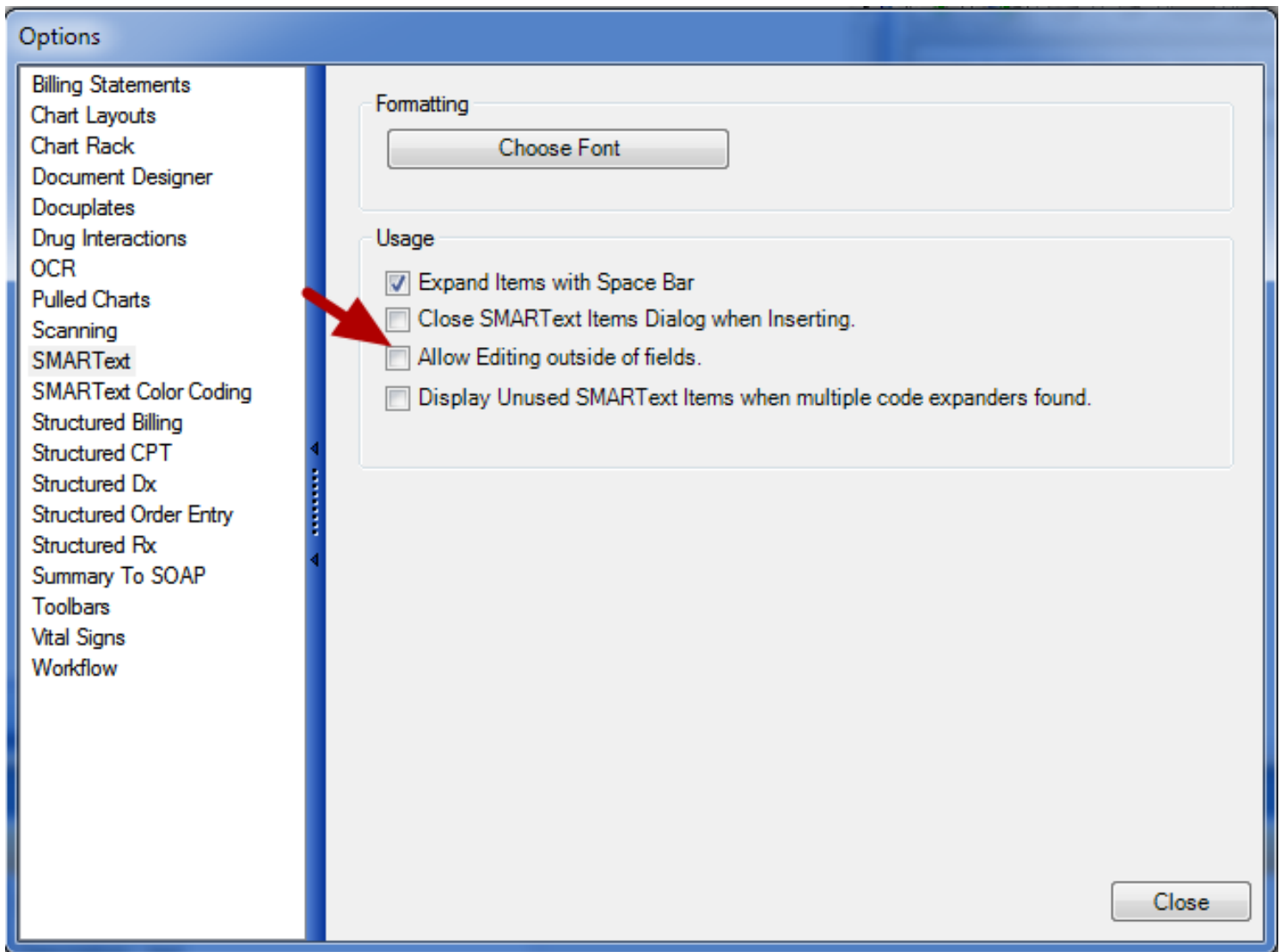
[ ]

### ]Allergies

[Starter - Allergies - Summary:](#)

Then press the space bar, and the field/header is inserted.

## Disable Editing Outside of Fields



Click Tools in the menu bar; Click the Options menu item; Click the SMARTText Items menu item. Click the Allow Editing outside of fields checkbox to toggle it back to unchecked. Click Close, and Log out/Log in.

# **Vital Signs Section**

## Introduction to Vital Signs

---

The Vital Signs section of a patient chart allows the provider to enter vital sign readings by date and time, and to graph those readings to provide a fast, easily viewed means of tracking changes.

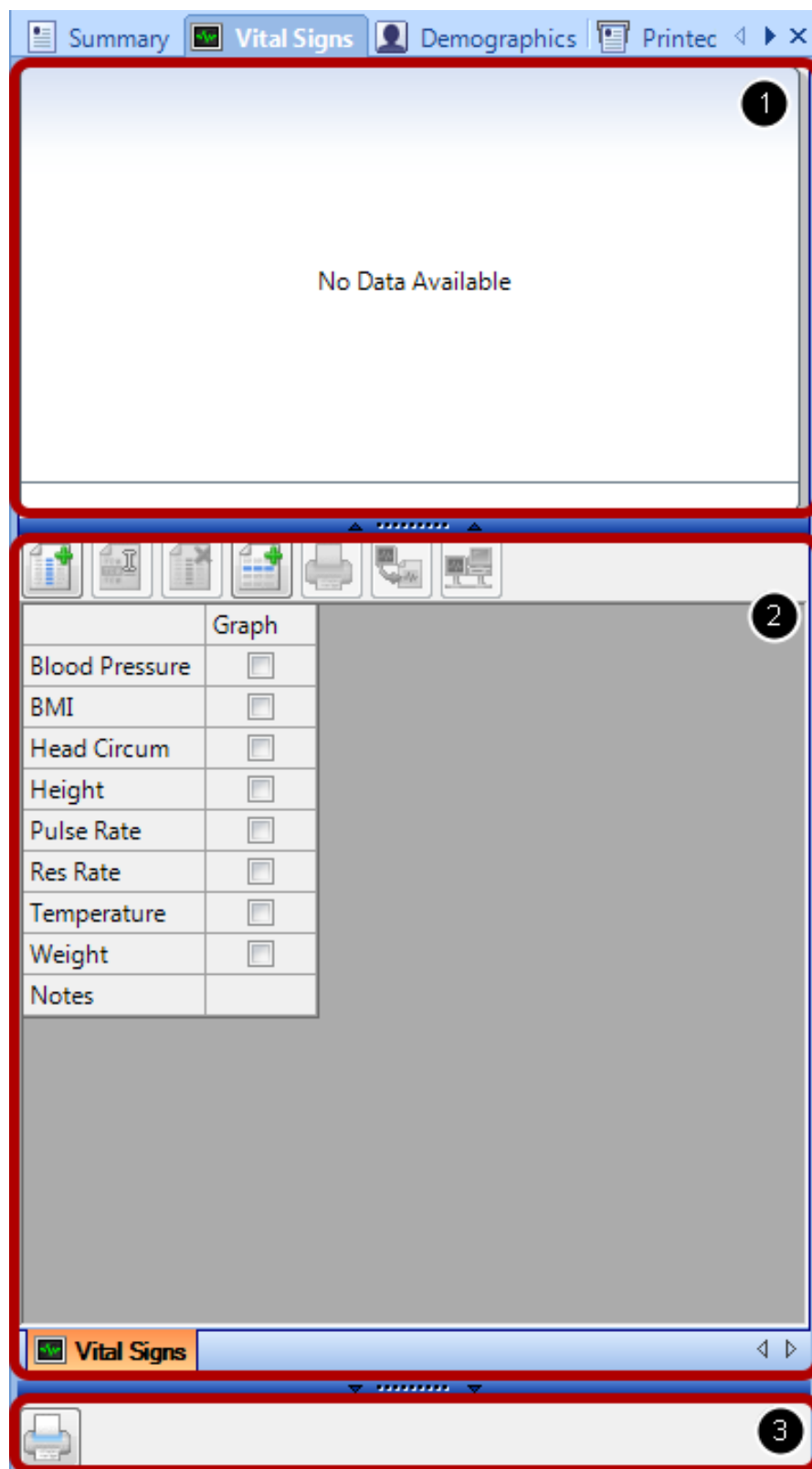
### Paper Connection

In a paper office, vital signs readings are often recorded directly into an encounter note. While this serves for the individual encounter, it does not provide an easy means of tracking possible changes in a patient's vital signs.

Since any changes might be indicative of an undiscovered problem, the ability to track changes can greatly enhance and improve the overall level of patient care.

In SOAPware, not only are vital signs easily entered and recorded in the Vital Signs section, they can easily be moved to the current SOAPnote via a few clicks of the mouse or a keyboard shortcut.

## Interface



The Vital Signs section consists of three areas.

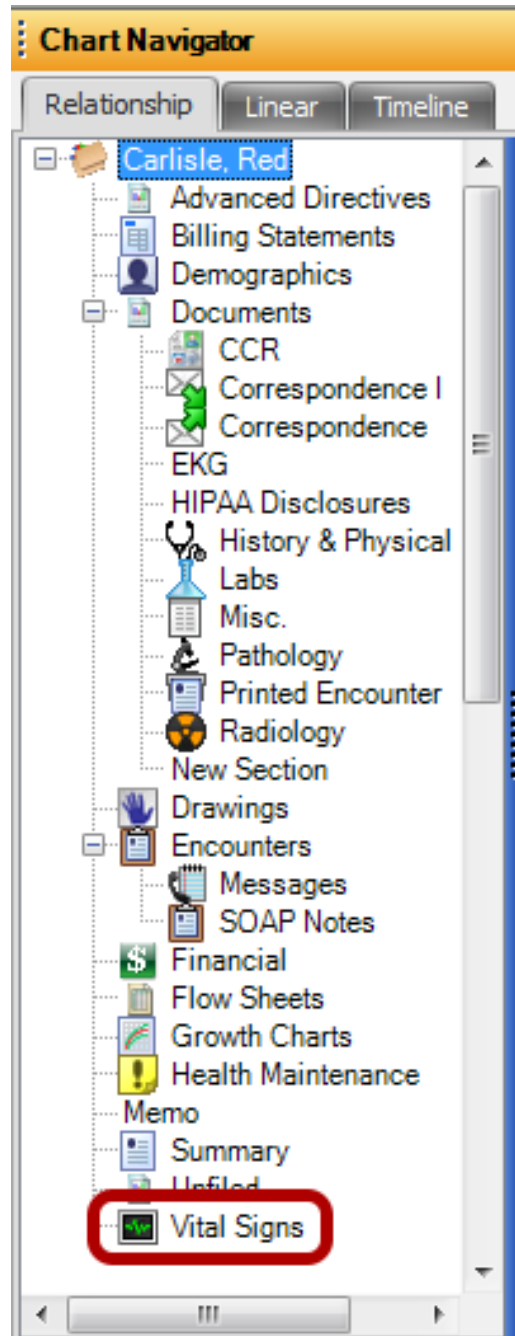
1. The top section is where a graph is displayed when data is selected for graphing.

2. The middle section contains the Vital Signs editor, which allows entry and modification of vital signs readings, and choices of vital signs to be graphed in the graph section.

3. The bottom section has a printer button.

You can resize these sections by using the splitter bar that separates them.

## Basics



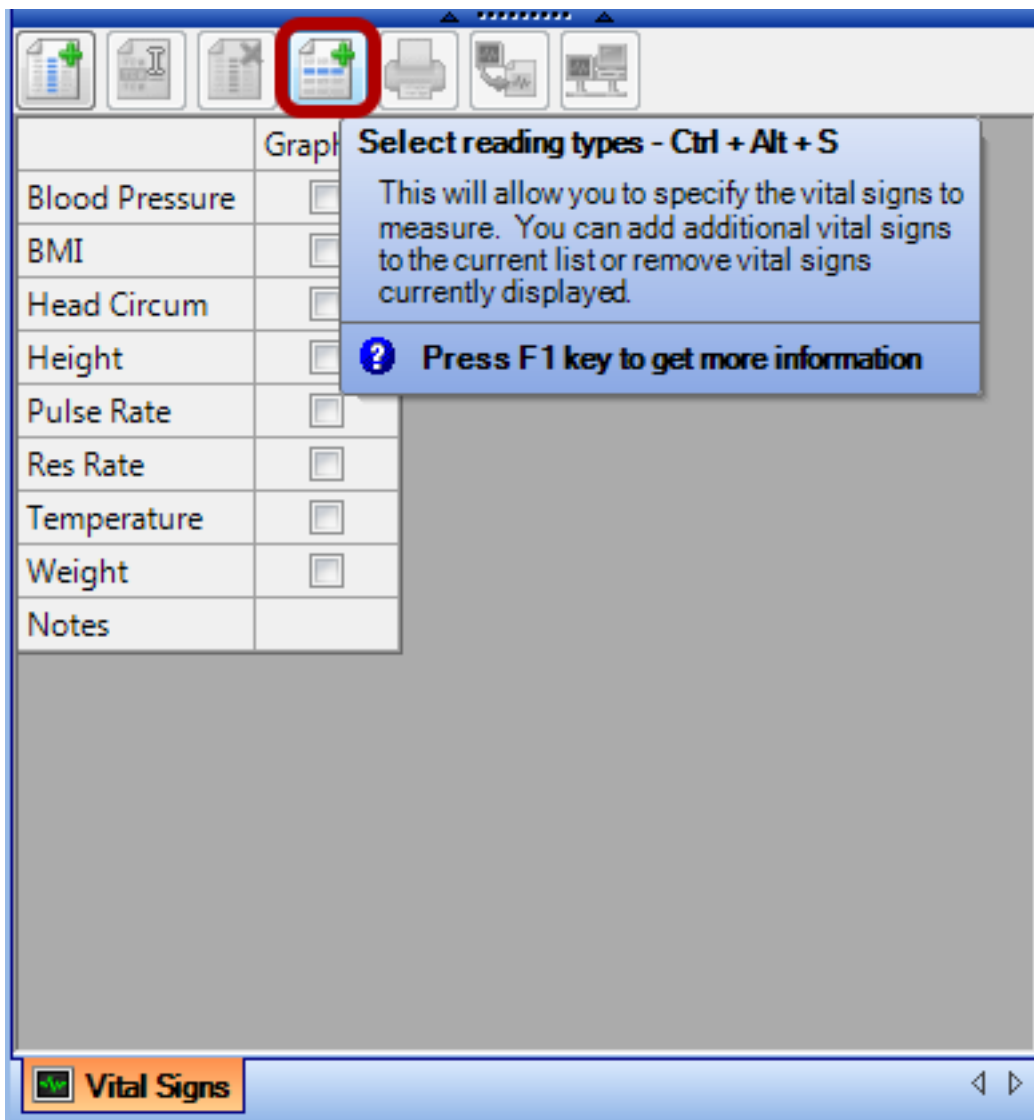
To access the Vital Signs section, choose Sections, Vital Signs from the Chart menu located on the main SOAPware menu bar.

NOTE: A patient chart must be open in order to access the Vital Signs section.

## Customizing Vital Signs View

You can customize what vital signs are included in the reading types. To customize the vital signs chart section to include the readings you need, follow the instructions below.

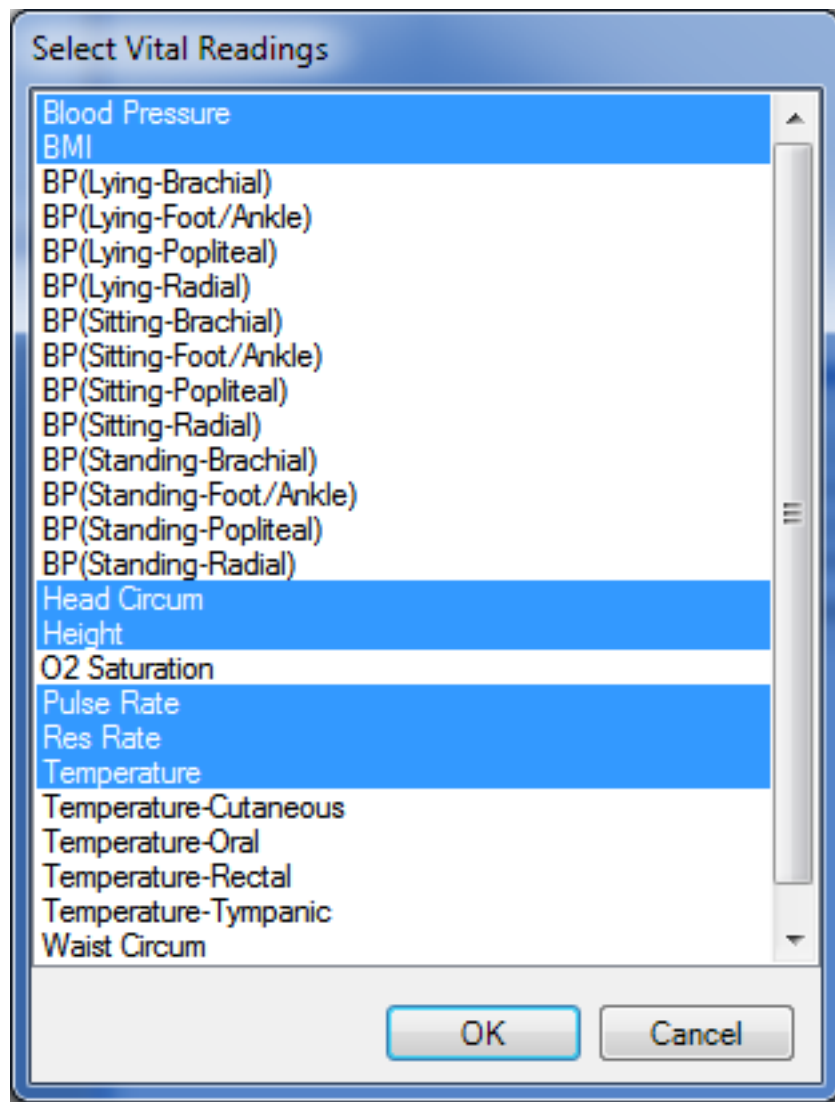
### Select Reading Types



Click on "Select Reading Types" icon.



## Choose the Vitals Readings



Click to highlight the vital signs to be included. There is no need to hold control or shift while doing this, simply left-clicking on a new selection will add it to the reading types to be included.

If you wish to remove vital signs, Click to un-highlight the vital signs to be excluded.

Click OK to save the settings.

**NOTE: These changes are not global; they will be per patient.**

## Add / Edit Vital Reading Date

### Add a Reading Date

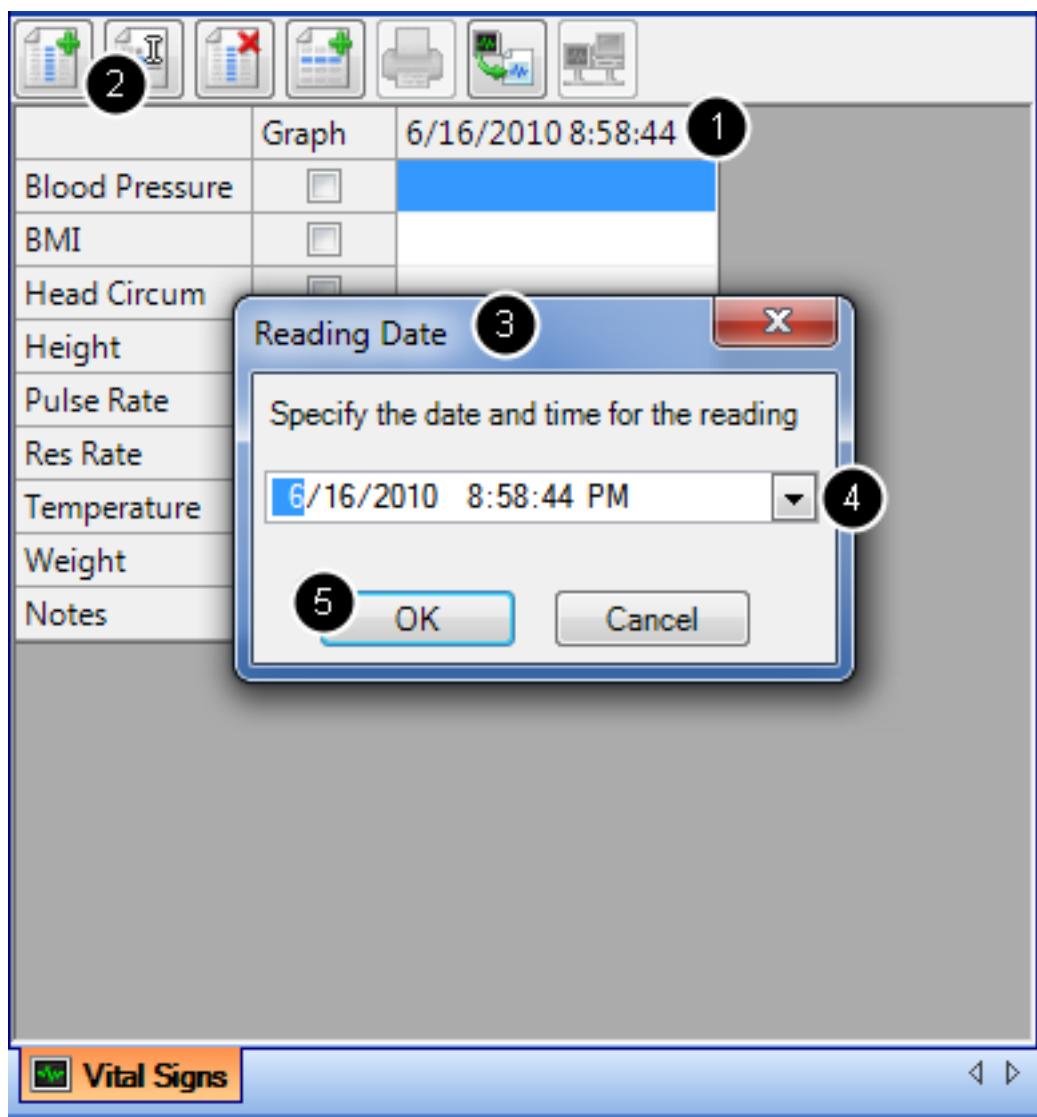
	Graph	6/16/2010 8:58:44	
Blood Pressure	<input type="checkbox"/>		
BMI	<input type="checkbox"/>		
Head Circum	<input type="checkbox"/>		
Height	<input type="checkbox"/>		
Pulse Rate	<input type="checkbox"/>		
Res Rate	<input type="checkbox"/>		
Temperature	<input type="checkbox"/>		
Weight	<input type="checkbox"/>		
Notes			

**Vital Signs**

To add a reading date:

1. Click the Add Reading Date Button (or press Control + Alt + N).
2. A new column will be created with the current date and time displayed at the top.

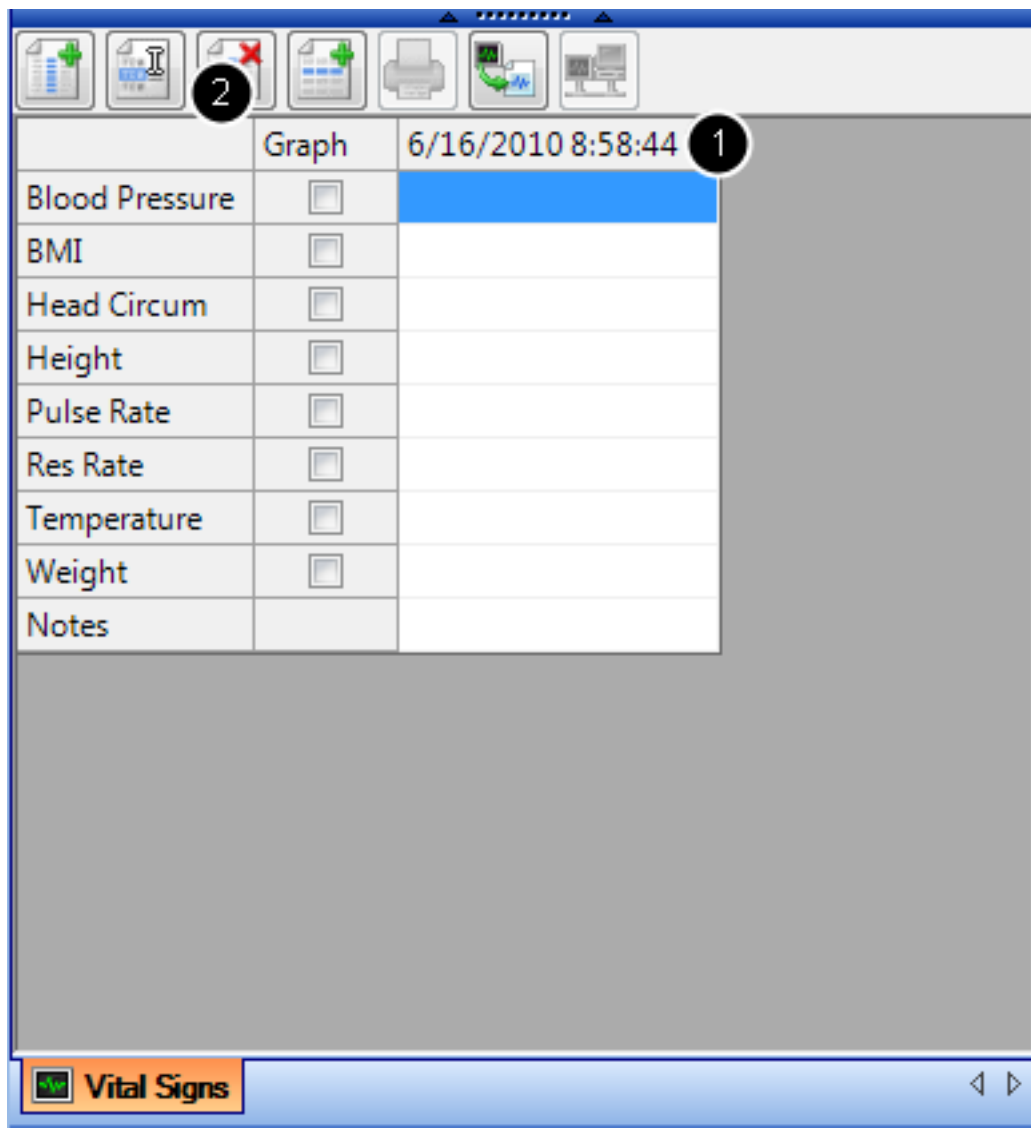
## Edit a Reading Date



To edit a reading date:

1. Select it by clicking the top of the column.
2. Then, click the Edit Reading Date Button (or press Control + Alt + E).
3. The Reading Date dialog box will open, asking you to specify the date and time for the reading.
4. New information may be typed in, or entered using the drop-down arrow to select a date and then change the time manually.
5. When you are satisfied with the changes, click OK (or press Enter); the date and time will be changed at the top of the reading column.

## Remove a Reading Date



To remove a reading date:

1. Select it by clicking the top of the column.
2. Then, click the Remove Reading Date Button (or press Control + Alt + R).

**NOTE:** Removal of the selected selected reading date will result in the loss of all contained readings.

## Inserting Vital Signs

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) CORE REQUIREMENT - SEE INSERT VITAL SIGNS**

### Open Vital Signs

Click on the Vital Signs tab in the patient's chart (OR) Click on Chart in the SOAPware menu bar > Chart Navigator > Vital Signs.


### Add a Reading Date

	Graph	6/16/2010 8:58:44 PM	6/16/2010 9:08:28 PM
Blood Pressure	<input type="checkbox"/>		
BMI	<input type="checkbox"/>		
Head Circum	<input type="checkbox"/>		
Height	<input type="checkbox"/>		
Pulse Rate	<input type="checkbox"/>		
Res Rate	<input type="checkbox"/>		
Temperature	<input type="checkbox"/>		
Weight	<input type="checkbox"/>		
Notes			

Click on the "Add Reading Date" icon.

To change the reading date/time, see: [Add/Edit Vital Reading Date](#).

## Insert Vital Signs

		
	Graph	6/16/2010 8:58:44 PM
Blood Pressure	<input type="checkbox"/>	120 / 80
BMI	<input type="checkbox"/>	26.7
Head Circum	<input type="checkbox"/>	
Height	<input type="checkbox"/>	72 in
Pulse Rate	<input type="checkbox"/>	80 /min
Res Rate	<input type="checkbox"/>	16 /min
Temperature	<input type="checkbox"/>	98.6 F
Weight	<input type="checkbox"/>	197.0 lbs
Notes		

### **\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT**

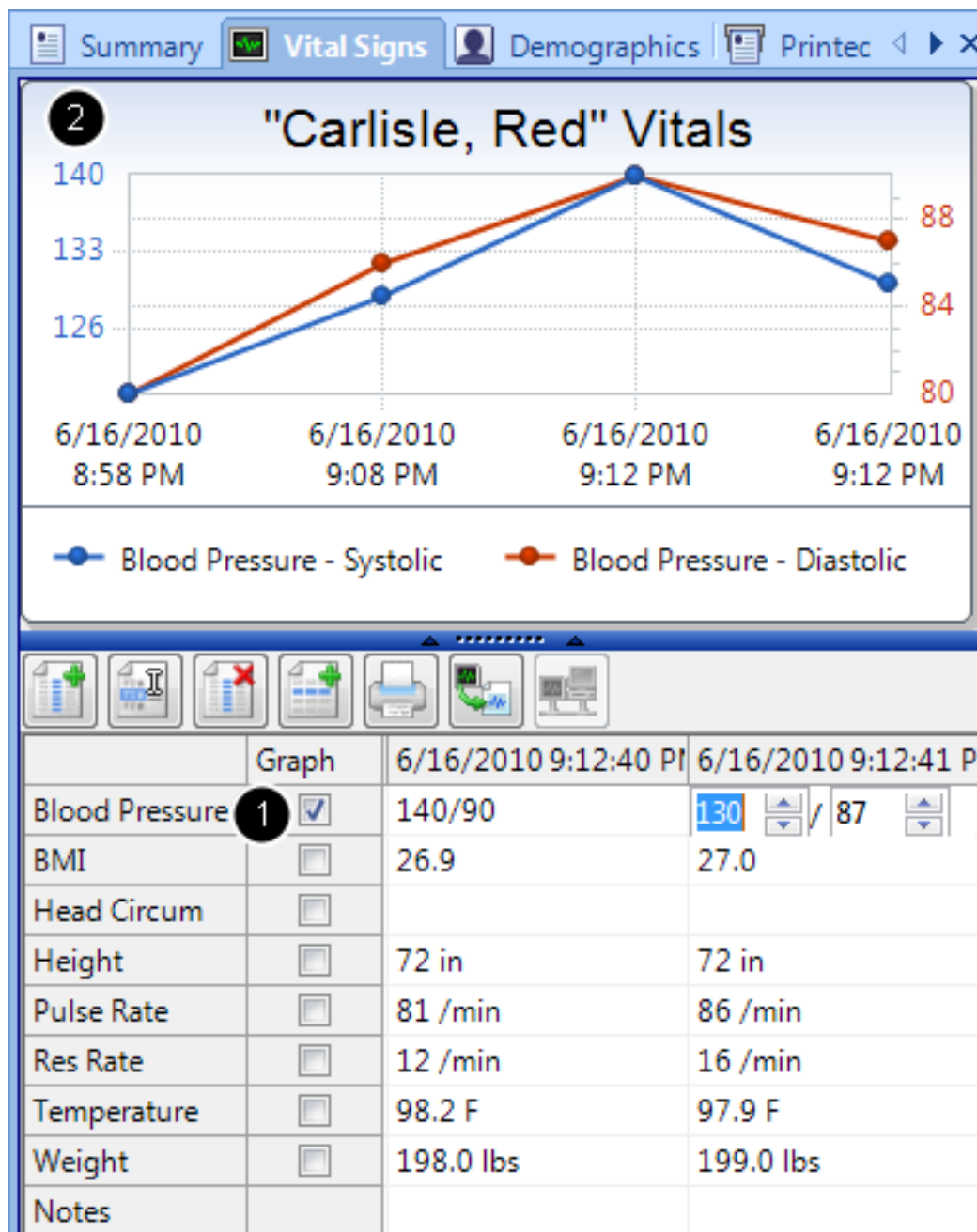
[Click here to view Meaningful Use Criteria - Vital Signs](#)

[Click here to view Meaningful Use Criteria - Report Quality Measures to CMS/States](#)

Fill out the appropriate area using the tab key to navigate.

## Graphing Vital Signs

### Select Vitals to Graph



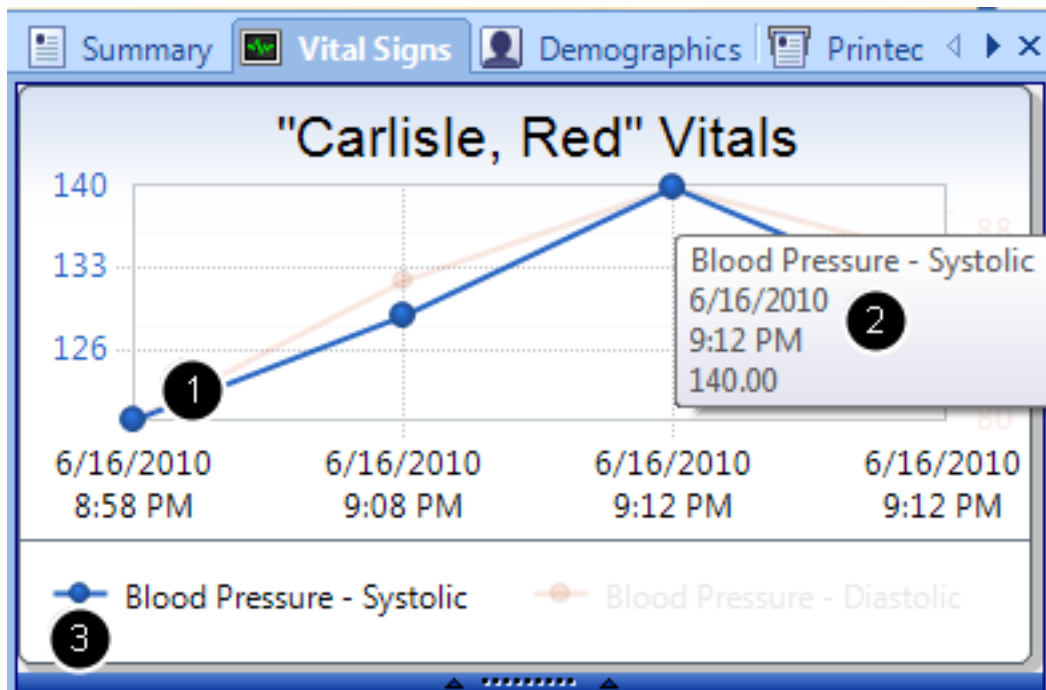
To graph vital signs:

1. Simply place a check in the box next to the readings that you wish to see displayed as a graph.
2. SOAPware will automatically display a graphical representation of the selected vital signs in the top area of the Vital Signs section of the patient chart.

**NOTE:** You must select a reading with multiple reading dates in order to view a graph of the selected vital sign(s).

If several vital signs are selected, the graph may become difficult to read. If this occurs, expand SOAPware to a larger display size by clicking the "maximize" button in the top right of the SOAPware window.

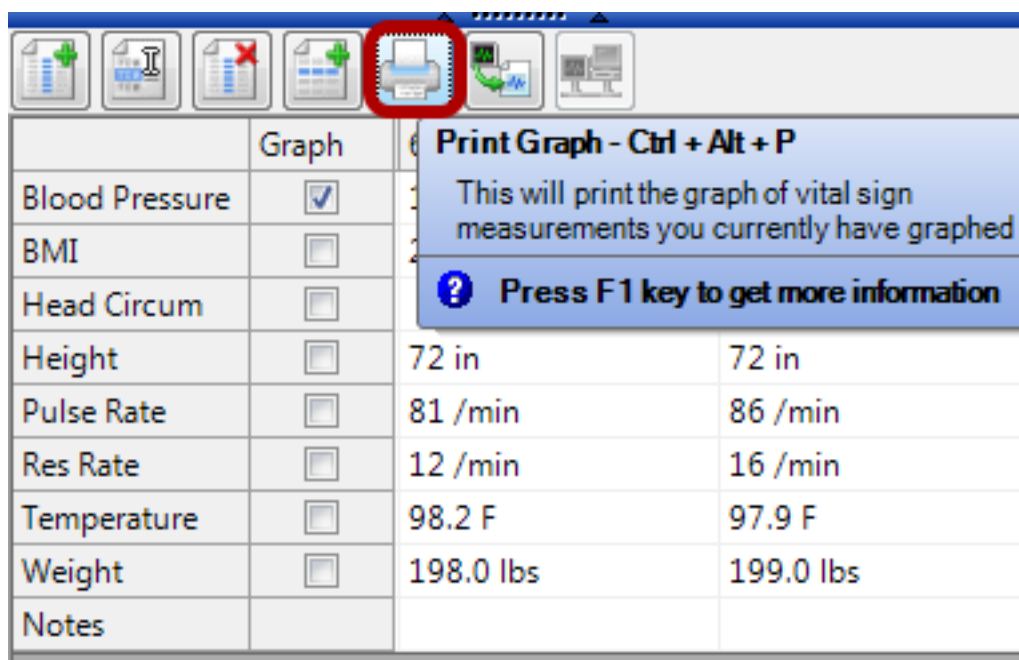
## Reading the Graph



1. Hovering over any part of a particular line on the graph will bring the entire line forward and fade the others into the background. This allows you to easily view the graph for a particular vital sign, without having to de-select the other graphed readings.
2. To display the values of a single point on the graph, hover the mouse cursor over the point you wish to view. The item, date, time, and value will be displayed.
3. Another method of viewing a single line at a time is to hover the mouse cursor over the legend entry for that particular reading. The legend appears directly below the graph in the graph area of the vital signs section.



## Printing a Graph

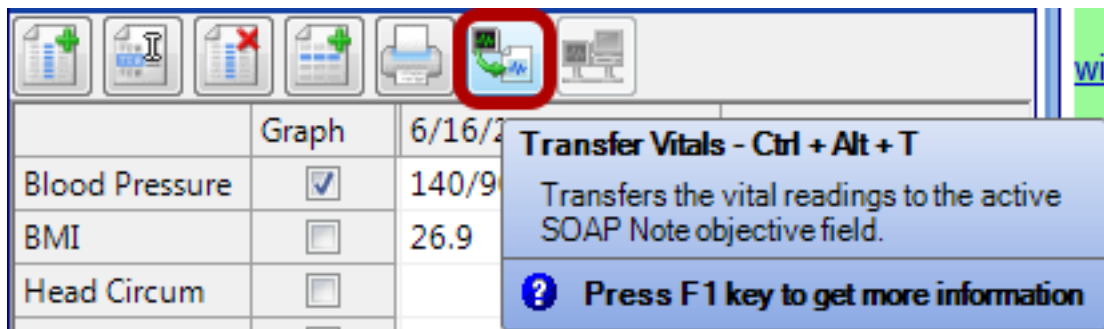


To print the currently graphed vital signs, click the Print Graph Button (or press Control + Alt + P).

A print dialog box will be displayed, allowing you to select the printer and printing properties for the graph. Once you have chosen these, click OK. The graph will be printed to the printer you have chosen.

## Transferring Vital Signs to the Active SOAPnote

### Transfer Vitals



To transfer vital signs to the Objective field of the active SOAPnote:

1. Select a reading date to transfer by clicking on the head of the column.
2. Click the Transfer Vitals Button (or press Control + Alt + T). The readings for the selected reading date will be transferred to the active SOAPnote.

### The SOAPnote with Vitals

#### Objective[

VS: BMI: 27.0. BP: 130/87. H: 72 in. P: 86 /min.  
RR: 16 /min. T: 97.9 F. W: 199.0 lbs. |

Exam: GENERAL: Appearance: General  
appearance can be described as well-nourished,  
well-developed, and in no acute distress. ]

Vital Sign readings are now located in the SOAPnote, field header "Objective."

## Vital Signs Reading Types

---

The Vital Signs Reading (VSR) Types are the core of the Vital Signs section of the patient chart. Using VSR types, you can input, modify, and track a patient's vital sign readings.

Each VSR type has pre-set upper and lower limits ("smart" values). These smart values assist in assuring accurate data entry by reducing the amount of erroneous data that can be entered into a given type.

**NOTE: These values should be sufficient for most practices. If you find that you regularly need to enter a value outside these ranges, please contact SOAPware technical support.**

### Blood Pressure

The lower and upper limits of the systolic and diastolic ranges are 0-250 and 0-200, respectively.

### Head Circumference

The lower and upper limits of this range are 11.7 to 23.4 inches.

### Height

The lower and upper limits of this range are 15 to 95 inches.

### O2 Saturation

The lower and upper limits of this range are 50 to 100%.

### Pulse

The lower and upper limits of this range are 30 to 220/min.

### Respiratory Rate

The lower and upper limits of this range are 4 to 60/min.

### Temp

The lower and upper limits for this value are 90 to 110 (F).

### Weight

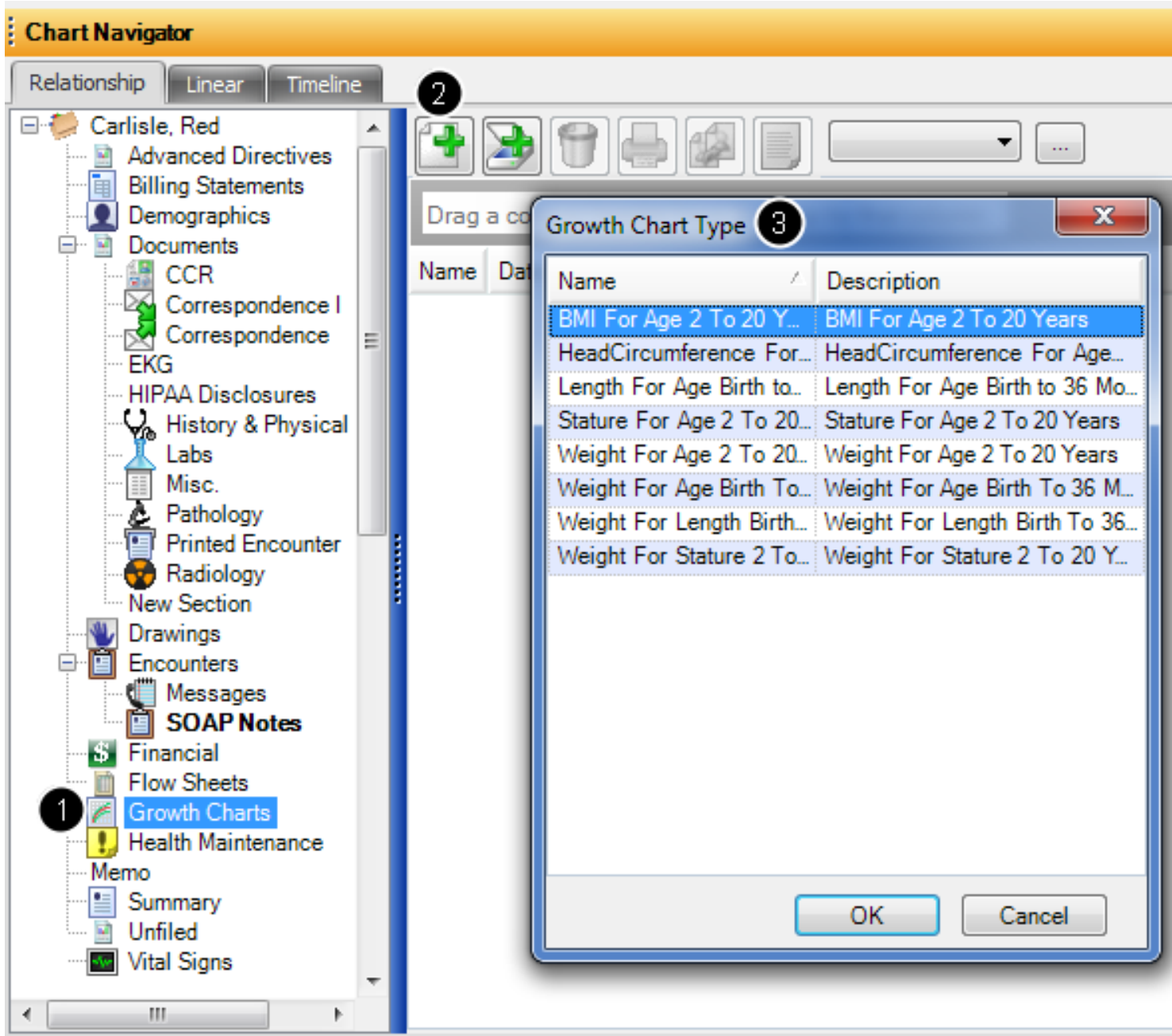
The lower and upper limits of this range are 3 to 550 pounds.

# **Growth Charts Section**

## Interface

SOAPware's Growth Charts can be used to automatically track growth rates and percentile comparisons for patients over time. Based on the CDC standard growth charts, measurement data points are pulled from patients' Vital Signs and automatically plotted. Growth charts may be printed for off line use.

### Accessing Growth Charts from Chart Navigator

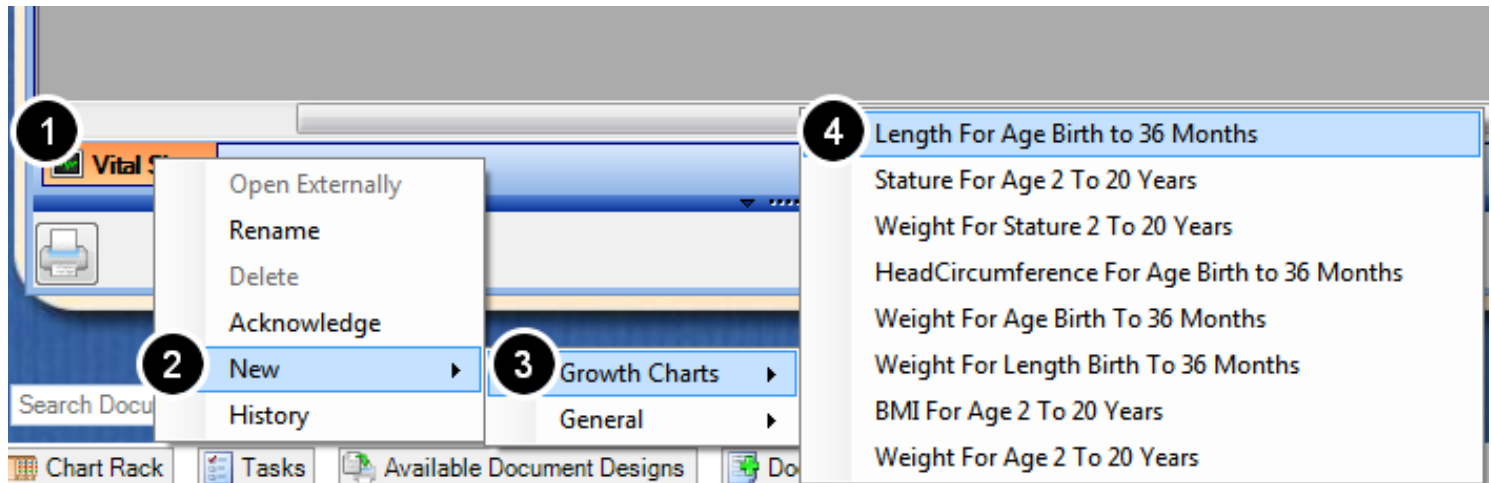


Go the Chart Menu > Chart Navigator

1. Choose Growth Charts

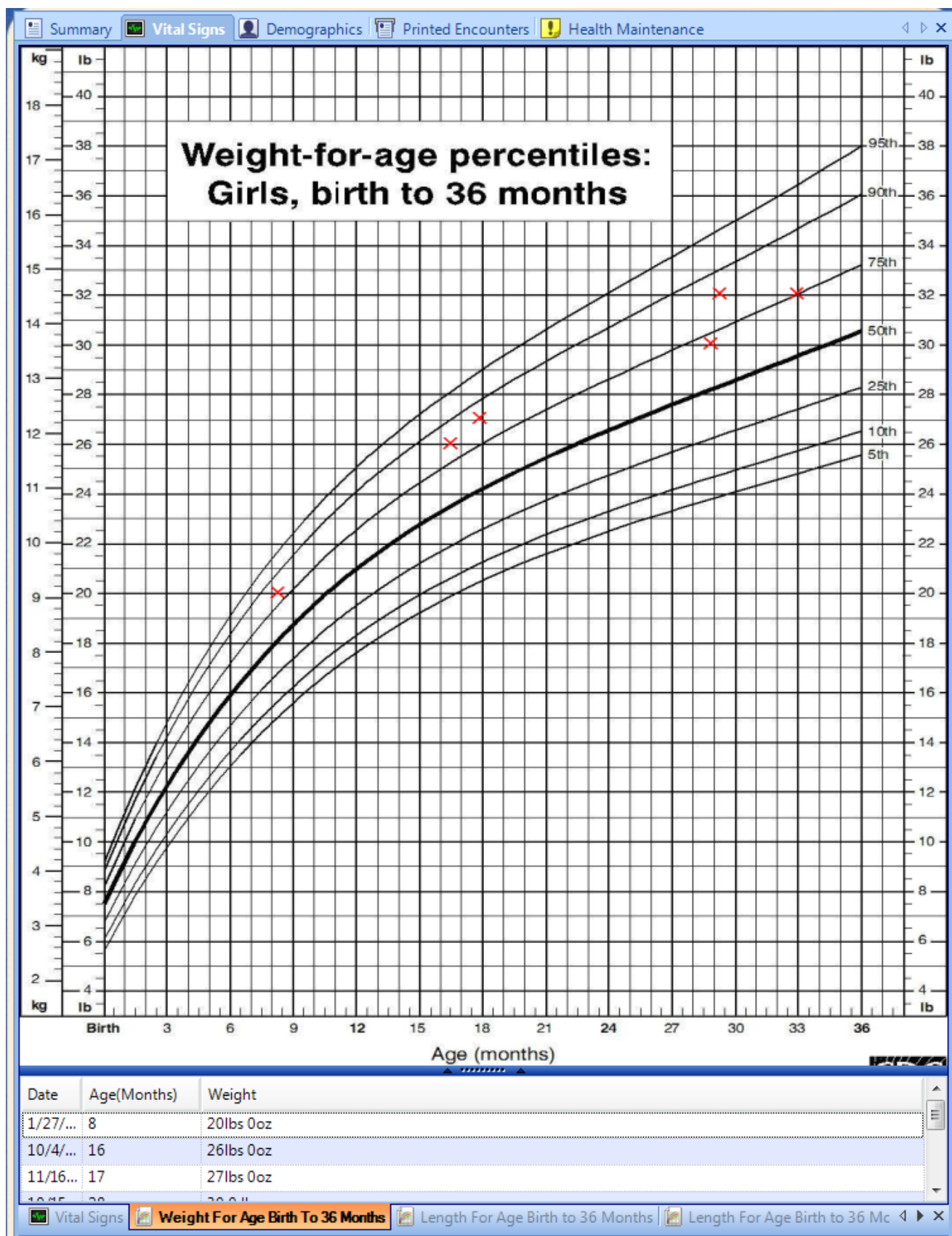
2. Click the Create Docutainer button in the window to the right.
3. Select the desired Growth Chart Type.

## Accessing Growth Charts from Vital Signs



1. Right Click over the Vital Signs tab at the bottom of the section.
2. Select New
3. Select Growth Charts
4. Select desired Growth Chart

## View Graph



SOAPware will automatically plot the values on the chart using red X's and will continue to plot the Vital Signs by sequential dates.

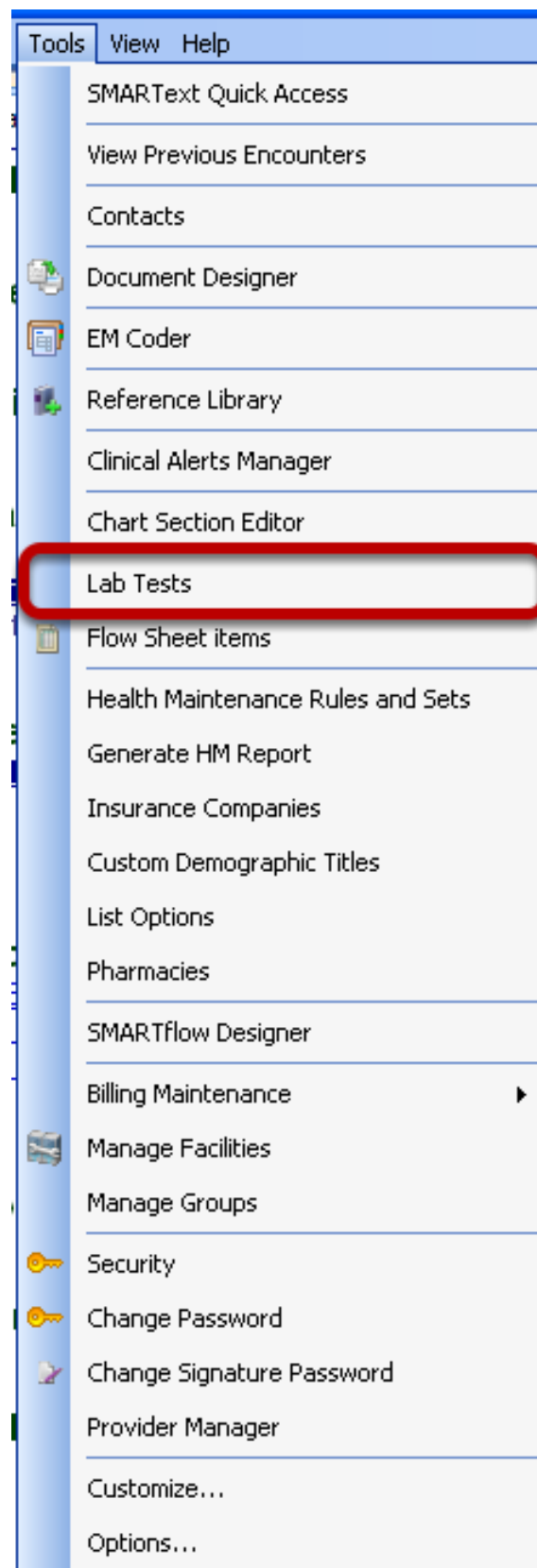
# Labs



## Creating and Editing Lab Tests

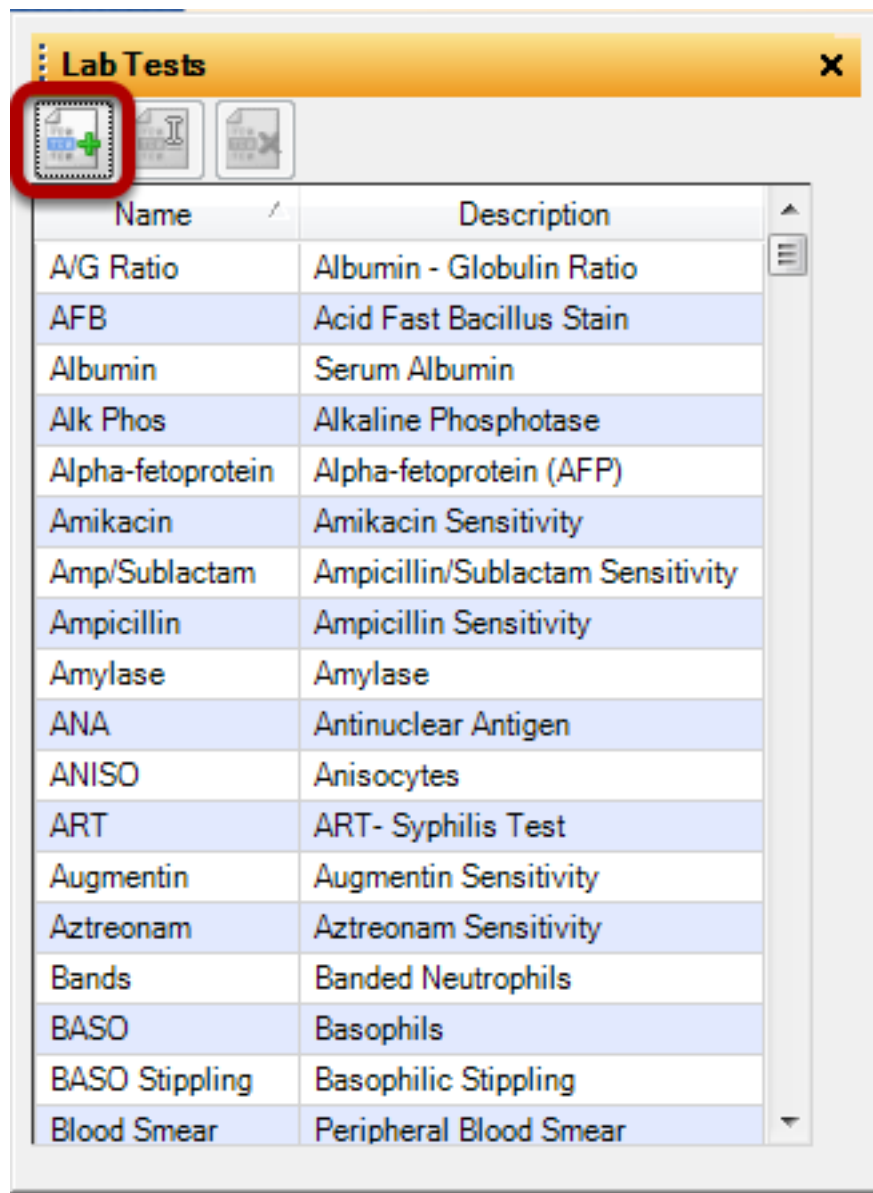
---

This lesson will explain how to create individual lab tests with reference ranges. These lab tests can be pulled into Lab Docuplates for documentation of lab results in your clinic. Lab docuplates will be discussed in the next lesson.



1. Go to the Tools Menu
2. Click on Lab Tests

## Add a Lab Test



To create a specific lab test you will click on the green (+). This will bring up the Lab Test editor

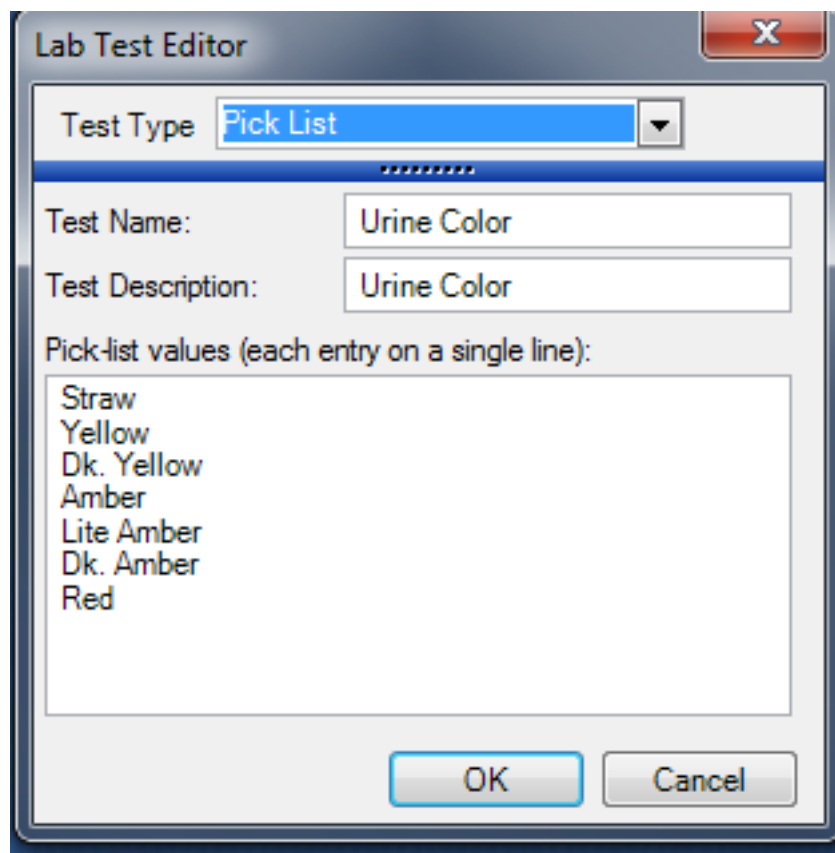
## Create Labs with Numeric Ranges

The image shows a 'Lab Test Editor' dialog box. At the top, there is a 'Test Type' dropdown menu set to 'Numeric Range', with a callout '1' next to it. Below this is a 'Test Name' text field with callout '2'. Next is a 'Test Description' text field with callout '3'. Then is a 'Test Units' dropdown menu with callout '4'. Below these is a 'Reference Ranges' section containing a table with 'Low' and 'High' columns. The rows are 'Adult male:', 'Adult female:', 'Child:', and 'General:'. Each cell in the table contains a numeric input field with a callout '5' next to the 'High' column headers. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

	Low	High
Adult male:	0	0
Adult female:	0	0
Child:	0	0
General:	0	0

1. Select Test Type
2. Enter Test Name
3. Enter Test Description
4. Select Test Units.
5. Enter Reference Ranges for Adult Male, Adult Female, Child and General.
6. Click OK.

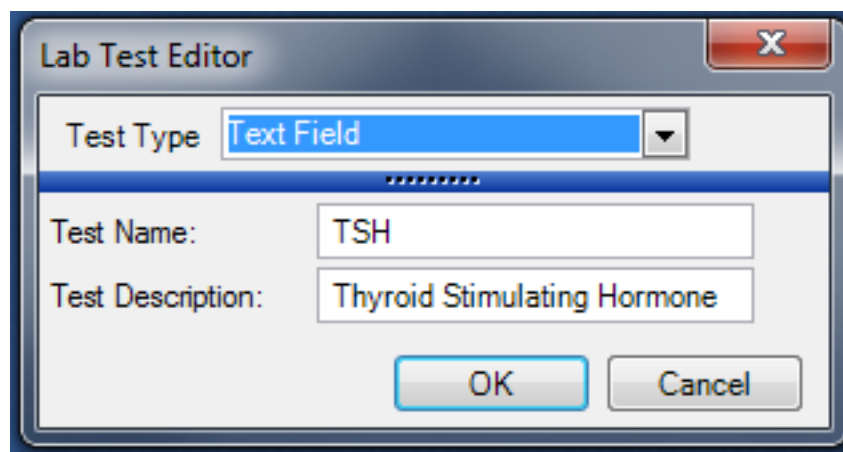
## Create Labs with Pick List Values



The Lab Test Editor dialog box is shown with the 'Test Type' dropdown set to 'Pick List'. The 'Test Name' and 'Test Description' fields both contain 'Urine Color'. Below these fields is a text area labeled 'Pick-list values (each entry on a single line):' containing the following list of values: Straw, Yellow, Dk. Yellow, Amber, Lite Amber, Dk. Amber, and Red. At the bottom are 'OK' and 'Cancel' buttons.

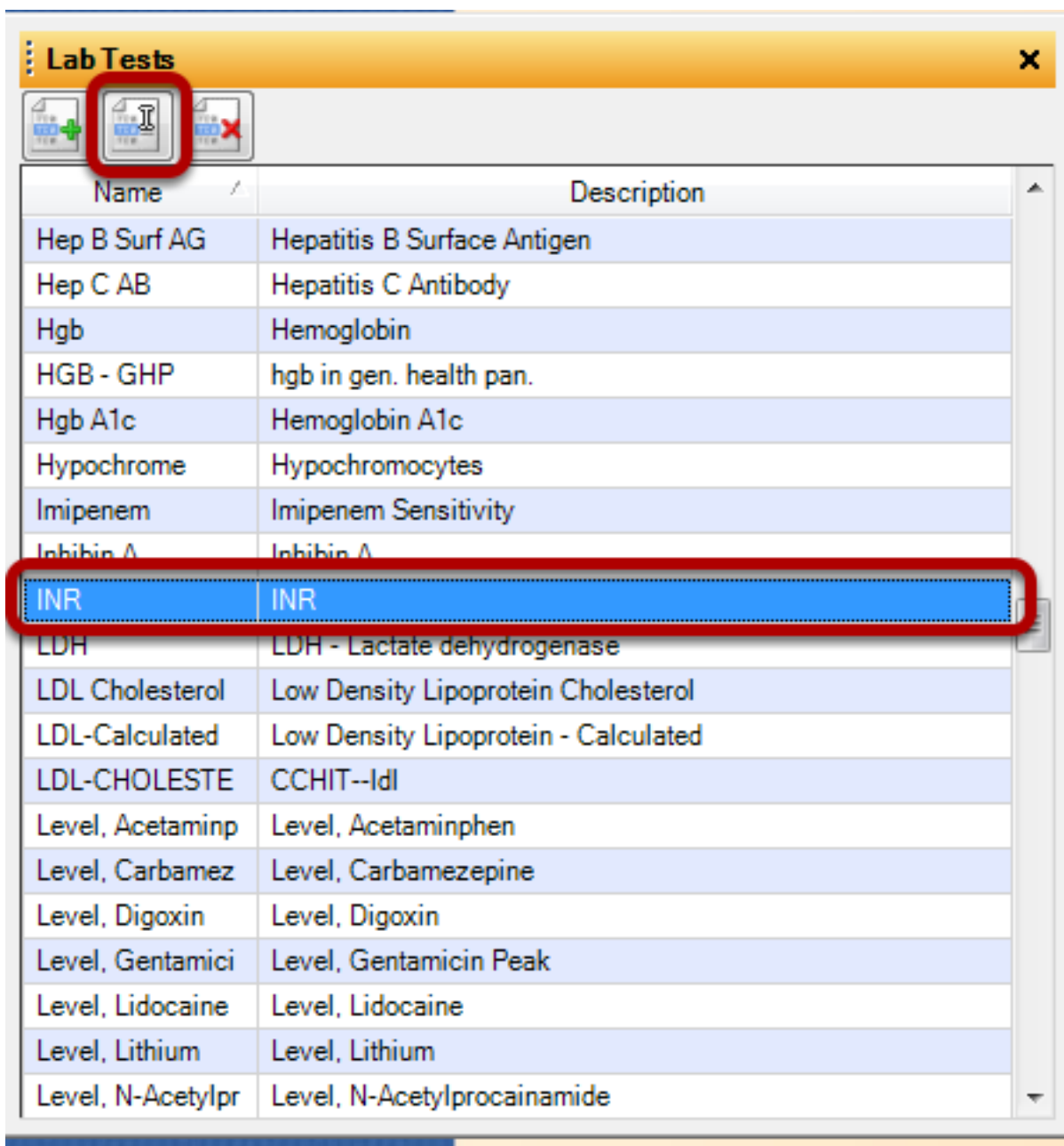
1. Select Test Type
2. Enter Test Name
3. Enter Test Description
4. Enter Pick list value press the "Enter key" and enter second Value. Press the "Enter Key" and enter third value. Continue until all values are entered in this box
5. Press OK to save this lab test.

## Create Labs with Text Fields



The Lab Test Editor dialog box is shown with the 'Test Type' dropdown set to 'Text Field'. The 'Test Name' field contains 'TSH' and the 'Test Description' field contains 'Thyroid Stimulating Hormone'. At the bottom are 'OK' and 'Cancel' buttons.

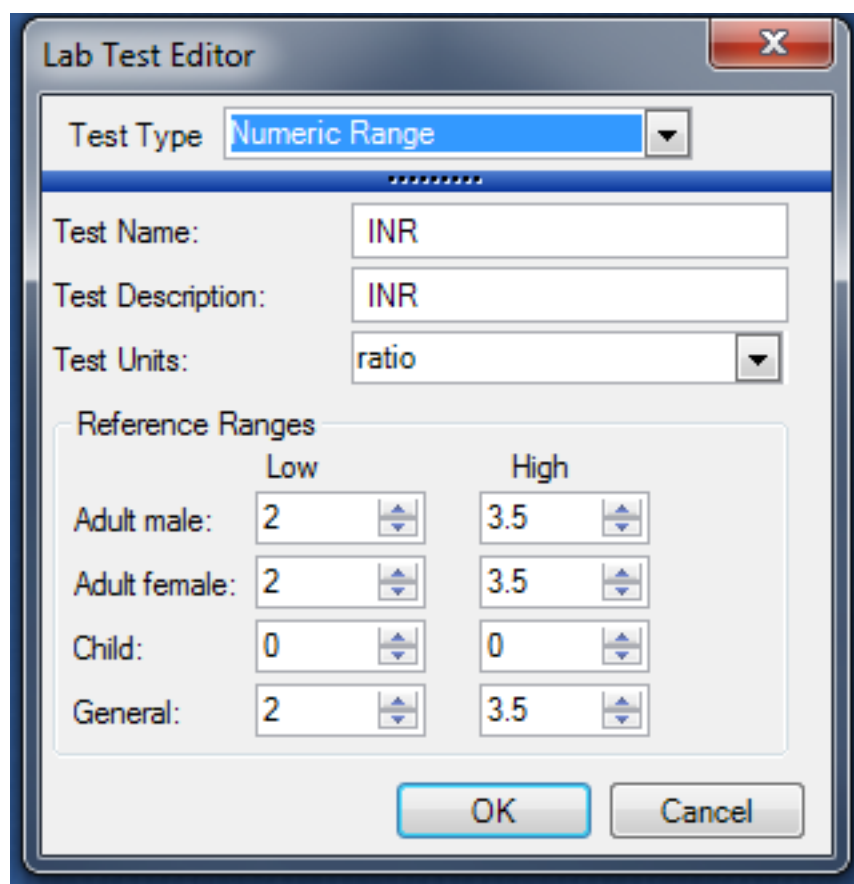
Text Field labs allow the user to free text lab findings into the lab docuplate. These are not graph-able.



To Edit an Existing Lab

1. Highlight lab to edit.
2. Click on the Edit Icon.

## Numeric Range



The image shows a 'Lab Test Editor' dialog box with a title bar containing a close button (X). The 'Test Type' dropdown is set to 'Numeric Range'. Below this, there are three text input fields: 'Test Name' with 'INR', 'Test Description' with 'INR', and 'Test Units' with 'ratio'. A section titled 'Reference Ranges' contains a table with two columns, 'Low' and 'High', and four rows for different patient groups. Each cell in the table contains a numeric value and a small up/down arrow icon. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

	Low	High
Adult male:	2	3.5
Adult female:	2	3.5
Child:	0	0
General:	2	3.5

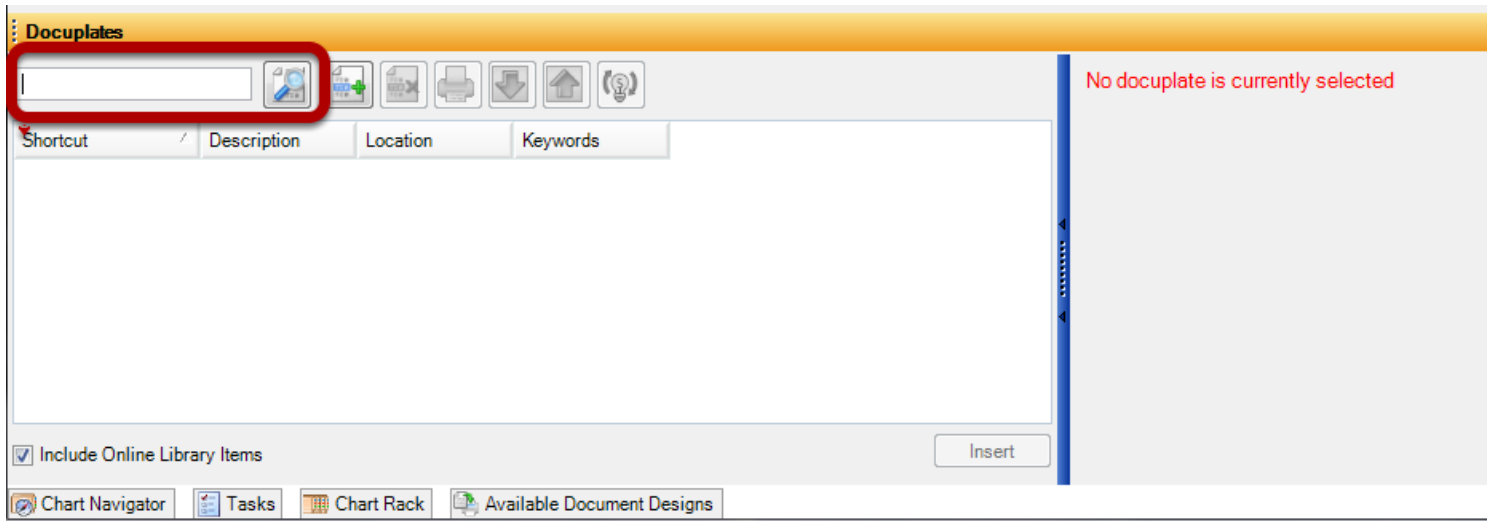
Make necessary changes to Lab Test and press OK to save.

## Lab Docuplates

This lesson will cover how to search create Lab docuplates.

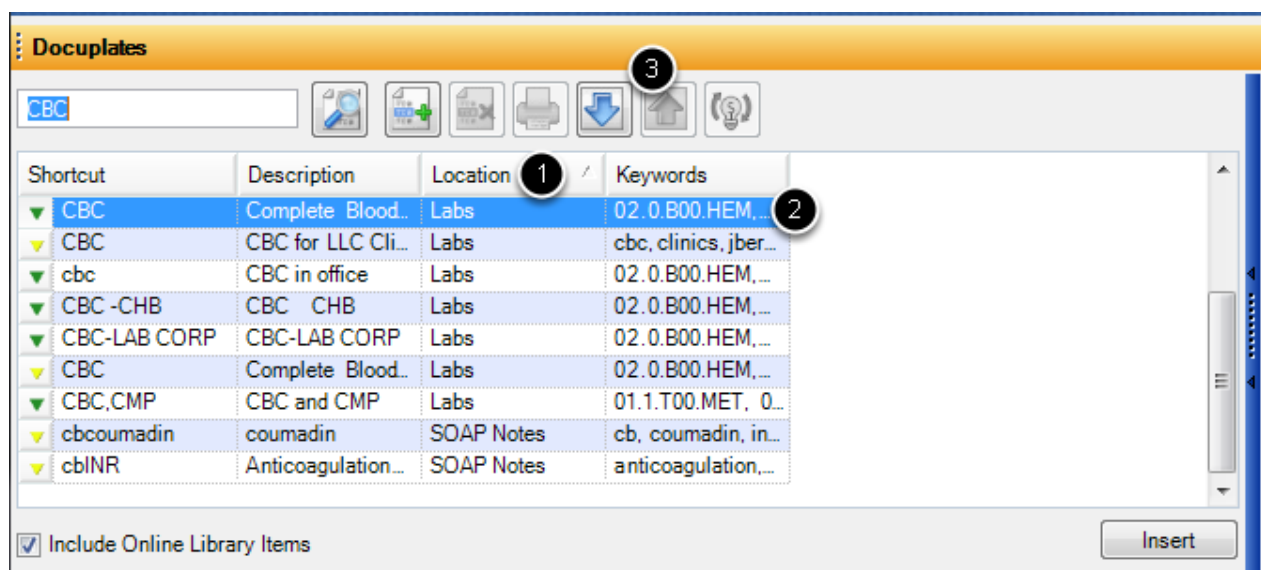
Lab docuplates are used for documenting groups of lab tests. For example a CBC is composed of many lab tests: WBC, RBC, Hbg, Hct, etc. A lab docuplate for a CBC would contain all of the individual tests that make up that CBC.

### Search



To search for a docuplate, enter a key word and click on the Search button.

### Download Docuplate

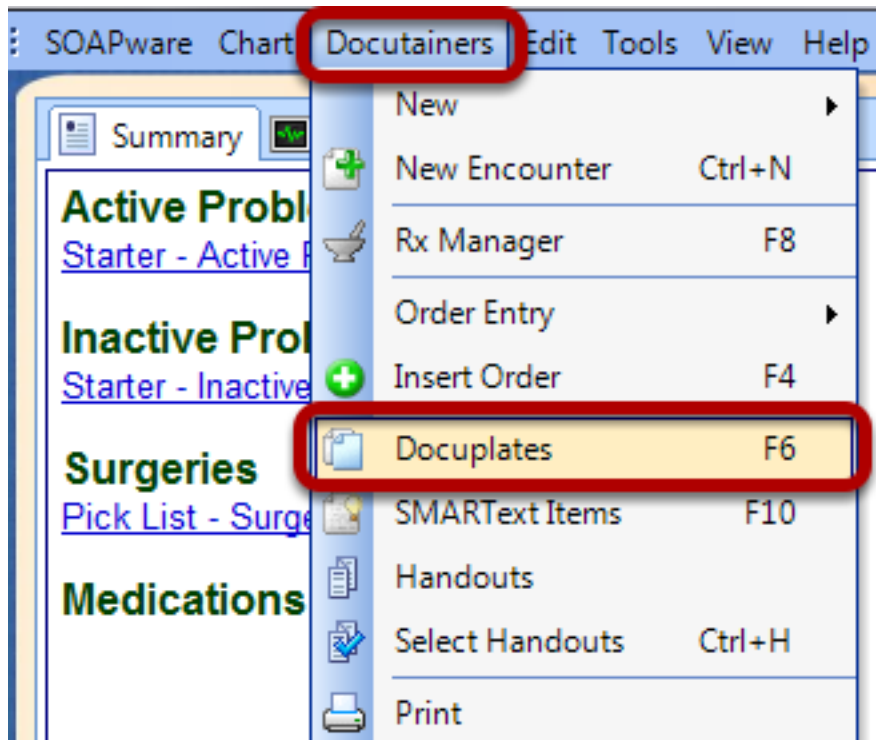


1. Click on Location to sort the docuplates
2. Find docuplates in the Labs location
3. Download the docuplate to your local library



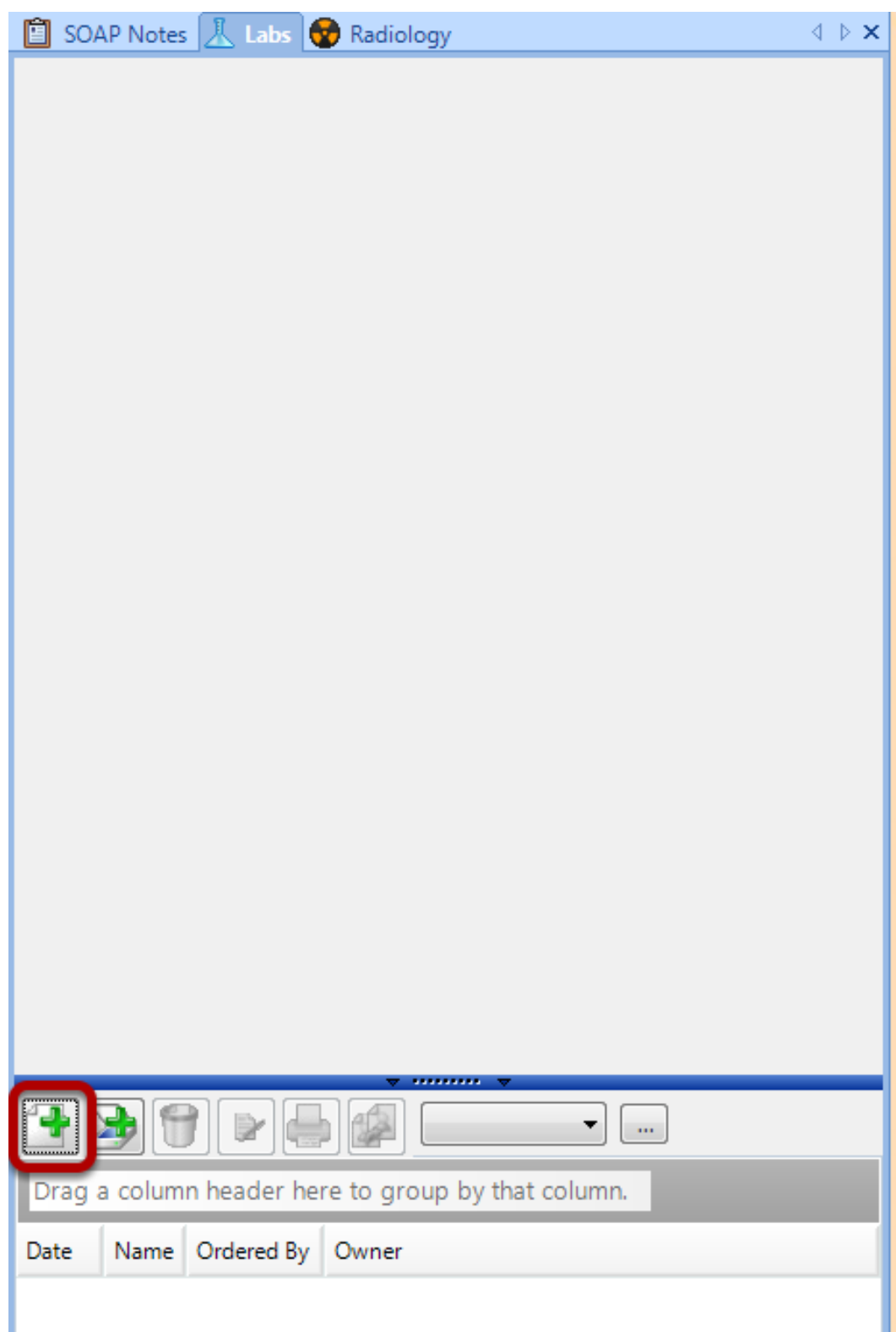
The docuplate is now ready to use in your network.

## Searching for Lab Docuplates



Many lab docuplates are pre-built by SOAPware. To search for available lab docuplates, click on the Docuplates tab docked at the bottom of the screen or click in the menu bar Docutainers > Docuplates

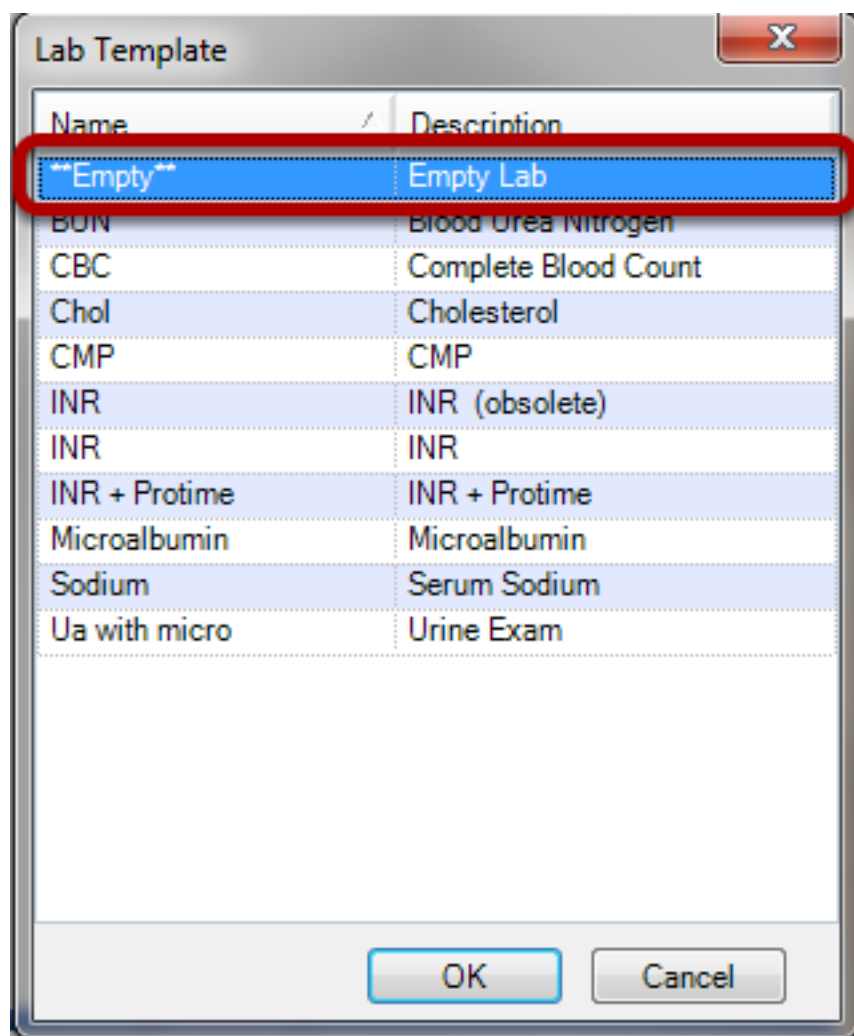
## Creating New Lab Docuplates



To Create a lab docuplate:

1. Open a "test" chart
2. Open the Lab Chart section
3. Click on the green + to create a new lab docutainer.

## Select Empty



Select the Empty Lab template and click OK.

## To Add a Lab Test

SOAP Notes Labs Radiology

Date 07/22/2010 10:26 AM

Name Empty Lab

Ordered By

Owner Jennifer Berg

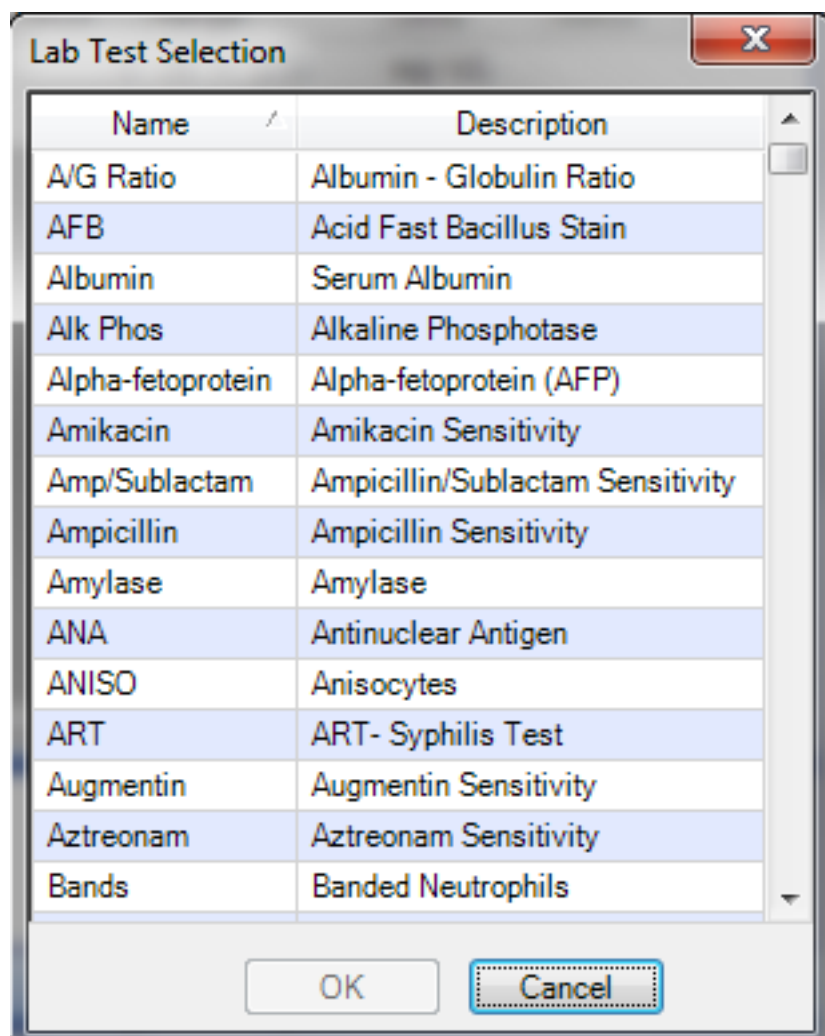
Name	Flags	Value	Range	Units	Status	Code	Date	Range	Status

Drag a column header here to group by that column.

Date	Name	Ordered By	Owner
7/22/2010 10:26:20 AM	Empty Lab		Jennifer Berg

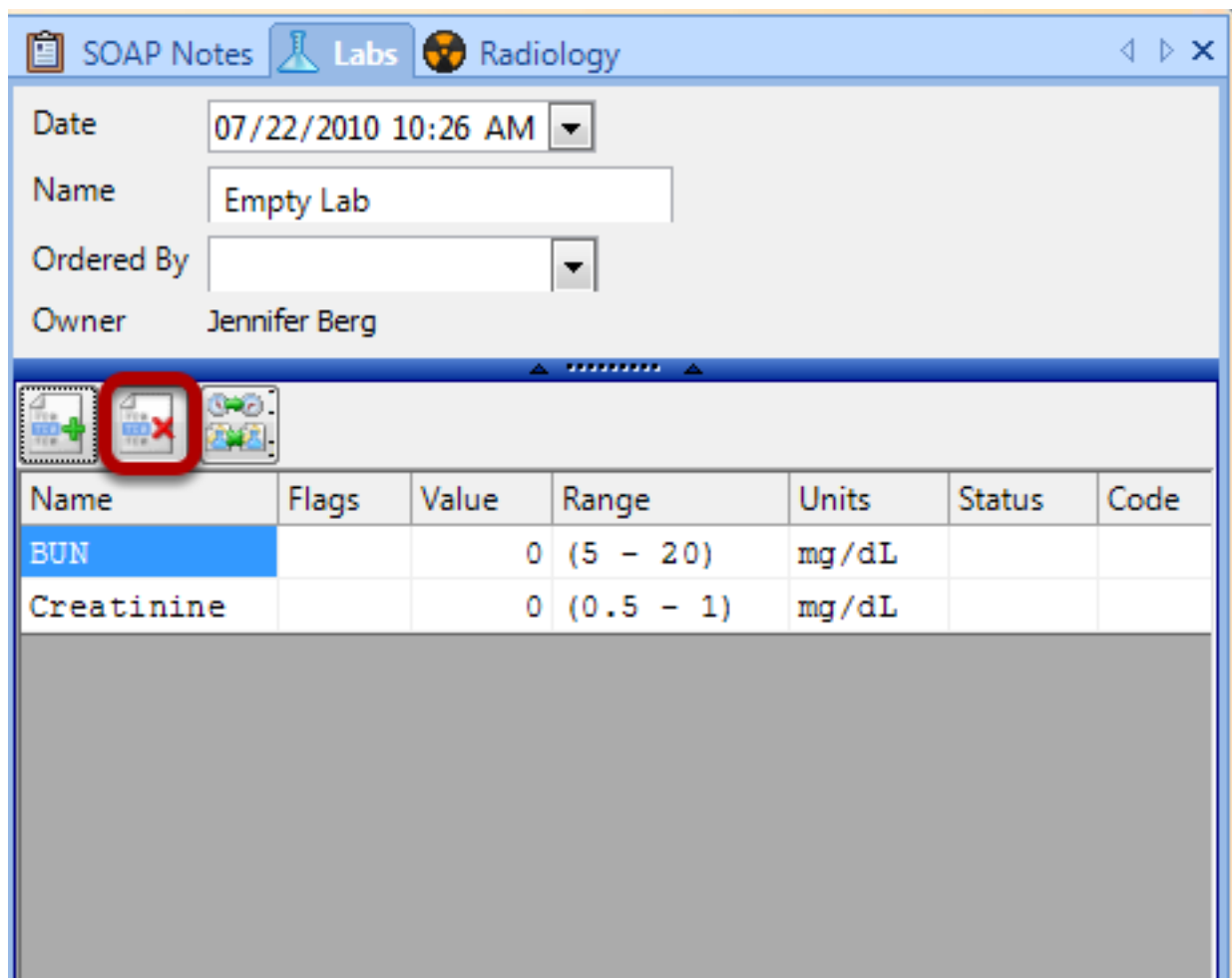
Click on the green + at the top of the Lab Encounter to enter lab tests.

## Select Lab Tests



Highlight the lab tests you want to include and click OK. To highlight multiple lab tests, click and hold down the Control key on your keyboard and select the lab tests to add. The lab tests will display in the order they are selected. These cannot be moved up or down.

## To Remove a Lab Test



SOAP Notes Labs Radiology

Date: 07/22/2010 10:26 AM

Name: Empty Lab

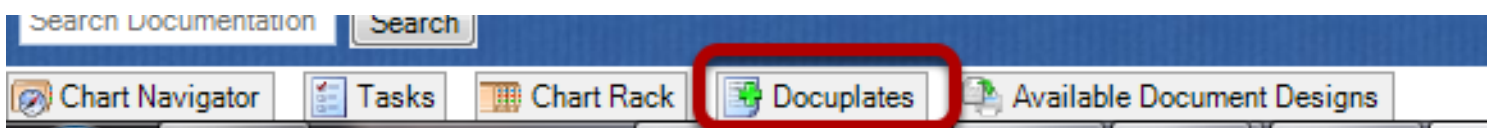
Ordered By:

Owner: Jennifer Berg

Name	Flags	Value	Range	Units	Status	Code
BUN		0	(5 - 20)	mg/dL		
Creatinine		0	(0.5 - 1)	mg/dL		

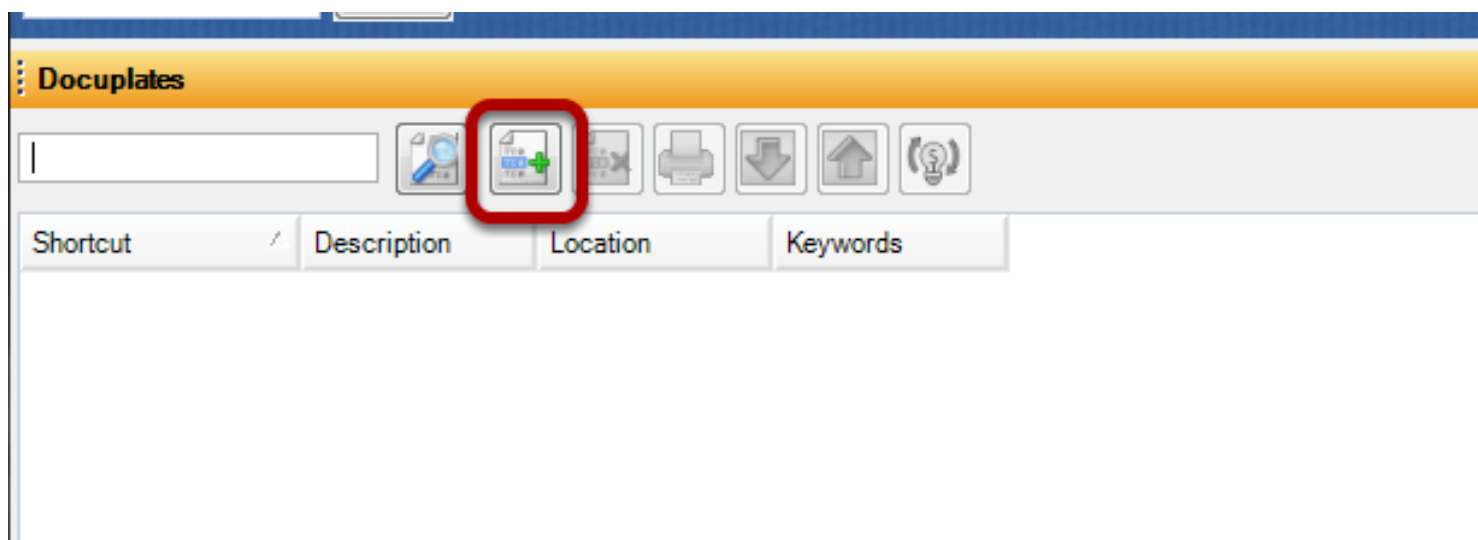
If a test needs to be removed, click on the red X button.

## Creating the Docuplate



Click on the Docuplates tab docked at the bottom of the screen or select Docutainers > Docuplates from the menu bar.

## Create a New Docuplate



To create the new docuplate, click on the green + in the Docuplates Menu.

## Enter Docuplate Information

A screenshot of a dialog box titled "Docuplate Information". It contains three input fields: "Shortcut", "Description", and "Keywords". The "Shortcut" field has a cursor in it. At the bottom of the dialog, there are "OK" and "Cancel" buttons.

1. Give the docuplate a shortcut
2. Enter a description for the docuplate
3. Enter key words for the docuplate.

## Introduction to HL7 Labs

HL7 Labs are lab reports received electronically from outside lab facilities. To receive lab results electronically, a "SOAPwareXchangeHL7" license must be purchased.

### HL7 Labs in Patient Charts

Name	Flags	Value	Range	Units
<b>REPORT GENERATED: 09/03/2009 10:42 AM</b>				
Patient Name: Slim Jim				
Birthdate: 12/13/1950 12:00 AM				
Social Security: 263720372				
Accession Number: AT368302U				
Order Status: F				
Collection Date: 01/22/2007 12:00 AM				
<b>URIC ACID</b>				
Status: F				
URIC ACID	N	5.7	(1.7 - 7.5)	mg/dL
<b>COMPREHENSIVE METABOLIC PANEL W/EGFR</b>				
Status: F				
<b>GLUCOSE</b>	H	109	(65 - 99)	mg/dL
FASTING REFERENCE INTERVAL				
UREA NITROGEN (BUN)	N	20	(7 - 30)	mg/dL
CREATININE	N	0.8	(0.5 - 1.2)	mg/dL
GFR ESTIMATED	N	>60	> OR = 60	mL/min/1.73m2
IF THE PATIENT IS AFRICAN-AMERICAN				

Labs sent from outside facilities to SOAPware will display in a patients Chart.

In addition to the lab values and reference ranges, HL7 labs will contain other information within the report:



- \*Patient demographics
- \*Collection Date
- \*Report Generated Date
- \*Performing Facility Information


Information contained within this report cannot be edited or deleted.

## HL7 Lab Tasks

Show Tasks Patient Show Tasks due in: --Show All--

Layout  ...

Drag a column header here to group by that column.

Patient	Description	Notes	Priority	Action/Status
▶ Jim, Slim	ABN: URIC ACID		Urgent	Needs Review

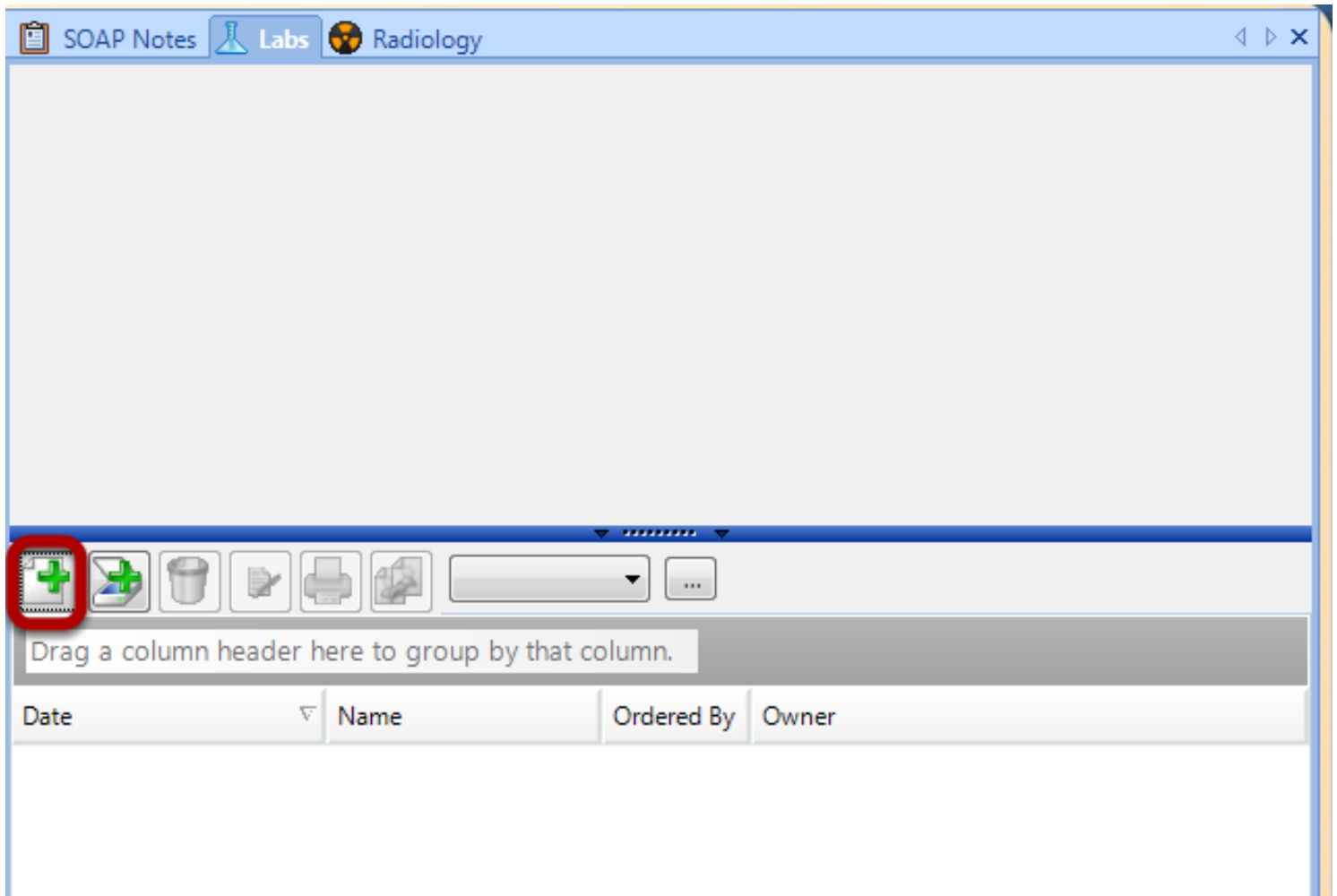
HL7 lab reports placed in the patient chart will automatically create a task and place item on the ordering providers task list. This can be signed off or reassigned just as any other task. Note attached to task will say "HL7-facility name".

## Documenting Labs

**\*THIS LESSON CONTAINS A MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10)  
- SEE ENTER RESULTS**

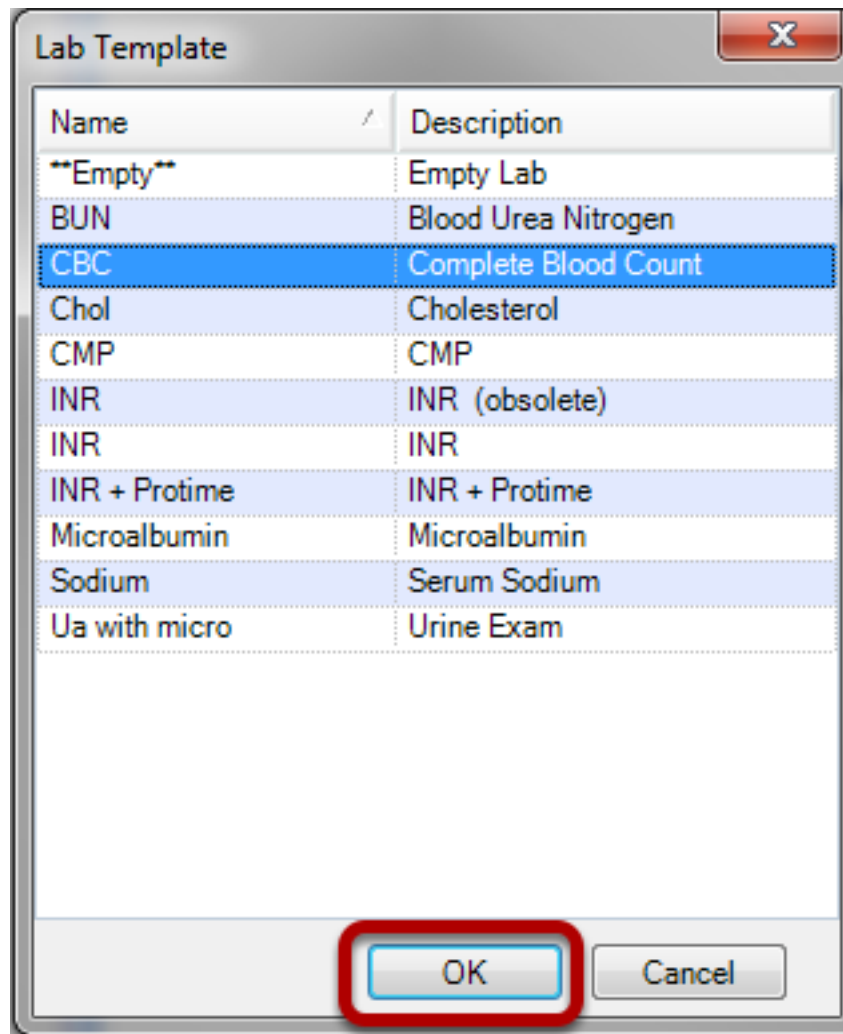
This lesson will walk through the workflow of entering Lab results.

### Creating a New Lab Result.



Click on the green + in the Labs Chart Section.

## Select a Lab Template

A screenshot of a 'Lab Template' dialog box. The dialog has a title bar with a close button (X). It contains a table with two columns: 'Name' and 'Description'. The table lists various lab templates, with 'CBC' (Complete Blood Count) highlighted in blue. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. The 'OK' button is circled in red.

Name	Description
**Empty**	Empty Lab
BUN	Blood Urea Nitrogen
CBC	Complete Blood Count
Chol	Cholesterol
CMP	CMP
INR	INR (obsolete)
INR	INR
INR + Protime	INR + Protime
Microalbumin	Microalbumin
Sodium	Serum Sodium
Ua with micro	Urine Exam

To alphabetically sort list Click on the header Name or Description. The Name of the lab and Description will be the information that was entered into the shortcut box when the lab docuplate was created. Click to highlight the desired lab template and Click OK.

## Document Task

**Add Document Task**

**Task Info**

Description

Owner  Assigned To

Due  Reminder

Priority  Action/Status

Type

Notes

**Docutainer Info**

Date

Name

Ordered By

Owner Jennifer Berg

☐ Apply To All

**Add** Cancel

This will automatically create a Document Task item. Click Add to place this Document Task item to the "Assigned To" users Task list.

## Enter Results

**SOAP Notes**   **Labs**   **Radiology**

---

Date: 07/23/2010 3:35 PM  
Name: Complete Blood Count

Name	Flags	Value	Range	Units	Status	Code	Date	Range	Status	Lab Tech
WBC		10	(4 - 10)	cmm			7/23/2010			2
RBC		0	(0 - 0)	cmm			7/23/2010			
Hgb		0	(0 - 0)	g/dL			7/23/2010			
HCT		0	(0 - 0)	cmm			7/23/2010			
MCV		0	(80 - 94)	cu mic			7/23/2010			
MCH		0	(26 - 34)	pg			7/23/2010			
MCHC		0	(30 - 37)	g/dL			7/23/2010			
Platelets		0	(130 - 400)	cmm			7/23/2010			
Segs		0	(36 - 65)	%			7/23/2010			
Lymphs		0	(25 - 40)	%			7/23/2010			
MID		0	(0 - 8)	%			7/23/2010			

**MU**

3

**CBC**

Drag a column header here to group by that column.

Date	Name	Ordered By	Owner
7/23/2010 3:35:57 PM	Complete Blood Count	Jennifer Berg	

**\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) -  
STRUCTURED LAB RESULTS**

[Click here for Meaningful Use Criteria](#)

1. Enter lab values
2. Enter lab tech initials
3. This area is a free text area used specifically for CLIA documentation. In this section please include where the lab was performed, the address of the facility, and who enter the result. This is very important documentation. All lab results must have this information to be CLIA compliant.

# **Patient Visit Documentation - SOAPnotes Encounter Notes**

## SOAP Charting

---

SOAPware derives its name from the SOAP format used for encounter documentation (i.e. Subjective, O  
bjective, Assessment and Plan).

In SOAPware, the legacy format for encounters is for the Plan to be further divided into three (3) fields:

1. Plan
2. Medications
3. Follow-up.

### Subjective

#### Subjective

CHIEF COMPLAINT: Cough. Allergic rhinitis and shortness of breath

HPI:

ONSET/TIMING: Sudden. Today. Onset was-

DURATION: Acute.

Quality-

LOCATION: N/A.

INTENSITY/SEVERITY: Severe.

CONTEXT/WHEN: Worsened by- exertion

MODIFIERS/TREATMENTS: Has tried- Bronchodilators. Last work-up or evaluation for this was \_\_\_\_.

REVIEW OF SYSTEMS: Cough. productive of green sputum Headache. Fever. up to 102

The history or information offered by the patient.

### Objective

#### Objective

Exam: HEENT: Moist mucous membranes; otoscopic exam is unremarkable ; eyes and nose appear to be unremarkable.

NECK: Supple and without obvious masses. LUNGS: LUNGS: Lung/Auscultation-Abn(+) with-.- Wheezing(+).

. Respirations-Abn(-). HEART: Regular rate and rhythm; no murmur, gallop or rub. ABD: Abdomen is soft, flat, and without tenderness. No masses or organomegaly present. Bowel sounds are normal.

The findings discovered by clinical examination.

### Assessment

#### Assessment

Tonsillitis, acute ICD#463

The diagnoses addressed during the encounter.



## Plan

### Plan

**Estab. Pt Eval/Management** #99215 Related Dxs- Tonsillitis, acute Modifiers- Date of Service From: 4/29/2009 Date of Service To: 4/29/2009 Place of Service: EPSDT: Family Plan: Supplemental: Days/Units: Emergency: **PARTICLE AGGLUTINATION TEST (i.e. Strep)** #86403 Related Dxs- Modifiers- Date of Service From: 3/08/2009 Date of Service To: 3/08/2009 Place of Service: EPSDT: Family Plan: Supplemental: Days/Units: Emergency:

Activities: Plans for new Dx: get plenty of rest and fluids. No work for now, will re-evaluate in 2 days Lab/Tests: cbc, chem7, ua X-rays: repeat chest x-ray in 2 days

The plans for the patient's care going forward.

## Medications

### Medications

**Amoxicillin (Amoxil) 250/5 Susp** 250 mg/5 mL (powder for reconstitution) SIG- 5 3 times a day orally #100  
Substitutions Allowed Refills- 0

The medications prescribed.

## Follow-up

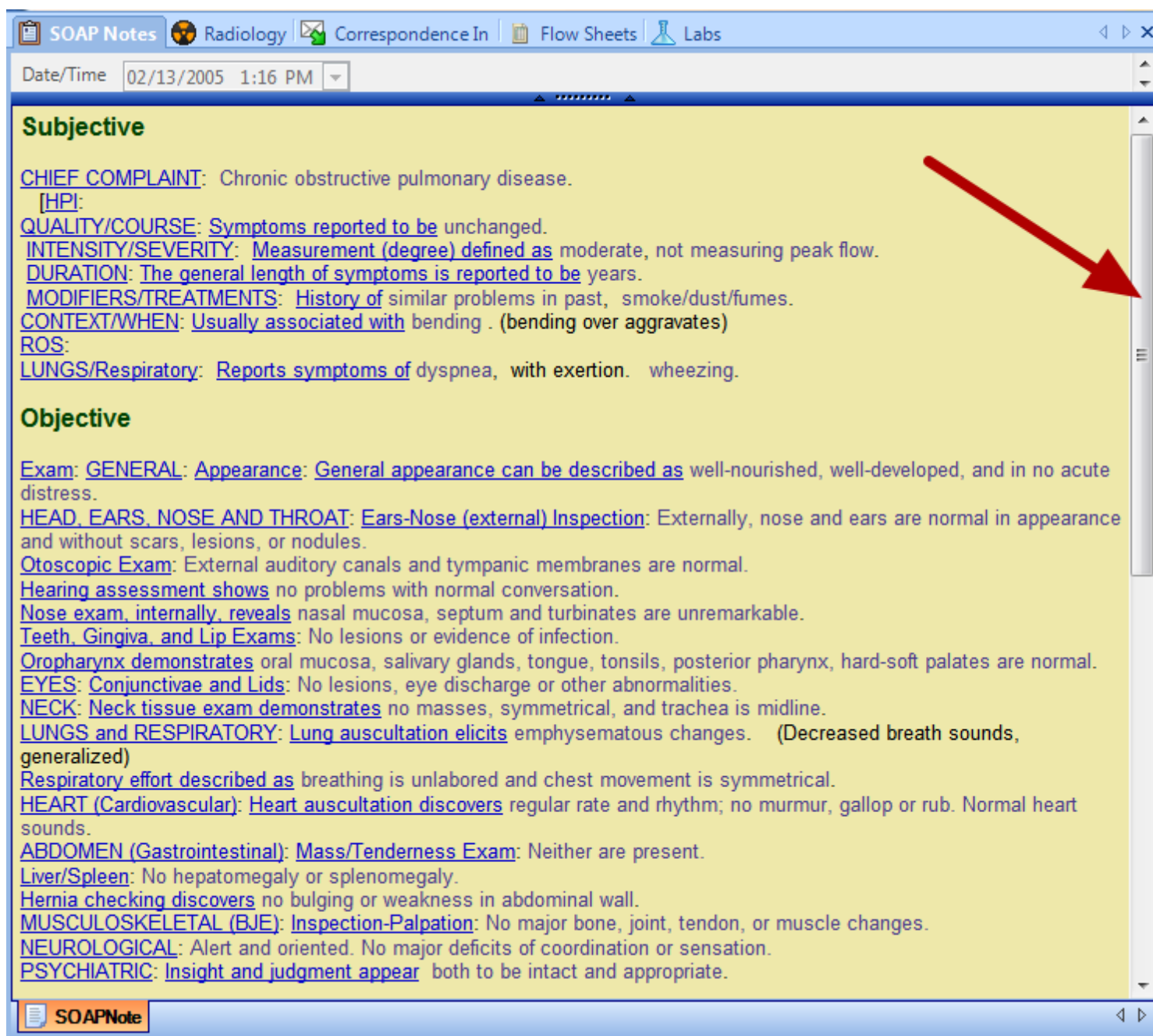
### Follow Up

Return to clinic in (+) 2 days for repeat chest x-ray

Kaye Yocham

The follow-up instructions.

## Scroll to see the entire SOAPnote



The screenshot shows a web-based SOAPnote application. The top navigation bar includes tabs for 'SOAP Notes', 'Radiology', 'Correspondence In', 'Flow Sheets', and 'Labs'. Below this is a date/time selector set to '02/13/2005 1:16 PM'. The main content area is titled 'Subjective' and contains the following text:

**CHIEF COMPLAINT:** Chronic obstructive pulmonary disease.  
**[HPI]:**  
**QUALITY/COURSE:** Symptoms reported to be unchanged.  
**INTENSITY/SEVERITY:** Measurement (degree) defined as moderate, not measuring peak flow.  
**DURATION:** The general length of symptoms is reported to be years.  
**MODIFIERS/TREATMENTS:** History of similar problems in past, smoke/dust/fumes.  
**CONTEXT/WHEN:** Usually associated with bending . (bending over aggravates)  
**ROS:**  
**LUNGS/Respiratory:** Reports symptoms of dyspnea, with exertion. wheezing.

The 'Objective' section follows, containing a detailed physical exam report. A red arrow points to the vertical scroll bar on the right side of the text area, indicating that the content is scrollable.

**Objective**

**Exam: GENERAL:** Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.  
**HEAD, EARS, NOSE AND THROAT:** Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.  
**Otoscopic Exam:** External auditory canals and tympanic membranes are normal.  
**Hearing assessment shows** no problems with normal conversation.  
**Nose exam, internally, reveals** nasal mucosa, septum and turbinates are unremarkable.  
**Teeth, Gingiva, and Lip Exams:** No lesions or evidence of infection.  
**Oropharynx demonstrates** oral mucosa, salivary glands, tongue, tonsils, posterior pharynx, hard-soft palates are normal.  
**EYES: Conjunctivae and Lids:** No lesions, eye discharge or other abnormalities.  
**NECK: Neck tissue exam demonstrates** no masses, symmetrical, and trachea is midline.  
**LUNGS and RESPIRATORY:** Lung auscultation elicits emphysematous changes. (Decreased breath sounds, generalized)  
**Respiratory effort described as** breathing is unlabored and chest movement is symmetrical.  
**HEART (Cardiovascular):** Heart auscultation discovers regular rate and rhythm; no murmur, gallop or rub. Normal heart sounds.  
**ABDOMEN (Gastrointestinal):** Mass/Tenderness Exam: Neither are present.  
**Liver/Spleen:** No hepatomegaly or splenomegaly.  
**Hernia checking discovers** no bulging or weakness in abdominal wall.  
**MUSCULOSKELETAL (BJE):** Inspection-Palpation: No major bone, joint, tendon, or muscle changes.  
**NEUROLOGICAL:** Alert and oriented. No major deficits of coordination or sensation.  
**PSYCHIATRIC:** Insight and judgment appear both to be intact and appropriate.

Depending upon the size of the monitor used for the display and/or the amount of information contained within the SOAPnote fields, all the information within the six SOAP fields may not be visible in a single view. In order to view additional SOAP field information, click the **Up or Down Arrows** in the vertical scroll bar located on the right side of the SOAPnote workspace.

# Creating a SOAPnote

## Open the SOAPnote Chart Section

**SOAP Notes** | Radiology | Correspondence In | Flow Sheets | Labs

Date/Time: 05/12/2010 1:42 PM

**Subjective**  
CHIEF COMPLAINT(S): Cough, Chest Pain, nonspecific, Asthma, Earache or otalgia.  
HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) as  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

**Objective**  
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

**Assessment**  
Hypertension, benign ICD#401.1

**Plan**  
Actions: Lab/Tests: GLYCOSYLATED HEMOGLOBIN TEST. #83036 Relates Dx- Hypertension - Benign Modifiers-

**Medications**  
Accuretic (HCTZ/Quinapril): 12.5 mg-10 mg (tablet) SIG- 1 each once a day orally #30 Substitutions Allowed  
Refills- 0 Comment- Notes-

**Follow Up**  
Return if problems develop or worsens.  
Schedule: Krista L. Laningham

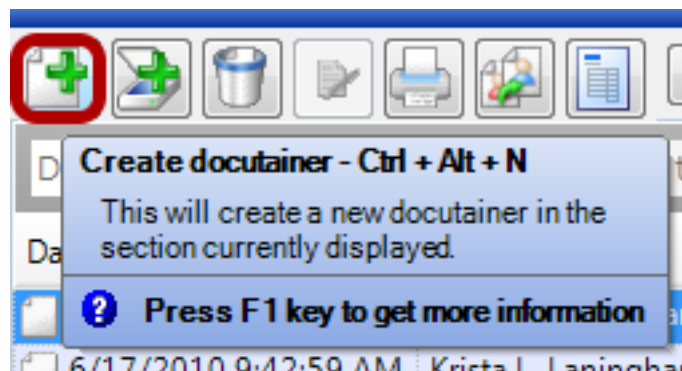
**SOAPnote**

Drag a column header here to group by that column.

Date/Time	Owner	Status	Description	Related Dx
5/12/2010 1:42:33 PM	Krista L. Laningham	Complete	Hypertension, benign ICD#401.1	Hypertension, benign
4/29/2010 8:37:58 AM	Kaye L. Yocham			
4/19/2010 11:47:39 AM	Kaye L. Yocham	Complete		
9/3/2009 8:38:56 AM			Neoplasms of unspecified nature ICD#239	Neoplasms of unspecified
7/2/2009 9:29:26 AM			burn	
6/8/2009 1:04:20 PM			Hypertension ICD#401.9	Hypertension
2/13/2005 1:16:38 PM			Chronic obstructive pulmonary disease ICD#496	Chronic obstructive pulm

To create a new SOAPnote, open the SOAPnote chart section. Here, you will be able to view previous visits as well as create, sign off, print, and reassign encounters.

## Create Docutainer



Using the toolbar below the lower splitter bar, click the Create docutainer button.

## Add Document Task

Add Document Task

**Task Info**

Description	SOAPNote		
Owner	Krista L. Laningham	Assigned To	Krista L. Laningham
Due	6/17/2010	Reminder	/ / : :
Priority	Normal	Action/Status	
Type	SOAP Note		
Notes			

**Docutainer Info**

Date/Time	06/17/2010 9:42 AM
Owner	Krista L. Laningham
Status	
Description	
Related Dx	

☐ Apply To All

Add Cancel

When you create new patient documents, the Add Document Task window will appear. Tasks helps to manage reminders to keep tasks on track and improve productivity and quality of care. This document task for a SOAPnote will be associated with the encounter we are creating and can be set to have a

particular action/status, indicating what needs to be addressed before the task is completed. The task can also have a reminder set, and can be assigned to anyone in the clinic.

The primary reason that we need to make sure to always track SOAPnotes with a task associated is to make sure that the SOAPnote encounter is signed off. If the action/status is set as Needs Review or Sign, the task will automatically be marked as completed and will be removed from the user's task list when the document is signed off.

For more on Tasks, see: [Tasks List](#).

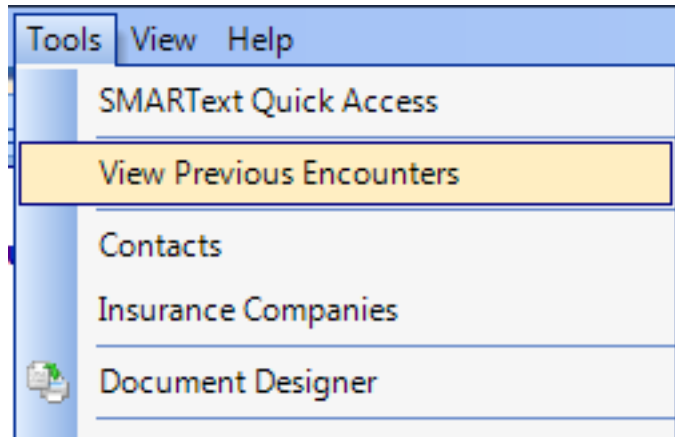
This will bring up the Task window. Tasks are a way to create "To-Do" Items so that you can track them and make sure that each document is signed off after any other needs have been addressed. Using this window, you can enter the information you would like to include with the task, assign it to a user, set a due date and reminder, and choose an action/status. If you click "Add", the task item will be added to the 'assigned to' person's task list. If you click cancel, this will prevent SOAPware from creating a task item associated with this patient encounter.

## View Previous Encounters

---

The View Previous Encounters window allows users to view all past patient encounters/SOAPnotes while viewing a current SOAPnote. This provides easy reference to past encounters and the ability to add past SOAPnote information to the current SOAPnote visit documentation.

### Open the View Previous Encounters Viewer



Click Tools and choose View Previous Encounters.

## Locating a Past Encounter

The screenshot shows the 'Encounter Viewer' window. At the top, there are tabs for 'By Date', 'By Rx', and 'By Dx'. The main area is divided into two sections: 'Subjective' and 'Objective'. The 'Subjective' section contains fields for 'Well Child 12 to 18 Months', 'Visit:', 'Accompanied By:', 'Secondary Phone #', 'Drug Allergies: See Summary', 'History/Parent Concern:[]', 'Interval History Reviewed Yes', 'Current Medications: See Summary', 'Social/Family History Completed', and 'Child Care: Yes'. The 'Objective' section contains fields for 'Review of Systems: Elimination Assessed: Yes', 'Environment Assessed: Yes', 'Nutrition Assessed: Yes', 'Sleep Patterns Assessed: Yes', 'Development Assessed: 18 Month Gross Motor: Walks backwards', '18 Months Communication', '18 Months Social: Uses spoon/fork', 'Comments:', and '(OR) Denver Development II Administered: Yes'. Below the main area is a 'SOAPnote' tab. At the bottom, there is a table with three columns: 'Date', 'Description', and 'Provider'. A red arrow points to the 'Provider' column of the table. The table contains the following data:

Date	Description	Provider
6/17/2010 9:00 AM		Krista L. Laningham
5/1/2010 3:30 PM		Krista L. Laningham
4/29/2009 3:33 PM	ASSESSMENT ASSESSMENT ASSESSMENT ASSE...	Kaye L. Williamson
2/10/2009 10:55 AM	Tonsillitis, acute ICD#463	Kaye L. Williamson
11/6/2008 11:22 AM		Kaye Yocham
8/28/2007 9:59 AM	sinus	Kaye Yocham
1/27/2007 1:27 PM	Well child check CPT#V20.2.	Randall Oates, MD
1/27/2007 11:44 AM		Randall Oates, MD

At the bottom of the window, there are two buttons: 'Add Active Field to Current Encounter' and 'Add Active Document to Current Encounter'.

The Encounter Viewer shows the SOAPnote preview at the top of the window and the list of SOAPnotes at the bottom. Use the scroll bar to locate the visit you would like to view.

## Copy the Previous Encounter to the Current SOAPnote

**Encounter Viewer**

By Date | By Rx | By Dx

**Subjective**  
Well Child 12 to 18 Months

Visit:

Accompanied By:

Secondary Phone #

Drug Allergies: See Summary

History/Parent Concern:[]

Interval History Reviewed Yes

Current Medications: See Summary

Social/Family History Completed

Child Care: Yes

**Objective**  
Review of Systems: Elimination Assessed: Yes  
Environment Assessed: Yes  
Nutrition Assessed: Yes  
Sleep Patterns Assessed: Yes

**SOAPnote**

Date	Description	Provider
6/17/2010 9:00 AM		Krista L. Laningha
5/1/2010 3:30 PM		Krista L. Laningha
4/29/2009 3:33 PM	ASSESSMENT ASSESSMENT ASSESSMENT ASSE...	Kaye L. Williamso
2/10/2009 10:55 AM	Tonsillitis, acute ICD#463	Kaye L. Williamso
11/6/2008 11:22 AM		Kaye Yocham

Add Active Field to Current Encounter | Add Active Document to Current Encounter

Click the "Add Active Document to Current Encounter" to add the entire previous visit to the current SOAPnote.

**NOTE:** To copy to a current encounter, you need to have an open, unsigned SOAPnote in this



patient's chart.

## Copy a Field to the Current SOAPnote

The screenshot shows the 'Encounter Viewer' window. At the top, there are tabs for 'By Date', 'By Rx', and 'By Dx'. The main area displays a SOAPnote with the following fields:

- Subjective[**
- Well Child 12 to 18 Months
- Visit:** 1
- Accompanied By:**
- Secondary Phone #**
- Drug Allergies:** See Summary
- History/Parent Concern:** []
- Interval History Reviewed** Yes
- Current Medications:** See Summary
- Social/Family History** Completed
- Child Care:** Yes
- Objective**
- Review of Systems:** Elimination Assessed: Yes
- Environment Assessed:** Yes
- Nutrition Assessed:** Yes
- Sleep Patterns Assessed:** Yes

Below the SOAPnote is a 'SOAPNote' tab. At the bottom, there is a table of previous encounters:

Date	Description	Provider
6/17/2010 9:00 AM		Krista L. Laningha
5/1/2010 3:30 PM		Krista L. Laningha
4/29/2009 3:33 PM	ASSESSMENT ASSESSMENT ASSESSMENT ASSE...	Kaye L. Williamso
2/10/2009 10:55 AM	Tonsillitis, acute ICD#463	Kaye L. Williamso
11/6/2008 11:22 AM		Kaye Yocham

At the bottom of the window, there are two buttons: 'Add Active Field to Current Encounter' and 'Add Active Document to Current Encounter'.

To add just a field of the previous encounter to your SOAPnote:

1. Click into the field
2. Click "Add Active Field to Current Encounter".

**NOTE: To copy to a current encounter, you need to have an open, unsigned SOAPnote in this patient's chart.**

## The Default Docuplate

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The default docuplate is a docuplate that is automatically entered when a SOAPnote is created. When SOAPware 2010 is installed, the default docuplate will be set to "SOAPDPL".

### SOAPDPL

#### Subjective[

CHIEF COMPLAINT(S):

HPI: SYMPTOMS/RELATED: Reports symptoms of

LOCATION: Reports area of involvement as

QUALITY/COURSE: Reports condition is

INTENSITY/SEVERITY: Reports measurement ( or degree) as

DURATION: Reports the general length of symptoms to be

ONSET/TIMING: Reports occurrence as

CONTEXT/WHEN: Reports usually associated with

MODIFIERS/TREATMENTS: Improved by

ROS:

]

#### Objective

Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

#### Assessment

#### Plan

Actions:

#### Medications

#### Follow Up

Return if problems develop or worsens.

Schedule: Krista L. Laningham

This is a good starter docuplate to use that also allows for an introduction to using SMARText Items in your encounter documentation. You can modify this docuplate or set the default to another docuplate that you wish to use instead.

## Subjective Entry

---

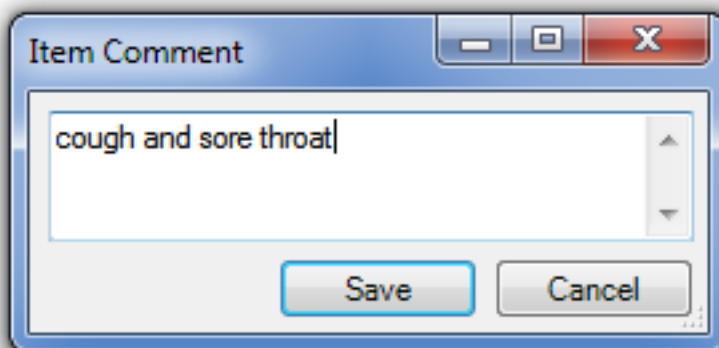
### Free Text

Subjective[  
Cough and sore throat]

You can always use the SOAPnote fields as though this was a word processor and type the documentation manually. To do this, you will need to click within one of the SOAPnote fields and type. You can highlight, delete, backspace, and insert text easily using this method of data entry.

### Comment Box

Subjective  
CHIEF COMPLAINT(S):[ ]



Using Item Comment attaches a free-text comment to a SMARTText item. In the SOAPnotes docutainer, click CHIEF COMPLAINT(S) under Subjective. Notice that an open and a close bracket appears immediately following CHIEF COMPLAINT(S). These brackets indicate that CHIEF COMPLAINT(S) is a SMARTText item and that if you start typing in these brackets, your comment will be associated with the SMARTText item, making it more meaningful data.

When you begin typing inside these brackets, the Item Comment box will appear. After you type and click save, the comment will be associated with chief complaint.

## Structured Text and Quick Access

The screenshot displays the SOAPware interface. The main window shows a patient record for 06/17/2010 11:40 AM. The record includes sections for Subjective, Objective, Assessment, Plan, Medications, and Follow Up. The Subjective section contains a CHIEF COMPLAINT(S) field with a pick list icon. The SMART Text Quick Access dialog is open on the right, showing a list of chief complaints with checkboxes and descriptions. The dialog is titled "SMART Text Quick Access" and has a red border. The "Active Item" is "CHIEF COMPLAINT(S)". The list includes various body systems and a "Most Common Chief Complaints BUNDLE" option.

**SOAP Notes** | Radiology | Correspondence In | Flow Sheets | Labs

Date/Time: 06/17/2010 11:40 AM

**Subjective**  
CHIEF COMPLAINT(S): [ ]

HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) as  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

ROS:

**Objective**  
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

**Assessment**

**Plan**  
Actions:

**Medications**

**Follow Up**  
Return if problems develop or worsens.  
Schedule: Krista L. Laningham

**SMART Text Quick Access**

Active Item: "CHIEF COMPLAINT(S)"

Selected	Description
<input type="checkbox"/>	( A - GENERAL and Unspecified )
<input type="checkbox"/>	( B - BLOOD and IMMUNE )
<input type="checkbox"/>	( D - DIGESTIVE )
<input type="checkbox"/>	( F - EYE )
<input type="checkbox"/>	( H - EAR )
<input type="checkbox"/>	( K - CARDIOVASCULAR )
<input type="checkbox"/>	( N - NEUROLOGICAL )
<input type="checkbox"/>	( P - PSYCHOLOGICAL )
<input type="checkbox"/>	( R - RESPIRATORY )
<input type="checkbox"/>	( S - SKIN )
<input type="checkbox"/>	( T - ENDOCRINE/METABOLIC/NUTRITIONAL )
<input type="checkbox"/>	( U - UROLOGICAL )
<input type="checkbox"/>	( W - PREGNANCY/CHILDBIRTH/FAMILY PLAN.
<input type="checkbox"/>	( X - FEMALE GENITAL )
<input type="checkbox"/>	( Y - MALE GENITAL )
<input type="checkbox"/>	( Z - SOCIAL PROBLEMS )
<input type="checkbox"/>	( L - MUSCULOSKELETAL )
<input type="checkbox"/>	( Most Common Chief Complaints BUNDLE )

Click on the CHIEF COMPLAINT(S), again, and notice the pick list displayed in the SMARTText Quick Access dialog. The second column in the pick list is the Description. If the Description column is not wide enough, it can be expanded, or you can point the cursor at the items and you will see the complete description in a pop up window. SOAPware recommends using SMARTText items like these found in Pick Lists as much as possible. It can make documentation faster as well as make the documentation more meaningful and searchable. Most of this lesson will cover using SMARTText Data Entry methods, but at any time you can use free text entry if that fits your needs best.

## Using Quick Access

Selected	Description	S	T	U
<input checked="" type="checkbox"/>	( A - GENERAL and Unspecified )		L	0
<input type="checkbox"/>	( B - BLOOD and IMMUNE )		L	0
<input type="checkbox"/>	( D - DIGESTIVE )		L	0
<input type="checkbox"/>	( F - EYE )		L	0
<input type="checkbox"/>	( H - EAR )		L	0
<input type="checkbox"/>	( K - CARDIOVASCULAR )		L	0
<input type="checkbox"/>	( N - NEUROLOGICAL )		L	0
<input type="checkbox"/>	( P - PSYCHOLOGICAL )		L	0
<input type="checkbox"/>	( R - RESPIRATORY )		L	0
<input type="checkbox"/>	( S - SKIN )		L	0
<input type="checkbox"/>	( T - ENDOCRINE/METABOLIC/NUTRITIONAL )		L	0
<input type="checkbox"/>	( U - UROLOGICAL )		L	0
<input type="checkbox"/>	( W - PREGNANCY/CHILDBIRTH/FAMILY PLAN...		L	0
<input type="checkbox"/>	( X - FEMALE GENITAL )		L	0
<input type="checkbox"/>	( Y - MALE GENITAL )		L	0
<input type="checkbox"/>	( Z - SOCIAL PROBLEMS )		L	0
<input type="checkbox"/>	( L - MUSCULOSKELETAL )		L	0
<input type="checkbox"/>	( Most Common Chief Complaints BUNDLE)		L	0

You will see in SMARText Quick Access "Pick List" that the chief complaint items are listed by system and that there is an additional item for Most Common Chief Complaints. When you click on any of these lists using the "Select" box, this will display another list of items in the SMARText Quick Access dialog.

## Using Pick List Items

**SMARText Quick Access**

Active Item: (Most Common Chief Complaints BUNDLE)

Selected	Description	S	T	U
<input type="checkbox"/>	-RFE- "Chronic obstructive lung disease (Emphyse...			C... 4
<input checked="" type="checkbox"/>	-RFE- "Cough" (06.0.R05.RES)			C... 3
<input type="checkbox"/>	-RFE- "Nausea" (09.0.D09.DIG)			C... 3
<input type="checkbox"/>	-RFE- "Chest Pain, nonspecific" (01.0.A11.G...			C... 2
<input type="checkbox"/>	-RFE- "Abdomen pains (or cramps) that are localiz...			C... 1
<input type="checkbox"/>	-RFE- "Allergic rhinitis" (06.0.R97.Res   03)			C... 1
<input type="checkbox"/>	-RFE- "Back pain (lower or lumbar-sacral)" (1...			C... 1
<input type="checkbox"/>	-RFE- "Hypertension, uncomplicated" (08.0.K...			C... 1
<input type="checkbox"/>	-RFE- "Diabetes - Insulin dependent" (01.1.T...			C... 1
<input type="checkbox"/>	-RFE- "Diarrhea" (09.0.D11.DIG)			C... 1
<input type="checkbox"/>	-RFE- "Earache or otalgia" (03.1.H01.EAR)			C... 1
<input type="checkbox"/>	-RFE- "Fever" (01.0.A03.GEN)			C... 1
<input type="checkbox"/>	-RFE- "Immunizations or boosters" (01.0.A44.G...			C... 1
<input type="checkbox"/>	-RFE- "Vision Screening" (04.0.F49.EYE)			C... 1
<input type="checkbox"/>	-RFE- "Abdomen pains (or cramps) that are gener...			C... 0
<input type="checkbox"/>	-RFE- "Abdominal pains that are epigastric" (...)			C... 0
<input type="checkbox"/>	-RFE- "Acute bronchitis, or bronchiolitis" (06...			C... 0
<input type="checkbox"/>	-RFE- "Chronic bronchitis" (06.0.R79.RES)			C... 0
<input type="checkbox"/>	-RFE- "Asthma" (06.0.R96.RES)			C... 0
<input type="checkbox"/>	-RFE- "Hypertension, complicated" (08.0.K87...			C... 0
<input type="checkbox"/>	-RFE- "Congestive Heart Failure" (06.0.R77...			C... 0
<input type="checkbox"/>	-RFE- "Ischemic heart disease with angina" (...)			C... 0
<input type="checkbox"/>	-RFE- "Coronary artery disease without angina" ...			C... 0
<input type="checkbox"/>	-RFE- "Depressive disorder" (13.0.P76.PSY)			C... 0
<input type="checkbox"/>	-RFE- "Diabetes - Non-insulin dependent" (0...			C... 0
<input type="checkbox"/>	-RFE- "Fatigue (Neurasthenia)" (13.0.P78.PS...			C... 0
<input type="checkbox"/>	-RFE- "Follow-up encounter" (13.1.Z63.SOC)			C... 0
<input type="checkbox"/>	-RFE- "Nausea, vomiting, diarrhea (presumed gast...			C... 0
<input type="checkbox"/>	-RFE- "Preventative procedure" (other/misc) ...			C... 0
<input type="checkbox"/>	-RFE- "Hyperlipidemia" (01.1.T93.GEN)			C... 0
<input type="checkbox"/>	-RFE- "Influenza" (06.0.R80.RES)			C... 0
<input type="checkbox"/>	-RFE- "Knee pain/symptom/complaint" (11.0...			C... 0
<input type="checkbox"/>	-RFE- "Nasal congestion or sneezing" (06.0...			C... 0
<input type="checkbox"/>	-RFE- "Headache" (12.0.N01.NEU)			C... 0
<input type="checkbox"/>	-RFE- "Medication/Prescription renewal or injectio...			C... 0
<input type="checkbox"/>	-RFE- "Obesity" (01.1.T82.MET)			C... 0
<input type="checkbox"/>	-RFE- "Osteoarthritis/Osteoarthritis" (11.0.L...			C... 0
<input type="checkbox"/>	-RFE- "Osteoarthritis/Osteoarthritis of knee"...			C... 0
<input type="checkbox"/>	-RFE- "Osteoarthritis/Osteoarthritis of hip" (...)			C... 0
<input type="checkbox"/>	-RFE- "Pneumonia" (06.0.R81.RES)			C... 0
<input type="checkbox"/>	-RFE- "Rash-localized" (14.0.S06.SKI)			C... 0
<input type="checkbox"/>	-RFE- "Rash-generalized" (14.0.S07.SKI)			C... 0
<input type="checkbox"/>	-RFE- "Dyspnea or shortness of breath" (06.0...			C... 0
<input type="checkbox"/>	-RFE- "Sinusitis, acute or chronic" (06.0.R75...			C... 0
<input type="checkbox"/>	-RFE- "Sinus problems" (nonspecific) (06.0...			C... 0
<input type="checkbox"/>	-RFE- "Sore throat (Pharyngitis)" (03.0.R21.R...			C... 0
<input type="checkbox"/>	-RFE- "Review results of test or procedure" (...)			C... 0
<input type="checkbox"/>	-RFE- "Upper respiratory infection, acute" (06...			C... 0
<input type="checkbox"/>	-RFE- "Cystitis, bladder infection" (10.0.U71...			C... 0
<input type="checkbox"/>	-RFE- "Urinary frequency and/or urgency" (1...			C... 0
<input type="checkbox"/>	-RFE- "Vertigo or dizziness" (12.0.N17.NEU)			C... 0
<input type="checkbox"/>	-RFE- "Viral Infection (GENERAL)" (01.0.A7...			C... 0
<input type="checkbox"/>	-RFE- "Vomiting" (09.0.D10.DIG)			C... 0

[Select All](#) [Deselect All](#) ☐ Expand Groups

Comments

In this second list (Most Common Chief Complaints), click the Description column header to sort alphabetically. You can click any column header to sort by that column to easily find the item you need.

## Selecting a Pick List Item

The screenshot displays the SMARTText Quick Access interface. On the left, the 'Subjective' section shows the 'CHIEF COMPLAINT(S)' field with the text 'Cough, Sore throat (Pharyngitis)'. A circled '2' points to this field. On the right, the 'SMARTText Quick Access' panel shows a list of items. A circled '1' points to the first item, '-RFE- "Cough" (06.0.R05.RES)', which is selected. The 'Active Item' field at the top of the panel shows '( Most Common Chief Complaints BUNDLE)'.

**SOAP Notes** | **Radiology** | **Correspondence In** | **Flow Sheet**

Date/Time: 06/17/2010 11:40 AM

**Subjective**

CHIEF COMPLAINT(S): [ Cough, Sore throat (Pharyngitis). ]

HPI: SYMPTOMS/RELATED: Reports symptoms of  
 LOCATION: Reports area of involvement as  
 QUALITY/COURSE: Reports condition is  
 INTENSITY/SEVERITY: Reports measurement ( or degree) a  
 DURATION: Reports the general length of symptoms to be  
 ONSET/TIMING: Reports occurrence as  
 CONTEXT/WHEN: Reports usually associated with  
 MODIFIERS/TREATMENTS: Improved by

ROS:

**SMARTText Quick Access**

Active Item: ( Most Common Chief Complaints BUNDLE)

Selected	Description
<input checked="" type="checkbox"/>	-RFE- "Cough" (06.0.R05.RES)
<input checked="" type="checkbox"/>	-REF- "Sore throat (Pharyngitis)" (03.0.R21.RES   0...
<input type="checkbox"/>	-RFE- "Abdomen pains (or cramps) that are generalized" ...
<input type="checkbox"/>	-RFE- "Abdominal pains that are epigastric" (09.0.D...
<input type="checkbox"/>	-RFE- "Abdomen pains (or cramps) that are localized" ...
<input type="checkbox"/>	-RFE- "Allergic rhinitis" (06.0.R97.Res   03)
<input type="checkbox"/>	-RFE- "Back pain (lower or lumbar-sacral)" (11.0.L0...
<input type="checkbox"/>	-RFE- "Acute bronchitis, or bronchiolitis" (06.0.R78...
<input type="checkbox"/>	-RFE- "Chronic bronchitis" (06.0.R79.RES)

When you (1) select an item, you will notice that it (2) inserts between the brackets of the CHIEF COMPLAINT(S) data entry area. All of these lists are completely customizable. Each clinician can create their preferred lists of commonly used chief complaints.

## RFE: Reason for Encounter

<input type="checkbox"/>	-RFE- "Follow-up encounter" (13.1.Z63.SOC)
<input type="checkbox"/>	-RFE- "Headache" (12.0.N01.NEU)
<input type="checkbox"/>	-RFE- "Hyperlipidemia" (01.1.T93.GEN)
<input type="checkbox"/>	-RFE- "Hypertension, complicated" (08.0.K87.CIR)
<input type="checkbox"/>	-RFE- "Hypertension, uncomplicated" (08.0.K86.CL...
<input type="checkbox"/>	-RFE- "Immunizations or boosters" (01.0.A44.GEN)
<input type="checkbox"/>	-RFE- "Influenza" (06.0.R80.RES)
<input type="checkbox"/>	-RFE- "Ischemic heart disease with angina" (08.0....
<input type="checkbox"/>	-RFE- "Knee pain/symptom/complaint" (11.0.L15...
<input type="checkbox"/>	-RFE- "Medication/Prescription renewal or injection" (GE...
<input type="checkbox"/>	-RFE- "Nasal congestion or sneezing" (06.0.R07.R...
<input type="checkbox"/>	-RFE- "Nausea" (09.0.D09.DIG)

Many visits don't really involve a complaint, but there is always a Reason For the Encounter, and this may or may not be a true complaint. You will notice that in the description column of Quick Access, many of the items are also RFE items.



## HPI: History of Present Illness

### Subjective[

CHIEF COMPLAINT(S): Cough, Sore throat (Pharyngitis).

HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) a  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

ROS:

Active Item		" HPI" (Header)
Selected	Description	
<input checked="" type="checkbox"/>	" SYMPTOMS/RELATED:"	
<input checked="" type="checkbox"/>	" QUALITY/COURSE: "	
<input checked="" type="checkbox"/>	" ONSET/TIMING:"	
<input checked="" type="checkbox"/>	" CONTEXT/WHEN:"	
<input checked="" type="checkbox"/>	" MODIFIERS/TREATMENTS:"	
<input checked="" type="checkbox"/>	" INTENSITY/SEVERITY:"	
<input checked="" type="checkbox"/>	" LOCATION:"	
<input checked="" type="checkbox"/>	" DURATION:"	

The Subjective field also contains a number of History of Present Illness SMARTText items. These HPI items present pick lists and function in the same manner as the CHIEF COMPLAINT(S) SMARTText items. At this time, consider spending a few minutes clicking around on the HPI SMARTText items and their associated pick lists. You can also look over the ROS (Review of Systems) as well. These pick lists can greatly reduce the amount of time needed to document in the subjective field, but you will need to be familiar with them to locate the items you need.

### Subjective[

CHIEF COMPLAINT(S): Cough, Sore throat (Pharyngitis).

HPI: SYMPTOMS/RELATED: Reports symptoms of

LOCATION: Reports area of involvement as

QUALITY/COURSE: Reports condition is

INTENSITY/SEVERITY: Reports measurement ( or degree) as

DURATION: Reports the general length of symptoms to be

ONSET/TIMING: Reports occurrence as

CONTEXT/WHEN: Reports usually associated with

MODIFIERS/TREATMENTS: Improved by

ROS:

COMPLAINT or ISSUE -

HPI: SYMPTOMS/RELATED: Reports symptoms of

Denies symptoms of

LOCATION: Reports area of involvement as

Denies regionality as

QUALITY/COURSE: Reports condition is

Denies, in general,

INTENSITY/SEVERITY: Reports measurement ( or degree) as

Declines to define as

DURATION: Reports the general length of symptoms to be

Declines to define duration as

ONSET/TIMING: Reports occurrence as

Denies onset as

CONTEXT/WHEN: Reports usually associated with

Denies association with

MODIFIERS/TREATMENTS: Improved by

Has tried

History of

Past evaluation and/or work-up includes

To add a third or fourth problem, an option would be to utilize the SMARText shortcut codes nexc, nexs or nexd. These codes will insert another, blank Subjective outline. Above you can see the nexd item.

## Multiple Complaints Docuplate

### Subjective[

CHIEF COMPLAINT(S)/REASON FOR VISIT:

HPI: SYMPTOMS/RELATED: Reports symptoms of

ONSET/TIMING:

QUALITY/COURSE:

MODIFIERS/TREATMENTS: Has tried

PROBLEM #2:

COMPLAINT or ISSUE:

HPI: SYMPTOMS/RELATED: Reports symptoms of

ONSET/TIMING:

QUALITY/COURSE:

MODIFIERS/TREATMENTS: Has tried

ROS: GEN- Constitutional:

HENT:

EYES:

LUNGS/Respiratory:

HEART/Cardiovascular:

ABD/Gastrointestinal:

GENT/Genitourinary:

Musculoskeletal (BJE):

NEURO/Neurological:

PSYCH/Psychiatric:

]

There is a docuplate in the online library that will allow the user to document more than one complaint.

Start with an empty SOAPnote and hit F5 to use the [Quick Entry](#) insertion method.

In the Search field/box, Type starterdefault. This particular docuplate is designed to be used for 2 problems.

## Objective Entry

Just as in Subjective, this default template/docuplate, has a number of specific SMARText items placed into the Objective field. Clicking on their headers causes Quick Access to display pick list items. In the objective exam, when the exam headers are selected, normal findings are pre-populated in the objective field from SMARText Quick Access.

### Vital Signs

Vital Signs are recorded in a dedicated chart section and can be transferred to the objective field in the SOAPnote. To learn more about how to use the Vital Signs section, see: [Inserting Vital Signs](#) and [Transferring Vitals to the Active SOAPnote](#).

### Growth Charts

Growth Charts can be used to plot vital sign readings to track growth. To learn how to use these, see: [Growth Charts Interface](#).

### Exam Systems

Click the Exam pick list header in the Objective field. A list of exam systems will appear in the Quick Access dialog. The default for this demonstration only displays 1 of the 14 exam systems, the GENERAL system.

### Exam Systems Data Entry

#### Objective

Exam: [ GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.  
HEAD/EARS/NOSE/THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.  
Otoscopy Exam: External auditory canals and tympanic membranes are normal.  
Oropharynx demonstrates oral mucosa, salivary glands, tongue, tonsils, posterior pharynx, hard-soft palates are normal.  
EYES: Conjunctivae and Lids: No lesions, eye discharge or other abnormalities.  
Pupils and irises: Pupils are equal, round, and reactive to direct light and are consensual to light bilaterally. Irises are symmetrical and without lesions.  
LUNGS and RESPIRATORY: Lung auscultation elicits no wheezing, rhonchi, rales or rubs and with equal breath sounds.  
HEART (Cardiovascular): Heart auscultation discovers regular rate and rhythm; no murmur, gallop or rub. Normal heart sounds.  
ABDOMEN (Gastrointestinal): Mass/Tenderness Exam: Neither are present.  
Liver/Spleen: No hepatomegaly or splenomegaly. ]

#### Assessment

Selected	Description
<input type="checkbox"/>	* LYMPHATIC:* (Exam)
<input type="checkbox"/>	* NECK:* (Normal)
<input type="checkbox"/>	- * FEMALE-GENITOURINARY:* (Normal)
<input type="checkbox"/>	* MALE-GENITOURINARY:* ...
<input type="checkbox"/>	* BREASTS:* ...
<input checked="" type="checkbox"/>	* GENERAL:* ...
<input checked="" type="checkbox"/>	* HEAD/EARS/NOSE/THROAT:* (Normal)
<input checked="" type="checkbox"/>	* LUNGS and RESPIRATORY:* (Normal)
<input checked="" type="checkbox"/>	* HEART (Cardiovascular):* (Normal)
<input checked="" type="checkbox"/>	* ABDOMEN (Gastrointestinal):* (Normal)*
<input type="checkbox"/>	* MUSCULOSKELETAL (BJE):* ...
<input type="checkbox"/>	* NEUROLOGICAL:* ...
<input type="checkbox"/>	* PSYCHIATRIC:* ...
<input type="checkbox"/>	* SKIN:* ...
<input type="checkbox"/>	*+++++ (SMARTips) ...
<input checked="" type="checkbox"/>	* EYES:* (Normal)

You can include any of these exam systems in your documentation by checking the box next to the exam system. This will insert the exam as normal in the SOAPDPL docuplate.

## Modifying Normal Exams

[LUNGS/Respiratory:](#)  
[HEART/Cardiovascular:](#)  
[ABD/Gastrointestinal:](#)  
[GENT/Genitourinary:](#)  
[Musculoskeletal \(BJE\):](#)  
[NEURO/Neurological:](#)  
[PSYCH/Psychiatric:](#)

### Objective

Exam: [GENERAL: Appearance:](#) General appearance can be described as [in mild distress.](#)

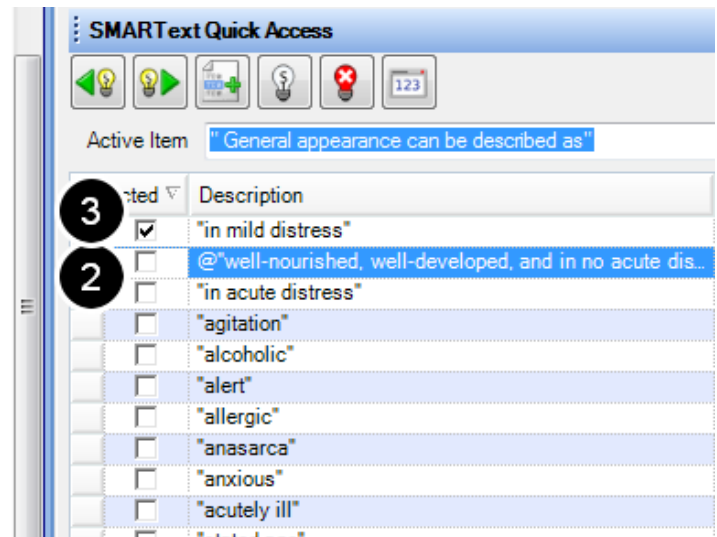
[HEAD/EARS/NOSE/THROAT: Ears-Nose \(external\) Inspection:](#) Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.

[Otoscope Exam:](#) External auditory canals and tympanic membranes are normal.

[Oropharynx demonstrates](#) oral mucosa, salivary glands, tongue, tonsils, posterior pharynx, hard-soft palates are normal.

[EYES: Conjunctivae and Lids:](#) No lesions, eye discharge or other

1



To modify a normal exam:

1. Click on the picklist before the item you would like to modify
2. Deselect the current picklist item
3. Select the exam finding you want to include

## Customizing Exams

By building a customized docuplate, you can create custom exams for all of your most common visits. This will help to speed up your documentation process, while also ensuring that you are documenting encounters in a meaningful way.

# Assessment Entry

## Location Pick List

The screenshot displays the SMARTText Quick Access interface. On the left, the 'Subjective' section shows the chief complaint: 'Hypertension, complicated.' The 'Objective' section includes physical exam findings. The 'Assessment' field is currently empty, and the 'Plan' section shows 'Lab/Tests:'. On the right, the 'SMARTText Quick Access' panel shows a list of diagnoses related to the chief complaint. The list is numbered 1 through 12, with 'Hypertension, benign' (ICD#995.9) highlighted as option 6.

**SMARTText Quick Access**

QA	Description	Shortcu	Type	Usage
1	"Hypertension with complica...	HypCo...	Dx	1000
2	"Hypertension, renovascular...	HTNr...	Dx	1000
3	"Hypertensive retinopathy L...	HypRet	Dx	1000
4	"Malignant hypertension"...	MalH	Dx	1000
5	"Renovascular hypertension...	RenHm	Dx	1000
6	"Hypertension, benign" (I...	HTNx	Dx	6
7	"Abdominal aortic aneurysm...	AbdAor	Dx	4
8	"Abdominal aortic aneurysm...	AbdAo...	Dx	4
9	"Abnormal electrocardiogra...	AbnE	Dx	4
0	"Administrative procedure/a...	AdmPro	Dx	4
	"Adverse effect of medicinal...		Dx	4
	"Adverse effects of anticoag...		Dx	4
	"Anaphylaxis" (ICD#995...	Anaphy	Dx	4
	"Angina" (nonspecific - IC...	Ang	Dx	4
	"Angioedema" (ICD#995...	Angl	Dx	4
	"Aortic aneurysm" (nonsp...	AorAne	Dx	4
	"Aortic Dissection" (ICD#...	AorD	Dx	4
	"Aortic insufficiency" (ICD...	AorI	Dx	4
	"Aortic stenosis" (ICD#42...	AorS	Dx	4
	"Aortic valve disorder" (no...	AorVD	Dx	4
	"Arterial occlusive disease"...	ArtO	Dx	4
	"Arteriosclerotic cardiovasc...	ArtC	Dx	4
	"Asthma - Acute Exacerbati...	AstAE	Dx	4
	"Atherosclerosis, generaliz...	AthG	Dx	4
	"Atrial fibrillation" (ICD#4...	AtrF	Dx	4
	"Atrial Flutter" (ICD#427...	AtrFlu	Dx	4
	"Atrial Septal Defect" (IC...	AtrS	Dx	4
	"Bleeding esophageal varic...	BleEso	Dx	4
	"Bleeding Internal Hemorrh...	BleIH	Dx	4
	"Blood test" (SHARED) (V...	BloTes	Dx	4
	"Bradycardia" (ICD#427.8...	BraC	Dx	4
	"Bruit" (ICD#785.9)	Bru	Dx	4
	"Cardiac arrest" (ICD#42...	CarA	Dx	4
	"Cardiac arrhythmia" (ICD...	CarArr	Dx	4
	"Cardiac Contusion" (ICD...	CarC	Dx	4
	"Cardiomegaly" (ICD#429...	CarMeg	Dx	4
	"Cardiomyopathy" (nonsp...	CarM	Dx	4
	"Cardiovascular System Prob...	CarSys	Dx	4

Instead of selecting an item from a pre-built pick list, the Assessment field presents an opportunity to utilize a "location pick list". This list works by giving you choices in the Quick Access when you click inside the Assessment field. The choices shown in Quick Access will be dependent on the chief complaint entered, as well as the items you have used previously in the Assessment field and items in this patient's Active Problems list from the Summary.



In this example, with (1) hypertension entered as a chief complaint, (2) many hypertension-related diagnoses will appear in our assessment field location pick list. To choose one of these options, simply double-click on the assessment in SMARTText Quick Access and it will insert into the assessment field of the active SOAPnote.



## F11 Pick List

hypertension 1

Q	Description	Shortcut	Type	U
<span style="border: 1px solid black; border-radius: 50%; padding: 2px 5px;">2</span>	"Renovascular hypertension, malignant" (ICD#405.01)	RenHm	Dx	1.
▲	"Hypertension with complications" (ICD#997.91)	HypCom	Dx	1.
▲	"Malignant hypertension" (ICD#401.0)	MalH	Dx	1.
▲	"Hypertension, renovascular, benign" (ICD#405.11)	HTNrb	Dx	1.
▲	"Hypertension, benign" (ICD#401.1)	HTNx	Dx	5
▲	"Pulmonary hypertension" (ICD#416.0)	PulH	Dx	4
▲	"Congestive Heart Failure, hypertensive" (ICD#402.91)	ConHh	Dx	4
▲	"Labile or Transient Hypertension" (white coat - ICD#796.2)	LabH	Dx	4
▲	"Gestational hypertension" (ante partum ICD#642.33)	GesH	Dx	1
▲	"Gestational hypertention or pre-eclampsia, mild" (uncomplicated - I...	GesHM	Dx	1
▲	"Hypertension, gestational, transient" (unspecified - ICD#642.30)	TraGesH	Dx	1
▲	Hypertension	htn	Mis...	1
▲	"High Risk Pregnancy" (v23.9)	HigR	Dx	1
▲	"Eclampsia" (nonspecific - ICD#642.60)	Ecl	Dx	1

 ☐ Show Unused 

Find

To use the F11 Pick List:

1. Click in the Assessment field, type a keyword and press F11 to search local items (or Shift+F11, which searches online as well as local items to return more choices).
2. This presents a pop-up pick list below the keyword.

You can scroll up and down on the list and double-click any item to select it and insert it into the field.

It is also possible to search by ICD-9 code if it is known. To narrow search results, type a word in the "Find" box at the bottom and hit enter or click the magnifying glass. This will filter the search by the word you typed, returning fewer choices.

## Pick List Selection

Assessment[  
Hypertension with complications ICD#997.91 |  
]

When selecting a SMARText Assessment item, SOAPware will also insert the ICD code as well as several behind the scenes codes, making reporting and searching data much easier.



## Plan Entry

### Plan

Actions: [ [Lab/Tests:](#)

[X-rays/Imaging:](#)

[Studies \(other than lab or x-ray\):](#)

[Summary updated:](#) ]

### Medications

Selected	Description
<input type="checkbox"/>	"Plans (Other):"
<input checked="" type="checkbox"/>	"Lab/Tests:"
<input checked="" type="checkbox"/>	"X-rays/Imaging:"
<input checked="" type="checkbox"/>	"-Studies (other than lab or x-ray):"
<input type="checkbox"/>	"Old Records Requested:"
<input type="checkbox"/>	"Discuss with physician:"
<input checked="" type="checkbox"/>	"Summary updated:" (2P)
<input type="checkbox"/>	"Second Interpretation:" (2P)
<input type="checkbox"/>	"Plans for New Dx:"

The Actions pick list will display in the Plan field for assisting in documentation data entry. Now, you can click the sub-item to choose the specific action item. In this example, you see Lab/Tests, X-Rays/Imaging, Studies, and Summary updated have all been included as a part of the plan field.

## Lab Tests

### Plan

Actions: Lab/Tests: [ **COMPLETE CBC, AUTOMATED.** #85027

[Related Dx-](#) [Modifiers-](#) ]

[X-rays/Imaging:](#)

[Studies \(other than lab or x-ray\):](#)

[Summary updated:](#)

<input type="checkbox"/>	"ANTINUCLEAR ANTIBODIES" (LAB - ANA - 86038)
<input type="checkbox"/>	"THYROGLOBULIN ANTIBODY" (LAB - Anti-Thyroi...
<input type="checkbox"/>	"MICROSOMAL ANTIBODY" (LAB - TPO/Thyroid P...
<input type="checkbox"/>	"GLYCOSYLATED HEMOGLOBIN TEST" (LAB - H...
<input checked="" type="checkbox"/>	"COMPLETE CBC, AUTOMATED" (LAB - Auto He...
<input type="checkbox"/>	"TEST FOR ACETONE/KETONES" (LAB - Acetone...
<input type="checkbox"/>	"ASSAY OF AMYLASE" (LAB - Amylase, Serum - 8...

Click on Labs/Tests to see the pick list items, then click a check box in front of a list item such as the CBC. This action inserts the selected pick list item into the Plan field.

## Related Dx

### Plan

Actions: Lab/Tests: **COMPLETE CBC, AUTOMATED.** #85027

[Related Dx-](#) [ [Modifiers-](#)

[X-rays/Imaging:](#)

[Studies \(other than lab or x-ray\):](#)

[Summary updated:](#)

### Medications

S	C	ICD	Description
<input type="checkbox"/>	0	496	Chronic obstructive pulmonary disease
<input type="checkbox"/>	0	722.6	Degenerative Disc Disease
<input type="checkbox"/>	0	530.81	Gastroesophageal reflux disease or GERD
<input type="checkbox"/>	0	455.6	Hemorrhoids
<input type="checkbox"/>	0	401.1	Hypertension - Benign
<input type="checkbox"/>	0	401.1	Hypertension - Benign
<input type="checkbox"/>	0	997.91	Hypertension with complications
<input type="checkbox"/>	0	723.1	Neck Pain or Cervicalgia
<input type="checkbox"/>	0	783.21	Weight loss, abnormal

For billing purposes, it is often necessary to associate a diagnosis with a lab test. In order to be able to relate the Structured Dx SMARText item types used in the Assessment field to this lab item (i.e. CBC), Click on the Related Dx- sub-item for the lab test. This results in all diagnoses in the Assessment and Active Problems (i.e. Hypertension) to be displayed for selection in the SMARText Quick Access dialog.

Select the appropriate Assessment/diagnosis item to associate it to the Plan item.

## Handouts



The Plan field is also where you may choose to include patient handouts. To learn more about creating and using handouts, see - [Selecting Handouts Automatically](#).

## Medication Entry

### Search for Medications

**Medications[**  
diovan

Q	Description	Shortcut	Type	U
▲	"Diovan HCT (Valsartan/HCTZ) 160/12, #30, 1qd, R-12"	Dio11	Rx	6
▲	"Diovan HCT (Valsartan/HCTZ) 80/12.5, #30, 1qd, R-12"	Dio81	Rx	4
▲	"Diovan (Valsartan) 320mg, #30, 1qd, R-12"	Dio3	Rx	4
▲	"Diovan (Valsartan) 40mg, #30, 1qd, R-12"	Dio4	Rx	4
▲	"Diovan (Valsartan) 160mg, #30, 1qd, R-12"	Dio16	Rx	4
▲	"Diovan (Valsartan) 80mg, #30, 1qd, R-12"	Dio8	Rx	4

 ☐ Show Unused 

Find

Click in the Medication field and type a keyword. Just like with Assessment items, you can search using F11 or Shift+F11.

In this example, we searched for "diovan" with an F11 (local) search. You do not have to enter the entire keyword, but the more letters you enter, the more specific the search results.

To enter one of these medication items, double click on the line you would like to insert.

## Medication Items

### Medications

Diovan HCT (Valsartan/HCTZ): [12.5 mg-160 mg (tablet)] SIG- 1  
each once a day orally #30 Substitutions Allowed Refills- 12  
Comment- Notes-

The structured Medication items are a complex item type, containing several subitems. The medication items will be used to e-prescribe medications for this patient.

## e-Prescribing

This is the point where you would e-Prescribe medications. To learn more about the Rx Manager and the e-Prescribing process, see - [Rx Manager](#) and [Refills](#).

## Drug Courses

You can also save courses of drugs that you prescribe often. This will speed things up when you want to prescribe one of these courses so that the strength, dose, frequency, etc. is already set up the way you need it to be. To learn about how to set these up, see: Drug Course Creation.

## Follow Up

---

### Follow-up

#### Follow Up

Return if problems develop or worsens.

[Schedule:](#)

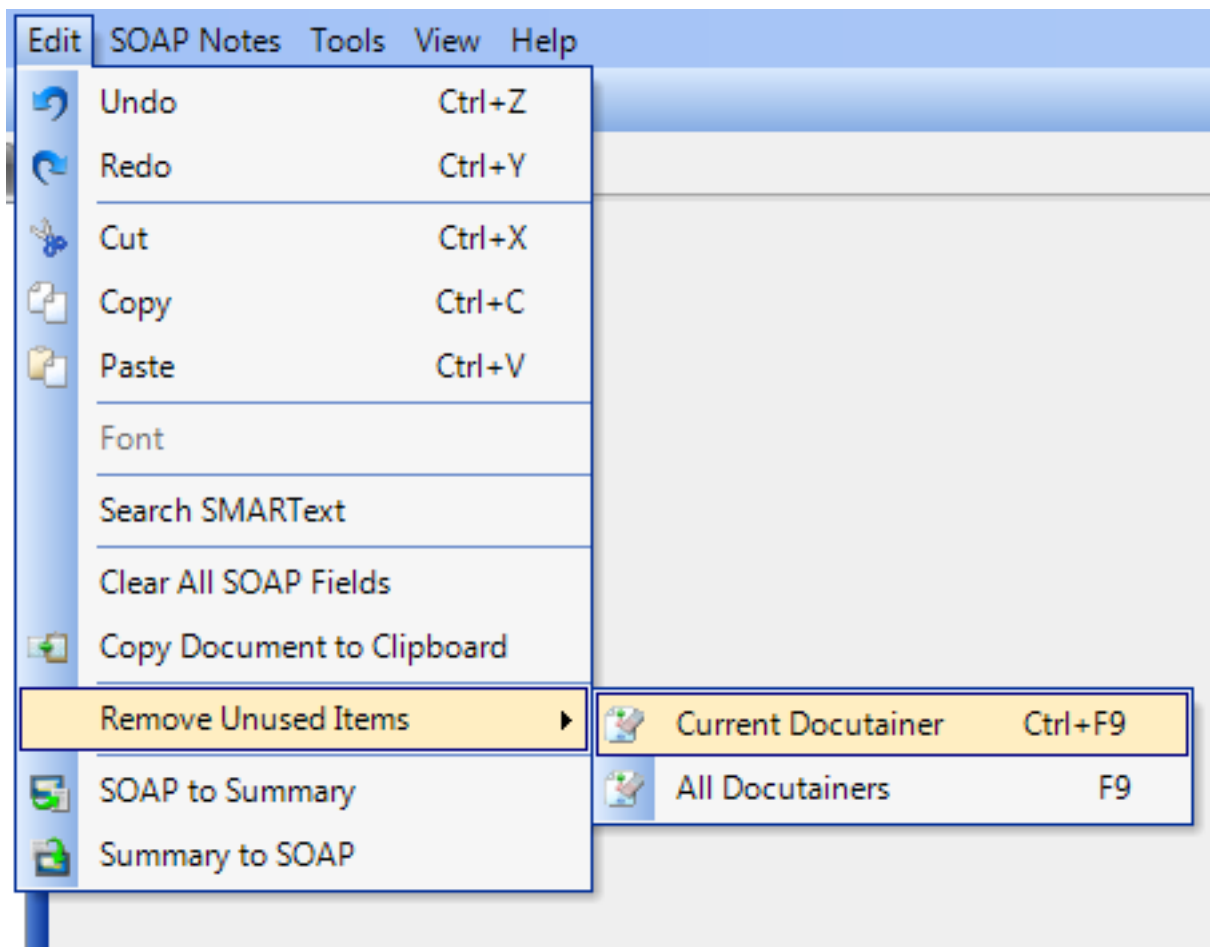
Notice that "Return if problems develop or worsens" has been entered into the Follow up by default. However, this default can be changed and/or additional information could be typed in a free text fashion. You can also click on the link for "Schedule" to choose to have the patient return at a specific interval.

## Remove Unused Items

---

SOAPware has a convenient command to clean up documentation called Remove Unused Items. This command removes any SMARText items that have not been used, and also removes extra spaces.

### Remove Unused Items



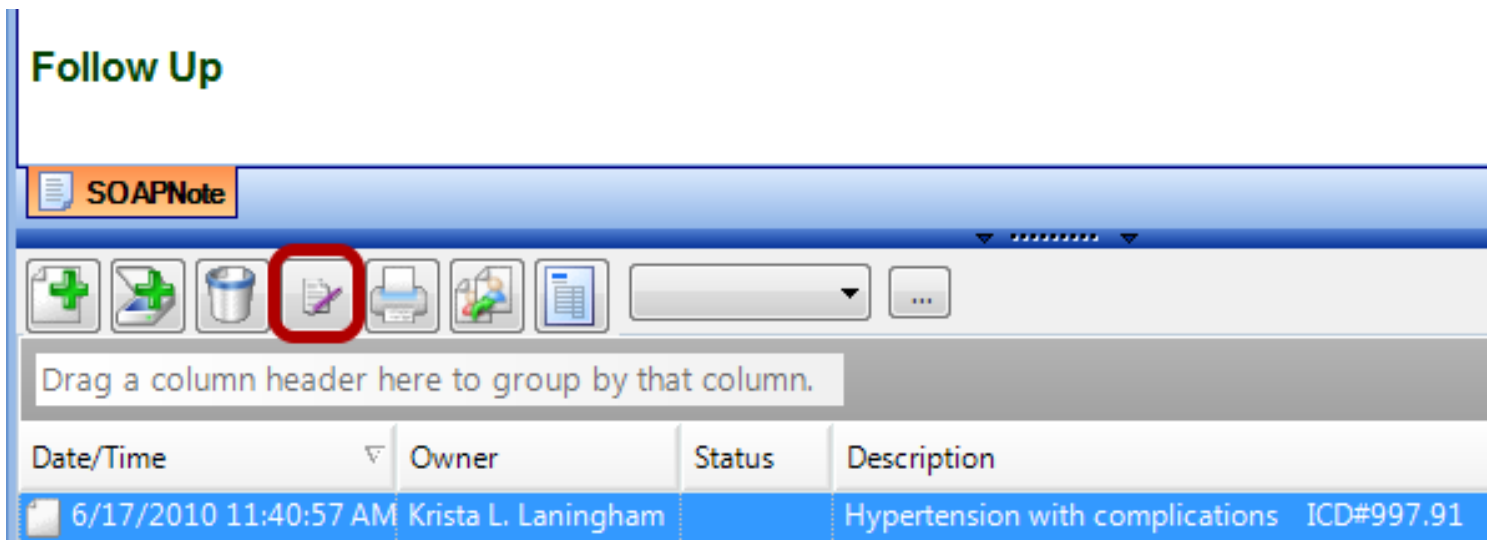
1. Click Edit in the menu bar;
2. Click the Remove Unused menu item
3. Click the Current Docutainer menu item.

**NOTE:** Remove Unused Items of the Current Docutainer clears out the unused items in the active document. When the SOAPnote is active, this will only clear out unused SMARText Pick Lists in the SOAPnote that we have open. If you were to choose All Docutainers instead, this would apply to all of the patient's encounters as well as the summary.

## Signing Off

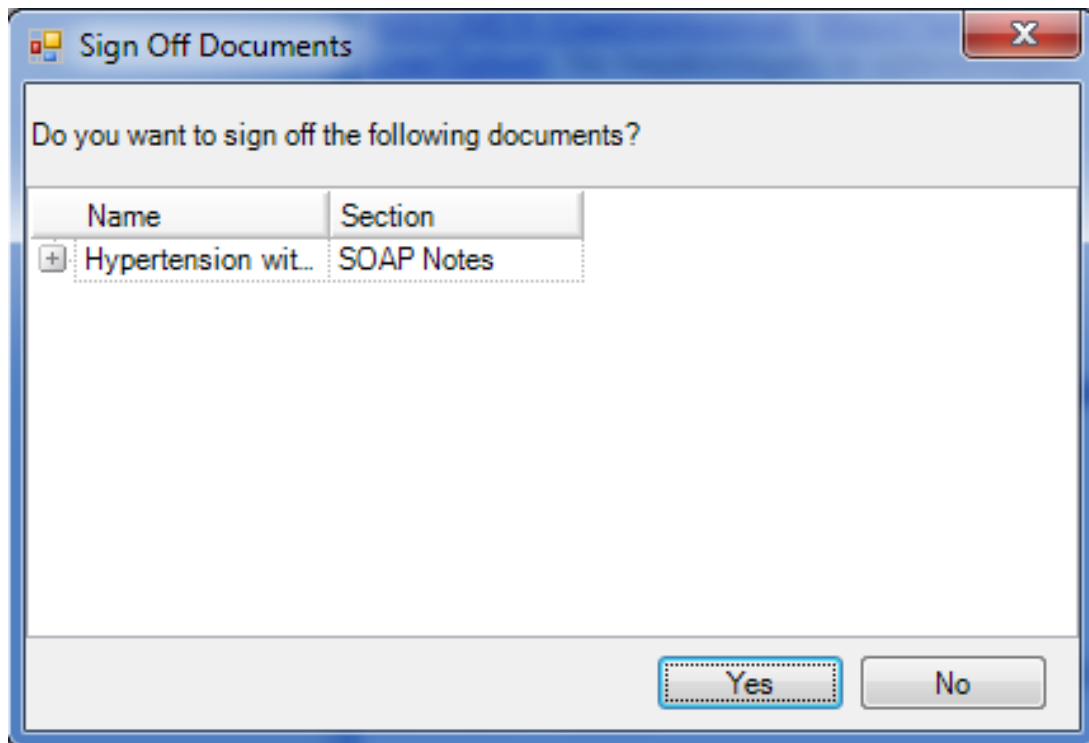
**NOTE:** Only providers have the security rights to sign off a document.

### Sign Off Documents Button



Click the Sign Off Documents button.

### Confirm Signing



A dialog box will display asking "Do you want to sign off the following documents?" Click Yes.

**\*\*Important:** Once you have signed off the document, it is locked and unalterable.

## Signed Off Documents

### Subjective

CHIEF COMPLAINT(S)/REASON FOR VISIT: Hypertension, complicated.

HPI: SYMPTOMS/RELATED: Reports symptoms of

ONSET/TIMING:

QUALITY/COURSE:

MODIFIERS/TREATMENTS: Has tried

### Objective

Exam: GENERAL: Appearance: General appearance can be described as in mild distress.

HEAD/EARS/NOSE/THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.

Otoscopic Exam: External auditory canals and tympanic membranes are normal.

Oropharynx demonstrates oral mucosa, salivary glands, tongue, tonsils, posterior pharynx, hard-soft palates are normal.

EYES: Conjunctivae and Lids: No lesions, eye discharge or other abnormalities.

Pupils and irises: Pupils are equal, round, and reactive to direct light and are consensual to light bilaterally. Irises are symmetrical and without lesions.

LUNGS and RESPIRATORY: Lung auscultation elicits no wheezing, rhonchi, rales or rubs and with equal breath sounds.

HEART (Cardiovascular): Heart auscultation discovers regular rate and rhythm; no murmur, gallop or rub. Normal heart sounds.

ABDOMEN (Gastrointestinal): Mass/Tenderness Exam: Neither are present.

Liver/Spleen: No hepatomegaly or splenomegaly.

### Assessment

**Hypertension with complications** ICD#997.91

### Plan

Actions: Lab/Tests: **COMPLETE CBC, AUTOMATED.** #85027 Related Dx- Modifiers-

X-rays/Imaging:

Studies (other than lab or x-ray):

Summary updated:

### Medications

Diovan HCT (Valsartan/HCTZ): 12.5 mg-160 mg (tablet) SIG- 1 each once a day orally #30 Substitutions Allowed Refills- 12

Comment- Notes-

### Follow Up[

SOAPNote



Drag a column header here to group by that column.

Date/Time	Owner	Status	Description	Related Dx
6/17/2010 11:40:57 AM	Krista L. Laningham		Hypertension with complications ICD#997.91	Hypertension with complications

Now, the document will turn yellow indicating that it has been signed off and is unalterable. Note that the icon in the encounter list has changed to denote a signed off document.



## Signature Password

The screenshot shows the 'Security Administration' dialog box with the 'General' tab selected. The left sidebar contains a tree view with 'General', 'Groups', 'Roles', and 'Users'. The main area contains several sections: 'Password Policy' with fields for 'Minimum password length' (0) and 'Passwords expire every' (365) days, and a checkbox for 'Require Alpha-Numeric Passwords'; 'Lockout Policy' with a checked 'Lock out Accounts' checkbox and fields for 'Account lockout duration' (10), 'Account lockout threshold' (3), and 'Reset account lockout counter after' (10) minutes; 'Transaction logging' with four checked checkboxes: 'Log user login/logout', 'Log data access', 'Log item creation/deletion', and 'Log data modifications'; 'Idle Logout' with a checkbox for 'Logout user after' (60) minutes; 'Login Window' with a checked 'Remember last user login name' checkbox; and 'Signature Password' with a checkbox for 'Require Password to sign documents'. A 'Close' button is at the bottom right.

Security Administration

General

Groups

Roles

Users

Password Policy

Minimum password length 0 characters.

Passwords expire every 365 days

☐ Require Alpha-Numeric Passwords

Lockout Policy

☒ Lock out Accounts

Account lockout duration (minutes) 10

Account lockout threshold (invalid logon attempts) 3

Reset account lockout counter after (minutes) 10

Transaction logging

☒ Log user login/logout

☒ Log data access

☒ Log item creation/deletion

☒ Log data modifications

Idle Logout

☐ Logout user after 60 minutes

Login Window

☒ Remember last user login name

Signature Password

☐ Require Password to sign documents

Close

Signature Password, when enabled, will require passwords to sign off documents. This will store digital signatures from multiple providers on one document. To set up a signature password:

1. Click on Tools - Security in the menu bar
2. At the bottom of the dialog window, check the box to Require Password to sign documents

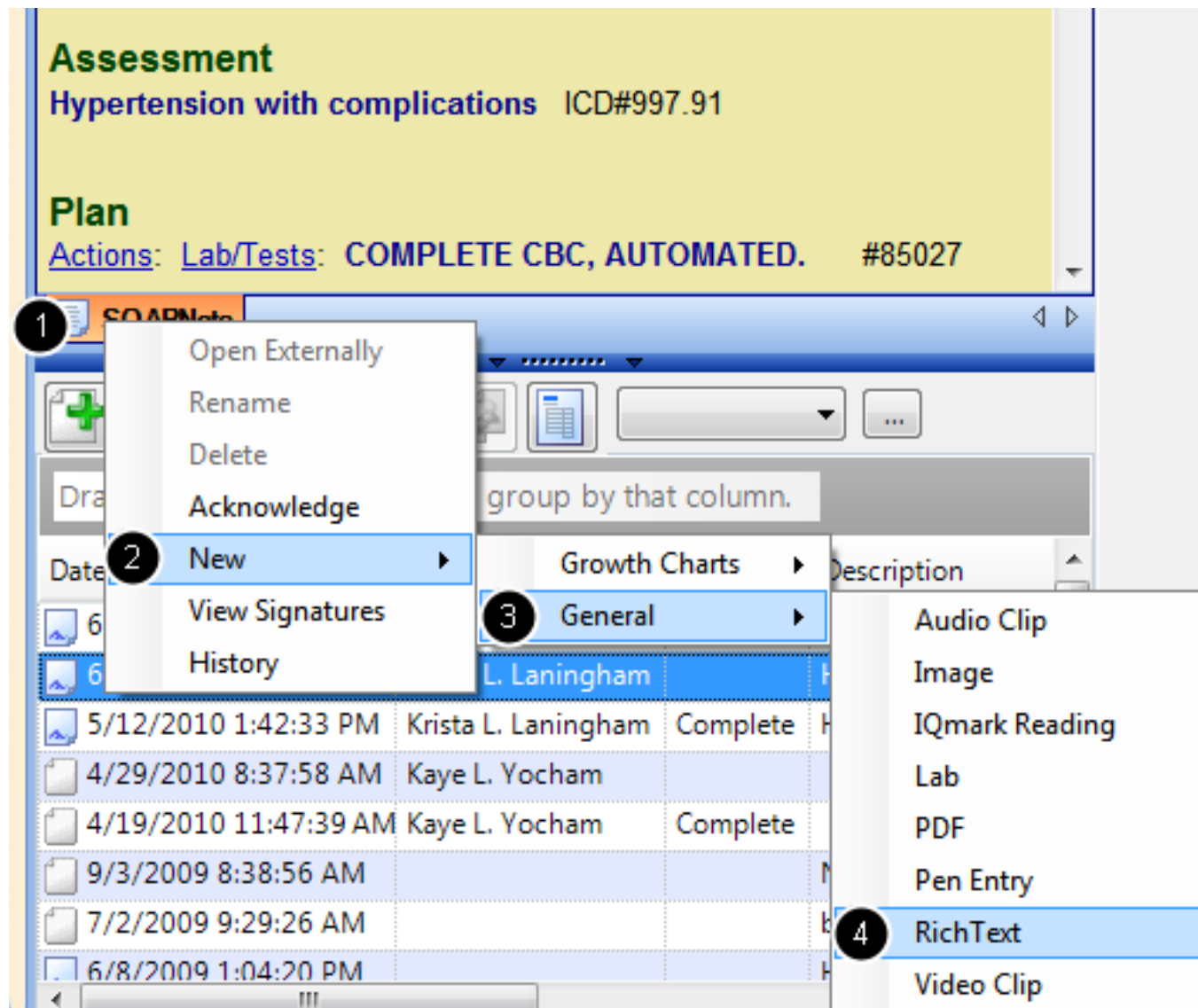
When using a signature password, in between clicking the sign-off button and confirming the sign-off documents, you will be asked for your password.

# **Adding a SOAPnote Addendum**

## Creating an Addendum

You can add an addendum to a SOAPnote if information needs to be added after the SOAPnote has been signed off.

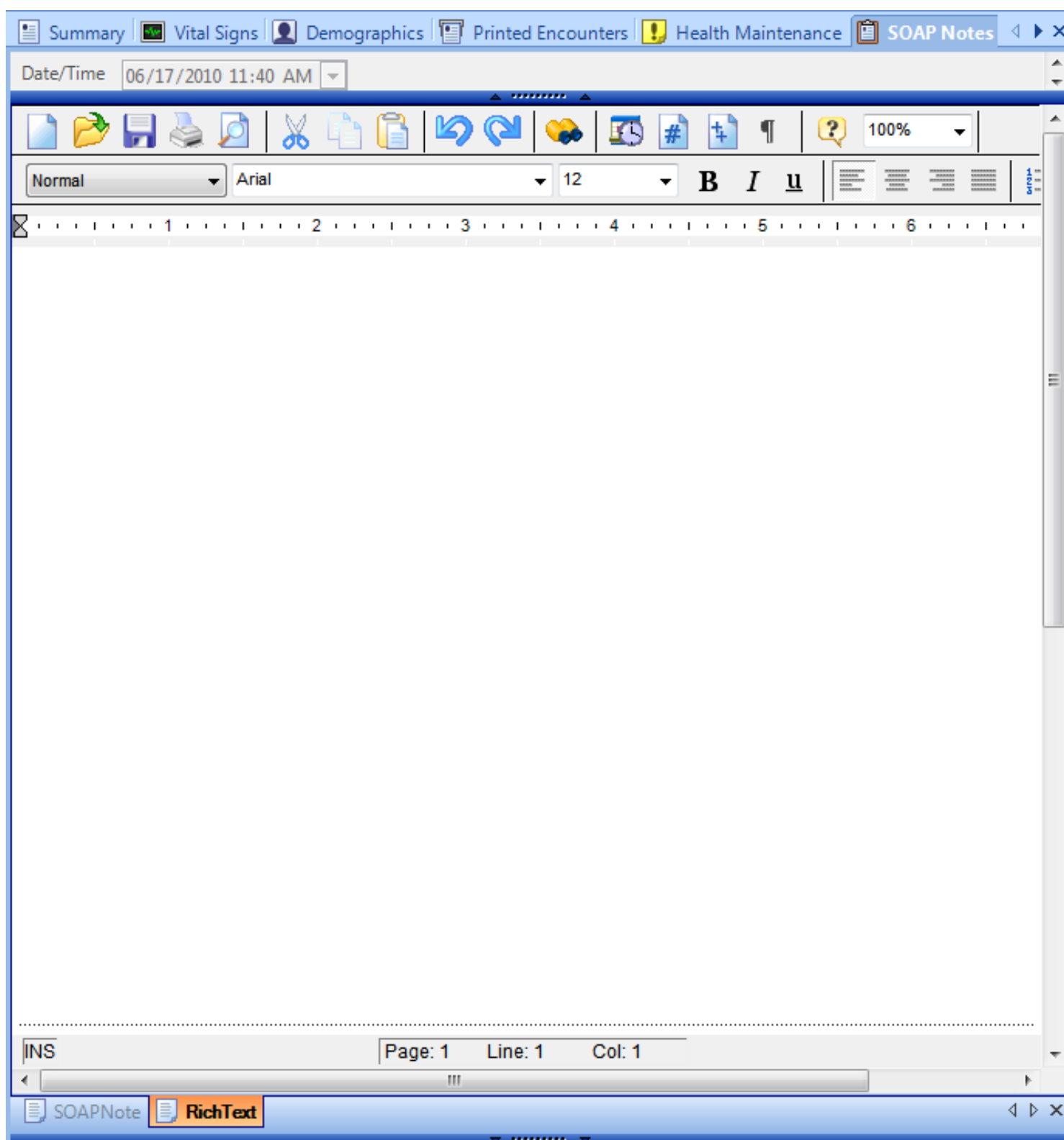
### Create a Rich-Text Addendum



To do this:

1. Right-click on the lower SOAPnote tab (just above the lower splitter bar).
2. A menu will appear and you choose New, (3) General, (4) Rich Text.

## Addendum is attached to the SOAPnote

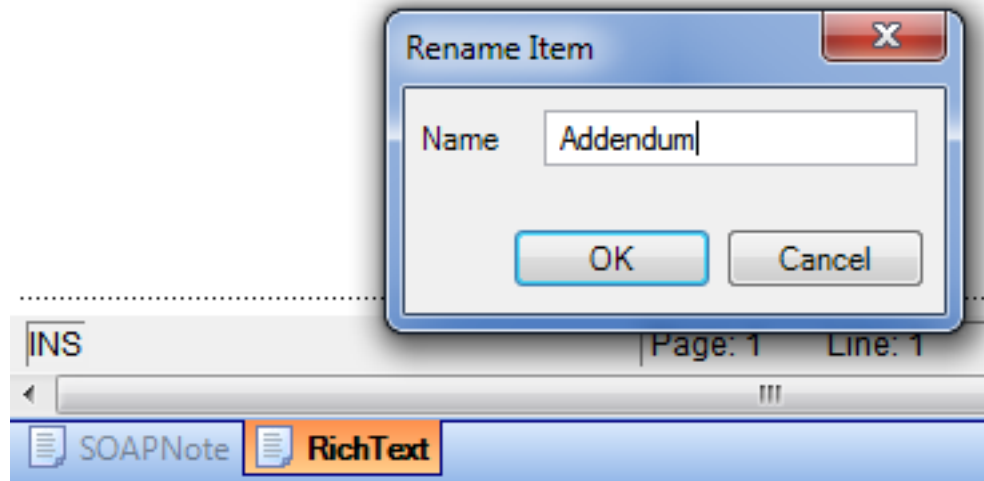


The Addendum you just created will appear and you can type to add information, which will be 'attached' to your SOAPnote in the same docutainer.

**NOTE:** You will not be able to insert SMARText items in the addendum. The addendum is used

for free-text only.

## Rename the Addendum



You can rename the addendum from "Rich Text". Right-click on the tab and choose "Rename".

# Billing Statements

## Creating a Billing Statement

The Billing Statements section displays previous superbills and allows for the creation of new billing statements.

Billing statements can often facilitate direct posting into the practice management system (this requires the SOAPwareXchange enhancement).

### Structured Data Entry

#### Assessment

**Diabetes - Type 2 - with complications** ICD#250.90

**Gastroesophageal reflux disease or GERD** ICD#530.81

#### Plan

**OFFICE/OUTPATIENT VISIT, EST.** CPT 99214 Related Dxs- Gastroesophageal reflux disease or GERD , Diabetes - Type 2 - with complications

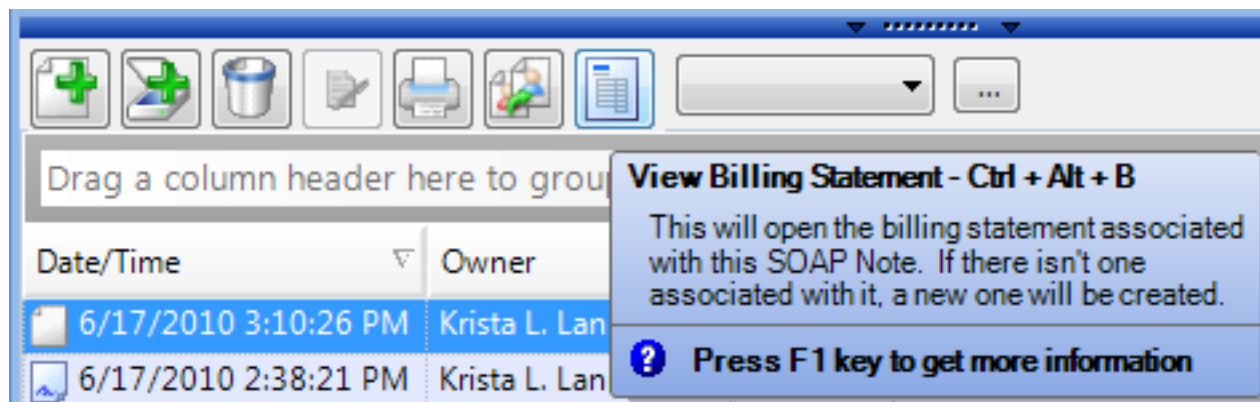
Actions: Summary updated: The summary record was updated with pertinent information from previous records (5-10 minutes).

Lab/Tests: Diabetes Lab: **GLYCOSYLATED HEMOGLOBIN TEST.** #83036 Relates Dxs- Modifiers-  
**GLUCOSE TOLERANCE TEST (GTT):** #82951 Relates Dxs- Modifiers-

Specific types of SMARText items must be used in order to directly populate the Billing Statement. These specific items are Structured Dx and Structured Plan Item types.

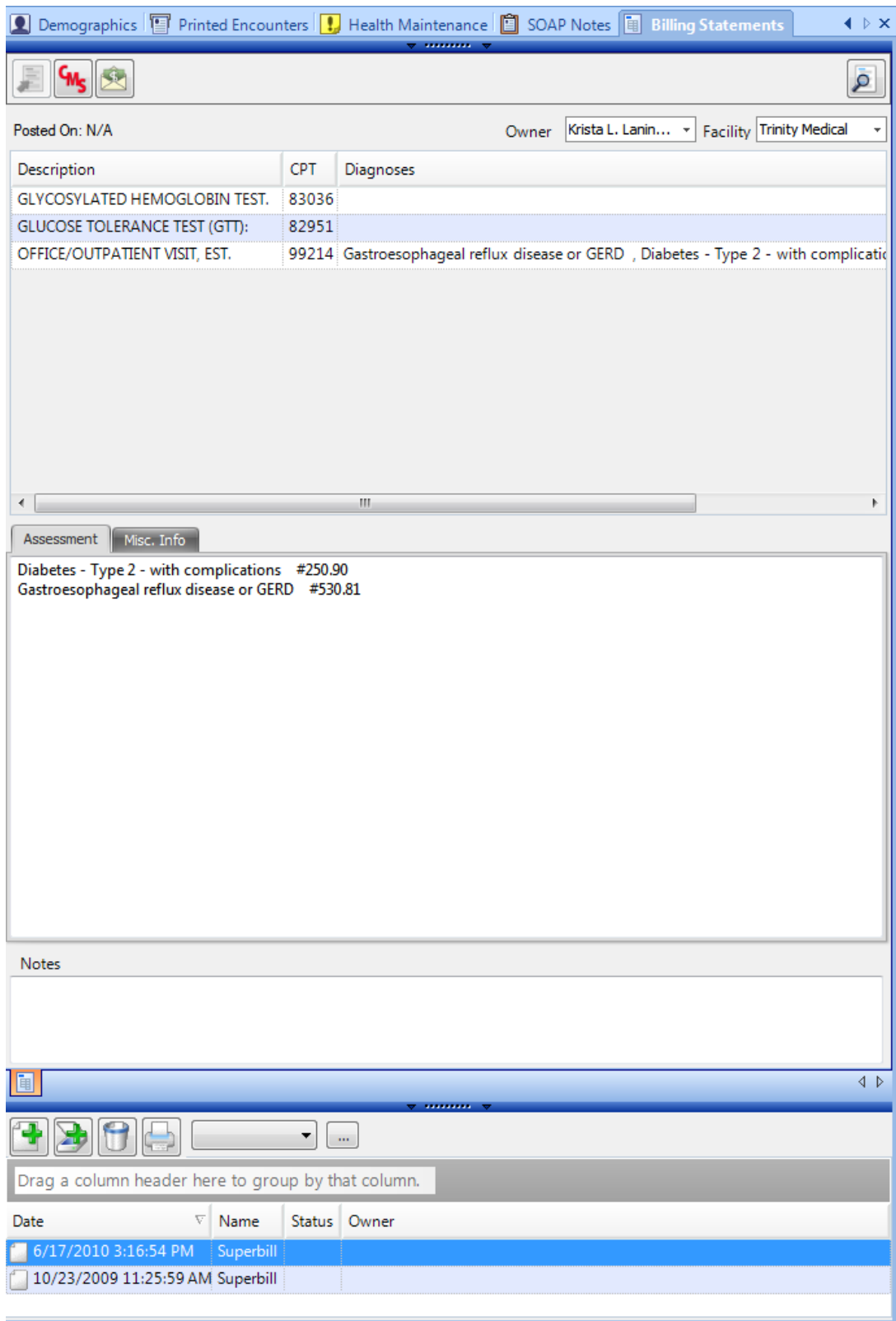
Also, the Plan field needs to contain a Structured Plan Item type of SMARText item that is associated to a related diagnosis.

### Create Billing Statement



Click the View Billing Statement button. It is located beneath the Lower Splitter Bar of the current SOAP encounter note, and is above the area of the Document List.

## View Billing Statement



Demographics Printed Encounters Health Maintenance SOAP Notes Billing Statements

Posted On: N/A Owner: Krista L. Lanin... Facility: Trinity Medical

Description	CPT	Diagnoses
GLYCOSYLATED HEMOGLOBIN TEST.	83036	
GLUCOSE TOLERANCE TEST (GTT):	82951	
OFFICE/OUTPATIENT VISIT, EST.	99214	Gastroesophageal reflux disease or GERD , Diabetes - Type 2 - with complications

Assessment Misc. Info

Diabetes - Type 2 - with complications #250.90  
Gastroesophageal reflux disease or GERD #530.81

Notes

Drag a column header here to group by that column.

Date	Name	Status	Owner
6/17/2010 3:16:54 PM	Superbill		
10/23/2009 11:25:59 AM	Superbill		

An Add Document Task dialog box will display.

At this time Click on the Add button.



The Billing Statements viewer is displayed, and a new Superbill is populated with the information contained within the current SOAP encounter note.

## Associate and Post the Superbill

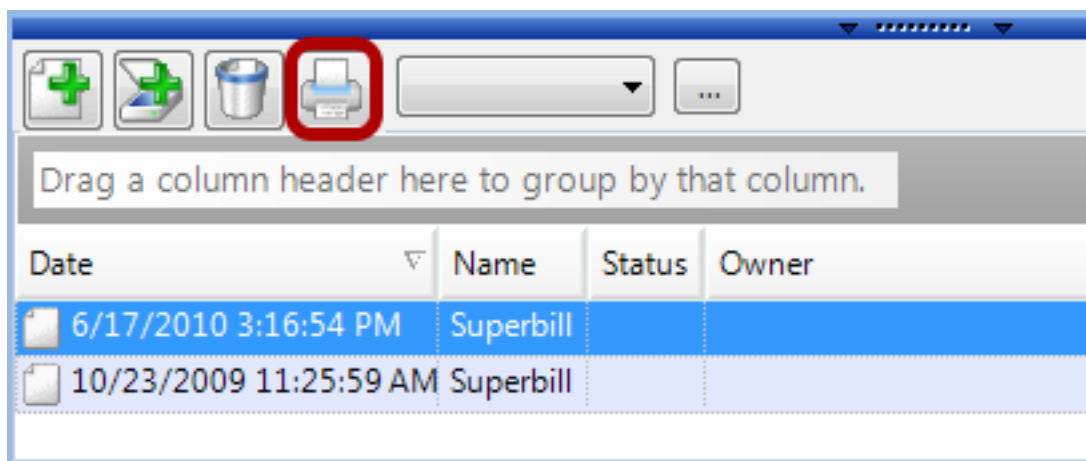
Description	CPT	Diagnoses
GLYCOSYLATED HEMOGLOBIN TEST.	83036	
GLUCOSE TOLERANCE TEST (GTT):	82951	
OFFICE/OUTPATIENT VISIT, EST.	99214	Gastroesophageal reflux disease or GERD , Diabetes - Type 2 - with complicati

1. Click the Associate button
2. Then Click on the Post Superbill button

SOAPware sends the billing statement to the practice management system.

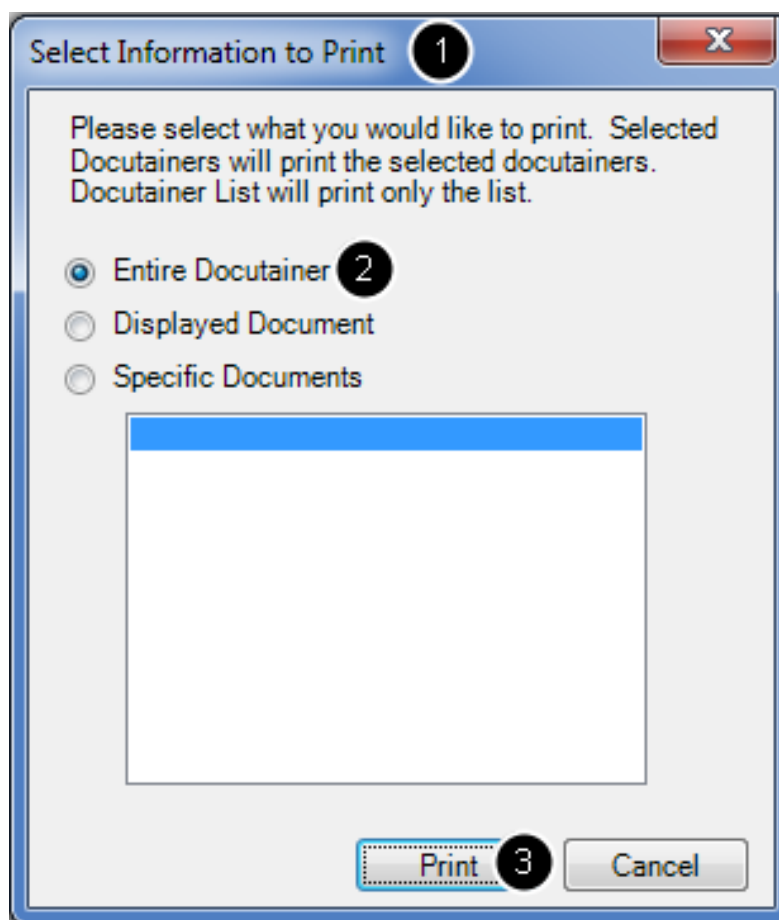
## Printing a Billing Statement

### Print Button



After creating the billing statement, Click the Print button beneath the Lower Splitter Bar.

### Select Printing Information



1. The Select Information to Print dialog will display.
2. Click the Entire Docutainer radio button (if not already selected by default).
3. Click the Print button.

# Introduction to Task Manager

## Tasks Lists

---

In paper-based offices, there are common activities that generally result in Post-It notes being placed on patient charts that are scattered around in multiple locations.

- \* Refill requests
- \* Patient phone calls
- \* Recalls or follow ups
- \* Internal messaging

It is very inefficient, and it is easy to misplace a reminder. It potentially reduces productivity and quality of care. With the Tasks Manager, all of these tasks and more are managed from a single, central location. Each and all users go to the same location to address tasks (i.e. view, act-on, sign-off, etc.). This tends to keep tasks on track and improves productivity and quality of care.

### **The Task Manager has two key functions:**

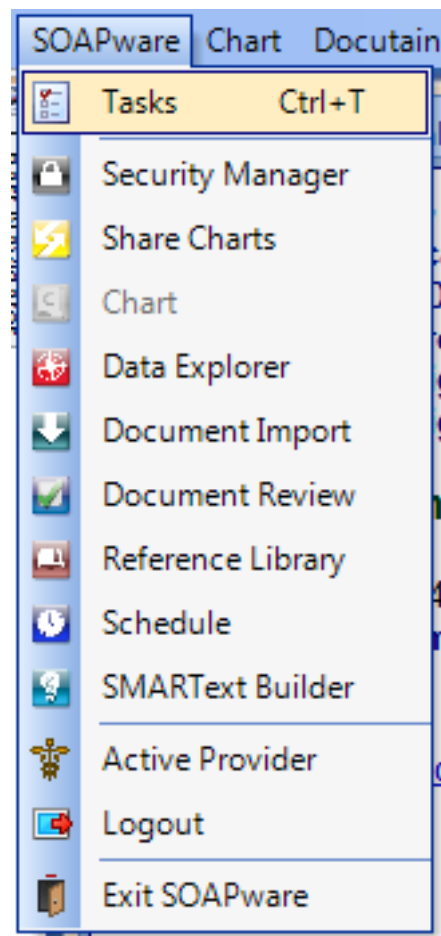
Track the status of all tasks

Send messages or reminders to various users

### **Interface**

**IMPORTANT: The Task lists section is not to be used for documentation purposes. Tasks are not a permanent part of the patient record. It is to keep track of tasks for the patient and to send messages or reminders to other users in your workplace.**

## Access the Tasks Manager



To access the Tasks Manager, Click SOAPware in the menu bar, and Click the Tasks Manager menu item (or Press Control+ T).

## Tasks Manager

1. User: All Users

2. Show: Assigned Tasks

3. Show Tasks due in: --Show All--

4. Layout: [Dropdown]

5. [Icon]

6. a column header here to group by that column.

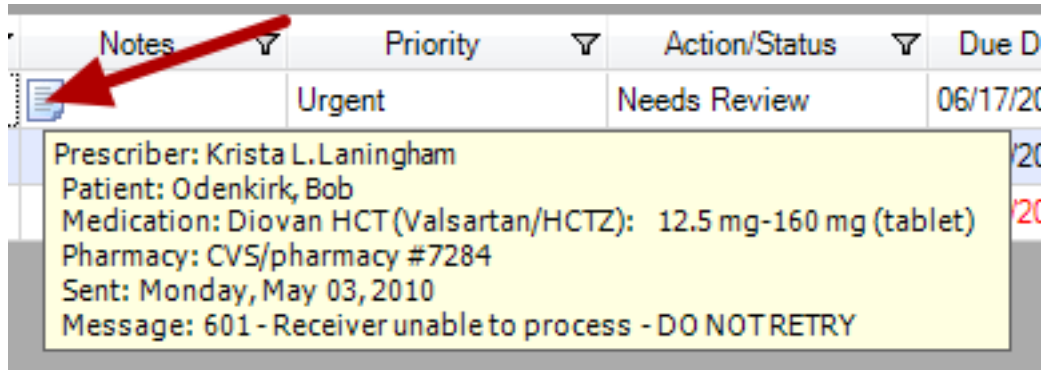
Patient	Description	Notes	Priority	Action/Status	Due Date	Assigned To	Last Modified	Completed
Odenkirk, Bob G.	EScript Error		Urgent	Needs Review	06/17/2010	Krista L. Laningham	05/03/2010 15:42	<input type="checkbox"/>
Jim, Slim	SOAPNote		Normal		06/17/2010	Krista L. Laningham	06/17/2010 14:38	<input type="checkbox"/>
Glenda, Tabitha	SOAPNote		Normal		05/10/2010	Krista L. Laningham	05/10/2010 14:57	<input type="checkbox"/>
Schnur, Dorothy	SOAPNote		Normal		05/03/2010	Krista L. Laningham	05/03/2010 10:59	<input type="checkbox"/>
Schnur, Dorothy	SOAPNote		Normal		05/02/2010	Kaye L. Yocham	05/02/2010 15:13	<input type="checkbox"/>
Odenkirk, Bob G.	SOAPNote		Normal	Sign	05/02/2010	Kaye L. Yocham	05/02/2010 15:20	<input type="checkbox"/>
Odenkirk, Bob G.	SOAPNote		Normal	Needs Review	05/02/2010	Kaye L. Yocham	05/02/2010 15:20	<input type="checkbox"/>
Odenkirk, Bob G.	SOAPNote		Normal		04/29/2010	Kaye L. Yocham	04/29/2010 16:46	<input type="checkbox"/>
Jim, Slim	SOAPNote		Normal	Acknowledged by M.D	04/19/2010	Kaye L. Yocham	04/19/2010 11:47	<input type="checkbox"/>

The Tasks Manager Overview:

### 1. Switch User Task lists

2. Perform a number of actions with the toolbar
3. Sort Tasks by type
4. Sort Tasks by due date
5. Create a Task layout
6. View the Task list

## Task Notes



Tasks can have notes associated with them. These are not notes that can be saved as a part of a patient's chart and will be deleted when the task is completed. To view the note, you can hover your mouse over the note icon to view the message.

## Task Item/Information Area

The Tasks information area at the bottom of the Task Manager displays one task item per line/row, and various task characteristics organized/displayed in columns. The tasks characteristics that are displayed can be customized.

- \* Patient ( patient the task is associated with)
- \* Description (type of task, i.e. phone call, lab, office visit etc)
- \* Notes (pertinent information related to specific task)
- \* Priority (rank of urgency)
- \* Action/Status (what needs to be/has been done on task)
- \* Due Date (will default to date created, can be edited)
- \* Assigned To (person responsible for next action on the task)
- \* Completed ( when task is completed, checking this box will remove it from the Task List)

## Viewing Task Notes

If notes have been added to a task, view those notes by Pointing at the Notes icon in the Notes column of the task item.

### Viewing an Associated Document

The screenshot shows the 'Tasks' window with a toolbar containing icons for document management. The 'View docutainer' icon (a document with a magnifying glass) is highlighted with a red circle. A tooltip is displayed over this icon, stating: 'View docutainer - Ctrl+Alt+V' and 'View the docutainer currently associated with this task. If none exists, the patient's chart will open.' Below the tooltip, it says 'Press F1 key to get more information'.

Below the toolbar, there is a table of tasks:

Patient	Description	Notes	Priority	Action/Status
Glenda, Tabitha	SOAPNote		Normal	
Jim, Slim	SOAPNote		Normal	Acknowledged by M
Jim, Slim	SOAPNote		Normal	
Odenkirk, Bob G.	SOAPNote		Normal	
Odenkirk, Bob G.	SOAPNote		Normal	Sign

If a task is related to a document, that document can be opened by Clicking the task item and Clicking the View Docutainer Button (or by Pressing CTRL + Alt + V). Alternatively, Double-click the task item.

A SOAPnote has been selected in this example, so the SOAPnote docutainer in the patient's chart opens for viewing.

### Using Tasks Manager to Retrieve Charts


Jim, Slim	SOAPNote		Normal
Jim, Slim	SOAPNote		Normal
Odenkirk, Bob G.	SOAPNote		Normal
Odenkirk, Bob G.	SOAPNote		Normal
Odenkirk, Bob G.	SOAPNote		Normal

The Tasks Manager is the best means to retrieve charts needing some type of action. Thus the Tasks Manager can serve a role similar to that of a stack of pulled charts sitting on your desk. The stacks on your desk are now replaced with a list in Tasks Manager. Legacy SOAPware versions promoted the

use of a Pulled Charts section for this purpose. The Pulled Charts functionality was very useful and intuitive in the old days before the need for electronic signatures and legal electronic records. Even though current SOAPware versions still have this section, use of it is strongly discouraged. **Do not use the Pulled Charts List to manage ANY tasks, such as charts needing completion.**

To retrieve a chart from Tasks, Double-click on the gray box to the left of the Task line item.

### Grouping Task Items

Patient ▼	Description ▼	Notes ▼	Priority ▼
Glenda, Tabitha	SOAPNote		Normal
Jim, Slim	SOAPNote		Normal
Jim, Slim	SOAPNote		Normal
Odenkirk, Bob G.	SOAPNote		Normal
Odenkirk, Bob G.	SOAPNote		Normal
▶ Odenkirk, Bob G.	SOAPNote		Normal
Odenkirk, Bob G.	EScript Error		Urgent
Schnur, Dorothy	SOAPNote		Normal
Schnur, Dorothy	SOAPNote		Normal

To group task items together, you can sort by column header. For instance, you can click on the patient column header to sort by patient and group all tasks related to a particular patient together.

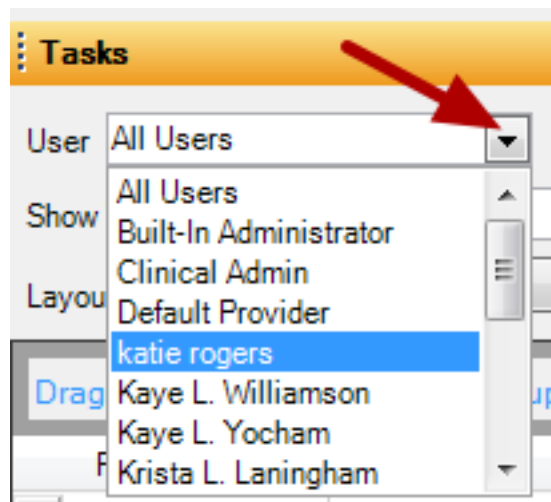
### Managing the Tasks Area

The task manager area at the top contains the buttons and drop-down menus for viewing, editing, adding, deleting, signing and printing tasks, as well as options for customizing the layout of the Tasks Manager.



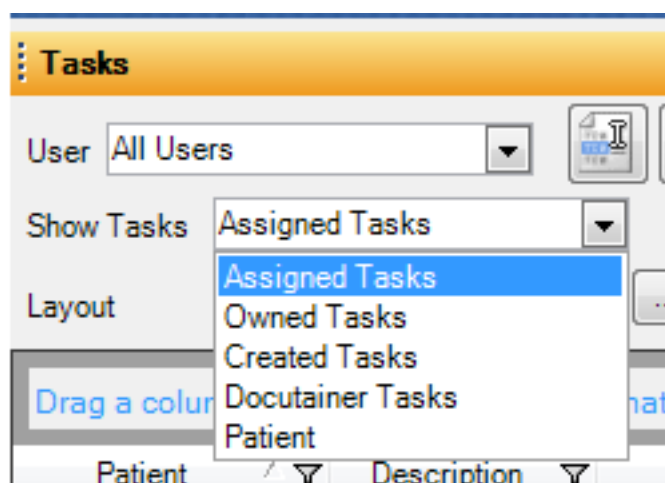
## Task List Functions

### Choosing Task User



To view a specific user's tasks, Click the User drop-down menu, and Click a User name. All tasks assigned to the selected user will be displayed. Click the All Users menu item in order to see all tasks in the entire system.

### Choosing Task Type



Click the Show drop-down menu, and Click on a Task type. This provides access to:

Assigned Tasks (all tasks assigned to the selected user)

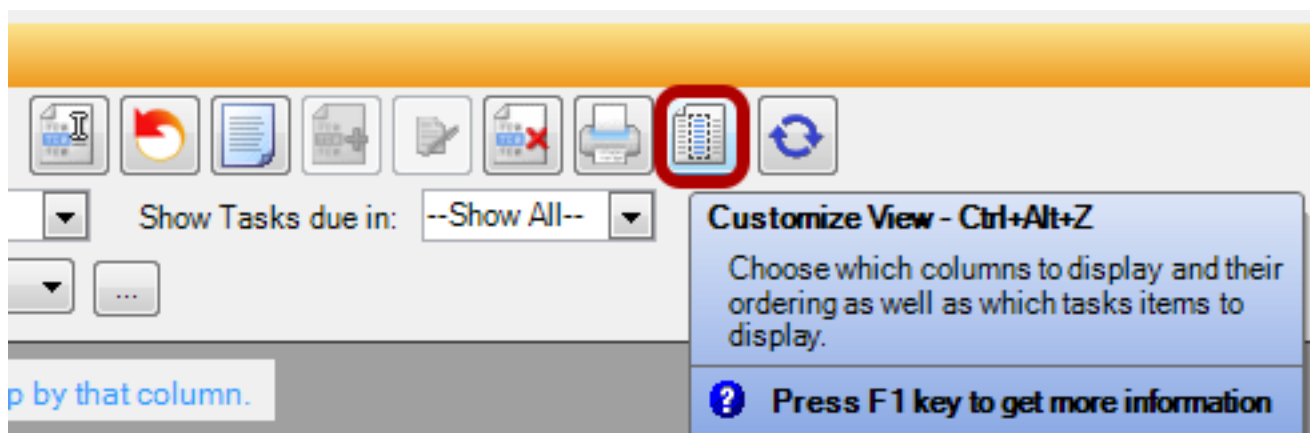
Owned Tasks (for the selected user, the owner will always be the Provider displayed at the top of SOAPware when the task was created)

Created Tasks (all tasks created by the selected user)

Docutainer Tasks (displays only tasks associated with a Document for the selected user ,not tasks that were manually created from the Task Manager)

Tasks within the current Patient chart (and NOT based on a selected user)

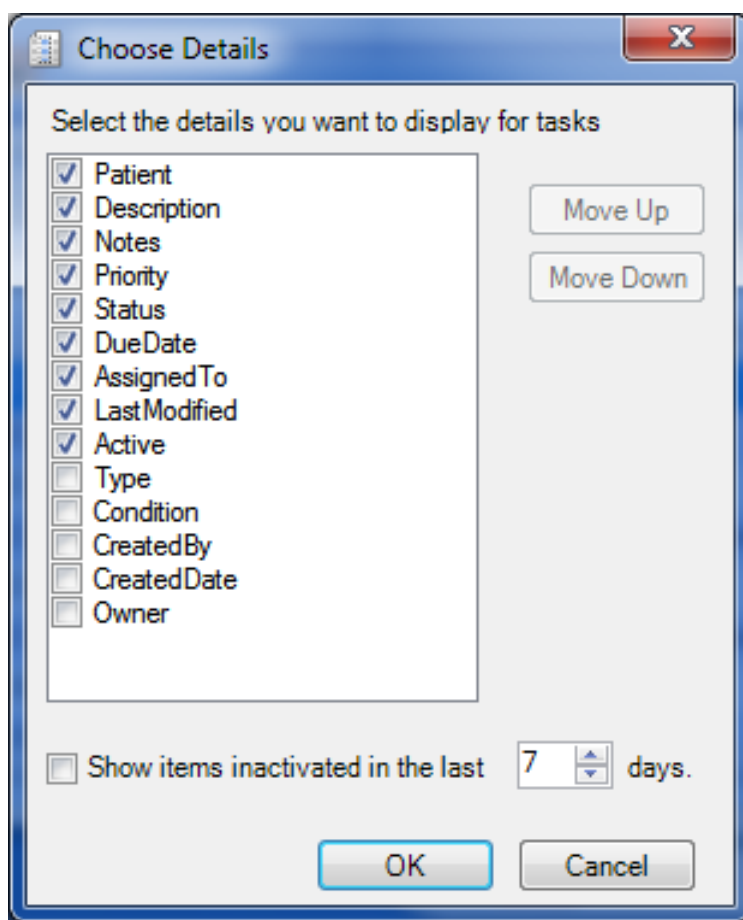
## Customize Tasks View



It is possible to customize the view of the Task Information area **per user** preference.

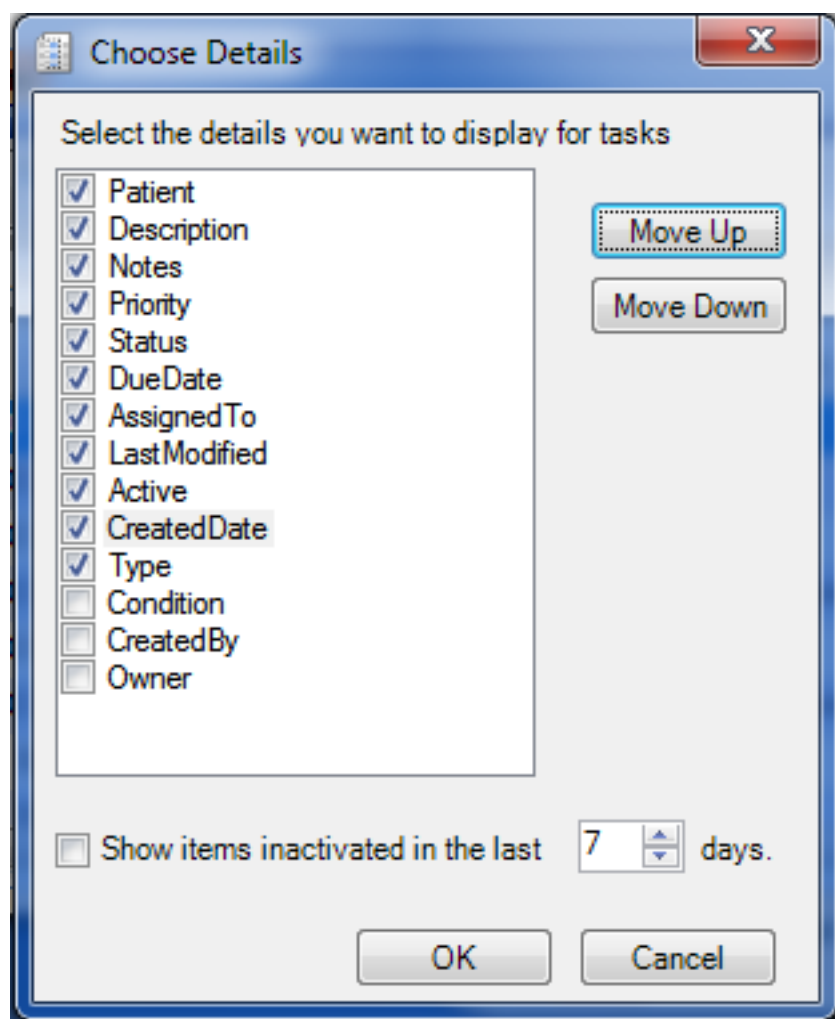
1. Click the Customize View button (or Press Control + Alt + Z) to display the Choose Details dialog.

## Customize Tasks View - Choose Details



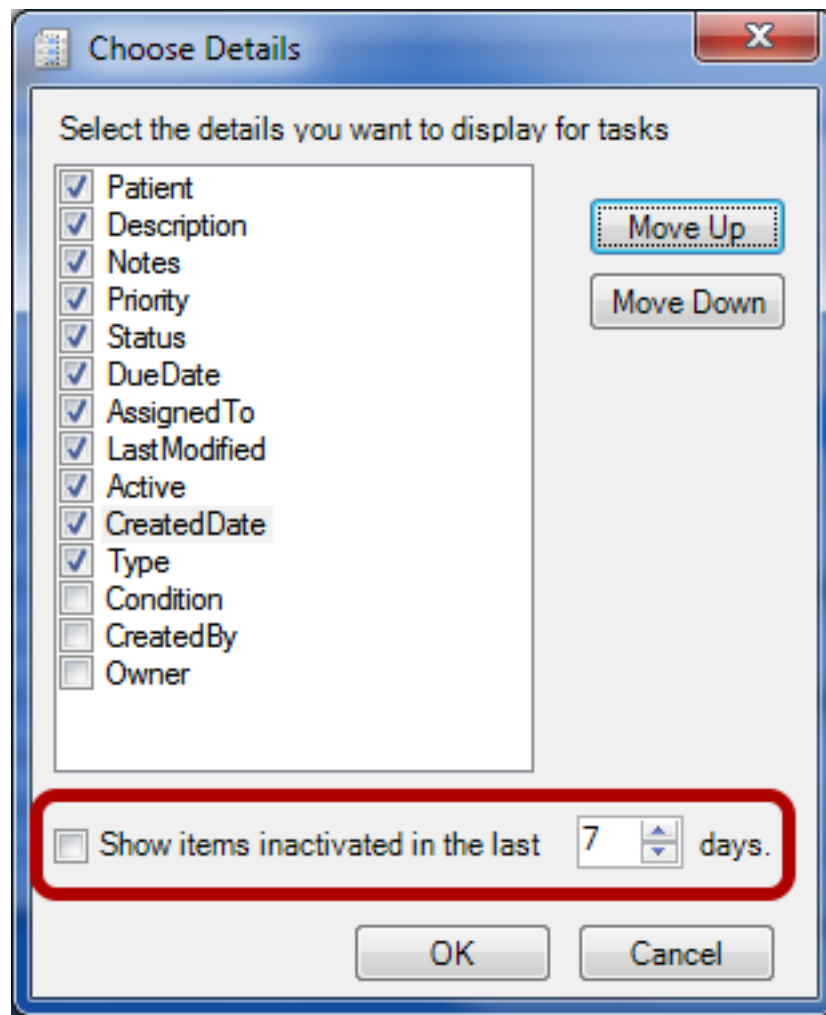
Click the Checkboxes to the left of the various columns available. This is the mechanism to select the columns displayed in the task list area of the Tasks Manager. Click to uncheck any items that are not to be displayed in the task list area.

## Rearrange Task Item Details



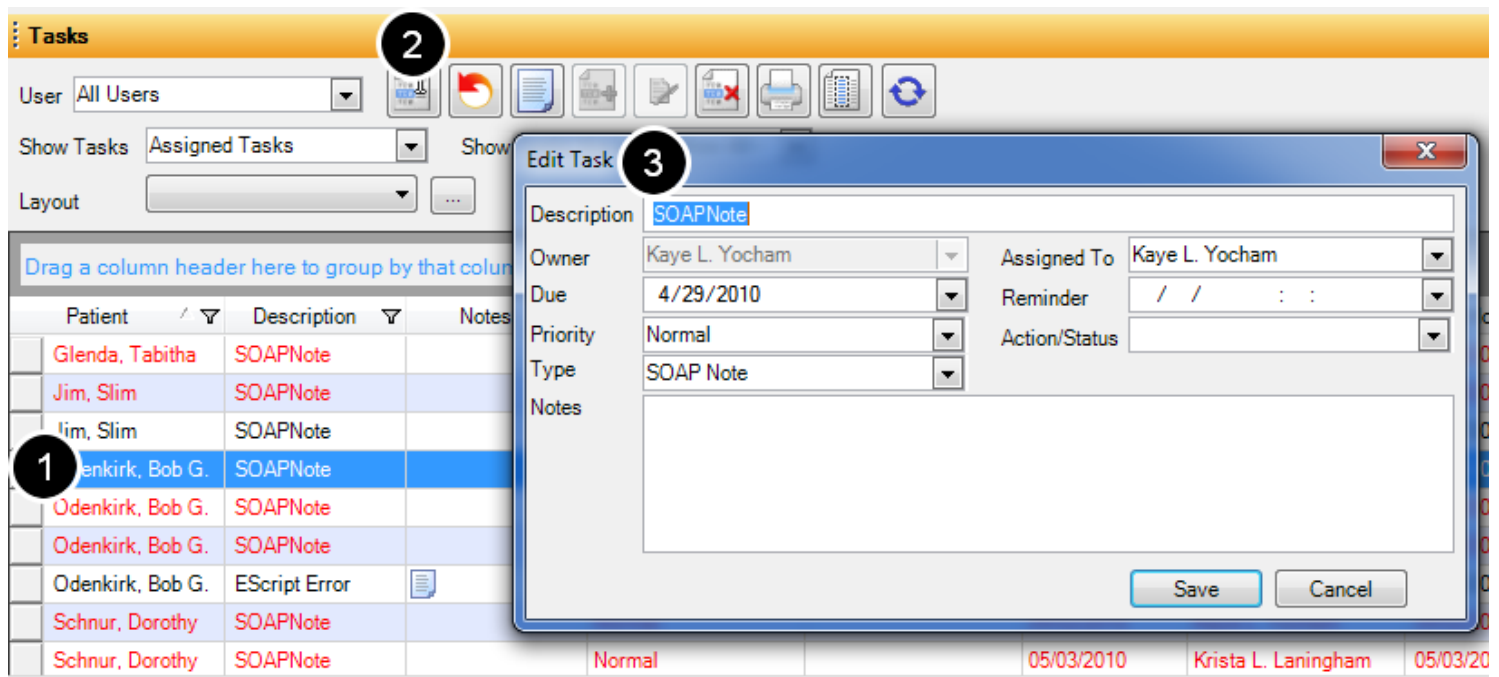
Click a Choose Details item, and Click the Move Up or Move Down buttons to rearrange the columns in the Tasks Manager. Click OK to save changes.

## Show Inactive and Deleted Task Items



In the Choose Details dialog, click the "Show items inactivated in the last" checkbox, and click the number of days down-arrow to retrieve and display tasks that have been removed (up to 100 days). Click OK to save. The Tasks Manager viewer will then show both active task items and inactivated task items in the same list. Inactivated tasks are displayed marked-through.

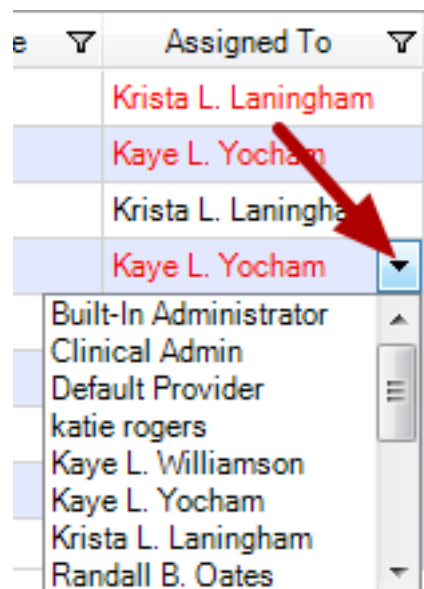
## Editing a Task



In order to edit a task from the Tasks Manager:

1. Click the selection box containing the black triangle to the left of the task item
2. Click the Edit button
3. The Edit Task window will open, allowing you to edit the task information.

## Editing a Task - Option 2



You can also edit a Task one section at a time. To do this, click the drop-down menu next to the item and select another option for the task item.

## Editing Multiple Items

Patient	Description	Notes	Priority	Action/Status
Glenda, Tabitha	SOAPNote		Normal	
Jim, Slim	SOAPNote		Normal	Acknowledged by M.D
Jim, Slim	SOAPNote		Normal	
Odenkirk, Bob G.	SOAPNote		Normal	
Odenkirk, Bob G.	SOAPNote		Normal	Sign
Odenkirk, Bob G.	SOAPNote		Normal	Needs Review
▶ Odenkirk, Bob G.	EScript Error		Urgent	Needs Review

To make edits to multiple tasks all at once, first select the group of tasks to edit. Always Click the selection box containing the black triangle to the left of the task item whenever selecting tasks.

## Performing Edits

The screenshot shows a software interface with a task list and a 'Multi Item Edit' dialog box. The task list has columns for Patient, Description, Notes, Priority, and Action/Status. Several rows are highlighted in blue. A black triangle in the selection box of the last highlighted row (Odenkirk, Bob G.) is labeled with a circled '1'. The 'Multi Item Edit' dialog box is open, showing fields for Owner, Due, Priority, Assigned, Action/Status, and Reminder, each with an 'Include' checkbox. The dialog box is labeled with a circled '2'.

1. Once the tasks to edit are selected-highlighted, Click the Edit Task button.

2. This displays the Multi-Item Edit dialog.

## Include

Multi Item Edit

Update all selected Task Items with the following information.

Owner	<input type="text"/>	<input type="checkbox"/> Include
Due	6/17/2010 12:00:00 AM	<input checked="" type="checkbox"/> Include
Priority		<input checked="" type="checkbox"/> Include
Assigned		<input checked="" type="checkbox"/> Include
Action/Status		<input type="checkbox"/> Include
Reminder	6/17/2010	<input type="checkbox"/> Include

OK Cancel

Click the Include checkboxes corresponding to the edits desired.

## Select New Choices

Multi Item Edit

Update all selected Task Items with the following information.

Owner	<input type="text"/>	<input type="checkbox"/> Include
Due	6/17/2010 12:00:00 AM	<input checked="" type="checkbox"/> Include
Priority		<input checked="" type="checkbox"/> Include
Assigned		<input checked="" type="checkbox"/> Include
Action/Status	Built-In Administrator	<input type="checkbox"/> Include
Reminder	Clinical Admin	<input type="checkbox"/> Include

Cancel

Once "Include" is checked, its drop-down menu becomes available to make changes. Click the drop-down menu of any item to change the assigned option. Click OK to save changes. In this example, we can bulk reassign all of these tasks at once instead of having to do so individually.

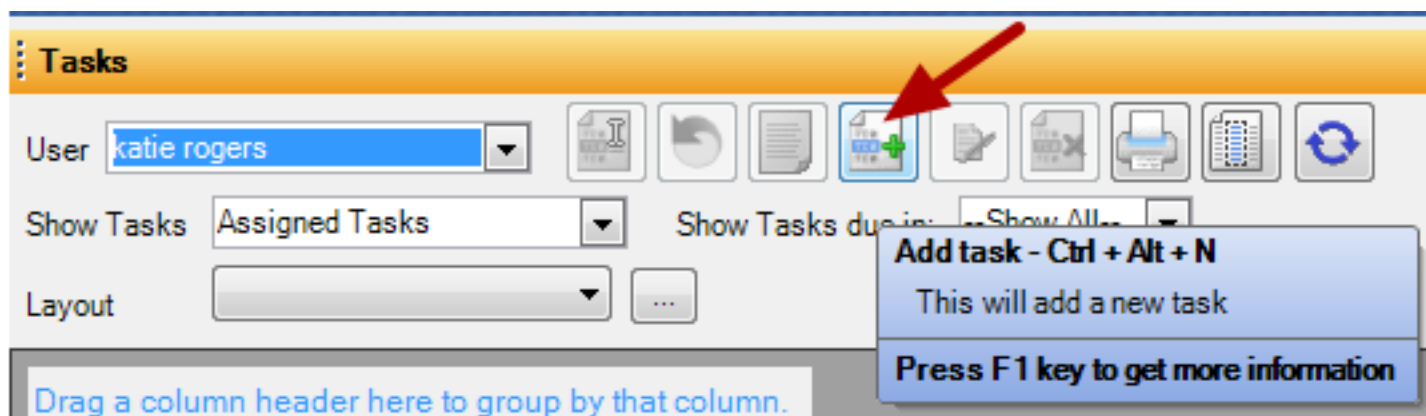
## Manually Add New Tasks from Task Manager

By default, new Task items are automatically created anytime a new document is added to a chart. (There is a security setting where this can be turned off, but we strongly discourage turning off the auto-creation of task items). The Owner for the new Task item will be the Active Provider listed in the title bar at the top of the SOAPware window when the Task item is created (i.e. a new document is created). The Assigned to will automatically default to the Active Provider as well.

When adding a task manually from the Tasks Manager, the Owner will default to the current User (person that is currently logged into SOAPware).

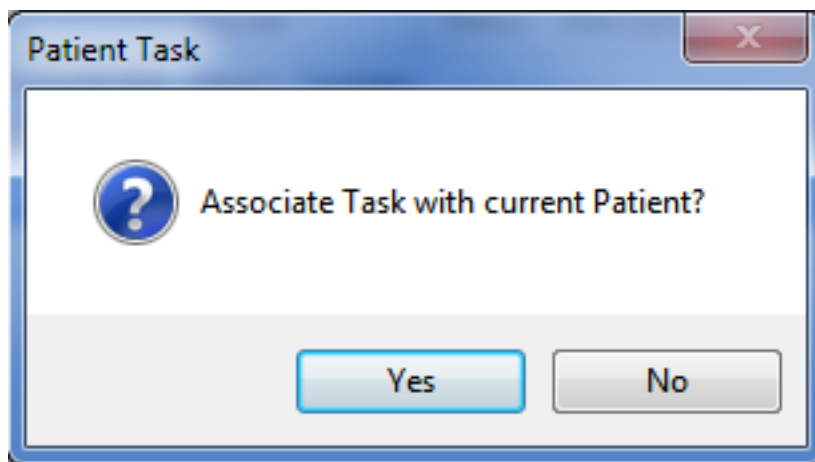
**NOTE: Manually added tasks do not allow you to sign documents from Task Manager. These documents will need to be signed using the chart section's toolbar.**

### Add Task



Manually add a new task directly to the Tasks Manager by Clicking the Add Task button

### Associate Task



At this point a dialog will appear with the option to associate the new task with a patient chart. Choose Yes or No.



## Create Task Dialog

The screenshot shows a 'Create Task' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains several input fields and buttons. Numbered callouts are placed over the following elements:

- 1: Description text box
- 2: Owner dropdown menu (showing 'katie rogers')
- 3: Due date dropdown menu (showing '6/17/2010')
- 4: Priority dropdown menu
- 5: Type dropdown menu
- 6: Assigned To dropdown menu (showing 'katie rogers')
- 7: Reminder time dropdown menu (showing '/ / : :')
- 8: Action/Status dropdown menu
- 9: Notes text area

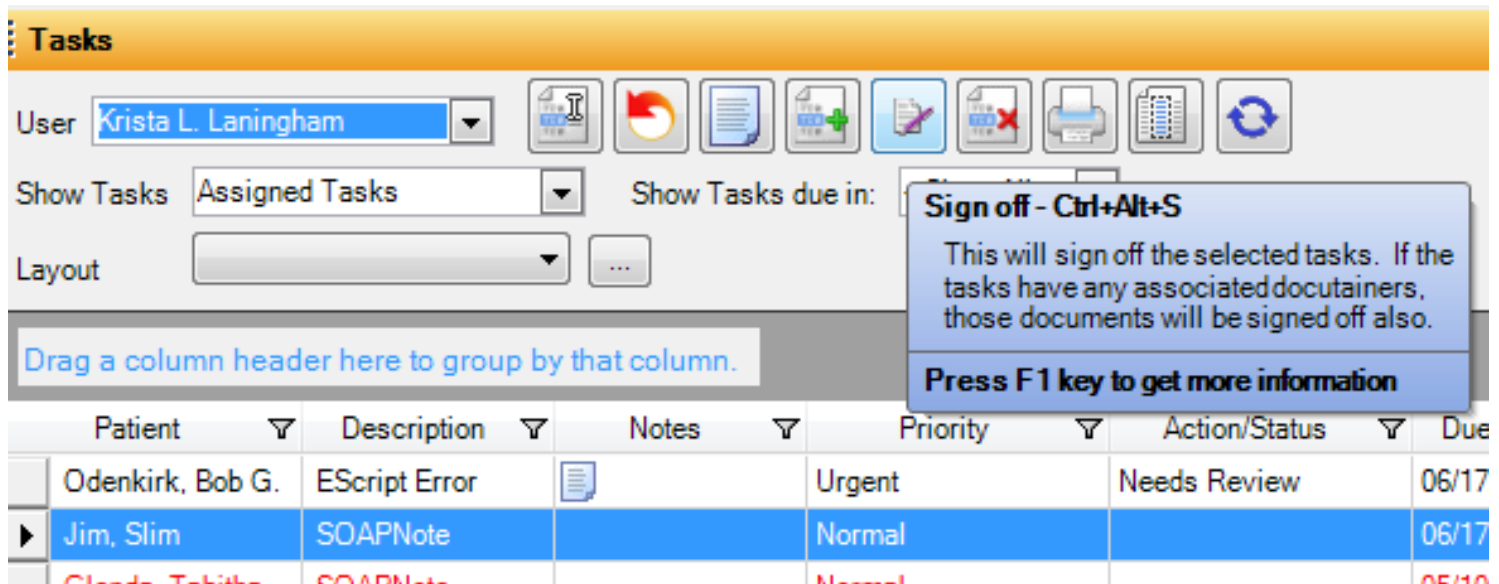
At the bottom right of the dialog are two buttons: 'Create' and 'Cancel'.

The Create Task dialog opens. Add appropriate information to the new task, and Click the Create button.

The information you can include is:

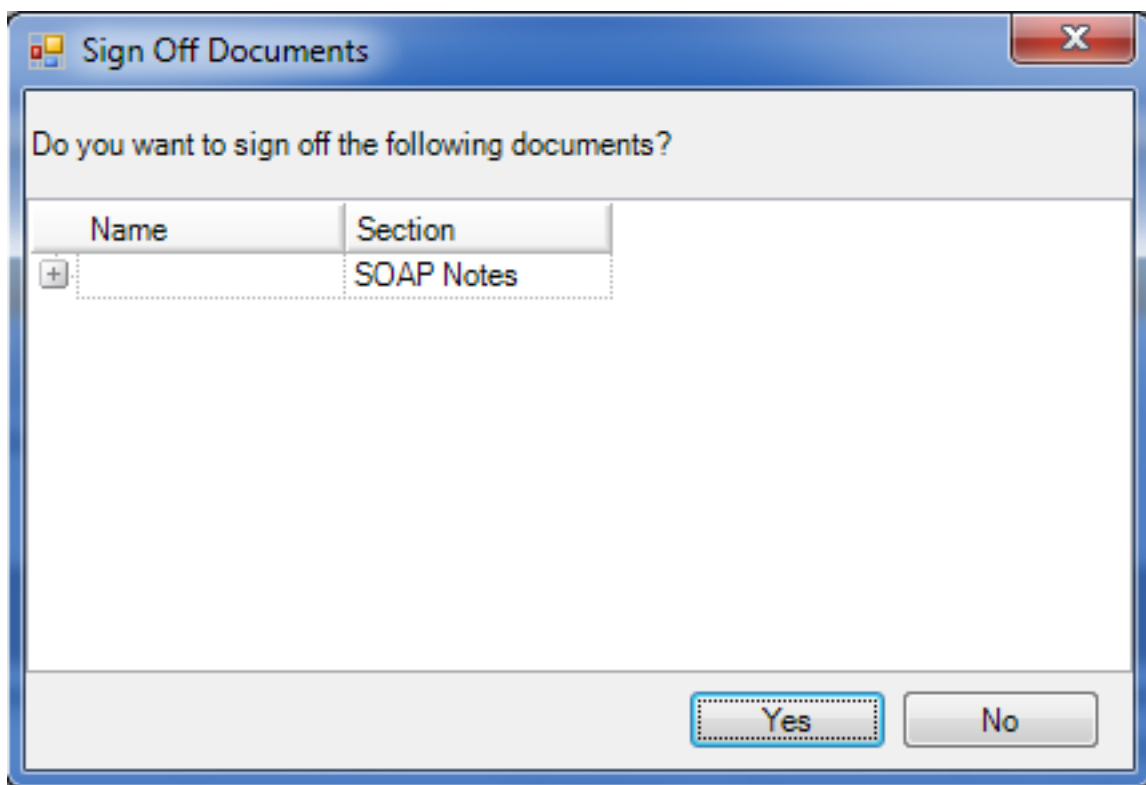
1. Description - this will be the description that shows up in the task list and will help you identify what this document is.
2. Owner - this will always be the active provider for an automatic task, but will be the user when creating a manual task not associated with a patient's chart.
3. Due - this is when the task is set to be due. After this date, the task will turn red, indicating that it is past due.
4. Priority - this allows you to rank tasks using a priority system so that you can make sure to complete the most urgent tasks first.
5. Type - this indicates what kind of document this task is (i.e. SOAPnote, Radiology, etc.)
6. Assigned To - this is the person to whom this task is assigned. The task will appear on their task list.
7. Reminder - this allows us to set a reminder to pop up (similar to an outlook calendar reminder) when this item is due.
8. Action/Status - this indicates what action needs to be taken for this task to be complete.
9. Notes - this is a section where you can attach temporary notes to a task as a reminder or to contain additional information. It is important to understand that this area will not be a permanent part of a patient's chart because it will be deleted after task completion.

## Signing off on a Task and its Associated Document



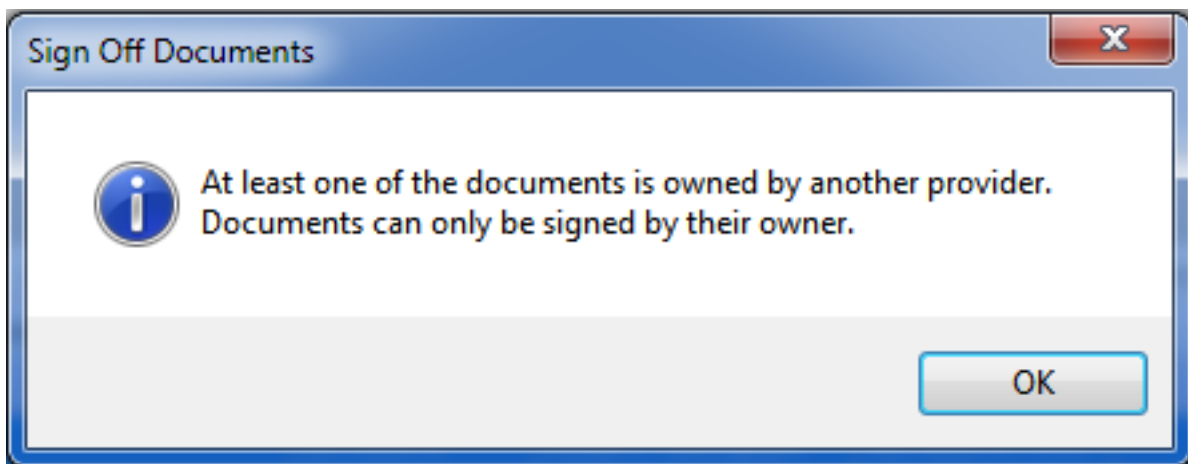
If a task is associated with a document, the document can be signed off directly from the Tasks Manager. To sign off a task item's associated document, Click the task item to sign off, and Click the Sign-Off button (or Press CTRL + Alt + S). When a document is signed off, it automatically moves that task to the inactive list.

## Sign Off Documents



The Sign Off Documents dialog asks to confirm the sign-off. Click Yes to do so. Click No to leave it unsigned and to return to the Tasks Manager.

## Document Owners



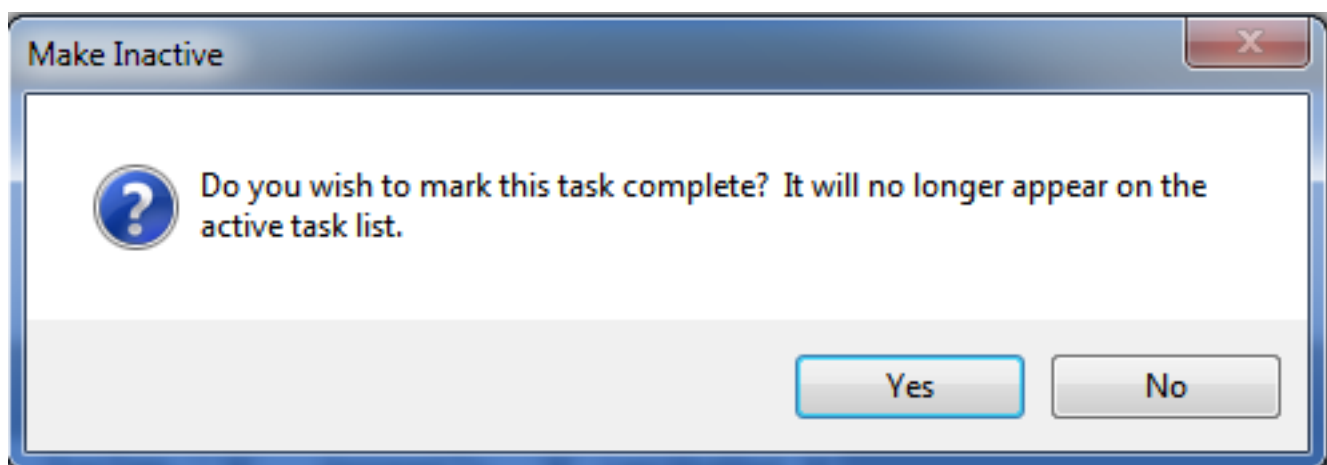
If you are not the Owner of the selected task, and you try to sign off the document, you will receive the following message. Only the Owner of the document can sign it.

## Completing a Task

Patient	Description	Completed
▶ Odenkirk, Bob G.	EScript Error	<input checked="" type="checkbox"/>
Jim, Slim	SOAPNote	<input type="checkbox"/>
Schnur, Dorothy	SOAPNote	<input type="checkbox"/>

If a task has been completed, to remove it from the list of tasks, Click the Checkbox in the Completed column.

## Confirm

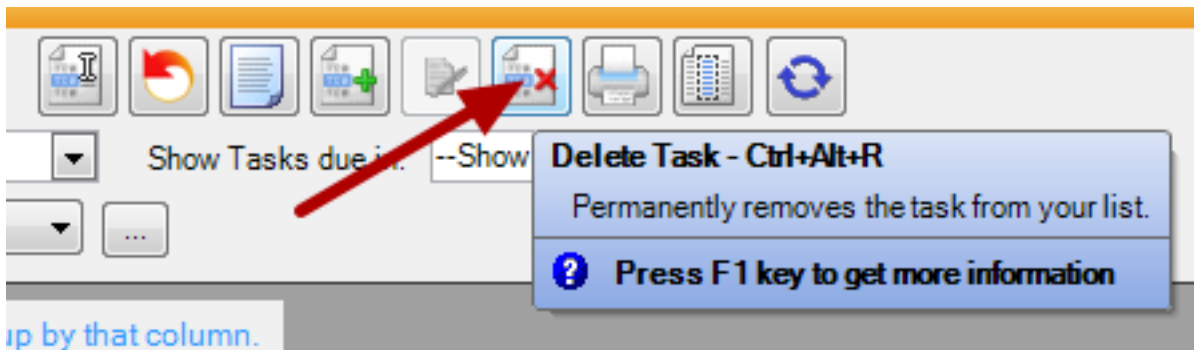


You will be prompted to confirm. Click Yes.

## Task Removed

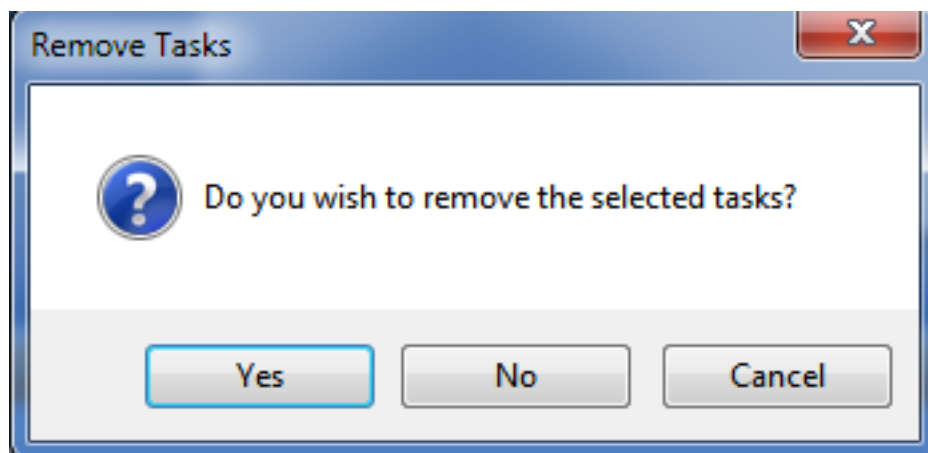
The task will then be removed from the list. If you Click No, you will be returned to the Tasks Manager.

## Deleting a Task



To remove a task from the Tasks Manager, Click on the task item to delete, and Click the Delete Task button (or Press CTRL + Alt + R).

## Confirm Deletion



A dialog presents asking to confirm. As in the Complete a Task screenshot (above). Click Yes to do so. Click No to return to the Tasks Manager. Removing a task item from the Tasks Manager does not remove the related document from a patient chart.

## Sign and Review Task Items

Changes to the Task Item Status.

### Add Task as Sign/Needs Review

**Add Document Task**

**Task Info**

Description: SOAPNote

Owner: Kaye L. Yocham

Assigned To: Kaye L. Yocham

Due: 4/29/2010

Reminder: / / : :

Priority: Normal

Type: SOAP Note

Notes:

**Docutainer Info**

Date/Time: 04/29/2010 8:37 AM

Owner: Kaye L. Yocham

Status:

Description:

Related Dx:

☐ Apply To All

Add Cancel

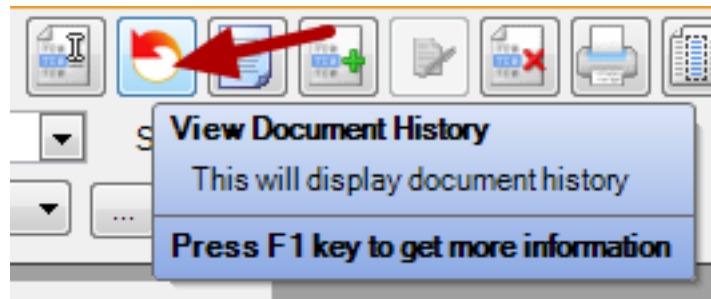
**Action/Status Options:**

- Lab Pending
- LMTC
- Needs Review
- PA Pending
- Phone busy
- Referral needed
- Referral Pending
- Sign

When adding a task, if you select the Action/Status item "Sign" or "Needs Review," the Task list item will be automatically removed when its related document is signed off. Otherwise, the Task List Item will remain on the task list until manually completed.

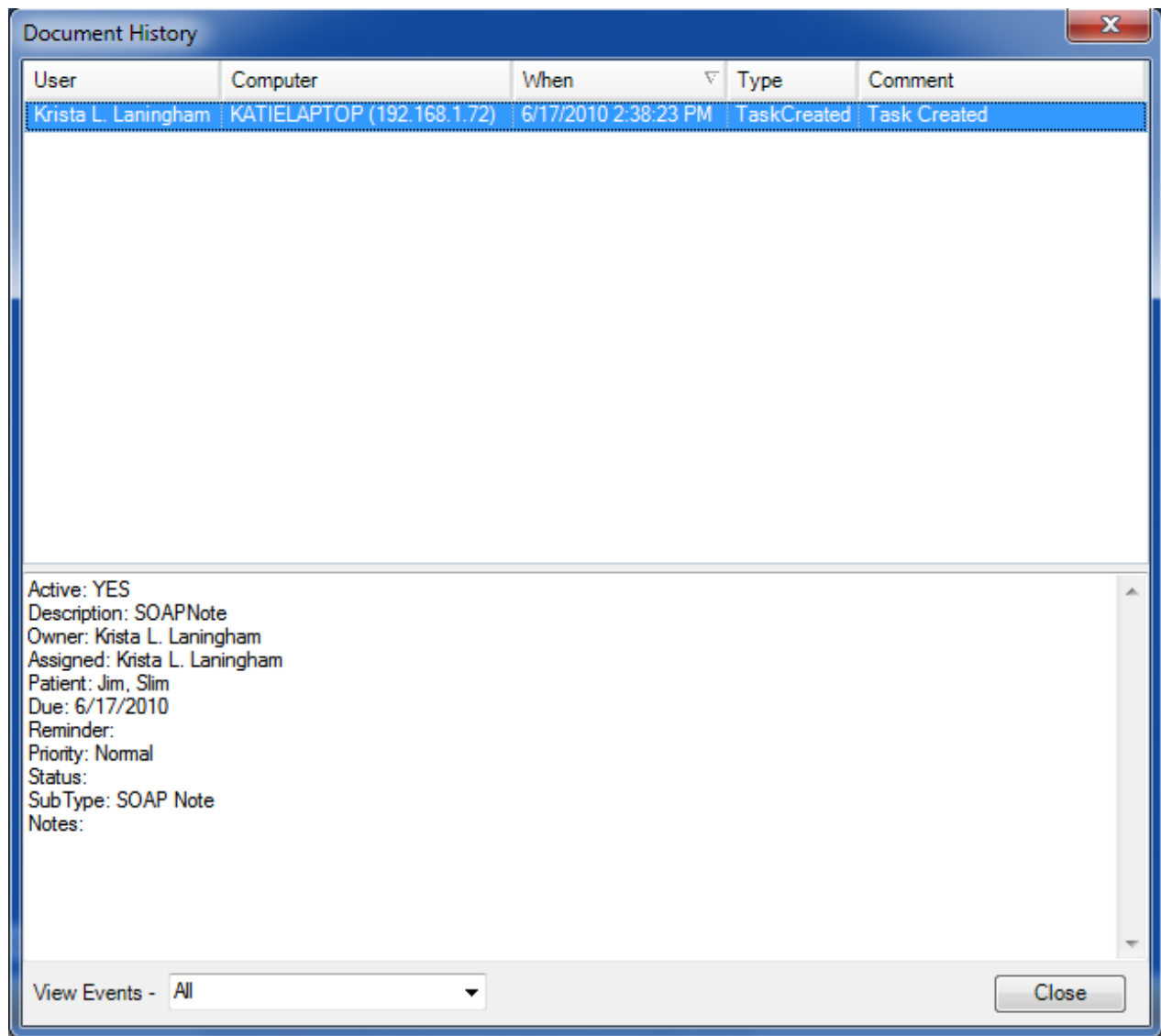
## Task Item History

### View Document History



Click the View Document History button to view the history of a document in the Tasks Manager.

### Document History Window



Included in this History are the Users that have accessed the task, the Computers from which the task has been accessed, the When (i.e. Date/Time) of accesses, the Type of accesses, and a Comment.

## Sign Off Multiple Documents, Multiple Patients

There is often a need for SOAPware providers who are the owners of documents to need to be able to sign off large groups of documents in one action. For example, in most clinics, paper documents come to the clinician's attention prior to having been scanned. The Clinician signs off the paper document and then the paper document (with the signature) is scanned into the electronic chart. Unfortunately, the emerging rules for electronic signature and the standard for the "Legal Electronic Health Record" are potentially in conflict with this workflow because there are requirements to have an electronic log of the date/times associated with signatures. The solution is to implement use of the Tasks Manager in a fashion so that the documents can be signed-off in a group, all at once, with a single action.

### Establish Efficient Workflows

	Patient ▼	Description ▼	Notes ▼	Priority ▼	Action/Status ▼ ▼
<input type="checkbox"/>	Odenkirk, Bob G.	SOAPNote		Normal	Sign
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Cross, David M.	Lab Created		Normal	Sign
<input type="checkbox"/>	Cross, David M.	SOAPNote		Normal	Sign
<input type="checkbox"/>	Jim, Slim	SOAPNote		Normal	Sign
<input type="checkbox"/>	Glenda, Tabitha	SOAPNote		Normal	Sign

Establish work flows so that any documents that need to be signed in bulk have a common characteristic in one of the Tasks Manager columns. For example, it could simply be to select Sign as the option in the Action/Status column. Then, clicking on the Action/Status header will group all the documents that need to be signed.

## Group Items

	Patient ▾	Description ▾	Notes ▾	Priority ▾	Action/Status ▾ ▾
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Cross, David M.	Lab Created		Normal	Sign
<input type="checkbox"/>	Cross, David M.	SOAPNote		Normal	Sign
<input type="checkbox"/>	Jim, Slim	SOAPNote		Normal	Sign
<input type="checkbox"/>	Glenda, Tabitha	SOAPNote		Normal	Sign
<input type="checkbox"/>	Odenkirk, Bob G.	SOAPNote		Normal	Sign
<input checked="" type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign

Once the items that need to be signed-off as a group are clustered together, the next step is to select all of them. To do this, click in the gray box at the far left of the first row. Next, hold down the shift key and click in the gray box at the far left on the last item in the group. Doing this selects all the items between the two clicks (while holding down the shift key).

## Sign

**Tasks**

User

Show Tasks 
Show Tasks due in:

Layout

Drag a column header here to group by that column.

	Patient ▾	Description ▾	Notes ▾	Priority ▾	Actio
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote		Normal	Sign
<input type="checkbox"/>	Cross, David M.	Lab Created		Normal	Sign
<input type="checkbox"/>	Cross, David M.	SOAPNote		Normal	Sign
<input type="checkbox"/>	Jim, Slim	SOAPNote		Normal	Sign

Once all the items to sign-off are selected, then click on the Sign-off button. This results in all of the selected documents being signed off in one action.



## Group by Column

Layout

Drag a column header here to group by that column.

Action/Status

Patient	Description	Notes	Priority	Action/Status
Schnur, Dorothy	SOAPNote		Normal	Sign
Schnur, Dorothy	SOAPNote		Normal	Sign
Cross, David M.	Lab Created		Normal	Sign
Cross, David M.	SOAPNote		Normal	Sign
Jim, Slim	SOAPNote		Normal	Sign
Glenda, Tabitha	SOAPNote		Normal	Sign
Odenkirk, Bob G.	SOAPNote		Normal	Sign
Schnur, Dorothy	SOAPNote		Normal	Sign

Simply drag the Action/Status Column up to the location of "Drag a column header here to group that by column" and the items are instantly grouped for selection and sign-off.

## Task Sorted by Type

**Tasks**

User: Krista L. Laningham

Show Tasks: Assigned Tasks

Layout: Action/Status

Action/Status : Sign (9 items)

Action/Status : Needs Review (1 item)

The tasks are all grouped by Action/Status type, allowing you to view only one type at a time, or all types.

## Expand Type

Action/Status ▾

☰ Action/Status : Sign (9 items)

	Patient ▾	Description ▾	Notes ▾
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote	
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote	
<input type="checkbox"/>	Cross, David M.	Lab Created	
<input type="checkbox"/>	Cross, David M.	SOAPNote	
<input type="checkbox"/>	Jim, Slim	SOAPNote	
<input type="checkbox"/>	Glenda, Tabitha	SOAPNote	
<input type="checkbox"/>	Odenkirk, Bob G.	SOAPNote	
<input type="checkbox"/>	Schnur, Dorothy	SOAPNote	
<input type="checkbox"/>	Schnur, Dorothy	Report	

☰ Action/Status : Needs Review (1 item)

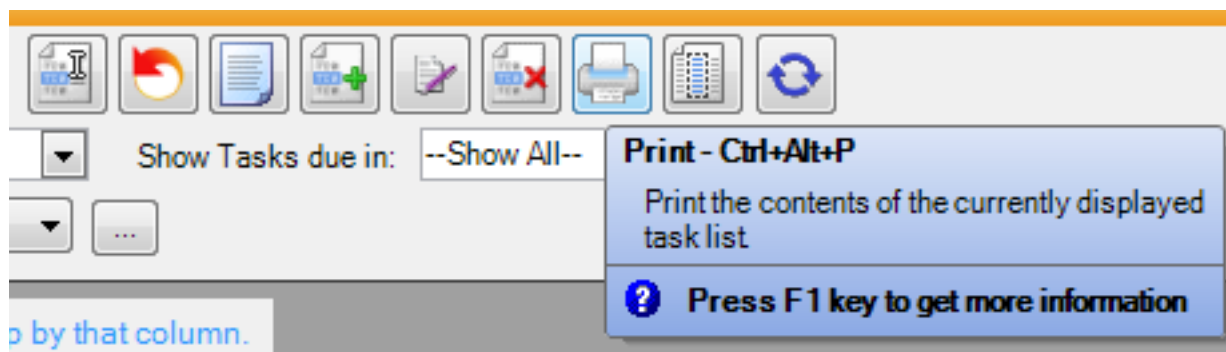
To see all of the items of one type (i.e. Sign), click the expander node next to the Type and a list of the items of that group will drop down into view.

### Tip

**NOTE:** Before the scanning person or nurse sends the documents to the clinician's list for final sign-off, establish a workflow where that person changes the status in item of a task item so that the clinician can sort all the documents needing signing to all be in one place. This makes it possible to sign all of them in bulk without having to search around.

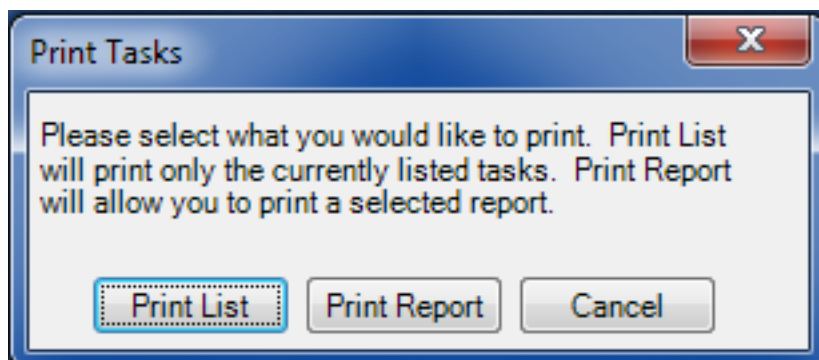
## Printing Task Manager Lists

### Click the Print Button



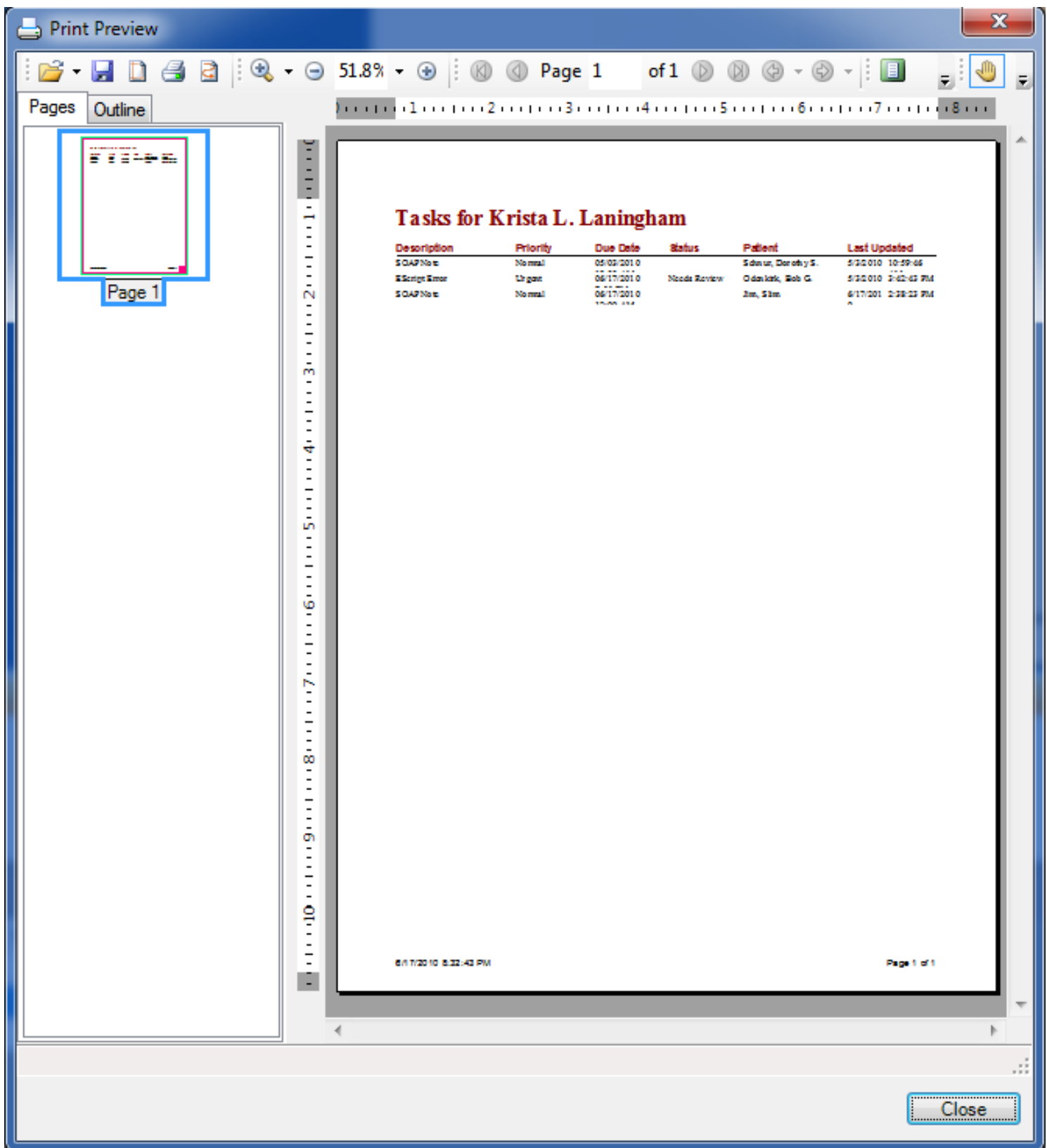
At any time, Click the Print button (or Press CTRL + Alt + P) to print a tasks manager list that is displayed.

### Choose List or Report

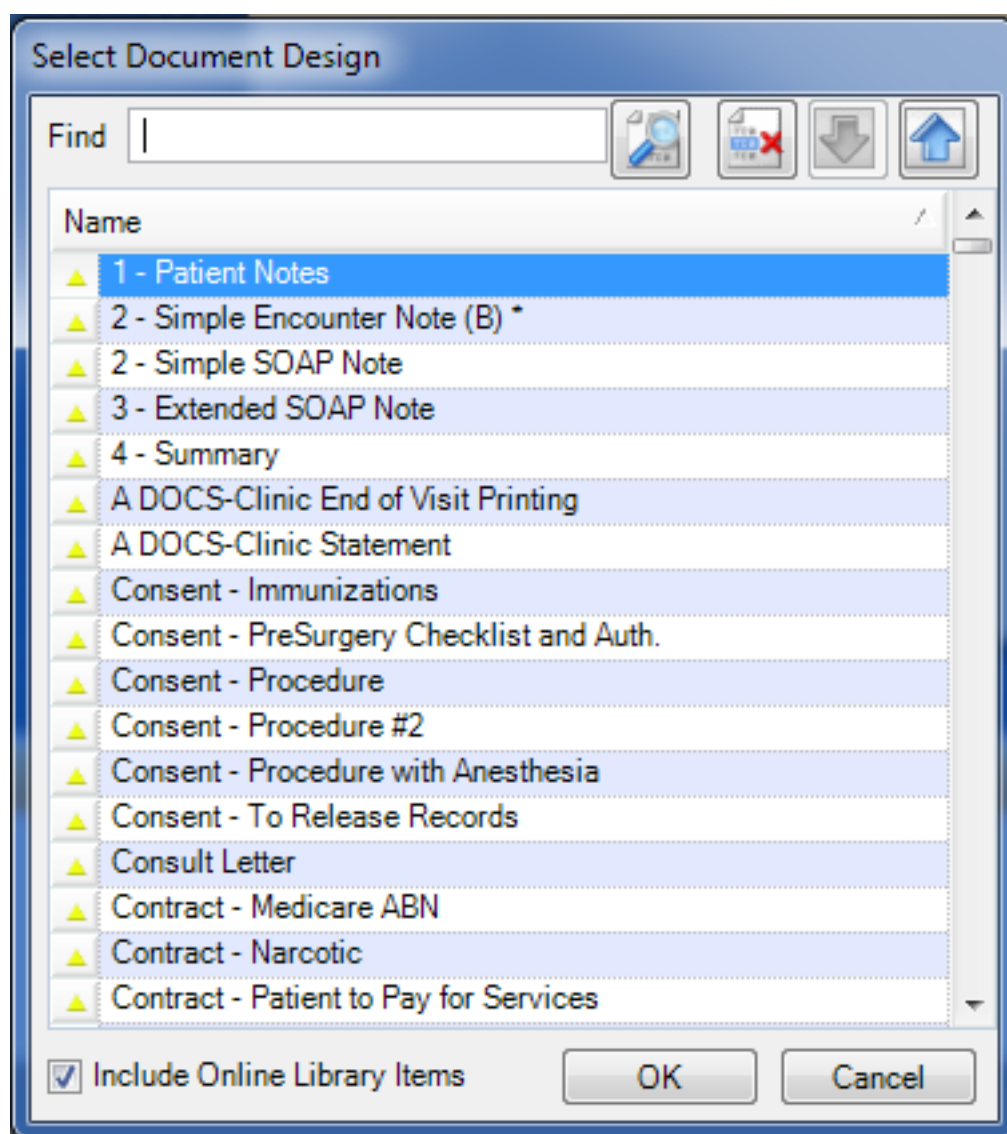


Click either the Print List or the Print Report buttons in the Print Tasks dialog.

## Print List



A Print Preview of the currently displayed tasks manager will be displayed. To Print the tasks manager list, Click the Print button in the upper left of the Print Preview dialog.



Print Report will prompt you to choose a design to print with the task list information.

# E-Prescribing

## Intro to Rx Manager

The Rx Manager is your e-prescribing station. It is here that you will finalize medications, view prescription history, check eligibility status, and send prescriptions to pharmacies.

**\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - E-PRESCRIBING FOR 40% OF PERMISSIBLE SCRIPTS**

[Click here to view Meaningful Use criteria](#)

### Rx Manager Tabs

**Rx Manager**

Rx Pad Medications History Patient - Refill Requests

Ph. **1** cy type **2** custom **3** : here / KROG **4** .OUTHWEST 327 (Ph#-

Patient Information

Allergies

**Starter - Allergies - Summary:**

Add Rx Update Summary Interactions

Actions	Rx
<input checked="" type="checkbox"/>	<b>Flomax (Tamsulosin):</b>
	1 each once a day orally
> Unknown	#30 Sub:

The Rx Manager has 4 tabbed sections:

1. Rx Pad - Used to write new prescriptions

2. Medications - Displays a list of previous prescriptions for the current patient.
3. History - A sequential, transactional list of all prescribing actions previously performed within Rx Manager.
4. Refill Requests - List of any pending electronic refills requests for the current patient.

### **Rx Manager Layout**

The actual drug information appears in more of a spreadsheet format (i.e. straight rows and columns). This row/column view to make the task of reviewing lists of meds easier. In all earlier versions of SOAPware each prescription had a trail of sub-items of varied length. Most/all the prescription sub-items in the Rx Pad are actually within pick lists.



## Rx Manager - Rx Pad

Some workflow choices are now available in SOAPware 2010 that do not exist in previous versions:

Changes to prescriptions within Rx Manager are now automatically reflected in the currently active SOAPnote as long as an encounter note is displayed and unlocked (i.e. not signed off or in use elsewhere). For example, removing a prescription within the Rx Pad in Rx Manager removes it from the SOAPnote Medications field.

Rx Manager now allows new prescriptions to be created from within the manager itself. In other words, any/all prescriptions can be created just within the Rx manager which subsequently updates the encounter note.

**\*THIS LESSON CONTAINS THE FOLLOWING MEANINGFUL USE (MU) CORE REQUIREMENTS:**

- 1. E-PRESCRIBING FOR 40% OF PERMISSIBLE SCRIPTS - SEE SUBMIT RX**
- 2. MEDICATION INTERACTIONS/ALERTS - SEE INTERACTIONS BUTTON**

### Rx Pad Overview

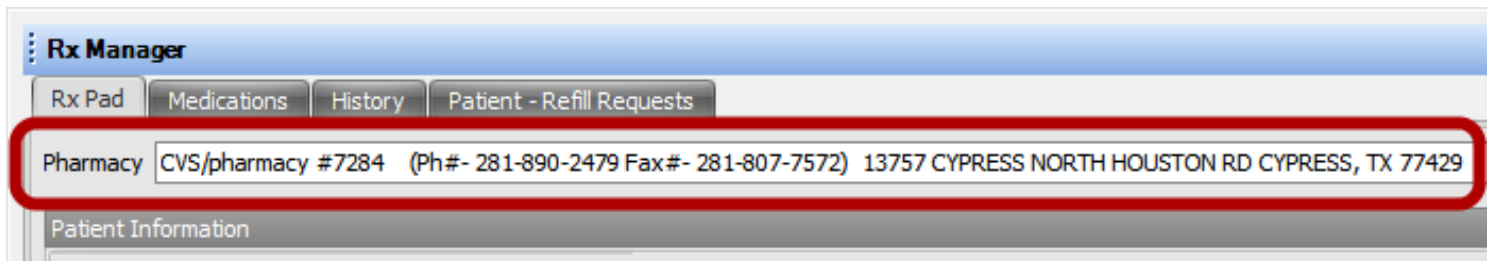
The screenshot shows the Rx Manager Rx Pad interface. At the top, there are tabs for 'Rx Pad', 'Medications', 'History', and 'Patient - Refill Requests'. Below the tabs, a pharmacy selection dropdown is shown with 'CVS/pharmacy #7284' selected. The 'Patient Information' section includes an 'Allergies' field with a red 'Starter - Allergies - Summary:' message, and a 'PBMB Notes' section with 'Active Benefits:' and 'Retail:' fields. Below these are buttons for 'Add Rx', 'Update Summary', and 'Interactions'. The main area is a table with columns for 'Actions', 'Rx', 'Misc', 'Date', 'Alternatives', and 'Warnings'. The first row shows a prescription for 'Flomax (Tamsulosin): 0.4 mg (capsule)' with a status of 'Pending' and a date of '6/17/2010'. The second row shows a prescription for 'Unknown #30' with a status of 'Substitutions Allowed' and a date of '0'. At the bottom, there is a 'Retrieve Eligibility Info' button and a 'Submit' button.

Actions	Rx	Misc	Date	Alternatives	Warnings
<input checked="" type="checkbox"/>	Flomax (Tamsulosin): 0.4 mg (capsule) 1 each once a day orally	Pending	6/17/2010		
<input type="checkbox"/>	Unknown #30	Substitutions Allowed	0		

1. Pharmacy Selection
2. Allergies
3. Eligibility Information
4. Add Rx
5. Update Summary
6. Interactions Summary

7. Prescription(s)
8. Retrieve Eligibility Information
9. Submit Rx

## Preferred Pharmacy Selection



**Rx Manager**

Rx Pad Medications History Patient - Refill Requests

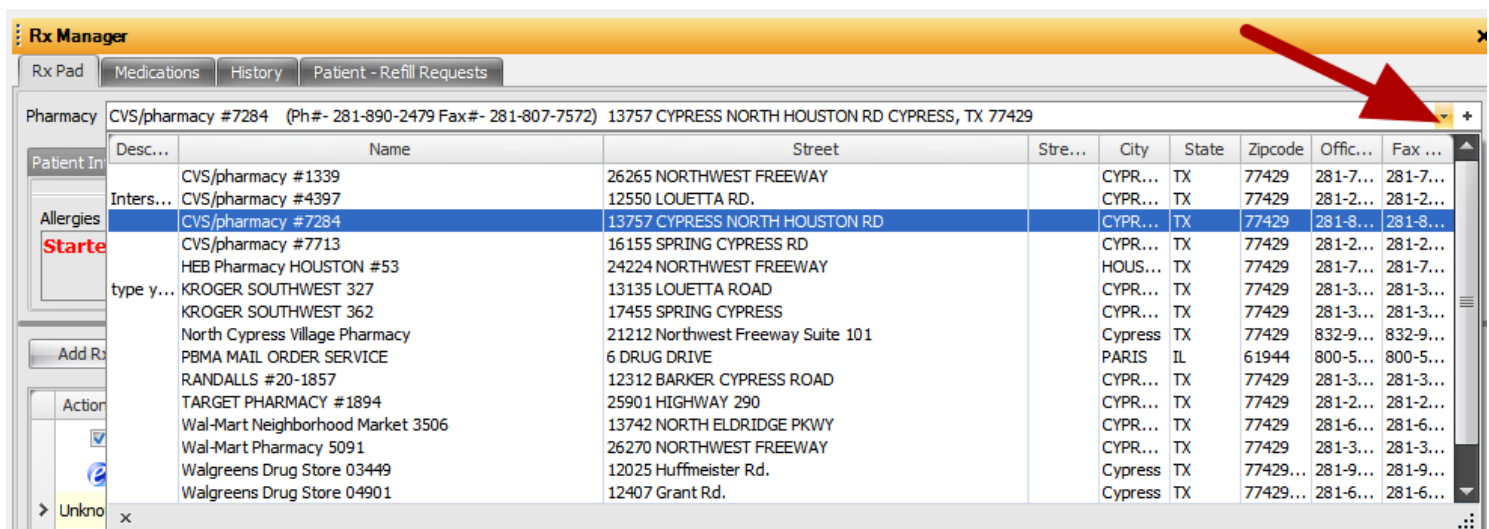
Pharmacy CVS/pharmacy #7284 (Ph#- 281-890-2479 Fax#- 281-807-7572) 13757 CYPRESS NORTH HOUSTON RD CYPRESS, TX 77429

Patient Information

A patient's preferred (or default) pharmacy can be designated as the pharmacy which is initially selected in the Rx Pad.

The Preferred Pharmacy drop-down menu in the Demographics chart section displays the pharmacy that will be used, by default, when prescribing. The reason for this is so that the default pharmacy can be defined (e.g. by front desk staff) in the patients General Demographics chart section as the patient's chart is initially created.

## Change Pharmacy Selection



**Rx Manager**

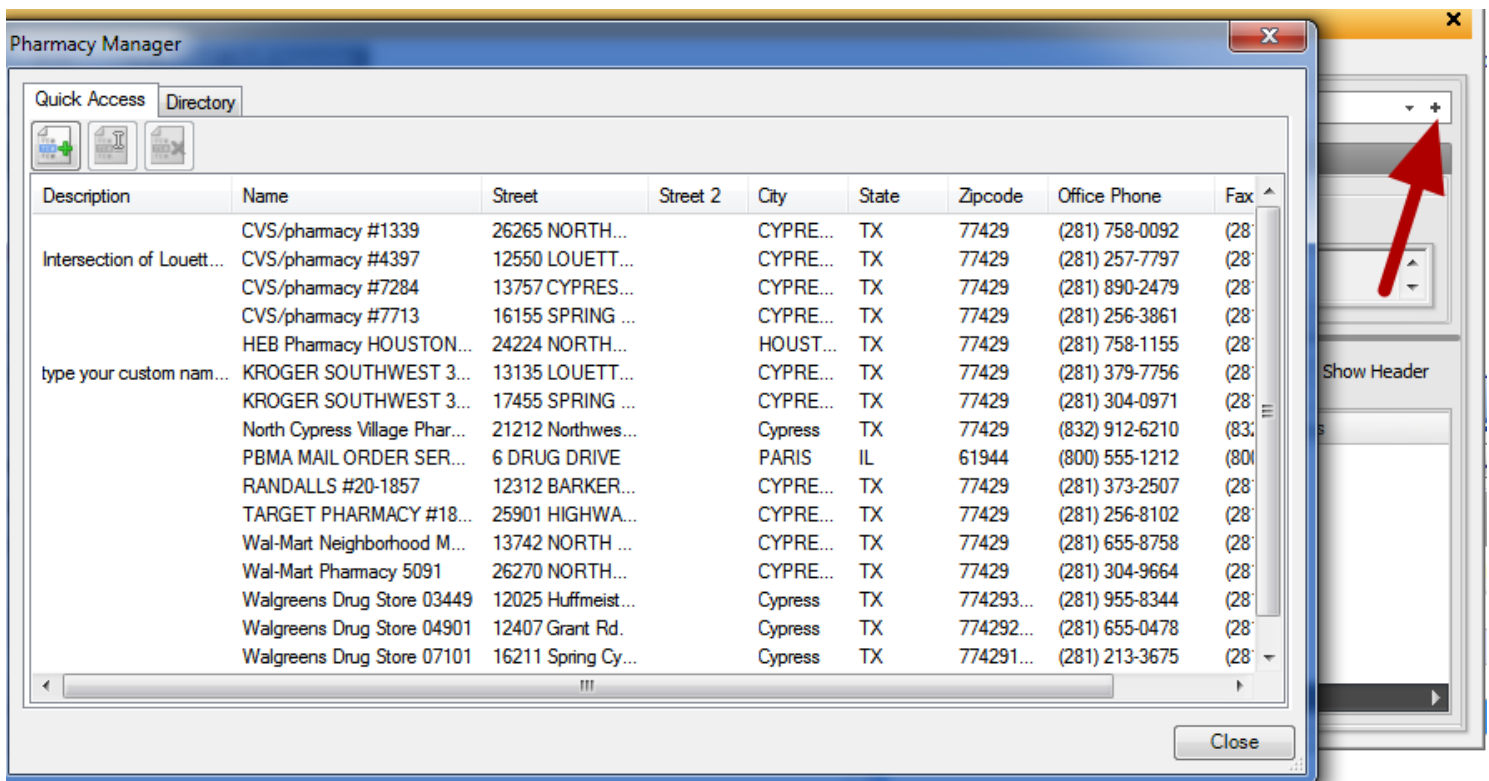
Rx Pad Medications History Patient - Refill Requests

Pharmacy CVS/pharmacy #7284 (Ph#- 281-890-2479 Fax#- 281-807-7572) 13757 CYPRESS NORTH HOUSTON RD CYPRESS, TX 77429

Desc...	Name	Street	Stre...	City	State	Zipcode	Offic...	Fax ...
CVS/pharmacy #1339		26265 NORTHWEST FREEWAY		CYPR...	TX	77429	281-7...	281-7...
CVS/pharmacy #4397		12550 LOUETTA RD.		CYPR...	TX	77429	281-2...	281-2...
CVS/pharmacy #7284		13757 CYPRESS NORTH HOUSTON RD		CYPR...	TX	77429	281-8...	281-8...
CVS/pharmacy #7713		16155 SPRING CYPRESS RD		CYPR...	TX	77429	281-2...	281-2...
HEB Pharmacy HOUSTON #53		24224 NORTHWEST FREEWAY		HOUS...	TX	77429	281-7...	281-7...
KROGER SOUTHWEST 327		13135 LOUETTA ROAD		CYPR...	TX	77429	281-3...	281-3...
KROGER SOUTHWEST 362		17455 SPRING CYPRESS		CYPR...	TX	77429	281-3...	281-3...
North Cypress Village Pharmacy		21212 Northwest Freeway Suite 101		Cypress	TX	77429	832-9...	832-9...
PBMA MAIL ORDER SERVICE		6 DRUG DRIVE		PARIS	IL	61944	800-5...	800-5...
RANDALLS #20-1857		12312 BARKER CYPRESS ROAD		CYPR...	TX	77429	281-3...	281-3...
TARGET PHARMACY #1894		25901 HIGHWAY 290		CYPR...	TX	77429	281-2...	281-2...
Wal-Mart Neighborhood Market 3506		13742 NORTH ELDRIDGE PKWY		CYPR...	TX	77429	281-6...	281-6...
Wal-Mart Pharmacy 5091		26270 NORTHWEST FREEWAY		CYPR...	TX	77429	281-3...	281-3...
Walgreens Drug Store 03449		12025 Huffmeister Rd.		Cypress	TX	77429...	281-9...	281-9...
Walgreens Drug Store 04901		12407 Grant Rd.		Cypress	TX	77429...	281-6...	281-6...

To change the preferred pharmacy while within Rx Pad, Click the down-pointing triangle (i.e. at the right in the Pharmacy field), and Click a pharmacy in your list of local, Quick Access pharmacies.

## Add Pharmacy Selection



To add a new pharmacy to your local, Quick Access pharmacy list, Click the Add button (i.e. plus sign at the far right).

Once a preferred/default pharmacy is selected, prescriptions will be automatically sent to that pharmacy when the Send button is clicked as long as there is a check in their checkbox in the Actions column.

## Sort Pharmacies

The screenshot shows the 'Rx Manager' application with the 'Medications' tab selected. The 'Pharmacy' field is populated with 'CVS/pharmacy #7284 (Ph#- 281-890-2479 Fax#- 281-807-7575) 13757 CYPRESS NORTH HOUSTON RD CYPRESS, TX 77429'. Below this, a list of pharmacies is displayed in a table format. The table has three columns: 'Desc...', 'Name', and 'Street'. The first row is highlighted in blue. A red arrow points to the 'Name' column header.

Desc...	Name	Street
CVS/pharmacy #7284		13757 CYPRESS NORTH HOUSTON RD
CVS/pharmacy #7713		16155 SPRING CYPRESS RD
HEB Pharmacy HOUSTON #53		24224 NORTHWEST FREEWAY
KROGER SOUTHWEST 327		13135 LOUETTA ROAD
KROGER SOUTHWEST 362		17455 SPRING CYPRESS
North Cypress Village Pharmacy		21212 Northwest Freeway Suite 101
PBMA MAIL ORDER SERVICE		6 DRUG DRIVE
RANDALLS #20-1857		12312 BARKER CYPRESS ROAD
TARGET PHARMACY #1894		25901 HIGHWAY 290
Walgreens Drug Store 03449		12025 Huffmeister Rd.
Walgreens Drug Store 04901		12407 Grant Rd.
Walgreens Drug Store 07101		16211 Spring Cypress Rd.
Walgreens Drug Store 9946		14127 Cypress Rosehill Rd
Wal-Mart Neighborhood Market 3506		13742 NORTH ELDRIDGE PKWY
Wal-Mart Pharmacy 5091		26270 NORTHWEST FREEWAY

The Pharmacy viewer displays full pharmacy information on a single line/row. When beginning to type a pharmacy name in the field, a drop-down appears listing all pharmacies that match the typed letters (much like with Chart Rack). The list of pharmacies would actually be in columns/rows, so they can be sorted by column (i.e. Pharmacy name, city, street, Zip, phone, fax etc.).

## Allergies / Eligibility

The screenshot shows the 'Allergies' field in the Rx Pad. The field contains the text 'Starter - Allergies - Summary:' in red. The field has a scroll bar on the right side.

The Allergies field in Rx Pad displays a copy of the contents from the Summary Allergies field.

## Eligibility

The screenshot shows a software window titled 'Eligibility' with two tabs: 'PBMB' and 'Notes'. The 'Notes' tab is active and displays the following information:

Active Benefits:  
Retail:  
Mail Order:

Service Date: 08/01/2002  
Additional ID: BIN123

Plan Name/#: CARRGRPNAME / PLAN123 Group Name/#:  
CARRGRPNAME/CG111111111/CGID33333333  
Employee ID :

Covered Person(s):  
BOB G ODENKIRK  
100 MR SHOW LANE  
LOS ANGELES CA, 90001  
DOB: 12/25/1959 Gender: M

Card Holder:  
BOB G ODENKIRK  
100 MR SHOW LANE  
LOS ANGELES CA, 90001  
DOB: 12/25/1959 Gender: M

After Checking for Eligibility (either beforehand or when opening Rx Manager), several new tabs will appear within the "Notes" section of the Rx Manager. Each tab represents different coverage plans for this patient. Depending on the particular pharmacy benefit manager, the exact data and format returned for any given coverage will vary. At a minimum, the type of benefits will be displayed, e.g. retail, PBM (i.e. mail order or both). For example, in the above screen shot, the PBMA coverage supports only mail order.

## Add Rx Button

Available Medications

Find

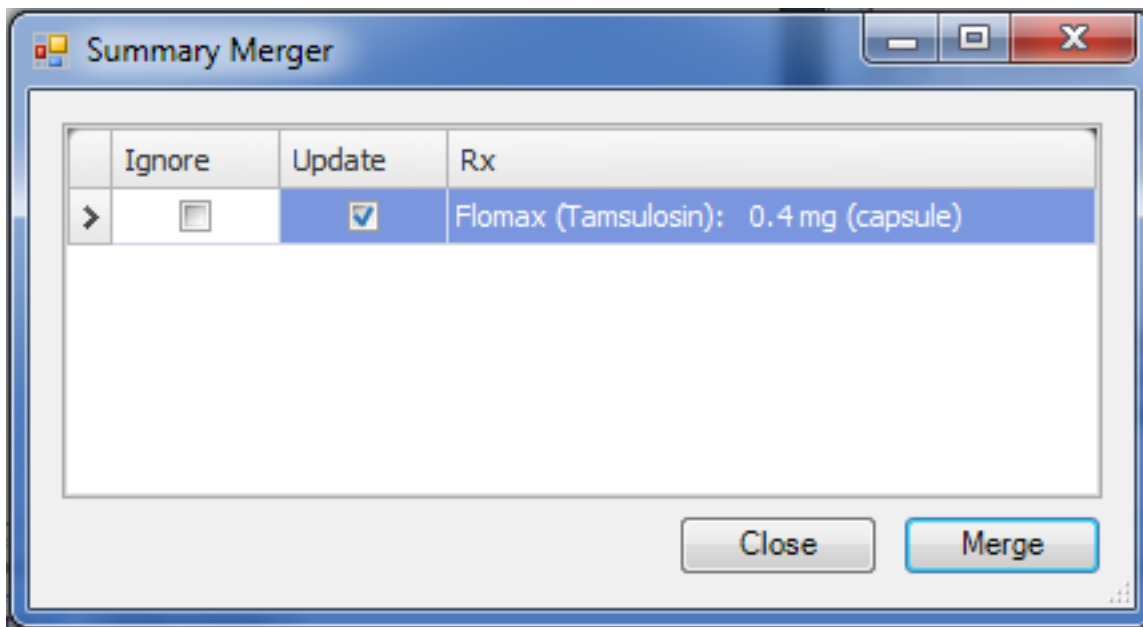
Description
> "Diovan (Valsartan) 160mg, #30, 1qd, R-12"
"Diovan (Valsartan) 320mg, #30, 1qd, R-12"
"Diovan HCT (Valsartan/HCTZ) 80/12,5, #30, 1qd, R-12"
"Diovan (Valsartan) 40mg, #30, 1qd, R-12"
"Diovan (Valsartan) 80mg, #30, 1qd, R-12"
"Diovan HCT (Valsartan/HCTZ) 160/12, #30, 1qd, R-12"

The Add Rx button displays an Available Medications dialog. Type in a drug name, and a list of matching prescriptions is automatically displayed. Double-clicking a prescription in the list adds it to the Medication list in Rx Pad.

1. Click the Find Rx button.
2. Begin typing a drug name in the Find field/box. After three characters have been typed, a list will appear. Further typing will result in a more refined list of results.

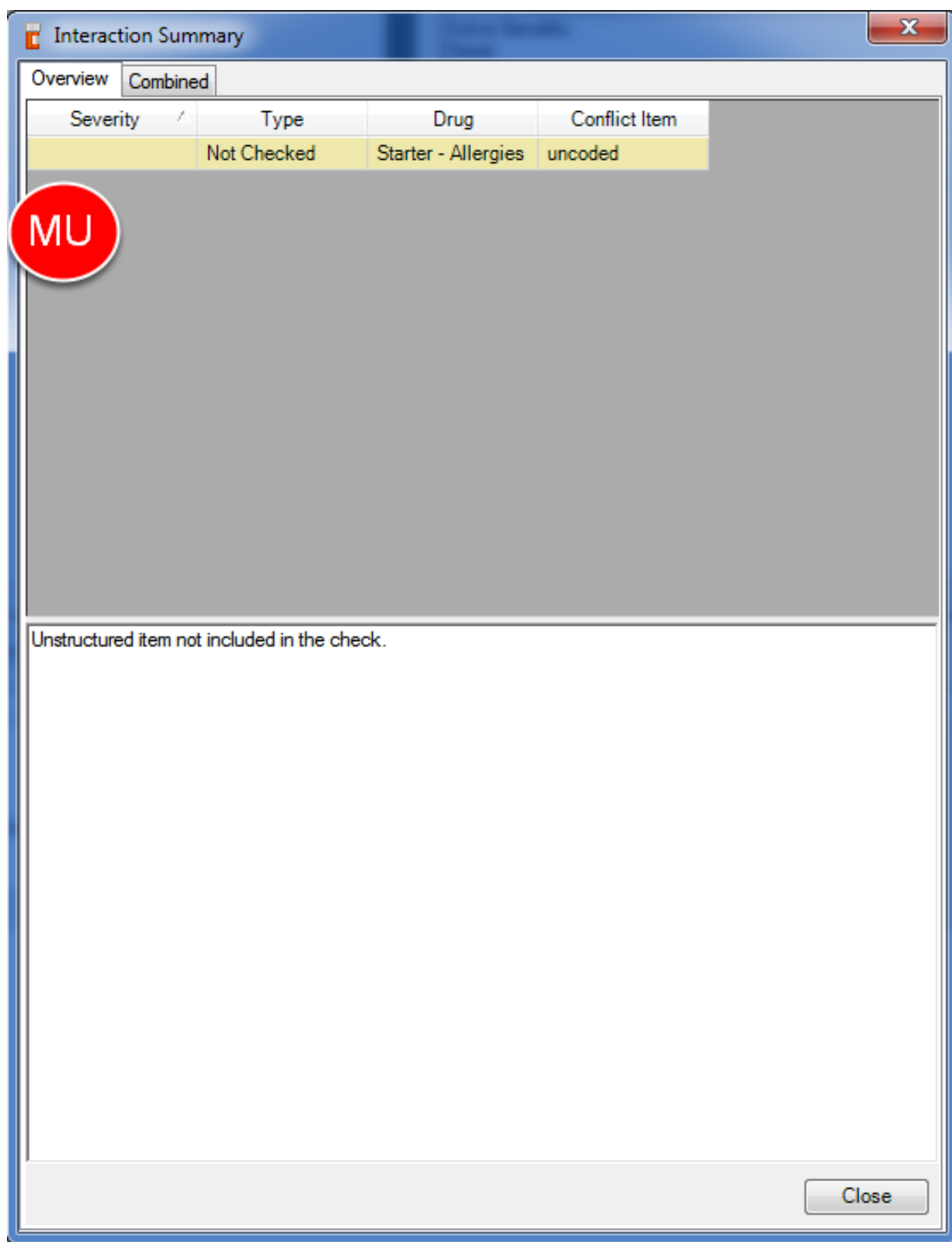
Alternatively, Click the prescription in the list once, then Click Insert. Only Structured Rx SMARText items that exist in the local library system will be displayed in this viewer. This list can contain your pre-defined, most commonly prescribed medications and their default values. Each user has their own list.

## Update Summary Button



The Update Summary button displays a Summary Merger dialog. This dialog allows for the merging of prescriptions in the Medication List in Rx Pad to the Summary Medications field. That is, it allows the user to specify whether or not to update/add a particular prescription to the Summary Medications list of on-going or chronic medications.

## Interactions Button



The Interactions button is grayed-out unless interactions are found. Clicking it displays the Interactions.

**\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - MEDICATION INTERACTIONS/ALERTS**



[Click here to view Meaningful Use Criteria](#)

## Show Header Checkbox

The screenshot shows the Rx Pad interface with the 'Show Header' checkbox checked. A red arrow points to the checkbox, and a red box highlights the table headers. The table has the following columns: Actions, Rx, Misc, Written Date, Alternatives, and Warnings. The Rx column is further divided into Drug, Strength, Submitted Via, Pharmacy, Provider, Drug Type, Valid Status, and Coverage Details. The table contains one row of data for Flomax (Tamsulosin) 0.4 mg (capsule), Pending, 6/17/2010, with a 'Remove Rx' button.

Actions	Rx	Misc	Written Date	Alternatives	Warnings
<input checked="" type="checkbox"/>	<b>Flomax (Tamsulosin):</b> 0.4 mg (capsule) 1 each once a day orally	Pending CVS/pharmacy #7284 Krista L. Laningham Valid Script Coverage Details	6/17/2010 Remove Rx		

The Show Header checkbox toggles the display of the Rx field-headers names on and off. Above is a screenshot with a check in the checkbox and the headers displayed.

## Medication List

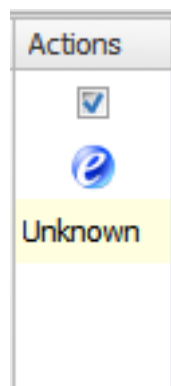
The screenshot shows the Medication List area of the Rx Pad interface. It displays a table of medication data with the following columns: Actions, Rx, Misc, Written Date, Alternatives, and Warnings. The Rx column is further divided into Drug, Strength, Submitted Via, Pharmacy, Provider, Drug Type, Valid Status, and Coverage Details. The table contains one row of data for Flomax (Tamsulosin) 0.4 mg (capsule), Pending, 6/17/2010, with a 'Remove Rx' button.

Actions	Rx	Misc	Written Date	Alternatives	Warnings
<input checked="" type="checkbox"/>	<b>Flomax (Tamsulosin):</b> 0.4 mg (capsule) 1 each once a day orally	Pending CVS/pharmacy #7284 Krista L. Laningham Valid Script Coverage Details	6/17/2010 Remove Rx		

The Medication List area of Rx Pad displays all the individual prescriptions to be sent electronically, faxed, printed, or given as samples. Each medication listed in the patients Rx Pad view can be directly edited (much like using a spreadsheet).

Clicking on the drug name drops-down a list of predefined Drug Courses for automatic Sig/data entry.

## Actions Column



The Actions column allows individual prescriptions to either be included or excluded from a particular action. For example, there could be multiple prescriptions listed with all but one to be sent electronically. Simply uncheck the one not to be sent electronically. Note that faxing is not considered the same as sending electronically (This is an industry-government differentiation and not the opinion of SOAPware, Inc.).

## Rx Column

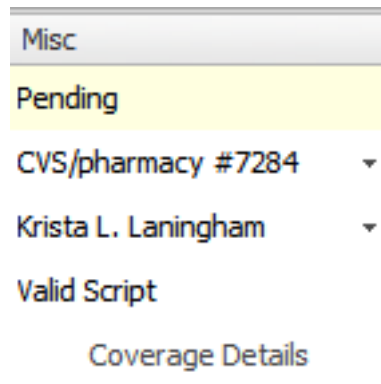
Rx			
<b>Flomax (Tamsulosin):</b>	▼	<b>0.4 mg (capsule)</b>	▼
1 each once a day orally			▼
#30	▼	Substitutions Allowed	▼ 0 ▼

The Rx column displays multiple fields offering detailed information about the prescription.

- \* Drug Name - e.g. Amoxicillin
- \* Strength - and form such as 250 mg. capsules
- \* Sig - (dose, frequency, route)
- \* Dispense - amount or quantity of medication
- \* Substitution - whether or not to allow generics
- \* Refills - the number entered here indicates how many refills are allowed
- \* Comment - location for typing in free-text message to be sent to the pharmacy

Clicking the down-arrows in each field displays the same pick list selections as when working with prescriptions in the Medications field in SOAP encounter notes.

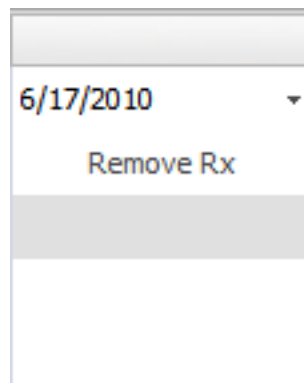
## Misc Column



The Misc column displays status information such as:

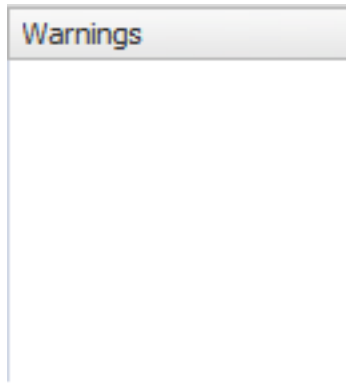
- \* Submitted Via - This will say pending until sent, then it will be replaced by e-Rx, faxed, written (printed), or samples.
- \* Pharmacy - the destination pharmacy name.
- \* Provider - the clinician responsible for the prescription.
- \* Valid Status - indicates whether the prescription can be sent electronically (this has nothing to do with faxing).

## Remove Column



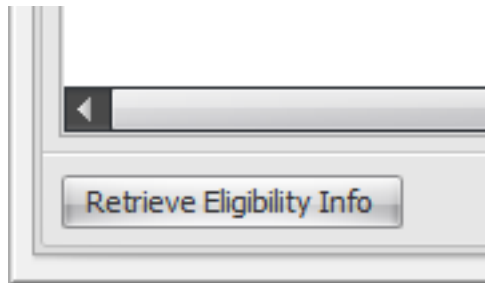
The last column on the right is the Remove column. It allows prescriptions to be removed from the Medications List. (and it subsequently removes it from the active SOAP encounter note if present there).

## Warnings Column



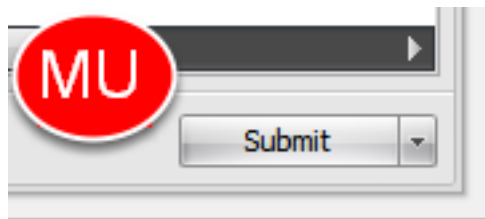
This column displays an alert when scheduled drugs are found.

## Retrieve Eligibility Information



This button retrieves/updates the eligibility information for this patient. If no eligibility is displayed upon opening Rx Manager, use this button to update the eligibility information.

## Submit Rx

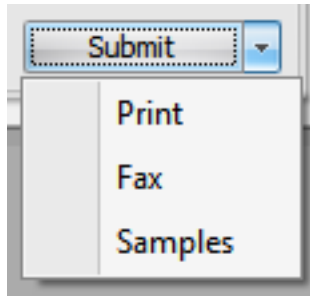


This button will send the prescriptions that are selected. It will send the prescriptions via the default method set under Tools - Options. For more information on these settings, see: [Tools - Options](#).

**\*REQUIRED FOR MEANINGFUL USE (MU) CORE REQUIREMENT - EPRESCRIBING FOR 40% OF PERMISSIBLE SCRIPTS**

[Click here to view Meaningful Use Criteria](#)

## Submission Options



You can also use the drop-down menu to the right of the Submit button to choose to send the prescription by printing, faxing, or by marking that you gave samples.

## Rx Manager - Medications Tab

---

The Medications Tab area displays each structured prescription found in either the patients Rx History or Summary Medications fields. It provides a quick way to view all medications the patient has ever been prescribed via SOAPware.

### Medications List

The screenshot shows the 'Rx Manager' window with the 'Medications' tab selected. Below the tabs, there is a checkbox labeled 'Active Rx's Only' which is currently unchecked. Below this is a table with four rows of medication data. Each row has a right-pointing arrow in the first column, the word 'Add' in the second column, the medication name in the third column, and a 'Discontinue' button in the fourth column. The first row is highlighted in blue.

>	Add	Lisinopril (Prinivil, Zestril):	Discontinue
	Add	Diovan HCT (Valsartan/HCTZ):	Discontinue
	Add	Metformin (Glucophage):	Discontinue
	Add	Flomax (Tamsulosin):	Discontinue

You can also choose to view Active Rx's Only, as well as to discontinue a medication or add it to the Rx Pad.

The area under the History tab displays a complete list of all prescribing actions-transactions (refills, add/remove, start/stop, print, fax edits etc.) performed in Rx Manager. It distinguishes refills from new prescriptions. It also lists whether prescriptions were sent electronically (i.e. E-Rx), printed, faxed, samples, etc. The columns can be sorted by clicking on the headers. The Add button allows for prescriptions to be added to the Medication List in Rx Pad. There are additional columns to the right of the display that are accessible via the horizontal scroll bar (i.e. destination pharmacy, prescriber etc.)

Rx Manager

Rx Pad

Medications

History

Patient - Refill Requests

Drag a column header here to group by that column

Action	Drug	Status		Notes	Pharmacy	Remove
Type	Sent	Response	Details			
	Fill Date	Provider				
Refill	PHENYL CHLOR-T...		PHENYL CHLOR-TAN SUSPENSION Dispense: 120.0		CVS PHARMACY #0000	X
	1/1/0001					
	5/17/2010					
Refill	ZITHROMAX 100...		ZITHROMAX 100 MG/5 ML SUSP Dispense: 30.0		CVS PHARMACY #0000	X
	1/1/0001					
	6/16/2010					
Refill	POLYVIT/FLUORI...		POLYVIT/FLUORIDE 0.25 MG DRP Dispense: 50.0		CVS PHARMACY #0000	X
	1/1/0001					
	5/1/2010					
Refill	Diovan HCT (Val...	Error: 601 - Rec...	12.5 mg-160 mg (tablet) SIG- 1 each once a day orally #30 Substitutions Allowed Refills- 12 Comment- Notes-		CVS/pharmacy #7284 Ph# - 2818902479 Fax# - 2818077572 13757 CYPRESS NORTH	X
e-Rx Sent	5/3/2010	Unknown				
	1/1/0001	c540f39c-bcb9-4...				
Refill	Metformin (Gluc...	Discontinued	850 mg (tablet) SIG- 1 each 2 times a day	Discontinued on 5/4/2010	Ph# - Fax# -	X
Discontinued	5/4/2010	Discontinued				
	1/1/0001	c540f39c-bcb9-4...				
Refill	Flomax (Tamsulo...	Sent	0.4 mg (capsule) SIG- 1 each once a day orally #30 Substitutions Allowed Refills- 0 Comment- Notes-		CVS/pharmacy #7284 Ph# - 2818902479 Fax# - 2818077572 13757 CYPRESS NORTH	X
Sample Given	6/17/2010	Unknown				
	1/1/0001	c540f39c-bcb9-4...				
Refill	Flomax (Tamsulo...	Sent	0.4 mg (capsule) SIG- 1 each once a day orally #30 Substitutions Allowed Refills- 0 Comment- Notes-		CVS/pharmacy #7284 Ph# - 2818902479 Fax# - 2818077572	X
Sample Given	6/17/2010	Unknown				

Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient.

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## Rx Hub Medications

Refill
Refill
e-Rx Sent
Refill
Discontinued
Refill
Sample Given
Refill
Sample Given

The patient's History list shows all medications that have been prescribed via the Rx Manager as well as other prescriptions from the patient's Rx Hub.

### Important Tip

Also keep in mind that certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient.



## Rx Manager - Refill Requests

The Refill Requests tab provides a location to view this patient's matched refill requests. You can approve or deny them here or you can use the Refill Requests Manager to address all patient refills from one central place. To learn more about refill requests manager, see: [Refills](#).

### Refill Requests Tab

The screenshot shows a software window titled "Refill Requests" with a close button (X) in the top right corner. The window contains a table with the following columns: Date Requested, Last Fill Date, Patient, Description, Refills (Total number of dispensings...), Comments, and Pharmacy. A "View pending refill requests" button is located above the Description column. The table has several rows, with the first row highlighted in blue. The first row contains the following data: Date Requested: 5/19/2009 7:25 AM, Patient: Patient, Test, SS# - 9/10/2008, Description: Amoxil 500 mg Oral Tab, Take 2 Tablet(s) By Oral Route BID Qty: Refills Requested: 2, Refills: 2, Comments: Note to pharmacy, Pharmacy: Druglix, Ph# - 4015633390, Fax# - 4016668888, 333 SR 566. Below the table, there are three buttons: Refresh, Delete Request, and Send.

Date Requested	Last Fill Date	Patient	Description	Refills (Total number of dispensings...)	Comments	Pharmacy
5/19/2009 7:25 AM		Patient, Test	Amoxil 500 mg Oral Tab	2	Note to pharmacy	Druglix Ph# - 4015633390 Fax# - 4016668888 333 SR 566
		SS# - 9/10/2008	Take 2 Tablet(s) By Oral Route BID Qty: Refills Requested: 2			
		Notes:				
		Josh Farquharson				
		Match Patient	Approved	2	Note to pharmacy	

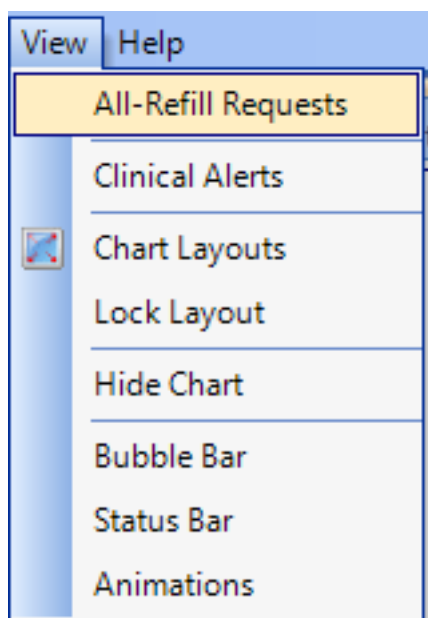
To handle a request from the patient's Rx Manager, select an action, choose a number of refills (refills have to be set to at least one (1) or else the refill is marked as denied).

Once you have approved or denied the refill request, hit the Send button at the lower right.

## Refills

This dialog can be docked for ease of access, and can be set to expand/collapse on demand.

### View - All Refill Requests



To access the Refill Requests dialog, Click View in the menu bar and Click the All-Refill Requests menu item. This will display the refill requests for All patients for the Active Provider.

### Refill Requests

A screenshot of the 'Refill Requests' dialog box. The dialog has a title bar 'Refill Requests' with a close button. Below the title bar is a table with columns: 'Date Requested', 'Patient', 'Description', 'Refills (Total number of dispensings...)', 'Comments', and 'Pharmacy'. The first row of data is highlighted in blue. Callouts 1 through 4 point to specific elements: 1 points to 'Date Requested', 2 points to 'Patient', 3 points to 'Description', and 4 points to 'Pharmacy'. Below the table is a 'Refresh' button and 'Delete Request' and 'Send' buttons.

Date Requested	Patient	Description	Refills (Total number of dispensings...)	Comments	Pharmacy
5/19/2009 7:25 AM	Patient, Test	Amoxil 500 mg Oral Tab	Take 2 Tablet(s) By Oral Route BID Qty: Refills Requested: 2		Druglox Ph# - 4015633390 Fax# - 4016668888 333 SR 566
9/10/2008	SS# -	Notes:			
Josh Farquharson	Match Patient	Approved	-- 2	-- Note to pharmacy	

As the user moves from one refill request to another, the corresponding patient chart is automatically loaded and displayed.

The display is horizontally divided into 4 general areas (from left to right).

1. Refill Notice
2. Patient Information
3. Description

## 4. Pharmacy Information

Note: A similar display is also available in Rx Manager. However, that display only shows pending refill requests for the active patient chart at the time the Rx Manager is open.

### Refill Notice

The first, or left-most, area of each refill request is the Refill Notice region and can contain Date Requested, Last Fill Date, Provider, and Action-Status rows (i.e. ready to send, scheduled drug, patient match needed etc.) When the refill request is complete and valid the Status will turn Green.

The Last Fill Date item is optionally sent by the pharmacies. An empty value does not imply the script has not been previously filled by the pharmacy.

NOTE: If a provider elects to no longer receive refill requests electronically, they will need to send an email to [support@soapware.com](mailto:support@soapware.com) request that it be disabled.

From that point, the pharmacy will send email requests in the conventional manner, by phone call or fax.

### Patient Information

The second area, horizontally, is the Patient Information passed to SOAPware from the pharmacy. When there is a match to a SOAPware chart (automatic or manual) the background is green. Red indicates the patient information from the pharmacy has not yet been matched to a specific SOAPware chart.

### Description

The third area is the Description, and is largely made up of the actual medication-prescription details sent from the pharmacy. The bottom row provides the ability to Approve/Deny, define # of refills and provides an option to send a typed, free-text comment back to the pharmacy.

### Pharmacy Information

The fourth area is for the Pharmacy Information.

### Refill Requests Buttons - Actions

#### Refresh

The Refresh button checks for any new refill requests.

#### Send

The Send button sends a response for the currently selected refill request.

### **Delete Request**

The Delete Request button presents a dialog explaining that it is preferable to respond to the pharmacy with a Denied reason rather than deleting the request. It is best to then proceed to select one of the valid reasons for denial and add any necessary comments in the available comment box. Again, it is best to submit a Denied response, and this does remove the refill request from the list.

### **Storing Prescription Information**

All the information listed above is stored in the related patient's History section of Rx Manager after being submitted to the pharmacy (or removed).

If there is an active, unsigned SOAP encounter note, the prescriptions will also be transferred to the Medications field.

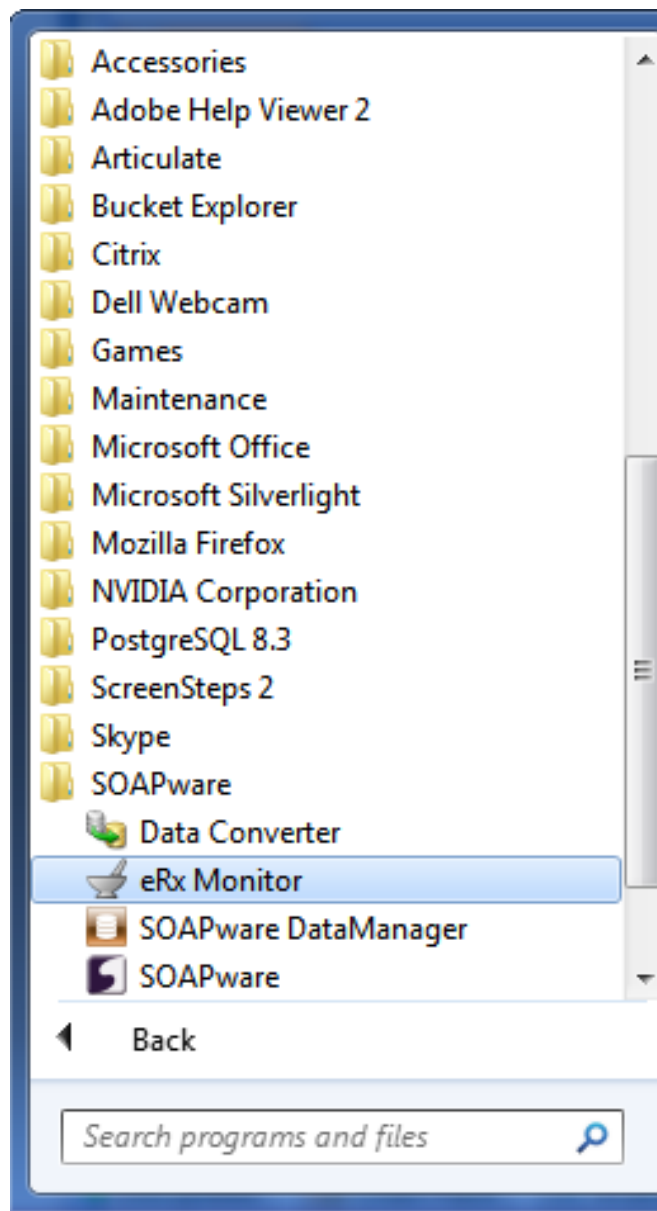
## eRx Monitor

---

This application is used to download your refills from Surescripts. If the application is running, every 15-minutes it will look at the Surescripts Server to see if you have any refills to download. eRx Monitor needs to run only on one computer for the day.

Important: You will automatically be signed up for refill requests with SOAPware 2010. You must sign in to the eRx Monitor daily to receive those refill requests from the pharmacy.

### Starting eRx Monitor



1. Click the Windows Start button.
2. Click the All Programs menu item.
3. Click the SOAPware menu item.

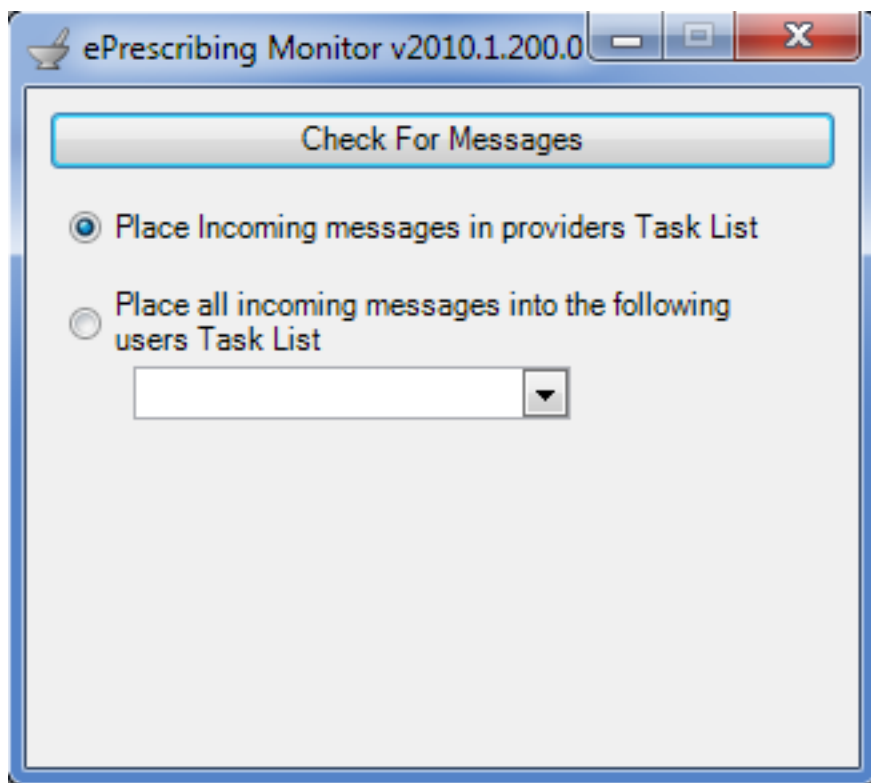
4. Click the ERx Monitor menu item.

## Signing In



Sign in as you would for your SOAPware log-in.

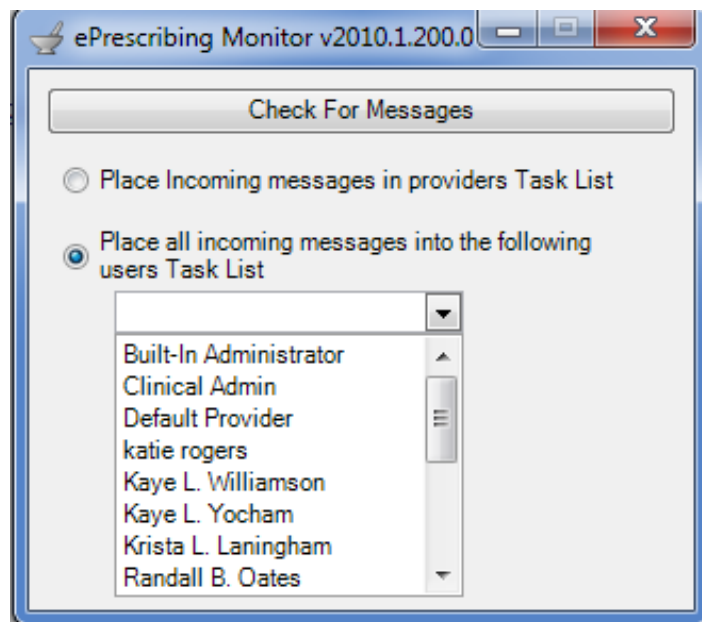
## Check for Messages



Click the Check for Messages button as needed.

Minimize the ePrescribing Monitor dialog and leave it running while the clinic is open.

## Select User Task List



You can have it direct Refill Requests to the provider's task list or a certain task list you choose. You can find any new refill requests in the Task List you set to send the refills to.

In SOAPware 2010, you can also find all open Refill Requests by going to View, All-Refill Requests.



## Anti Tampering Features

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Regarding Medicaid printed prescriptions, CMS has recently clarified their definition of secure printing to enable EMRs to directly print a secure prescription without the need for expensive security paper. Of course, the easiest route to preventing prescription fraud and errors is to directly submit your prescriptions via electronic prescribing. The details of the CMS Guidelines can be found [here](#).

**Important:** It is not legal in any state to send scheduled medications electronically. Scheduled medications must be printed out and signed.

Check your state pharmacy boards for regulations about faxing scheduled drugs.

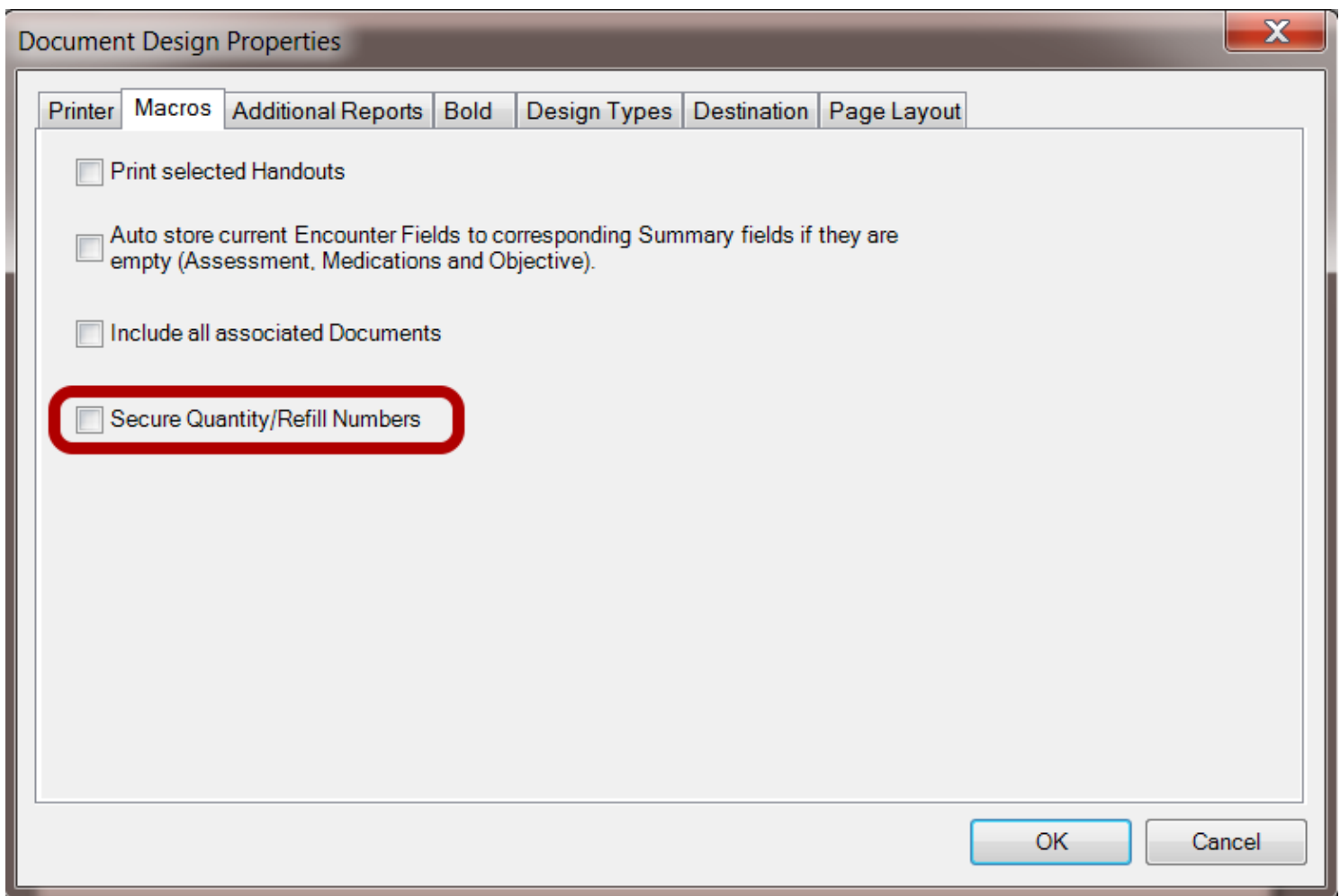
### Printing a Secure Rx from SOAPware

All 3 items are required in order for SOAPware to print secure prescriptions according to the rules.

1. Micro-printed Signature Line
2. Borders around the Quantity and Refill elements
3. Security features and descriptions listed on the prescription

Micro-printing simply means the printing of a defined text string in a font so small to be copied (when it's copied it's either unreadable or appears as a line). Technically, it's defined as a font that is .5 points in size or smaller and requires 5x magnification or greater to read. The potential gotcha with printing these is that your printer may not be able to accurately reproduce fonts that small. It's suggested you print an Rx and view it under magnification to ensure the micro-printing is visible.

## Creating a "Secure" Rx Document Design



1. Open existing Document Design (Tools > Document Designer; Then choose File > Available Designs)
2. Display Document Design Properties (Edit > Design Properties)
3. Click on the 'Macros' Tab and check the box labeled - Secure Quantity/Refill Numbers

## Design Types

Document Design Properties

Printer Macros Additional Reports Bold Design Types Destination Page Layout

Types

☐ General Design

☐ Order Design

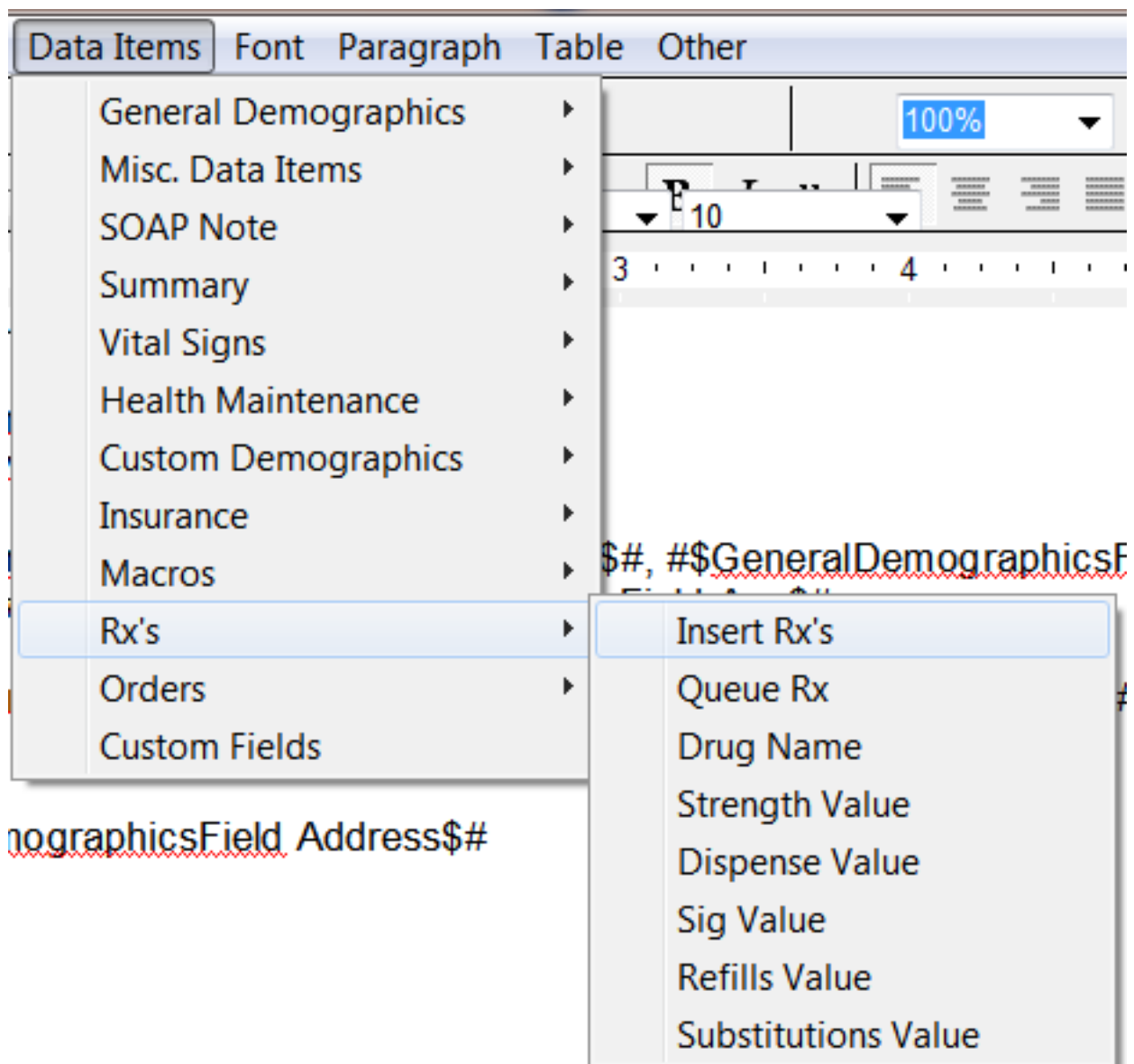
☒ RX Manager Design

Insert 1 Medication(s) per "Insert Rx's" Data Item

OK Cancel

Select the Design Types tab and make sure Rx Manager Design is selected. You can also select the number of Rx's per page you want printed.

## Insert Rx's



In the body of the Rx place the Command Data Items - Rx's - Insert Rx's at the location you want the Rx(s) inserted.

## Signature Line

#\$EncounterField Medications ,,\$#

Dr.

#\$CurrentProvider Full Name\$#

#\$CurrentProvider Full Name\$#

Substitution permitted

Dispense as written

**Regarding Refills:** After 12 months a medical history update and exam is necessary for any refills. Bring bottles for us to double check when you return for office visits.

Create a signature line that repeats "THIS IS AN ORIGINAL PRESCRIPTION" many times. We recommend using all caps to improve readability.

Set the font size of this line to ".5" by selecting the entire text, placing .5 in the Font Size drop down box in the tools bar and then pressing ENTER.

## Add Footer

Security Features: \*\*surrounds both the Quantity and Refill numbers, the signature line is micro-printed with "THIS IS AN ORIGINAL PRESCRIPTION" and is viewable under 5x or > magnification.

Click Edit > PageHeader/Footer and then Click into the Footer area of the document.

Enter the text " Security Features: \*\* surrounds both the Quantity and Refill numbers, the signature line is micro-printed with "THIS IS AN ORIGINAL PRESCRIPTION" and is viewable under 5x or > magnification.

Then, save the document design by clicking File > Save.

## Default Rx Print Designs

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Options in the Printing-Faxing tab are used to define the default reports to use when Rx Manager is used to print and fax prescriptions. In previous versions, the layout of faxed prescription was hard-coded into the program. This has been changed to allow faxed prescriptions to now have the flexibility and formatting as is found in the Document Designer.

### Tools - Options

To learn more about how to set up the default Rx print and fax designs, see: [Tools - Options](#).

## Scheduled Drug Routing

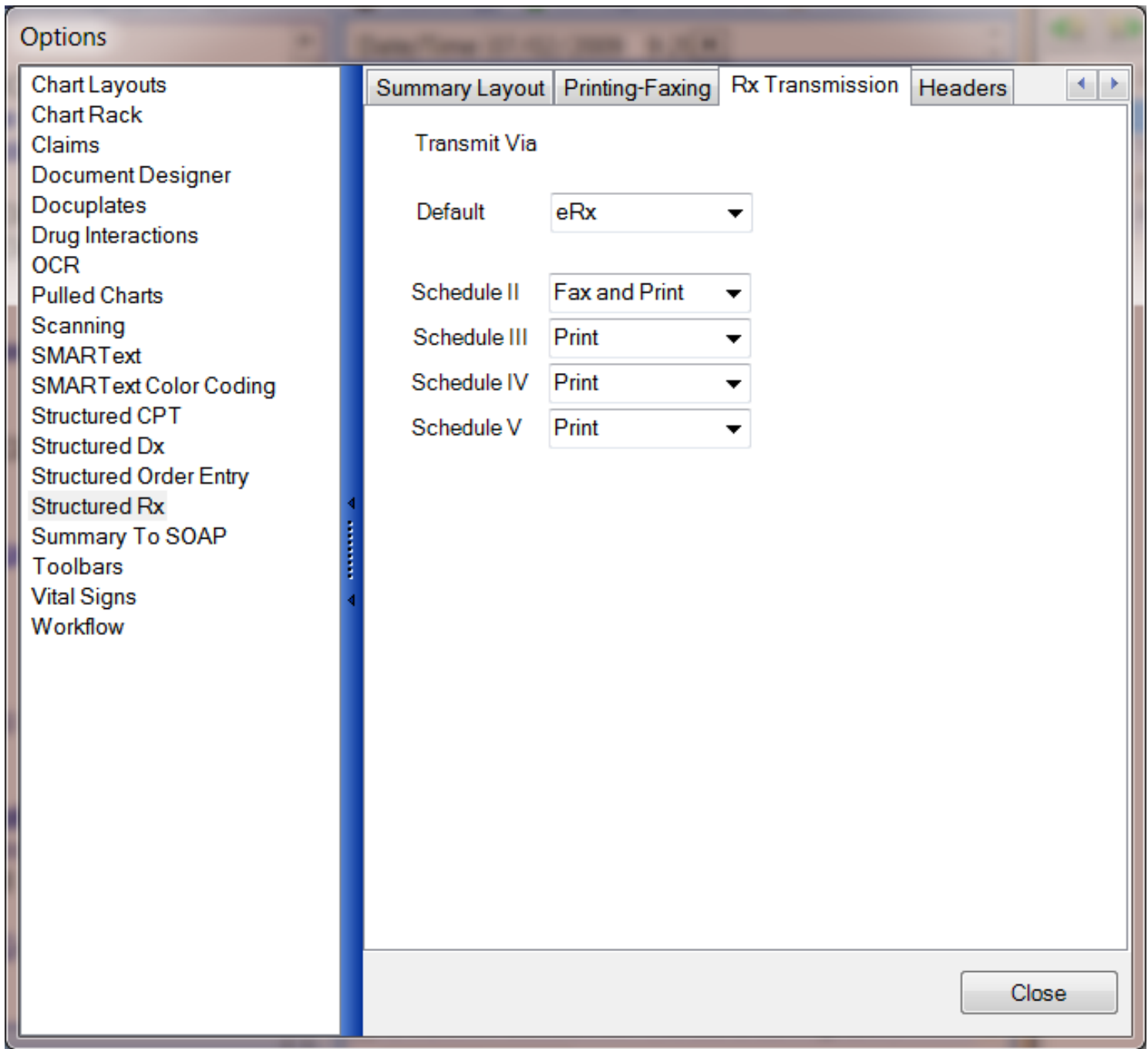
---

Scheduled drug routing is designated via: Tools -> Options -> Structured Rx -> Rx Transmission.

The options on the Scheduled Drugs tab allows users to individually define how various, prescribed meds of differing schedules will be handled. There is much confusion here. At a national level, electronic transfer of any scheduled medications is illegal in all states. However, many state pharmacy boards allow for direct, manual faxing of some scheduled meds.

**NOTE: Users in almost every state have asked that we allow for initial faxing of scheduled meds (containing an image of their signature) from SOAPware. If you choose to do this, implement workflows to subsequently provide pharmacies with a signed, hard-copy, paper prescription as a follow-up. The DEA is likely to announce rules that will allow electronic transmission of scheduled meds sometime in 2011.**

## In Summary



Faxing is not considered to be e-prescribing. No e-prescribing in any state passes any type of signature. The authentication of the prescriber is inherent within the network managing the prescriptions, and so no signatures are involved. E-prescribing of non-scheduled meds, not containing physician signatures is now legal in all 50 states.

In contrast, faxing (which is not e-prescribing) of scheduled meds in all 50 states requires a hand-written, fresh signature.

However, some pharmacies, in some states will often accept a faxed prescription of a scheduled med



that contains an image of a signature. It represents confusion that direct faxing from an EMR of scheduled med prescriptions is not legal, but happens anyway in some locales.

What makes this more confusing, and ridiculous, is that many pharmacies end up only being able to receive faxes of all meds, anyway, because they do not yet have software that can handle direct, electronic transfer.

## Custom Sigs

The Sig component of SOAPware Rx's has undergone a drastic change in SOAPware 2010. Gone are the cumbersome and hard to read/fill sigs.

In SOAPware 2010, most medications have pre-built Sigs that cover the most common prescribing scenarios. If you are a previous SOAPware user, you will need to update your existing Rx's so that they contain the latest settings. This is easily accomplished via the Update SMARText command in the SMARText Items Manager.

### Accessing Sigs

The screenshot shows the SOAPware interface. The main window displays a patient note with the following text: "your body right infection, get plenty of rest, drink lots of fluids and take any medication your doctor has prescribed for you. You may use acetaminophen (Tylenol) and or ibuprofen (Advil, Motrin) for fever or pain relief. It is important not to use aspirin in children who have the flu. Other medications which may be helpful include cough syrup (Robitussin DM) and decongestants (such as Sudafed)."

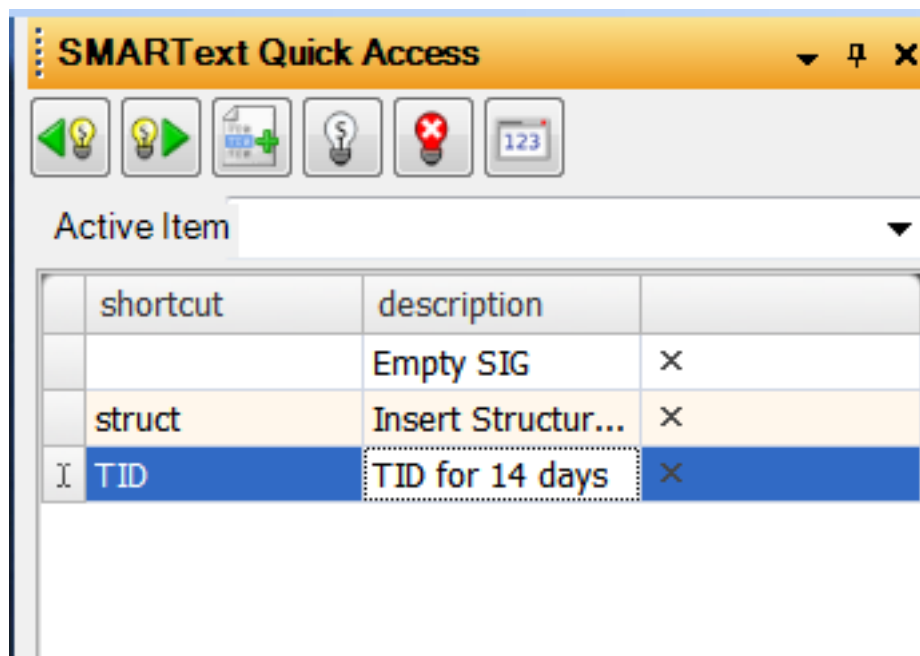
Below the text, there is a section titled "Medications" with the following details: "Tamiflu: SIG- [ 1 each 2 times a day orally ]", "#10 Substitutions Allowed", "Refills- 0", "Strength-", "Related Dxs-", "Start Date-", and "End Date-".

The SMARText Quick Access panel is visible on the right side of the screen. It contains a table with the following data:

shortcut	description	
>	Empty SIG	×
struct	Insert Stru...	×
*		×

Available Sigs are accessed via the Quick Access display. Click on the SIG- header to activate. Clicking on the Sig list item in the Quick Access list inserts it into the prescription item.

## Adding Sigs



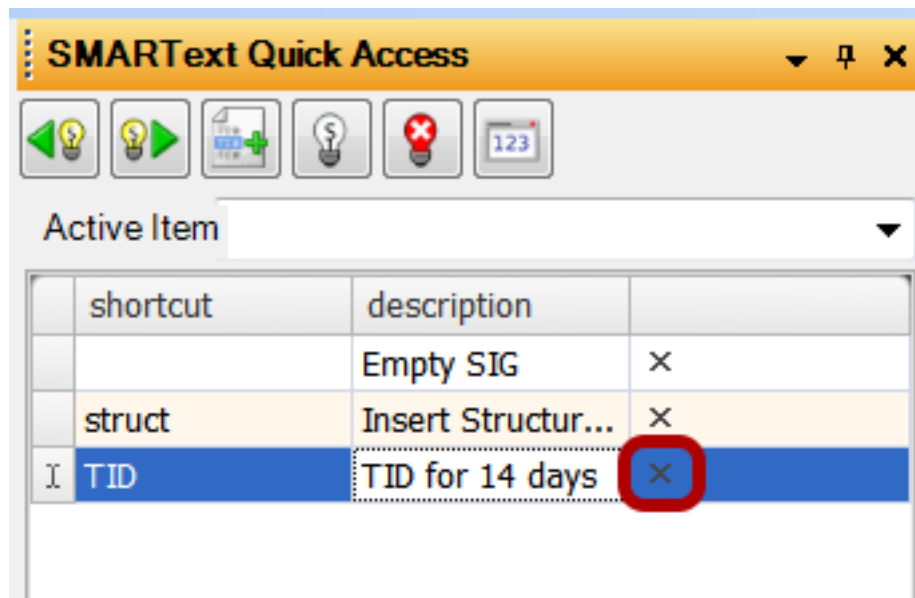
SOAPware allows users to modify the existing Sigs or add new ones at anytime.

To add a new Sig:

- 1: Select the empty sig line with the asterisk to the left.
2. You must type a shortcut in the first column. This will not be entered into the SOAPnote medication, but is required to save the sig.
3. Type in the desired information directly into the Sig display. For example, we could add... tid for 14 days.
4. Click back to one of the previous sigs. This step will save the sig you just created.
5. Click on your custom sig to insert it into the SOAPnote.

**NOTE: The Dispense/Quantity element does not automatically update based on the Sig.**

## Removing Sigs



Each Sig line has an X on the far right. Clicking on this will remove that Sig from your system.

**NOTE:** The Empty Sig and Structured Sig items are always present. if removed, they will simply be added the next time the Rx is activated.

## ERx Workflow

To access Rx Manager use the F8 key, right click over Medications in the SOAPnote or select Docutainers > Rx Manager from the menu.

**NOTE: SMARText medications must be entered in the Summary medications field and the SOAPnote medications field to be ePrescribed. The patient's General Demographics section must contain the full patient name, birth date, and address.**

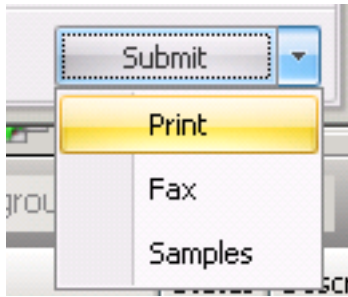
### ePrescribing a Prescription

The screenshot shows the Rx Manager application window. At the top, there are tabs for Rx Pad, Medications, History, and Patient - Refill Requests. Below the tabs is a Pharmacy selection field with a dropdown menu showing "COLLIER DRUG STORES-NORTH HILLS (Ph#- 479-443-9200 Fax#- 479-443-9295) 3380 N. FUTRALL DRIVE ...". Below this is a Patient Information section with Allergies and Notes fields. A row of buttons includes Add Rx, Update Summary, Interactions, and a Show Header checkbox. The main area is a table with columns for Actions, Rx, and Mi. The first row shows a checked checkbox in the Actions column, a blue 'e' icon, and the Rx details: "Atenolol (Tenormin): 100 mg (tablet)" and "1 each once a day orally". The second row shows "Unknown" in the Actions column, "#90" in the Rx column, and "Substitutions Allowed" and "3" in the Mi column. At the bottom right, there is a Submit button with a dropdown arrow, which is highlighted with a red box.

Actions	Rx	Mi
<input checked="" type="checkbox"/> e	<b>Atenolol (Tenormin):</b> 1 each once a day orally	100 mg (tablet) Pri
Unknown	#90	Substitutions Allowed 3 Re Pr

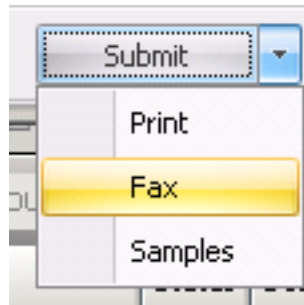
Clicking the submit button will transmit the prescription by ePrescribing. A participating pharmacy must be selected for ePrescribing. The submit button default setting is for ePrescribing. This action can be edited in Tools. See [Tools - Options](#).

## Printing a Prescription from Rx Manager



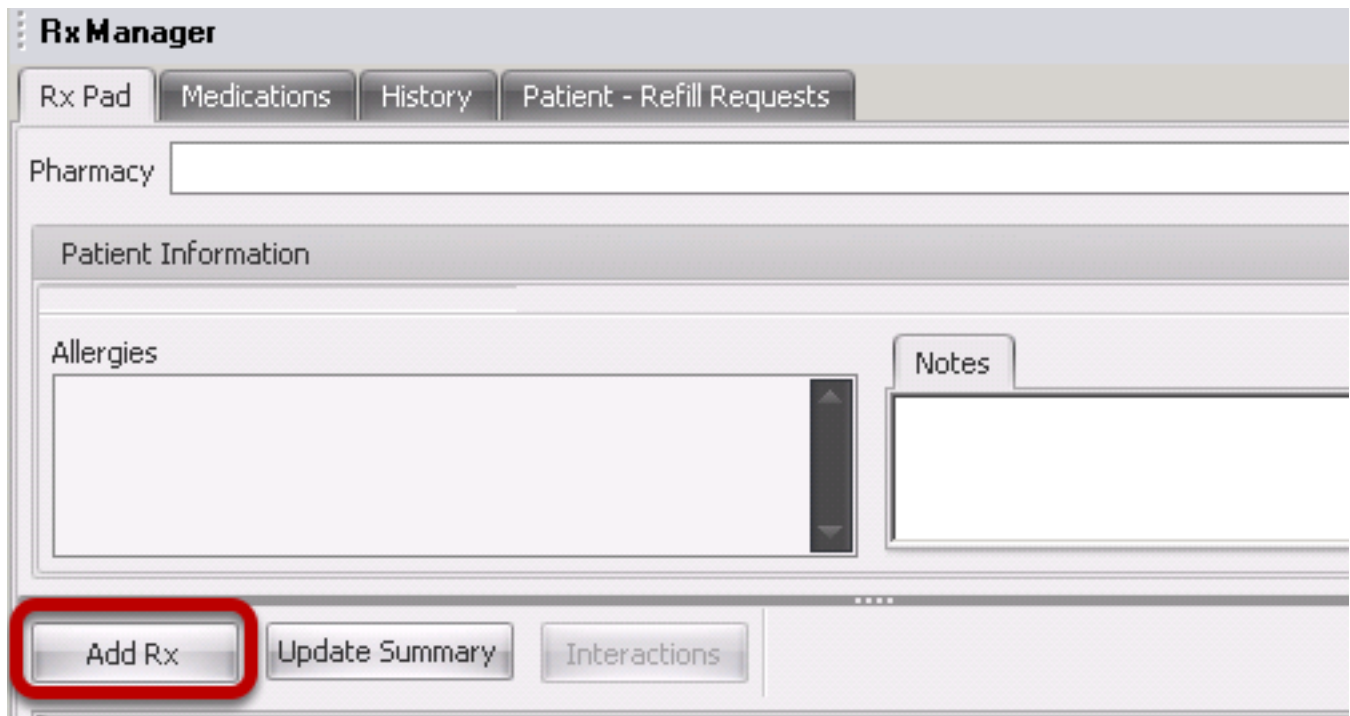
Click the drop down arrow and highlight Print.

## Faxing a Prescription from Rx Manager



Click the drop down arrow and highlight Fax. To note samples given for a patient, click Samples.

## Adding a Prescription in Rx Manager



Click the Add Rx button.

## Checking Available Medications

**Available Medications**

Find

Description
> (Allergy) "Lodine (Etodolac)"
"Lodine (Etodolac) 300mg, #60, 1 bid, R-0"
Lodine
Lodine XL
Lodine
Lodine (Etodolac) XL PICK LIST
Lodine (Etodolac) XL PICK LIST
"Lodine (Etodolac) 400mg, #60, 1 bid, R12"
"Lodine (Etodolac) 200mg., #90, 1 tid, R-3" F-\$
"Lodine (Etodolac) 200mg., #90, 1 tid, R-3" F-\$
"Lodine (Etodolac) XL 400mg, #60, 2 qd R-12"
Lodine (Etodolac) PICK LIST ADDED
"Lodine (Etodolac) PICK LIST
"Lodine (Etodolac) 300mg, #60, 1 bid, R-0"
"Lodine (Etodolac) XL 400mg, #60, 2 qd R-12"

Enter name of medication for the search. Click the Search Online Library button. A list will populate related to the entered medication. Click to highlight medication, then click Insert to place on Rx Pad.

## Updating Summary Medications

The screenshot shows the 'Rx Manager' window with tabs for 'Rx Pad', 'Medications', 'History', and 'Patient - Refill Requests'. The 'Medications' tab is active. Below the tabs, the 'Pharmacy' field is set to 'COLLIER DRUG STORES-NORTH HILLS (Ph#- 479-443-9200 Fax#- )'. The 'Patient Information' section is empty. The 'Allergies' section has a text area and a 'Notes' tab. At the bottom, there are three buttons: 'Add Rx', 'Update Summary' (highlighted with a red box), and 'Interactions'.

Clicking on Update Summary will take you to the Summary Merger Display.

## Summary Merger

The screenshot shows the 'Summary Merger' window. It has a table with two columns: 'Ignore' and 'Update'. The 'Update' column has a checked checkbox. The 'Rx' column shows 'Atenolol (Tenormin): 100 mg (tablet)'. At the bottom right, there are two buttons: 'Close' and 'Merge' (highlighted with a red box).

Ignore	Update	Rx
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Atenolol (Tenormin): 100 mg (tablet)

Medications can be updated/merged to the Summary Medications or this merge can be ignored.



## G-Codes for Medicare Electronic Prescribing Bonus

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It is necessary to be using SOAPware 2010.1 (or later) in order to qualify for the e-prescribing bonus.

For additional information regarding this initiative, visit the [CMS e-prescribing site](#).

### Using the G-Code

Practices that meet the e-prescribing criteria will be eligible for a 2 percent bonus in 2009 and 2010, a 1 percent bonus in 2011 and 2012 and a 0.5 percent bonus in 2013. Practices not e-prescribing will face a 1 percent cut in 2012 and 2013. That cut will grow to 2 percent in 2014 and beyond.

In order to participate, physicians simply add the following G-code to their Medicare claims for patient encounters:

Shortcut: eRx

G-code: G8553

Description: At least 1 Rx via qualified eRx system

Explanation: All prescriptions created during the encounter were generated using a qualified e-Prescribing system

### Notes

E&M services must be at least 10% of total allowed Medicare charges.

In addition, the physician must report the G-code, above, for at least 50% of the cases in which they apply (i.e..encounters with E&M codes).

The bonus is based on total Part B payments and not just E&M

The Average bonus is around \$1600/physician/year (e-prescribing is only \$500/physician/year)

This eRx bonus is in addition to other bonus programs such as the PQRI.

## **Additional Codes Needed**

The G-code must be listed as an additional procedure code on the standard claim form. However, it appears the electronic prescribing G-code has to be listed with one of the below codes in order for the G-code to be valid.

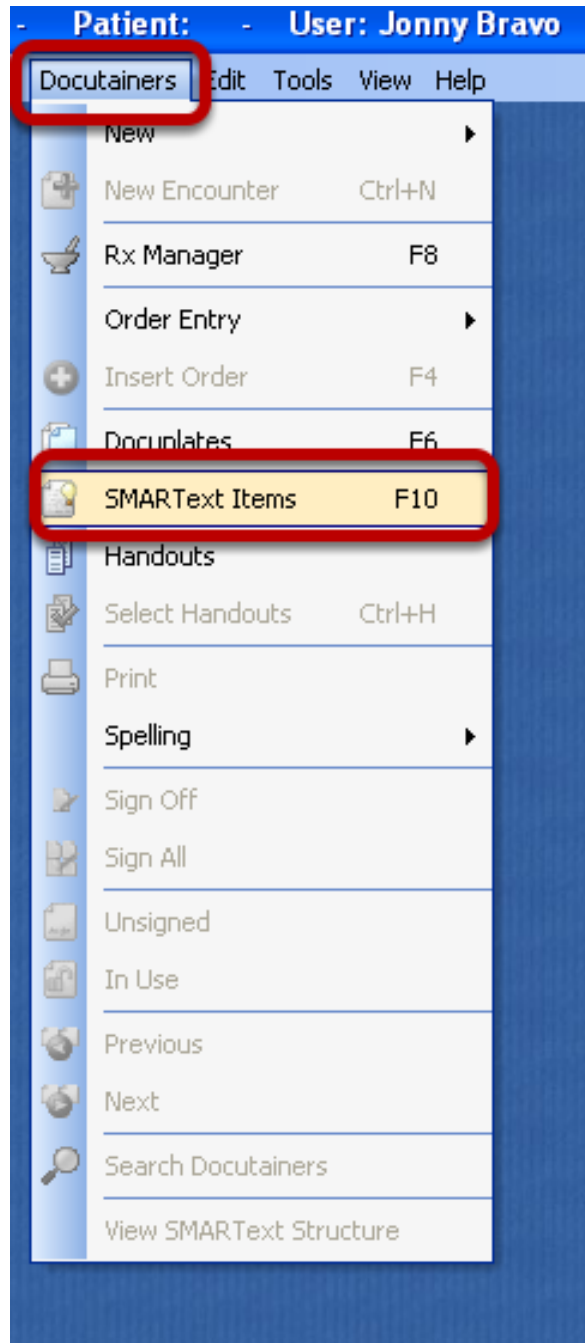
- \* (New Patient) 99201, 99202, 99203, 99204, 99205
- \* (Established Patient) 99211, 99212, 99213, 99214, 99215
- \* (Consultations) 99241, 99242, 99243, 99244, 99245
- \* (Psych Services) 90801, 90802, 90804, 90805, 90806, 90807, 90808, 90809
- \* (Behavioral Assessment) 96150, 96151, 96152
- \* (Screening & Diabetic Training) G0101, G0108, G0109.
- \* (Eye Codes) 92002, 92004, 92012, 92014

## Creating SMARText Prescriptions for Durable Medical Supplies

Durable Medical Supplies can now be created as SMARText Items and **printed** or **faxed** from the Rx Manager.

In this lesson we are going to create a prescription for Lancets.

### Accessing the SMARText Items Manager











- 1) Click on Docutainers on the Menu Bar
- 2) Click on SMARText Items

## Creating a New Item

**SMARText Items**

Search  List - By Type List - By Keyword

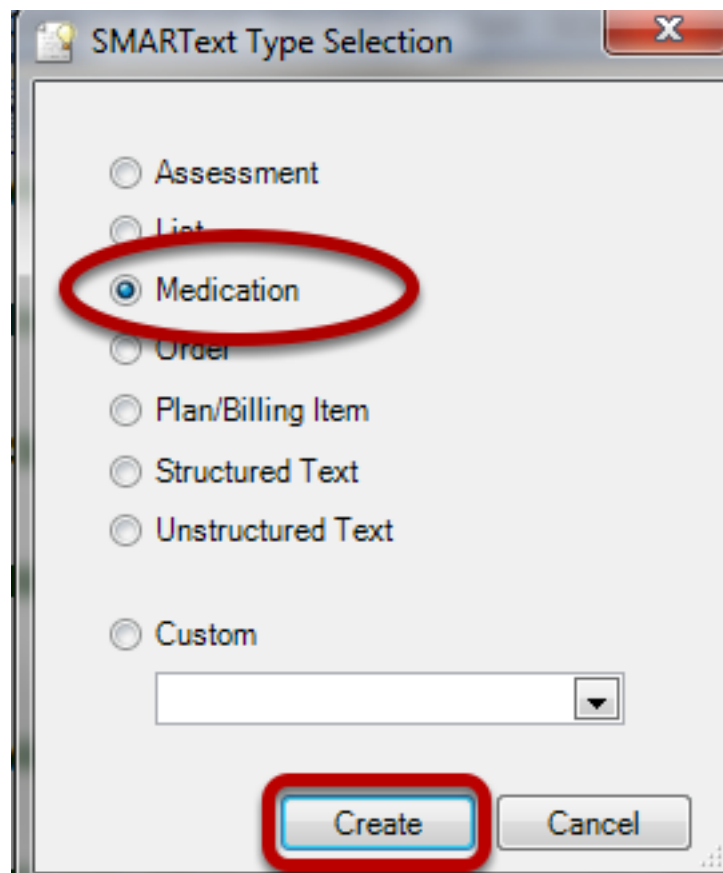
Find

Shortcut	Description	Type	Usage	Keywords	Last Mo
▲	-RFE- "Diabetes...	Chief Finding Sp...	0	!!T89, !01, !Chief...	12/1/200
▲	-RFE- "Diabetes...	Chief Finding Sp...	0	!!T90, !01, !Chief...	12/1/200
▲	(Diabetes - Type...	Item CLuster	0	01.1.T89.MET, 0...	12/1/200
▲	"not measuring b...	HPI Finding Spec	0	081015, blood, d...	12/1/200
▲	"random blood s...	HPI Finding Spec	0	080930, 081015,...	12/1/200
▲	"fasting blood su...	HPI Finding Spec	0	080930, 081015,...	12/1/200
▲	"measures blood...	HPI Finding Spec	0	081015, blood, d...	12/1/200
▲	-RFE- "Endocrin...	Chief Finding Sp...	0	!!T99, !01, !Chief...	12/1/200
▲	-RFE- "Gestatio...	Chief Finding Sp...	0	!!w85, !10, !Chie...	12/1/200
▲	-RFE- "High risk...	Chief Finding Sp...	0	!!w84, !10, !Chie...	12/1/200

1) Click on the Green + to create a Medication Item.

\*\*\*Note this should only be done when creating DME Items. Prescription medications should be duplicated and then edited. See "Creating SMARText Items in the SMARText Items Manager"



- 1) Click the radio button next to Medication
- 2) Click Create

SMARText Designer

Shortcut  1

Description  2

Keywords  3

☒ Display Header  4 ☐ only when item is empty.

Advanced

General

Item Type

Strength-  Sig-  Quantity-  Substitution-  Refills-  Related Dxs-  Start Date-  End Date-  Comment-  Notes-

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with  ☐ English List (or) ☐ End with

☐ Separate Lines

- 1) Enter Shortcut
- 2) Enter Description.
- 3) Enter Keywords
- 4) Check Box next to Display Header and Enter Diabetic Testing Supplies

## Entering the "Strength"

The screenshot shows the SMARTText Designer window. The 'Advanced' tab is selected. The 'Item Type' field is empty. The 'Strength' field is highlighted with a red circle and a '1' in a black circle. The 'Sig' field is highlighted with a red circle and a '2' in a black circle. The 'Quantity' field is highlighted with a red circle and a '3' in a black circle. The 'Substitution' field is highlighted with a red circle and a '4' in a black circle. The 'Refills' field is highlighted with a red circle and a '5' in a black circle. The 'Related Dxs' field is highlighted with a red circle and a '6' in a black circle. The 'Start Date' field is highlighted with a red circle and a '7' in a black circle. The 'End Date' field is highlighted with a red circle and an '8' in a black circle. The 'Item Comment' dialog box is open, showing the text 'Lancets and Strips' in the comment field, which is highlighted with a red circle and a '2' in a black circle. The 'Save' button is highlighted with a red circle and a '3' in a black circle. The 'Cancel' button is highlighted with a red circle and a '4' in a black circle.

SMARTText Designer

Shortcut: diatestsup

Description: Diabetic Testing Supplies

Keywords: diabetic, test, supplies, supply, niddm, supplies, durable, medical, diabetes

☒ Display Header: Diabetic Testing Supplies

Advanced

Item Type

Strength- [ Sig- Quantity- Substitution- Refills- Related Dxs- Start Date- 8/0:

Item Comment

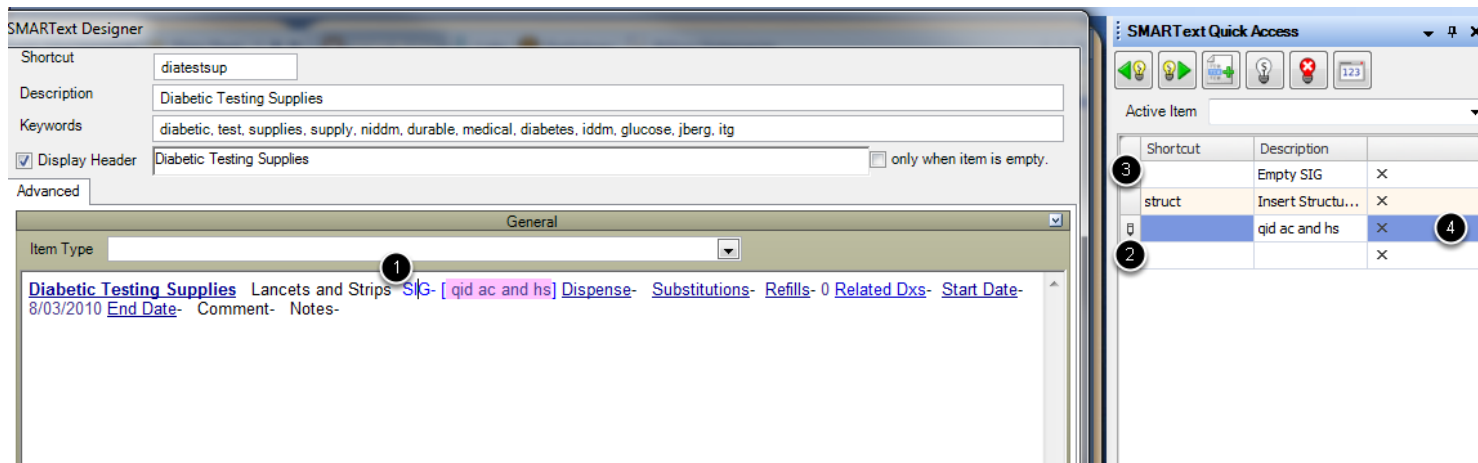
Lancets and Strips

Save Cancel

Item Settings

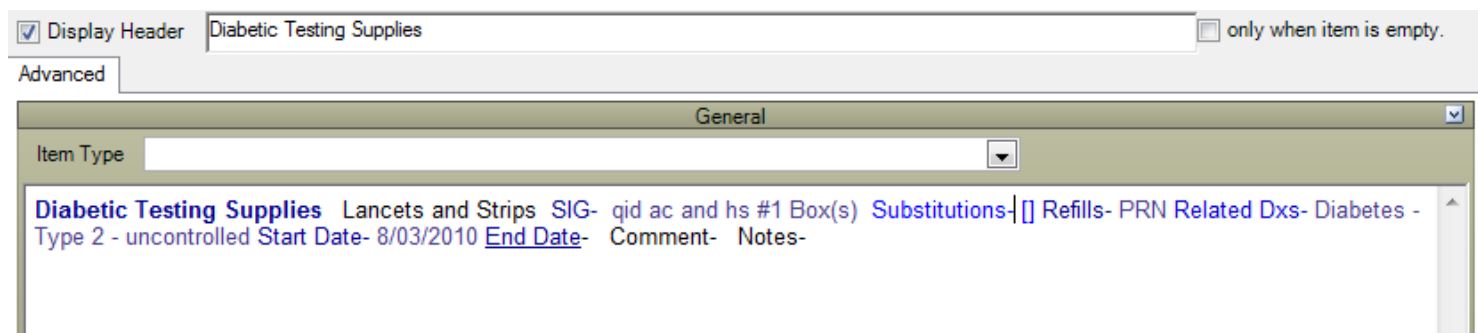
- 1) Left Click on Strength to bring up the Item Comment Box
- 2) Type in the Item Comment box "Lancets and Strips"
- 3) Click Save

## Entering the "Sig"



- 1) Left click over Sig
- 2) Create a new Sig by clicking in the blank sig line in the SMART Quick Access and enter your Sig
- 3) Click on the Empty SIG to save the newly created sig
- 4) Click on the sig you created to Insert this into your item.

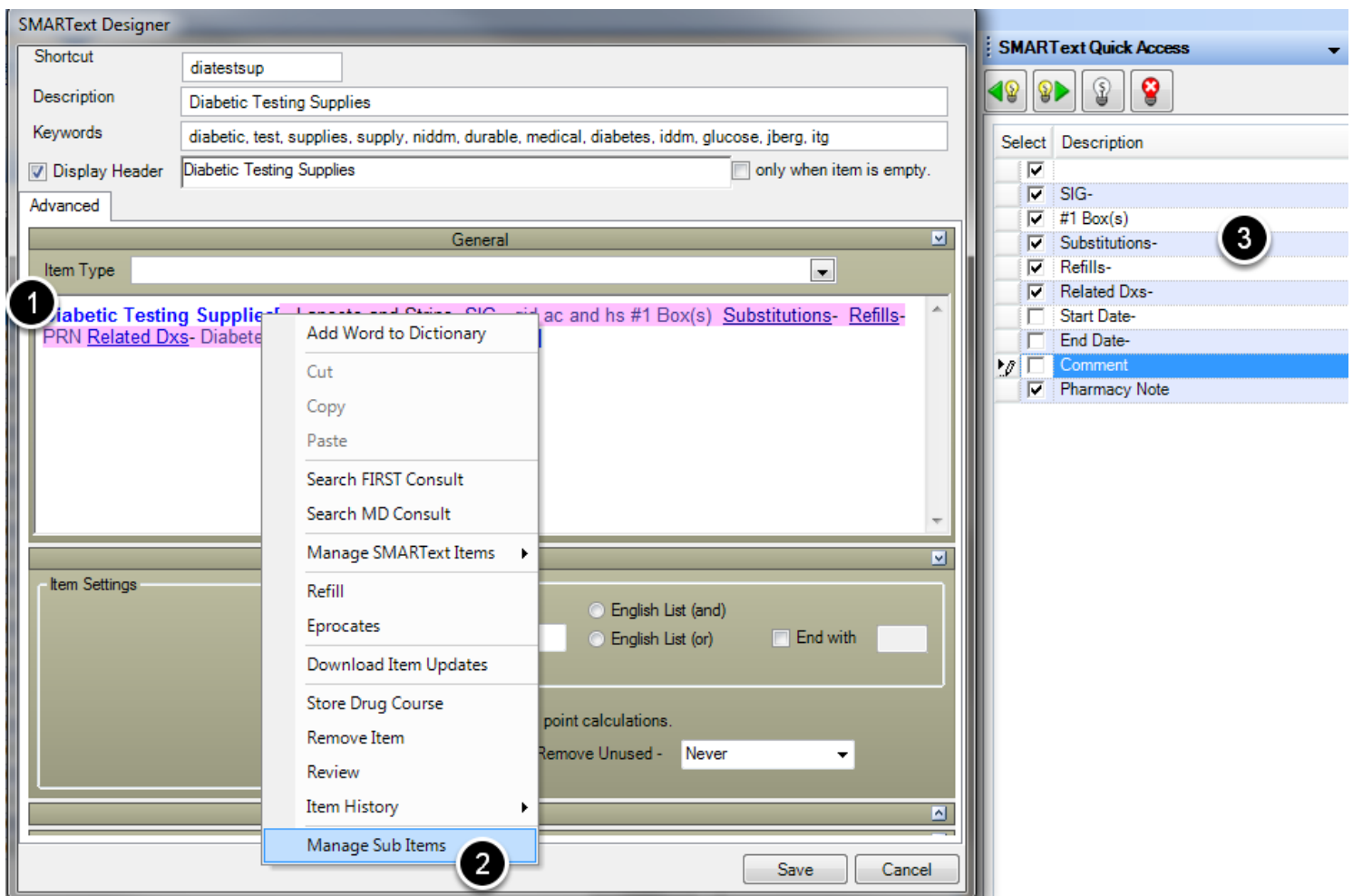
## Fill out Remaining Items



Fill in Dispense number, Substitutions, and Refills.

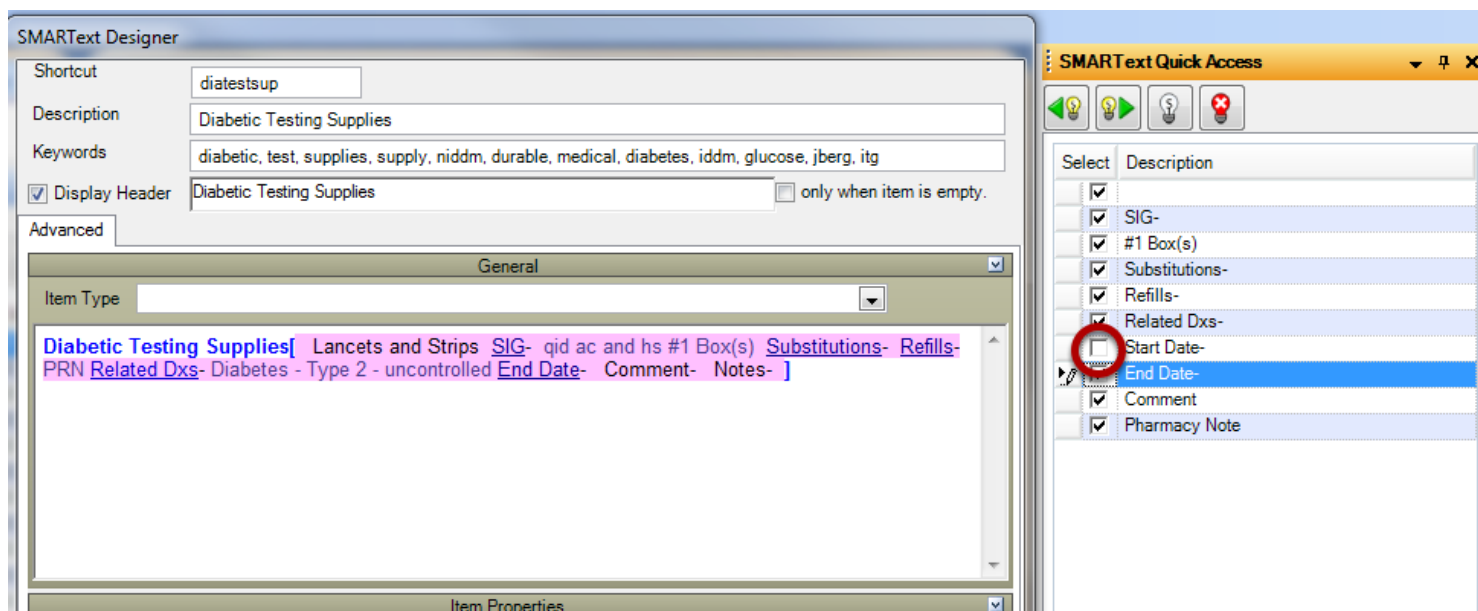


## Removing Sub Items



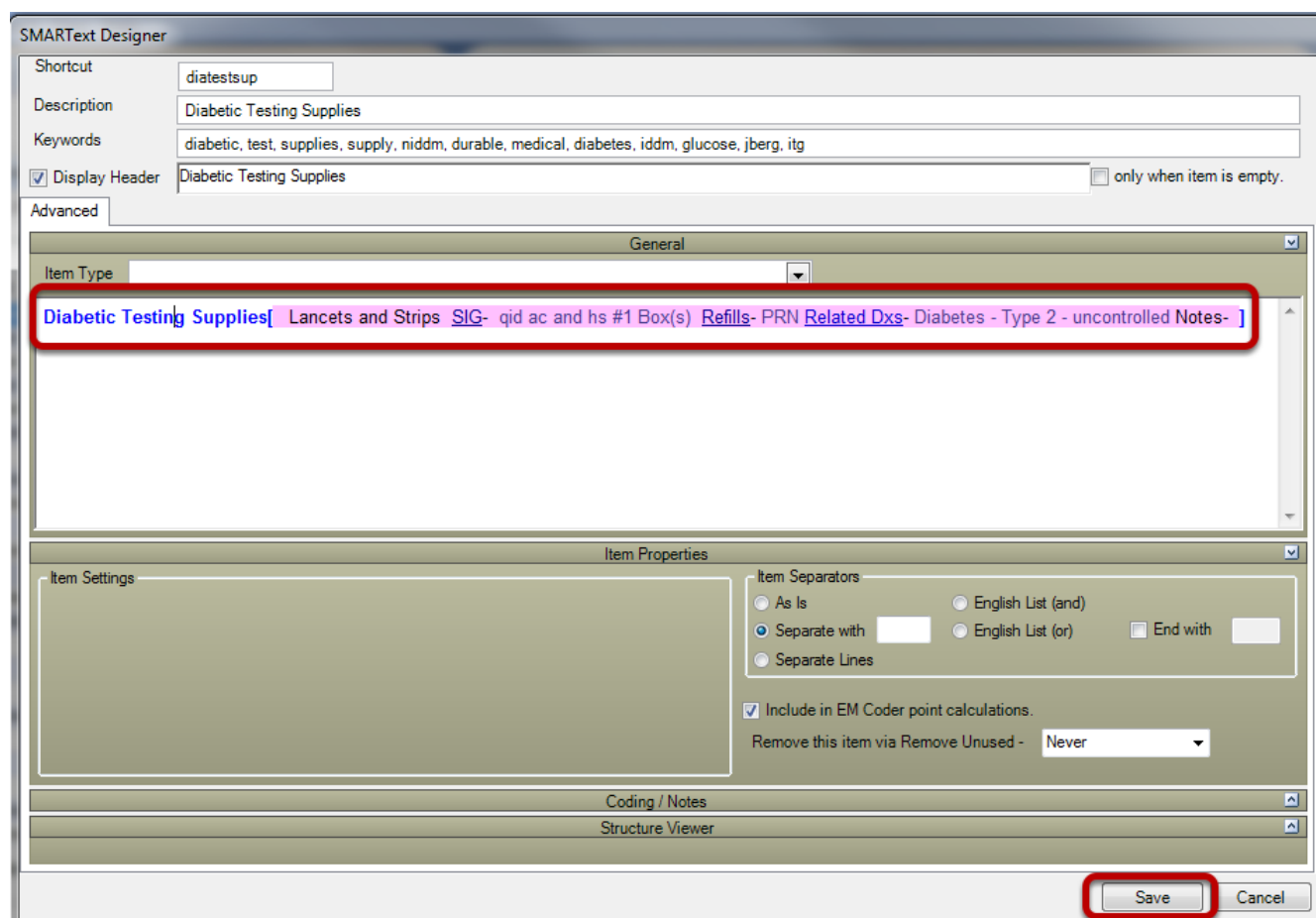
The SMARTText item will have sub items associated with a medication. To remove the sub items not needed:

- 1) Right click over the SMARTText header
  - 2) Choose Manage Sub items
  - 3) In the SMARTText Quick Access, un check the sub items not needed leaving only the Sub Items Strength, Sig, Quantity, Substitutions Refills, and Related Dx
- DO NOT CLICK SAVE AT THIS POINT



Uncheck items you do not wish displayed on the prescription. For example, Start Date and End Date, Comments.

## Saving your Item



Complete the item and ensure items looks as it should.  
Hit Save.

## Inserting the prescription into the chart

**Medications[**

diatestsup

**]**

**Medications**

Diabetic Testing Supplies Lancets and Strips SIG- qid ac and  
hs #1 Box(s) Substitutions- Refills- PRN Comment- Notes-



In the Medication Field of the SOAPnote, enter the shortcut code followed by the spacebar.

## Related Diagnosis

The screenshot displays a medical software interface with a SOAP note on the left and a context menu on the right. The SOAP note includes sections for Subjective, Objective, Assessment, Plan, Medications, and Follow Up. The Medications section is highlighted with a pink background. A context menu is open over the Medications section, showing options like 'Add Word to Dictionary', 'Cut', 'Copy', 'Paste', 'Search FIRST Consult', 'Search MD Consult', 'Manage SMARTText Items', 'Refill', 'Eprocat', 'Download Item Updates', 'Store Drug Course', 'Remove Item', 'Review', 'Item History', and 'Manage Sub Items'. A red circle with the number 1 is placed over the 'Medications' header, and a red circle with the number 2 is placed over the 'Manage Sub Items' option. A red circle with the number 3 is placed over the 'Related Dxs-' checkbox in the SMARTText Quick Access panel on the right.

**Subjective**

**Objective**  
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

**Assessment**  
**Diabetes - Type 2 - uncontrolled** ICD#250.02

**Plan**

**Medications**  
Diagnostic Testing Supplies, Lancets and Strips, SIG, aid as and  
hs #1 Box(s) Sub

**Follow Up**  
Return if problems c

**SOAPNote**

Drag a column head

Date/Time

8/3/2010 9:42:55

8/2/2010 9:40:27

Rx Manager

FR

Select Description

☒ SIG-

☒ #1 Box(s)

☒ Substitutions-

☒ Refills-

☐ Related Dxs-

☐ Start Date-

☐ End Date-

☒ Comment

☒ Pharmacy Note

1

2

3

If the patient, insurance or pharmacy require a Related diagnosis.

- 1) Right Click on the Item Header
- 2) Select Manage Sub Items
- 3) Check Related Dxs in the SMARTText Quick Access

\*\* In your Default Layout (Tools > Options > Structured Rx) if you have Related Diagnosis checked this will automatically display Related Diagnosis and you will not need this step\*\*

## Printing or Faxing the Prescription

The screenshot shows the Rx Manager application window. At the top, there are tabs for Rx Pad, Medications, History, and Patient - Refill Requests. Below the tabs, the Pharmacy field is set to '\*Fake SOAPware Pharmacy (Ph#- Fax#- 866-237-9073)'. The Patient Information section is empty. The Allergies section is also empty. The Notes section is empty. The Add Rx, Update Summary, and Interactions buttons are visible. The Show Header checkbox is checked. The main table displays a prescription for Diabetic Testing Supplies, with a strength comment of 'Strength Comment Not Allowed'. The Submit button is highlighted with a red box, and its dropdown menu is open, showing options for Print and Fax.

Actions	Rx	Misc
<input checked="" type="checkbox"/>	<b>Diabetic Testing Supplies</b>	Pending
<input checked="" type="checkbox"/>	qid ac and hs	*Fake SOAPware Pharmacy
<input checked="" type="checkbox"/>	#1 Box(s)	Jennifer Berg
		Strength Comment Not Allowed
		Coverage Details

- 1) Press the F8 key on the keyboard ( or right click over the Medication Field Header and choose Rx Manager) to bring up the Rx Manager. The dose will say "Strength Comment Not Allowed", this will not affect printing or faxing the prescription.
- 2) Click on the drop down arrow next to the Submit Button.
- 3) Choose Print or Fax.

## Item Sent

Rx Manager

Rx PadMedicationsHistoryPatient - Refill Requests

Drag a column header here to group by that column

Action	Drug	Status	Details	Notes	Pharmacy	Ren
Type	Sent	Response				
	Fill Date	Provider				
Refill	<b>Diabetic Testing ...</b>	Sent	Strips and Lancets SIG- bid ac and hs #1 Box(s) Substitutions Allowed Refills- PRN Related Dxs- Diabetes - Type 2 - uncontrolled Notes-		*Fake SOAPware Pharmacy Ph# - Fax# - 8662370973	
Printed	8/3/2010	Unknown				
	1/1/0001	98597f08-4f1e-4...				
Refill	<b>Diabetic Testing ...</b>	Sent	Strips and Lancets SIG- bid ac and hs #1 Box(s) Substitutions Allowed Refills- PRN Related Dxs- Diabetes - Type 2 - uncontrolled Notes-		*Fake SOAPware Pharmacy Ph# - Fax# - 8662379073	
Faxed	8/3/2010	Unknown				
	1/1/0001	98597f08-4f1e-4...				

Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medicati

The item has now been either faxed to the pharmacy or printed. Prescription will now display in the History tab of the Rx Manager.

# **Creating Patient Education Handouts**

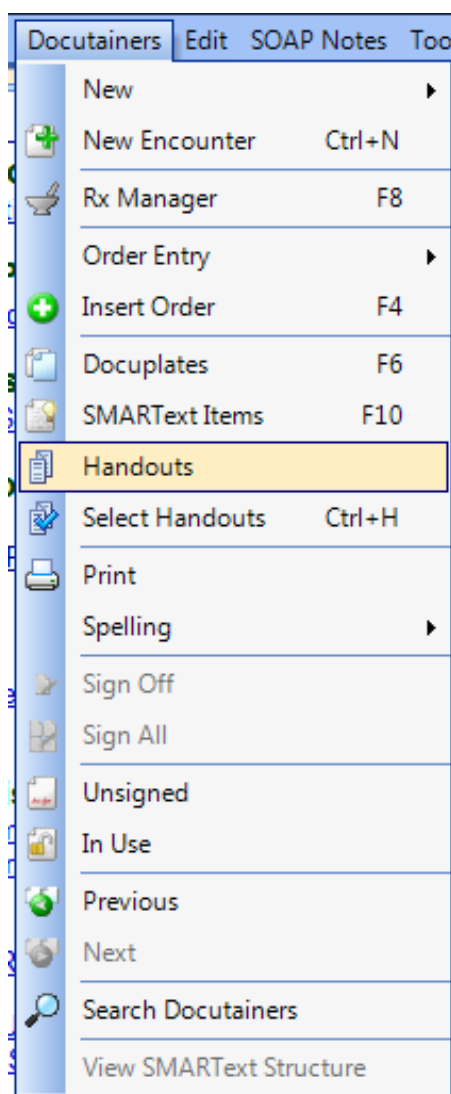
## Handouts Manager

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In SOAPware 2010, handouts are selectable by keywords and can still be organized by categories, but now they can also be found easily through a search window. Because of this, it is no longer necessary to search through categories to find a handout. Handouts are also much more than mere text documents. It is possible to create handouts as collections of related document items, rather than just single documents.

Paper-based patient education handouts can be used in SOAPware and printed from the patient's chart. You can select and print handouts manually, or have SOAPware automatically print them, and insert a notice of printing into the current encounter note.

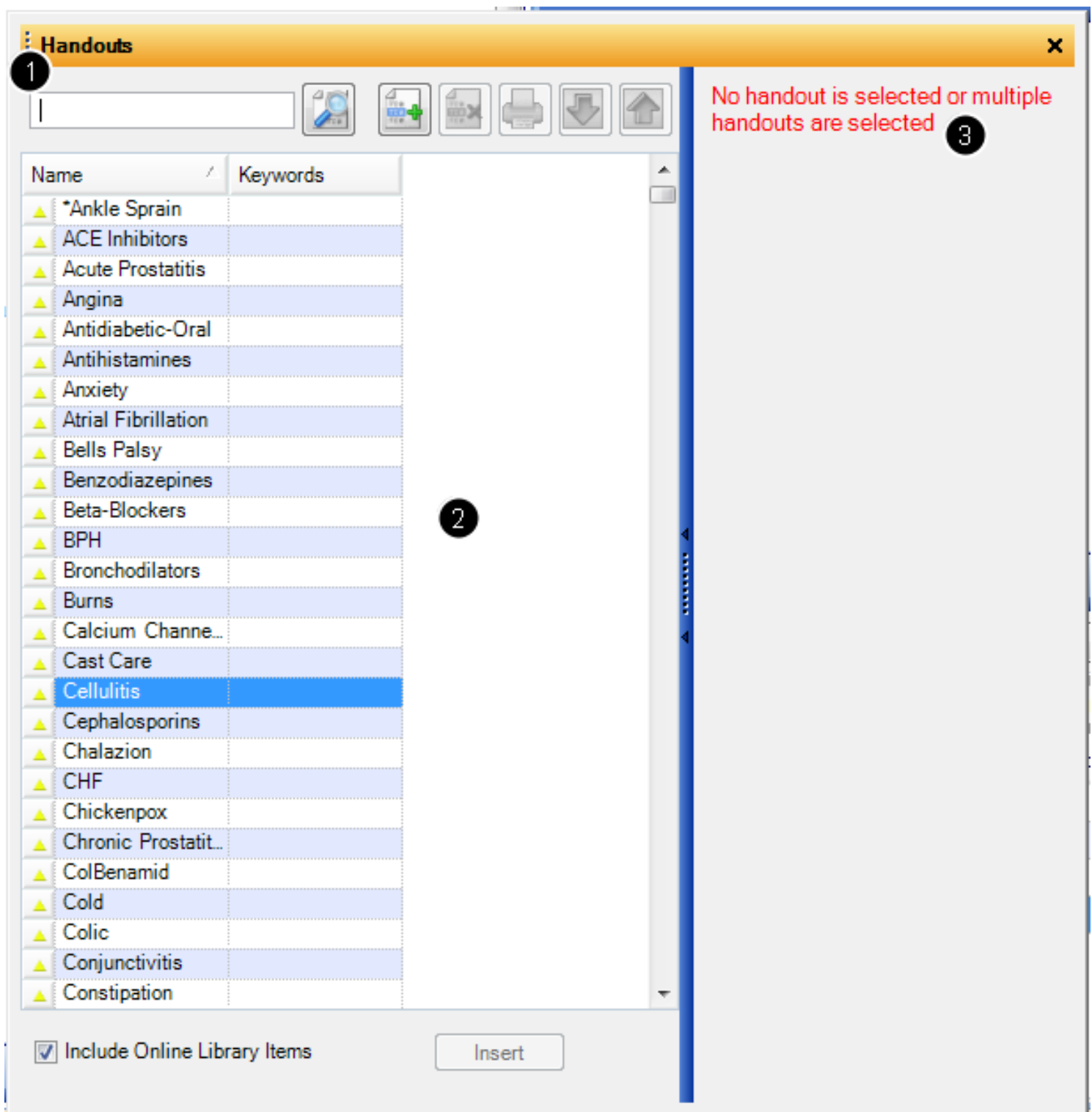
### Open the Handouts Manager



To open the Handouts Manager, click Docutainers on the menu bar, and select the Handouts menu item.



## Handouts Manager



The Handouts Manager has 3 main areas.

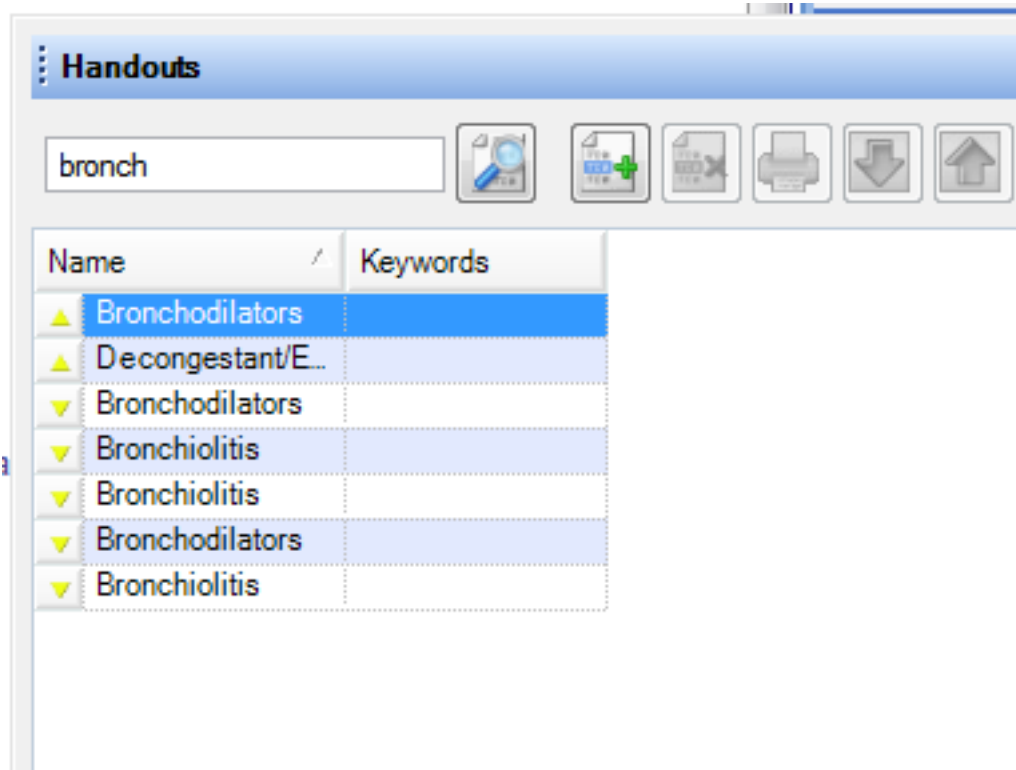
1. The left side of the Handouts Manager has a search field/box used for searching by keywords. This area also contains the mini-toolbar buttons (e.g. New Handout, Remove Handout, Print Handout, Download, and Upload).

2. Below the search field/box is the list of available handouts, which can be sorted by clicking the head of the column you wish to sort by. These columns are Name, which displays the name of the handout, and Keywords. In order to see handouts available for download, click the "Include Online Library Items" checkbox.

The top right area of the Handouts Manager contains the document demographics for handouts. These include Name, Description, Author, Email, and Keywords. If you cannot see this section, it is hidden from view, click the vertical splitter bar to expand it.

3. Finally, the lower right area of the Handouts Manager contains a preview window that displays the content of the handout currently selected in the handout list. Not only can the Handouts Manager itself be resized, but the individual sections within the Handouts Manager can be resized using the splitter bars between the sections.

## Search



To select a handout, click in the Search field/box, and type a keyword associated with the handout desired. For example, in order to select a handout on Bronchodilators, type branch. Once the keyword, is entered into search, either press the Enter key, or or click the Search button.

## Select a Handout

The screenshot shows a software window titled "Handouts" with a close button (X) in the top right corner. On the left, there is a search bar containing the text "bronch" and two icons (a magnifying glass and a document). Below the search bar is a table with two columns: "Name" and "Keywords". The table contains several rows, with the first row "Bronchodilators" highlighted in blue and marked with a circled "1". To the right of the table is a form with fields for "Name", "Description", "Author", and "Email". The "Name" field contains the text "Bronchodilators" and is marked with a circled "2". To the right of the form is a "Keywords" field. Below the table and form is a large text area displaying the content of the selected handout. The text area has a vertical scrollbar on the right. The content of the handout is as follows:

**INFORMATION HANDOUT: ADRENERGIC BRONCHODILATORS**

ALUPENT and METAPREL (Trade Names) or Metaproterenol (Generic Name); BRETHAIRE and BRETHINE (Trade names) or Terbutaline (Chemical name); PROVENTIL INHALER (Trade name) or Albuterol (Chemical name) , COMBIVENT

**WHAT IS THIS MEDICATION? ADRENERGIC BRONCHODILATORS** relieve the symptoms of bronchial asthma, bronchitis, and emphysema. These symptoms include cough, wheezing, shortness of breath, and troubled breathing. They increase the size of the bronchial tubes (bronchodilators) and improve the flow of air through the lungs. It is not habit forming, and a prescription is needed.

**WHO SHOULD NOT TAKE THIS MEDICATION?** You should take this cautiously if you have hypertension, diabetes, glaucoma, thyroid disease, heart disease, prostate enlargement or trouble emptying your bladder or epilepsy. It should not be taken during pregnancy and breast-feeding.

**WHAT OTHER MEDICINES CAN POSSIBLY INTERACT WITH THIS?** "Beta-blocker" blood pressure medications, oral diabetic medicine, monoamine oxidase (MAO) inhibitors (isocarboxazid, pargyline, phenelzine, tranylcypromine); tricyclic antidepressant medications.

**HOW SHOULD THIS MEDICINE BE TAKEN?** Food? - It can be taken with food or milk and this is suggested if you have any stomach problems. Liquid or suspension form of the medicine? - This should be shaken before taken. For dizziness - Sit or lie down until it clears.

At the bottom of the window, there is a tab labeled "Bronchodilators" and an "Insert" button.

If there are handouts associated with the keyword, they will appear in the handouts list.

1. Click the handout name in the item list.
2. A preview of the handout will appear in the right side of the Handouts Manager.

**Handouts** [X]

Search:  [Icon] [Icon]

Name	Keywords
▲ Bronchodilators	
▲ Decongestant/E...	
▼ Bronchodilators	
▼ Bronchiolitis	
▼ Bronchiolitis	
▼ Bronchodilators	
▼ Bronchiolitis	

Name:  Keywords:

Description:

Author:

Email:

**INFORMATION HANDOUT: ADRENERGIC BRONCHODILATORS**

ALUPENT and METAPREL (Trade Names) or Metaproterenol (Generic Name); BRETHAIRE and BRETINE (Trade names) or Terbutaline (Chemical name); PROVENTIL INHALER (Trade name) or Albuterol (Chemical name) , COMBIVENT

**WHAT IS THIS MEDICATION? ADRENERGIC BRONCHODILATORS** relieve the symptoms of bronchial asthma, bronchitis, and emphysema. These symptoms include cough, wheezing, shortness of breath, and troubled breathing. They increase the size of the bronchial tubes (bronchodilators) and improve the flow of air through the lungs. It is not habit forming, and a prescription is needed.

**WHO SHOULD NOT TAKE THIS MEDICATION?** You should take this cautiously if you have hypertension, diabetes, glaucoma, thyroid disease, heart disease, prostate enlargement or trouble emptying your bladder or epilepsy. It should not be taken during pregnancy and breast-feeding.

**WHAT OTHER MEDICINES CAN POSSIBLY INTERACT WITH THIS?** "Beta-blocker" blood pressure medications, oral diabetic medicine, monoamine oxidase (MAO) inhibitors (isocarboxazid, pargyline, phenelzine, tranylcypromine); tricyclic antidepressant medications.

**HOW SHOULD THIS MEDICINE BE TAKEN?** Food? - It can be taken with food or milk and this is suggested if you have any stomach problems. Liquid or suspension form of the medicine? - This should be shaken before taken. For dizziness - Sit or lie down until it clears.

☒

**Bronchodilators**

Once a handout is selected, it can be inserted into the currently active document. To do this, click the Insert button located under the handouts list.

## Selecting Handouts Automatically

---

### \*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - PATIENT-SPECIFIC EDUCATIONAL RESOURCES

[Click here to view Meaningful Use Criteria](#)

SOAPware can look at the current SOAP encounter note and automatically select and print the appropriate handouts, based on keywords, in the Assessment and Medications fields.

#### Assessment and Medication

##### Assessment

Allergic rhinitis ICD#477.9

##### Plan

[Actions:](#)

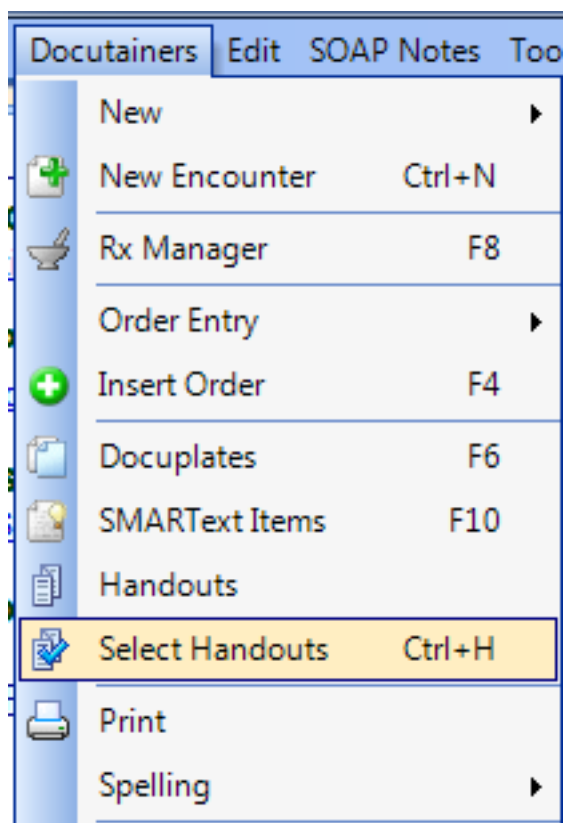
##### Medications[

Albuterol (Proventil, Ventolin) Solution: 0.5% (solution) SIG- as directed via nebulizer every 6 hours  
asneeded inhaled #60 ml Substitutions Allowed Refills- 12 Comment- Notes- |

]

In this example, notice Allergic rhinitis is in the Assessment field and Albuterol is in the Medications field.

## Select Handouts



Once the SOAP encounter note's Assessment and Medication fields are at or near completion, Click Docutainers in the menu bar, and Click Select Handouts (or Press Control + H).

## Handouts Added to Plan

Plan[  
Actions:  
Handouts: Bronchodilators, Nasal Allergy.  
]

SOAPware checks to see if there are any handouts linked to keywords appearing in the current SOAP encounter note. If there are handouts available, the handouts will automatically be inserted into the Plan field.

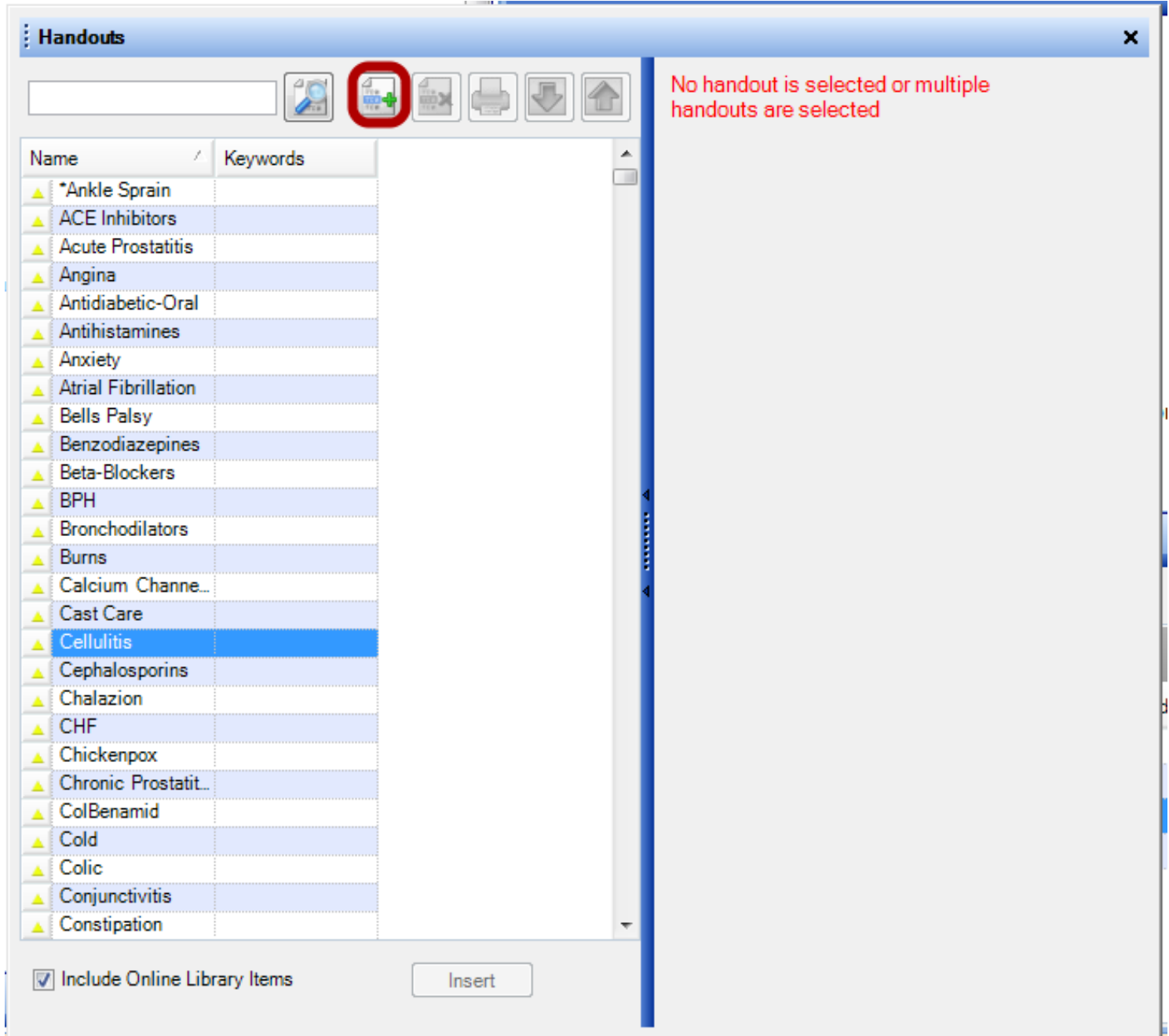
## Tips

Notice this function will only choose and insert handouts names if there are handouts in SOAPware that match an appropriate keyword from the current SOAP encounter note. If you attempt to use this function and nothing happens, there are no handouts in SOAPware that match your current SOAP encounter note.

## Adding a New Handout

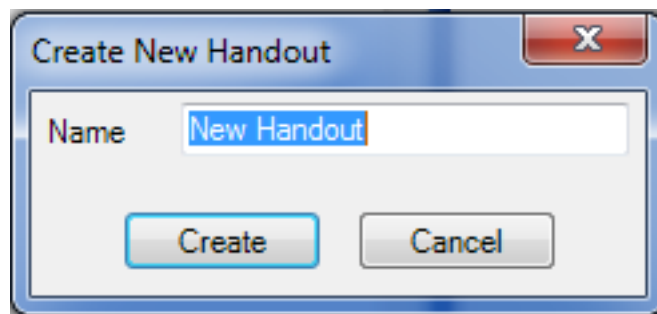
If you need to create a custom handout, or a handout on a topic not covered by an existing handout, you can create your own.

### New Handout



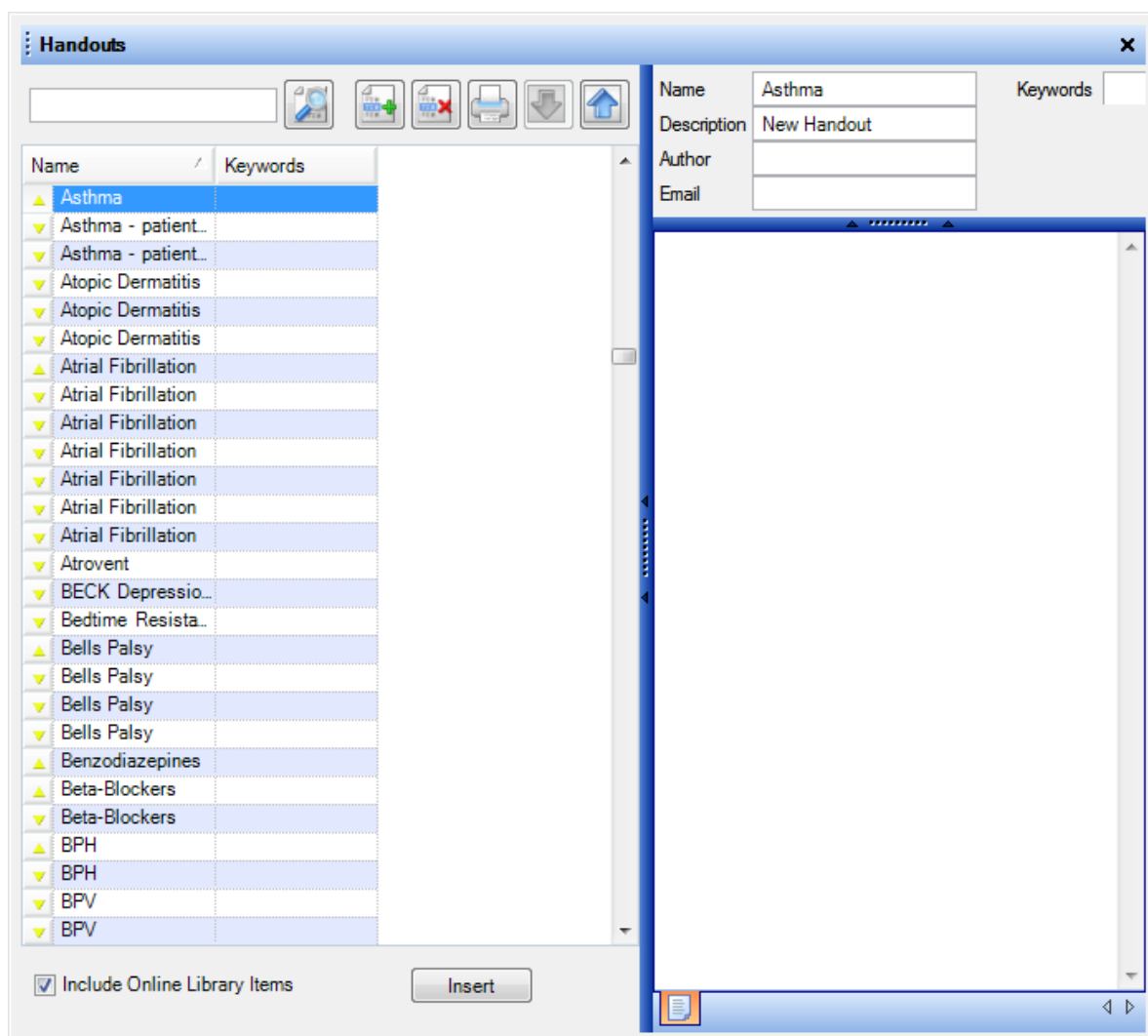
New handouts can be created in the Handouts Manager by Clicking the New Handout button (or by Pressing Control + Alt + N).

## Create New Handout



Clicking the New Handout button will open the Create New Handout dialog. Type a Name that best describes its content and purpose, and Click the Create button.

## Handout Demographic Information



A new, empty handout will appear in the handout preview window. Complete the document demographic information. The new handout's name will be filled in automatically. Type a Name, a short Description, and at least one Keyword for the new handout. Other options are to type the name of the author and the author's email.



Note: the keywords are what SOAPware uses to find handouts, so be sure to include them. Also note that the keywords need to be either a medication name or a diagnosis.

## Edit Handout

**Name**  **Keywords**

**Description**

**Author**

**Email**

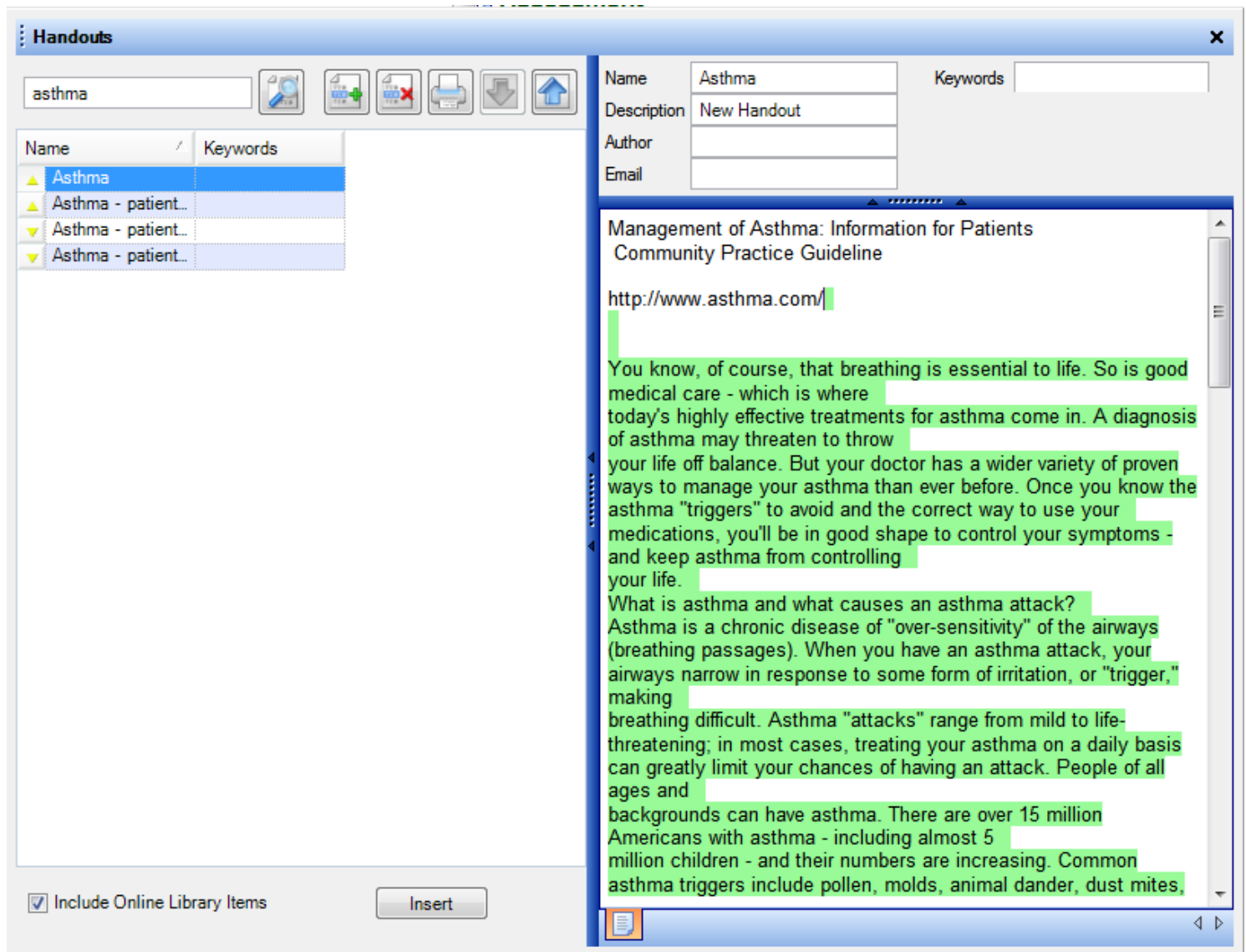
[Management of Asthma: Information for Patients  
Community Practice Guideline  
You know, of course, that breathing is essential to life. So is good medical care - which is where today's highly effective treatments for asthma come in. A diagnosis of asthma may threaten to throw your life off balance. But your doctor has a wider variety of proven ways to manage your asthma than ever before. Once you know the asthma "triggers" to avoid and the correct way to use your medications, you'll be in good shape to control your symptoms - and keep asthma from controlling your life.  
What is asthma and what causes an asthma attack?  
Asthma is a chronic disease of "over-sensitivity" of the airways (breathing passages). When you have an asthma attack, your airways narrow in response to some form of irritation, or "trigger," making breathing difficult. Asthma "attacks" range from mild to life-threatening; in most cases, treating your asthma on a daily basis can greatly limit your chances of having an attack. People of all ages and backgrounds can have asthma. There are over 15 million Americans with asthma - including almost 5 million children - and their numbers are increasing. Common asthma triggers include pollen, molds, animal dander, dust mites, smoke, strong odors or fumes, respiratory infections, cold air, and sometimes exercise. By learning what your triggers are, you may be able to reduce your day-to-day risk of having an asthma attack. During an asthma attack, the airways become narrowed and

To create the content for the new handout, type information, or copy and paste information from another document. The new handout is automatically saved when you exit.

## Editing Existing Handouts

It is easy to modify existing handouts to keep them up to date and comprehensive.

### Editing Handouts

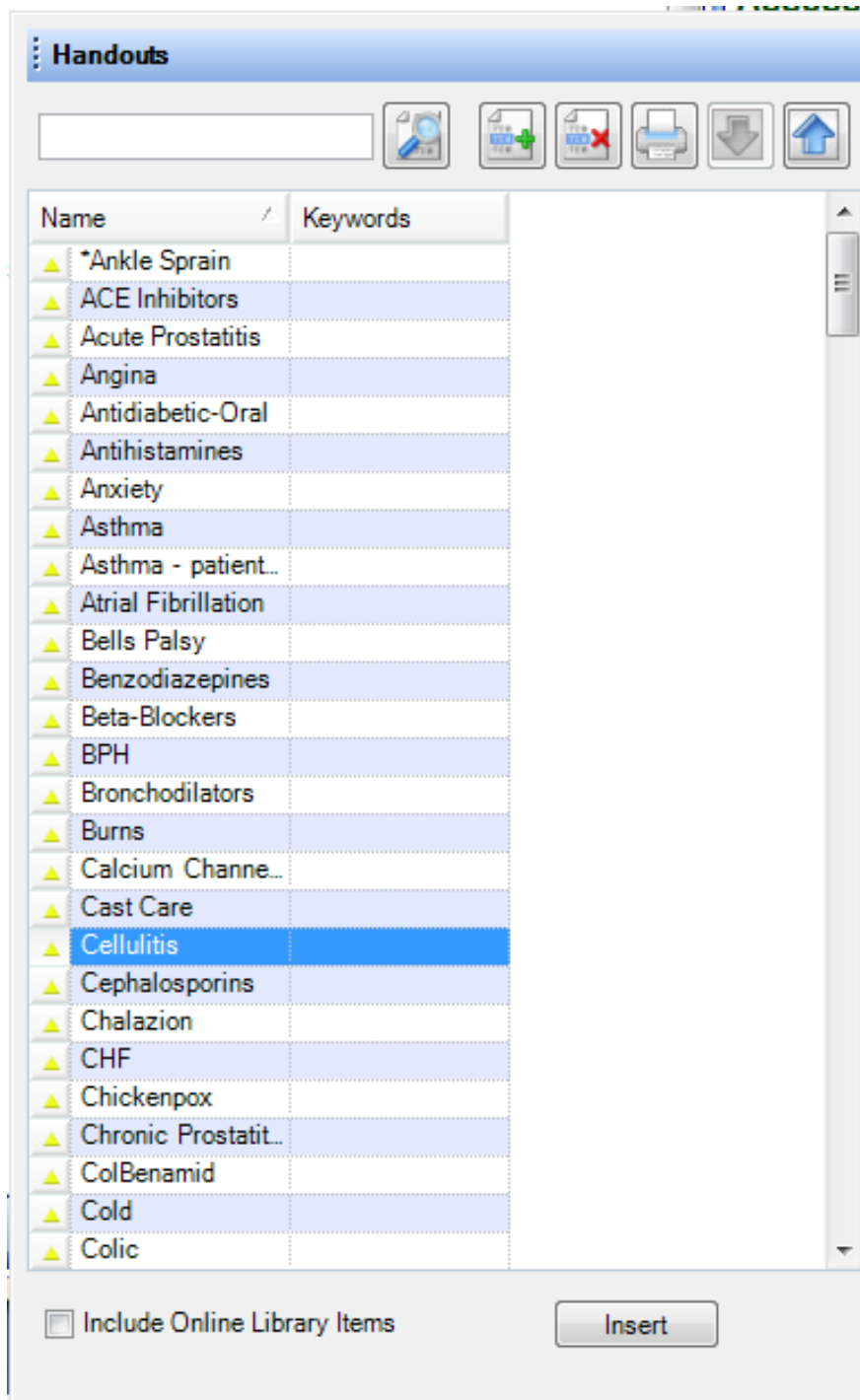


To modify or customize an existing handout, first select that handout to make it appear in the preview window on the right. Make any changes to the handout in the same way that you would if creating a new handout, and close the Handouts Manager. The handout will now appear with any edits or modifications made.

## Deleting Existing Handouts

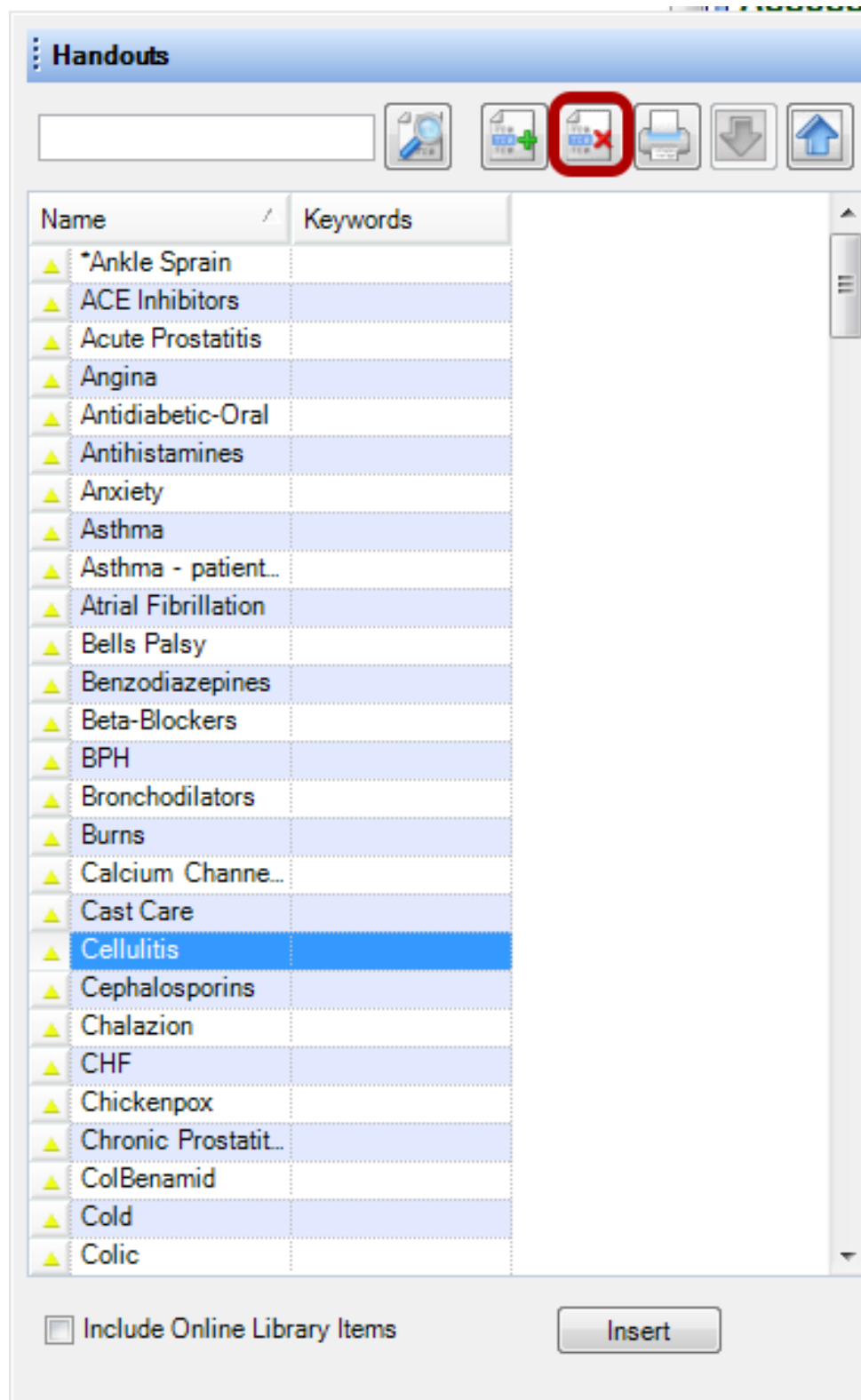
Deleting Handouts from your local library is a good way to keep them easy to use so that only the most current handouts are included with the Select Handouts Automatically option.

### Search and Select



To delete an existing handout, click the Name in the list (of the handout to be deleted). Do this by searching for the handout by keyword, and selecting it from the handouts list.

## Delete Handout

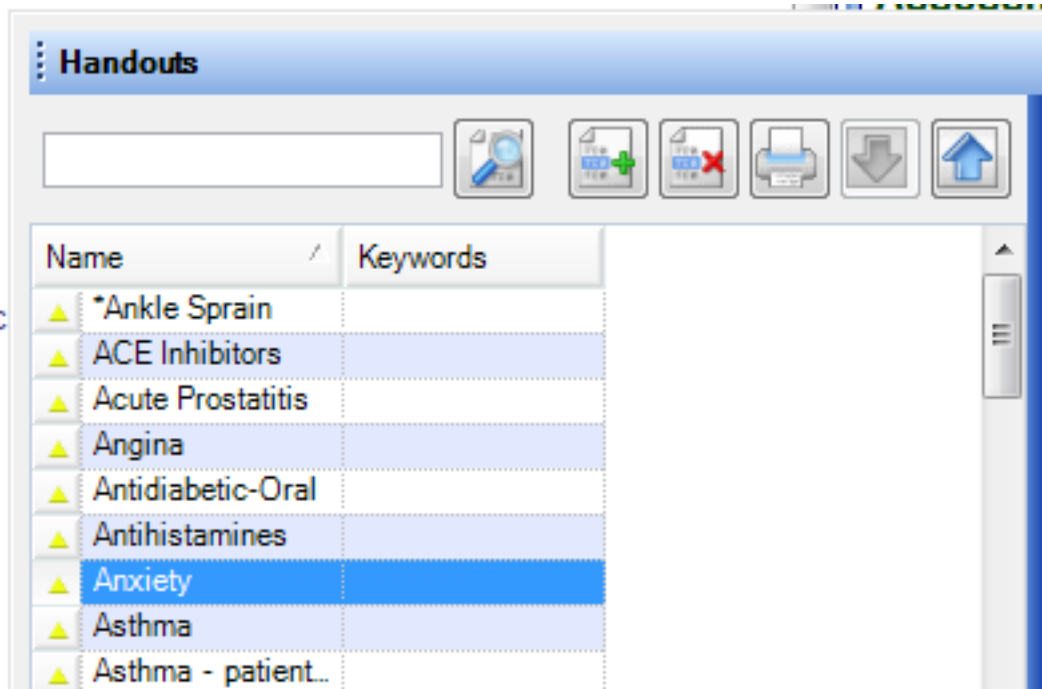


After selecting the handout to be deleted, click the Remove Handout button (or Press Ctrl+Alt+R). SOAPware will ask for confirmation to delete the handout. Click Yes, and the handout will be removed from the list. Otherwise, click No.

## Printing Individual Handouts

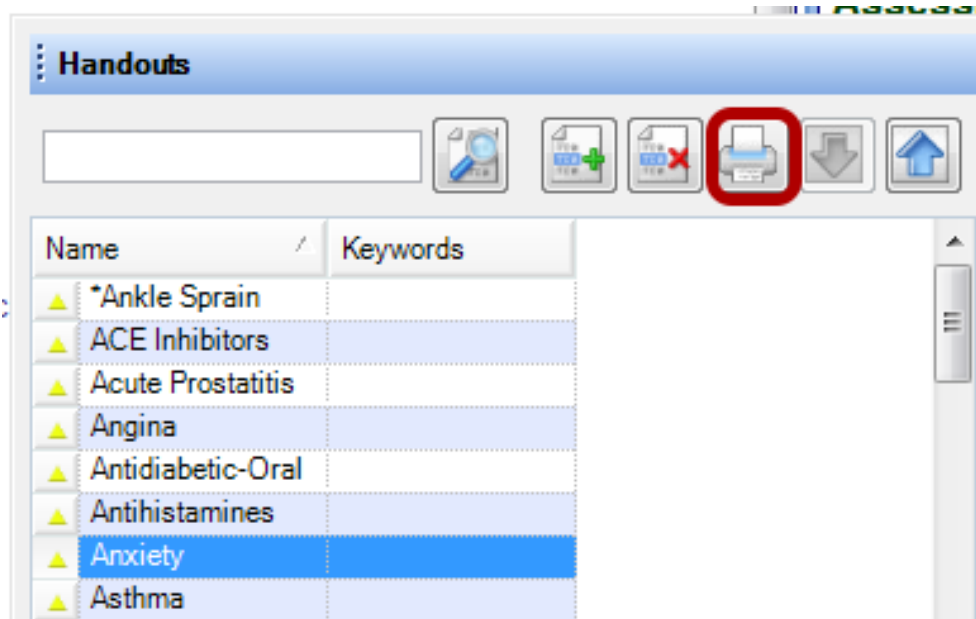
Handouts can be printed individually.

### Select



Select the handout to print. Do this by searching for the handout by keyword, and selecting it from the handouts list.

### Print



After selecting the handout to be printed, Click the Print Handout (or Press Control + Alt + P).

## Print Handouts Automatically when other Documents are Printed

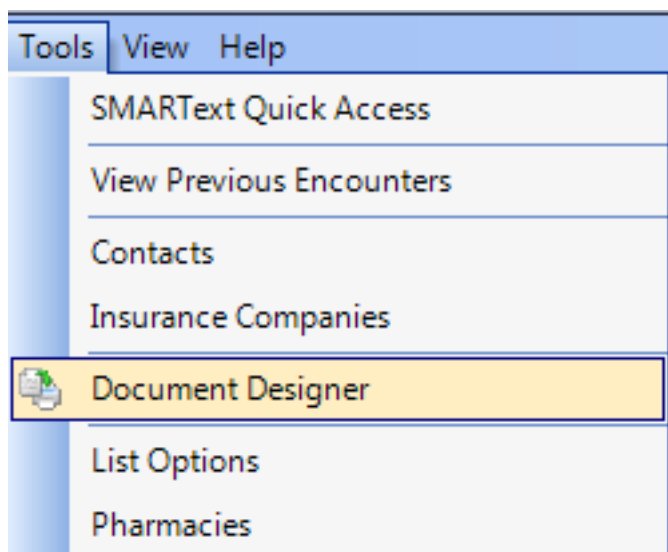
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### **\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - PATIENT-SPECIFIC EDUCATIONAL RESOURCES**

[Click here to view Meaningful Use Criteria](#)

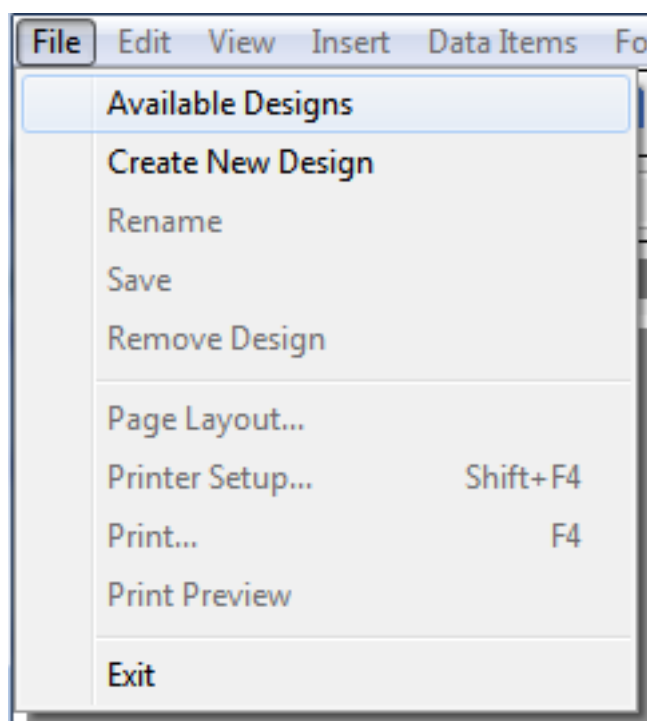
Document Designer allows you to set up print designs which automatically print associated handouts when the design is printed. For instance, you can set up the SOAPnote design to also print any handouts selected as a part of the visit.

#### **Open Document Designer**



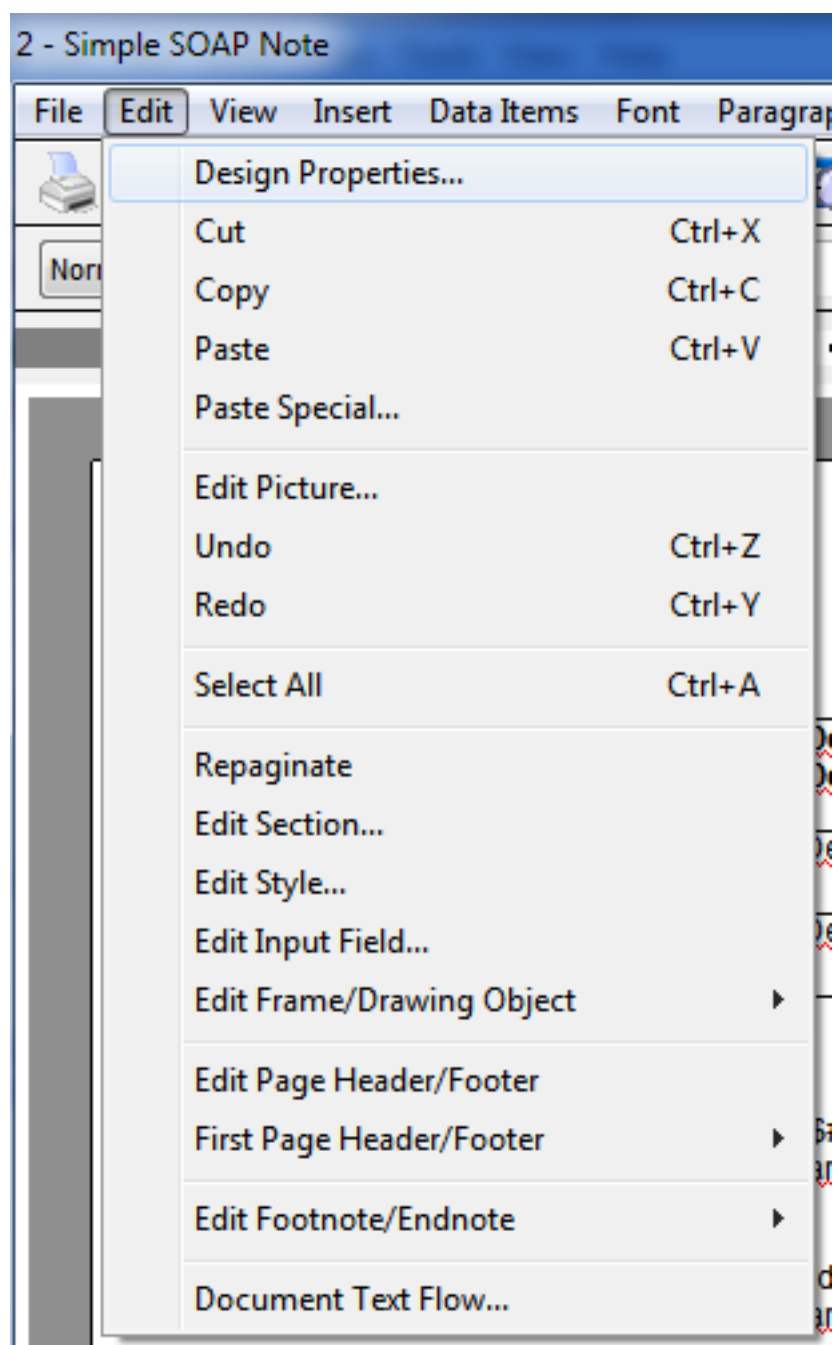
In order for handouts to be printed when a SOAPnote document design is printed, the Print Selected Handouts option must be set in the printed document design. Open the Document Designer (Tools - Document Designer).

## Open a Design



Open a document design or create a new one (File - Available Designs or Create New Design).

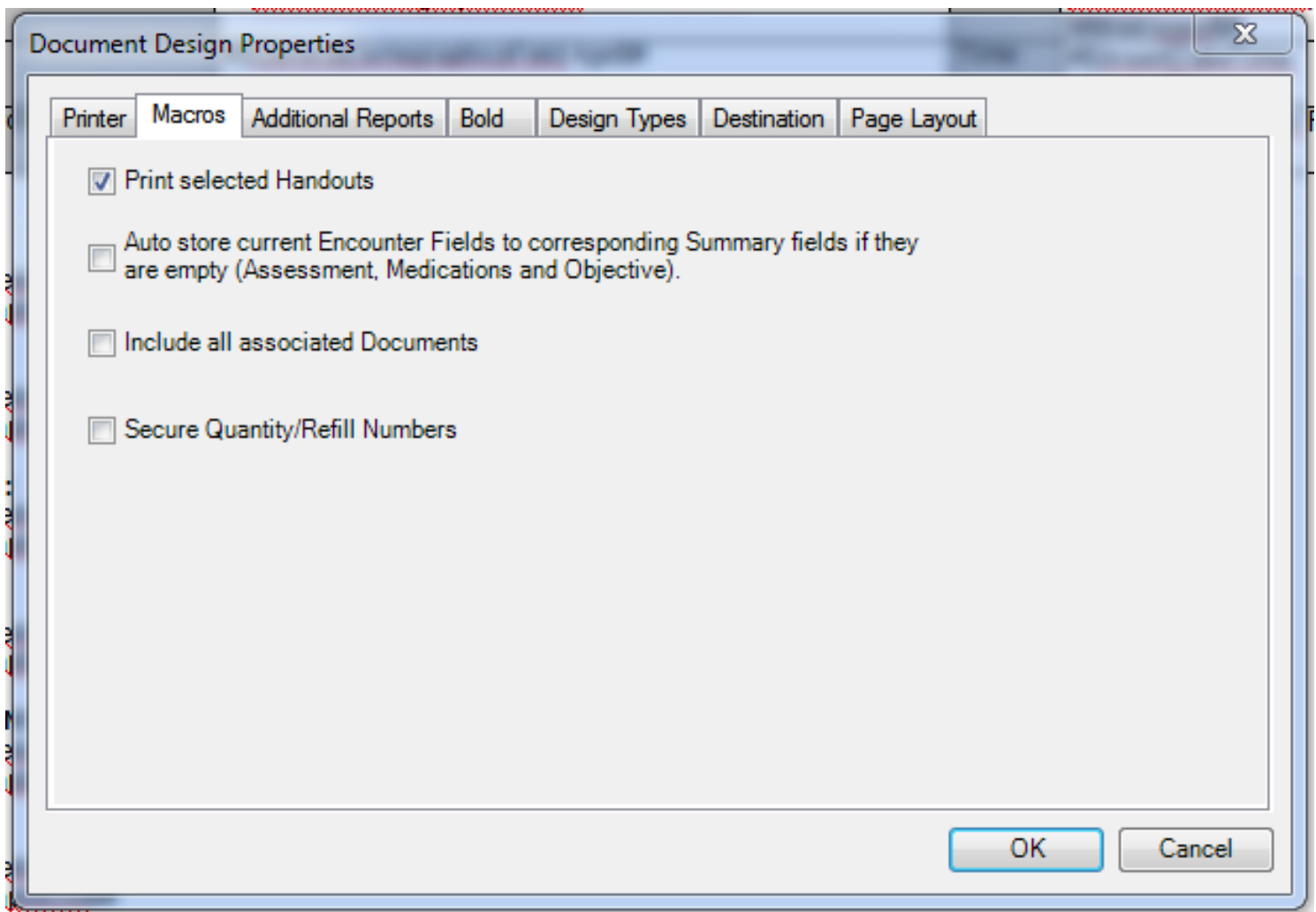
## Design Properties



Once you have created or opened a design, view the Document Design Properties (Edit - Design Properties).



## Print Selected Handouts



On the Macros tab, check the box next to Print Selected Handouts.

## Save

Click OK and save your changes. Any time that the document design is printed in the future, the selected handouts will be printed as well.

## Uploading/Downloading Handouts

The SOAPware Online Library contains handouts created by SOAPware and users. They can be downloaded for use. Please consider contributing your own handouts for others to download and use.

### Include Online Library Items



The screenshot shows the 'Handouts' window with a search bar and several icons (magnifying glass, document with plus, document with X, printer, download, and upload). Below these is a table with two columns: 'Name' and 'Keywords'. The table lists various medical conditions, each preceded by a yellow triangle icon. At the bottom left, there is a checkbox labeled 'Include Online Library Items' which is checked and highlighted with a red rectangle. To its right is an 'Insert' button.

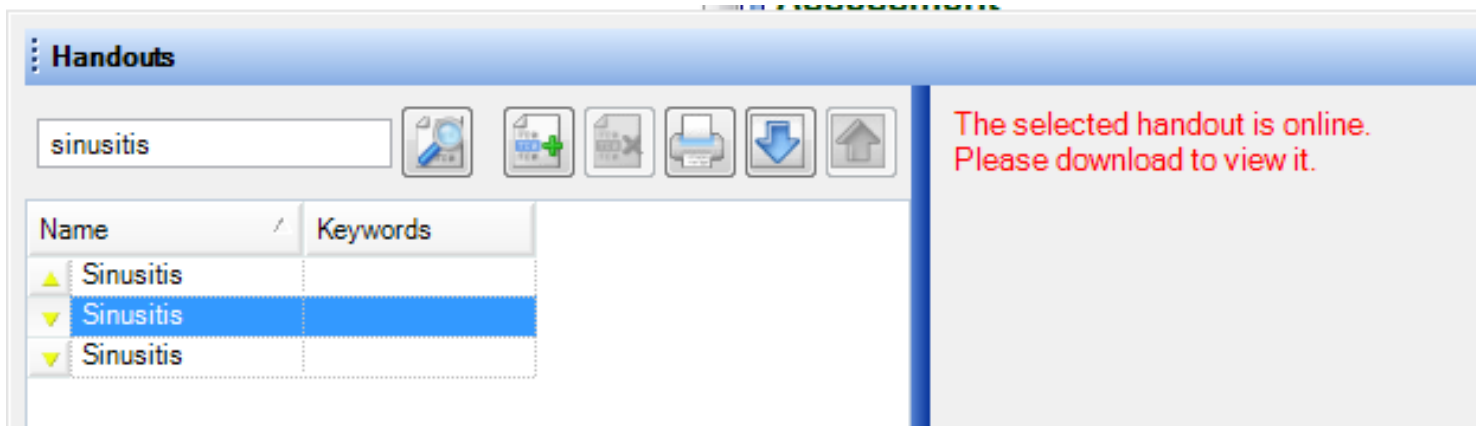
Name	Keywords
*Ankle Sprain	
ACE Inhibitors	
Acute Prostatitis	
Angina	
Antidiabetic-Oral	
Antihistamines	
Anxiety	
Asthma	
Asthma - patient..	
Atrial Fibrillation	
Bells Palsy	
Benzodiazepines	
Beta-Blockers	
BPH	
Bronchodilators	
Burns	
Calcium Channe..	
Cast Care	
Cellulitis	
Cephalosporins	
Chalazion	
CHF	
Chickenpox	
Chronic Prostatit..	
ColBenamid	
Cold	
Colic	

☒ Include Online Library Items

Insert

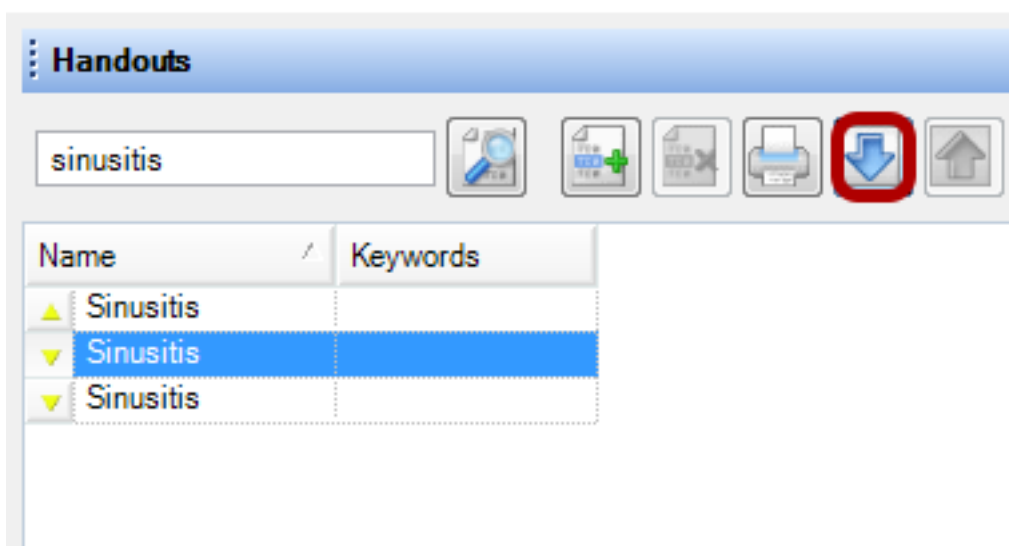
To download a handout from the library, First ensure that you have told the Handouts Manager to include online handouts. To do this, Click the Include Online Library Items checkbox located in the lower left corner of the Handouts Manager.

## Select Handout



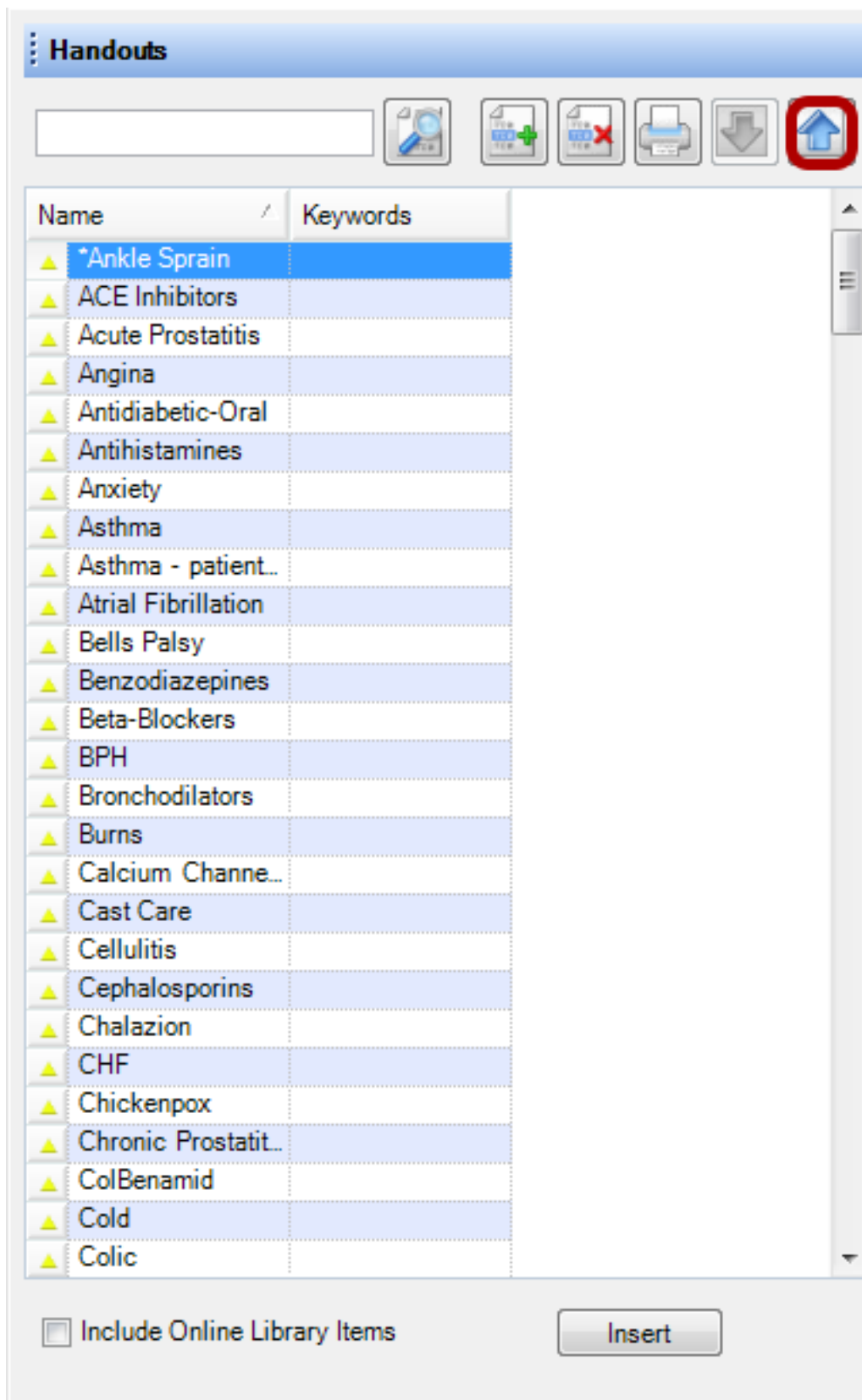
Handouts available for download will display with either a yellow or a green triangle pointing down. Click the name of a handout to download, and notice, in the right side of the dialog, the message - The selected handout is online. Please download to view it.

## Download



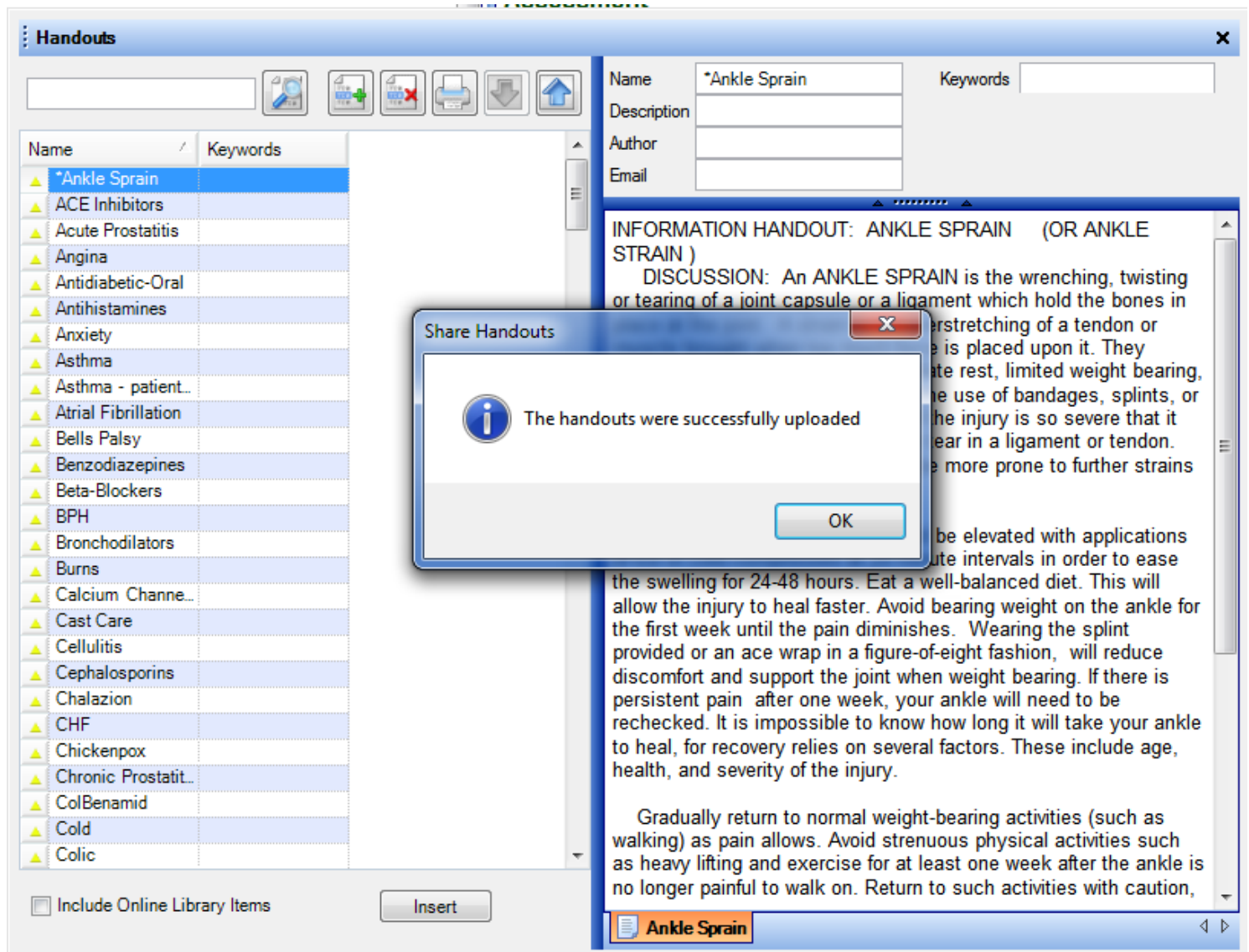
Click the Download button(or Press Control + Alt + D). The selected handout will be downloaded and stored for local use. Notice that the triangle is now pointing up which indicates that it is downloaded to the local database.

## Select Handout



To upload a handout, click the handout to share/upload, and click the Upload Handout button.

## Upload



SOAPware will confirm the handout has been uploaded.

# Health Maintenance

## Intro to Health Maintenance

---

### **\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - PATIENT REMINDERS**

[Click here to view Meaningful Use Criteria](#)

Health Maintenance is designed to alert and keep track of Preventive health issues. The Health Maintenance section is used anytime you wish to add, edit or modify rules that belong to a single patient.

The format for health maintenance in v4 is completely different in 2008/2009/2010. The conversion can and does bring over the notes from each rule in v4 patient charts, but the conversion can't reformat the rules to go forward in the new version.

Prior to the conversion, create HM Reports to identify patients due for follow up for health maintenance in the future. Print this report and use it as a back-up reference to ensure issues have been addressed in the future.

We suggest, as patients arrive in the future, update the HM rules in each chart.

### **Health Maintenance Rules and Sets**

Health Maintenance Rules and Sets allows you to Create, or Edit Rules and Rule Sets.

## Health Maintenance

The screenshot shows the 'Health Maintenance' tab selected in a medical software interface. The top navigation bar includes 'SOAP Notes', 'Labs', 'Radiology', and 'Health Maintenance'. Below the navigation bar is a toolbar with icons for adding, editing, and deleting items. The main content area displays a list of health maintenance tasks for the date 2/24/2011 11:06:07 AM. The tasks are listed in a table with columns for the task name and its status. The tasks are: \*DTetanus - Adult (Performed), Cholesterol (Reminder given), Comp Exam (Performed), Oral Health (Reminder given), Pap/Breast (Performed), PPD 2 (Reminder given), Self Exams (Reminder given), and Tobacco 2 (Reminder given). Below the table is a section for 'Basic' and 'Vaccine' tabs. The 'Vaccine' tab is selected, showing a form for adding or editing a vaccine. The form includes fields for 'Action' (set to 'Performed'), 'By' (set to 'Smith, John, MD'), 'Location' (set to '@ Outside Clinic'), and 'Notes'. Below these fields are sections for 'Next Due' and 'Frequency'. The 'Next Due' section has a date field set to 'Wednesday, February 24, 2021' and an alert field set to '1 Years before due'. The 'Frequency' section has an interval field set to '10 Years'. At the bottom right of the form are buttons for 'Edit', 'Add', and 'Remove'.

Task	Status
*DTetanus - Adult	Performed
Cholesterol	Reminder given
Comp Exam	Performed
Oral Health	Reminder given
Pap/Breast	Performed
PPD 2	Reminder given
Self Exams	Reminder given
Tobacco 2	Reminder given

**Basic** **Vaccine**

Action:

By:

Location:

Notes:

**Next Due**

On:

Alert:   before due

**Frequency**

Interval:

Ages / Dates:

Edit Add Remove







Open a patient chart. Verify the Demographics section of the chart is completed for patient age and gender. Click Chart in the menu bar; Click the Sections menu item, and then Click the Health Maintenance menu item. (or, simply Click on the Chart Navigator docked tab, and Double-Click on Health Maintenance) This will add that section to your chart layout if it is not there already. Once the tab



is included in the chart layout, it can be opened via clicking the Health Maintenance Tab.

**Adding Rules and Rule Sets**

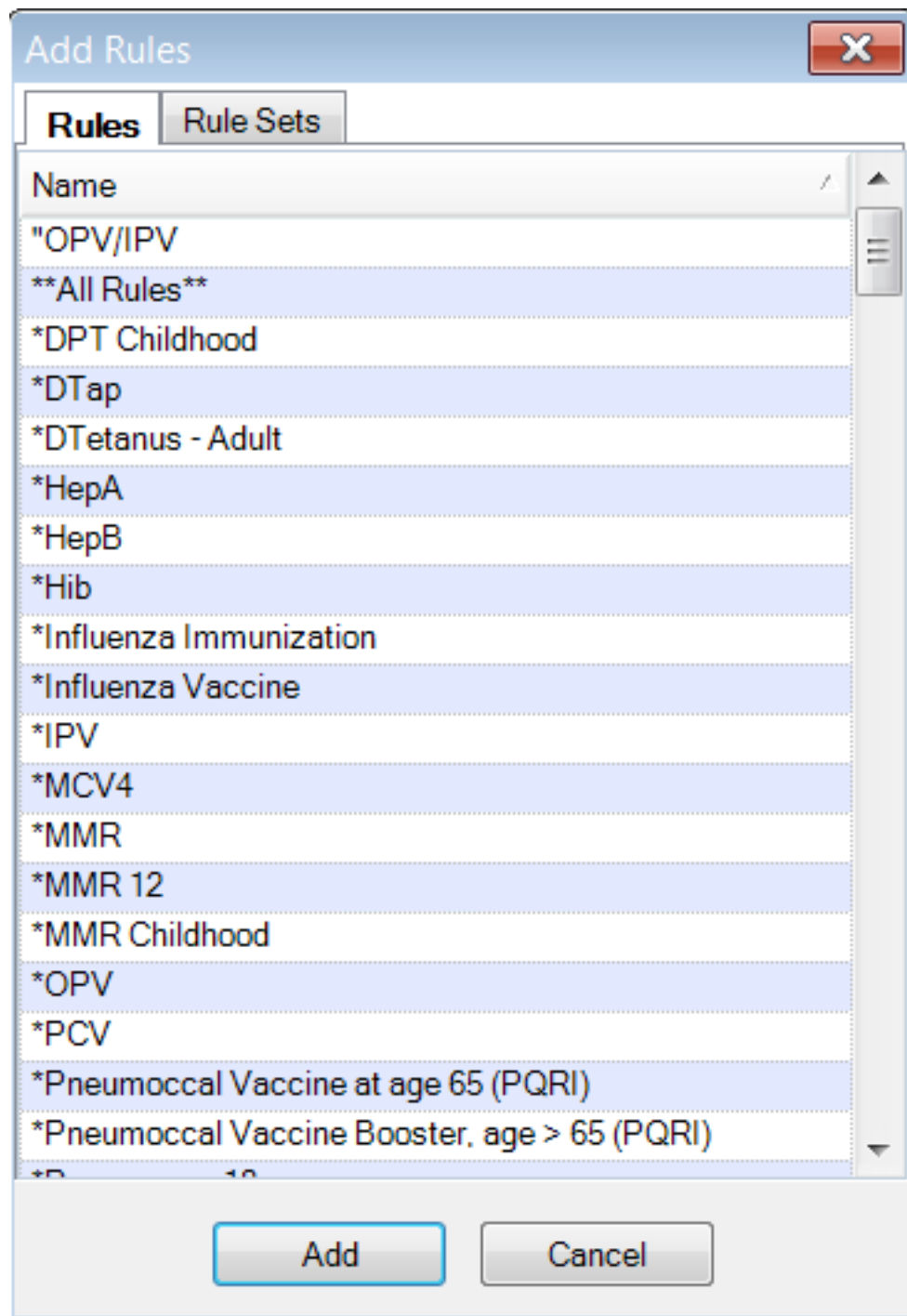
SummaryVital SignsHealth MaintenanceDemographicsPrinted



	11/21/2008 10:48:46 AM	4/29/2009 3:49:12 PM	8/3/2010 9:14:35 .
*DTap	Performed		
*HepA	Performed		
*HepB			
*Hib	Performed		
*Influenza	Performed		
*IPV			
*MCV4			
*MMR		Performed	
*PCV			

To add a Rule or Rule set, Click the Add Rule button (Green +)

## Add Rules



Click the Rules tab to add a single rule. In order to select multiple rules (not consecutive), Hold-down the Ctrl key; Click each Rules list item to add; then Click the Add button.

## Add Rule Sets

The screenshot shows a dialog box titled "Add Rules" with a close button (X) in the top right corner. It has two tabs: "Rules" and "Rule Sets", with "Rule Sets" being the active tab. Below the tabs is a list box with a header "Name" and a search icon. The list contains three items: "\*Immunization Schedule Birth to 6 years", "Child birth to 6 years" (which is highlighted), and "Gestational Diabetes Mellitus". At the bottom of the dialog, there is a checkbox labeled "Only show ones matching patient demographics" which is checked. Below the checkbox are two buttons: "Add" and "Cancel".

Name
*Immunization Schedule Birth to 6 years
Child birth to 6 years
Gestational Diabetes Mellitus

☒ Only show ones matching patient demographics

Add Cancel

Click the Rule Sets tab to add a collection or set of Rules. Click the Add button.

For example, Click the Males 35 to 49 Rule set to place the Rules applied to it into the upper region of the Health Maintenance section

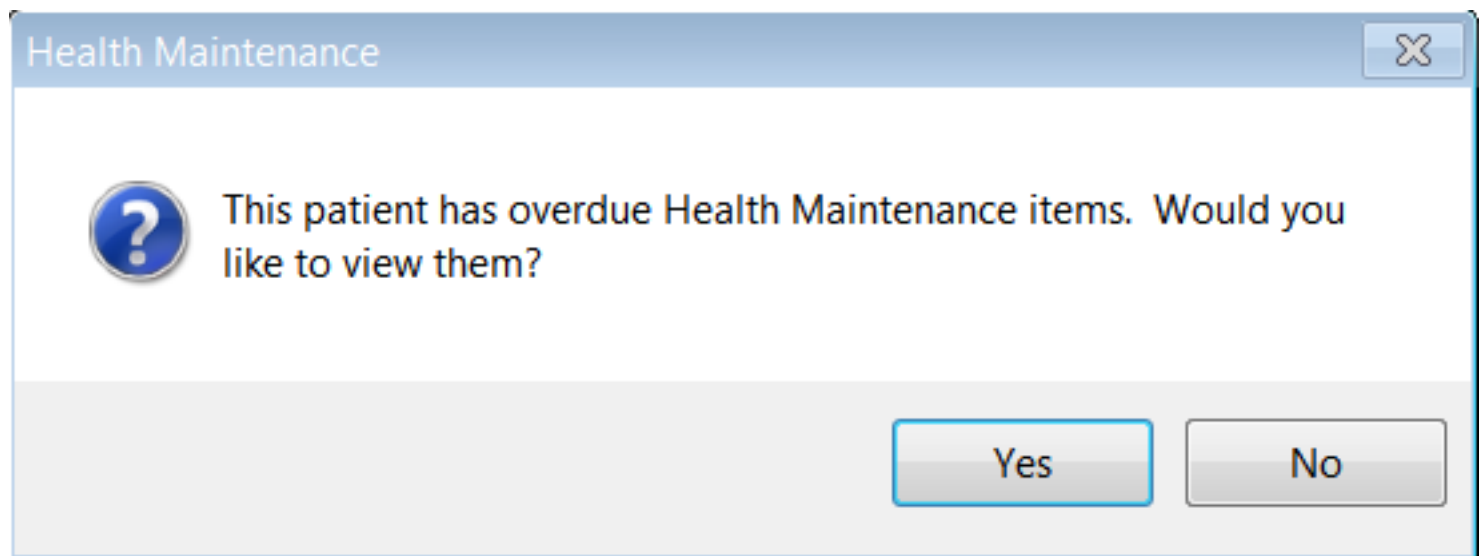
## Health Maintenance Color Coding

*Rota	
*Varicella	
Anemia	

When a Rule is highlighted in red, the item is overdue or has never been addressed

When a Rule is highlighted in yellow, the rule is not overdue at this point, but past the first day within your alert period you have set for the Rule.

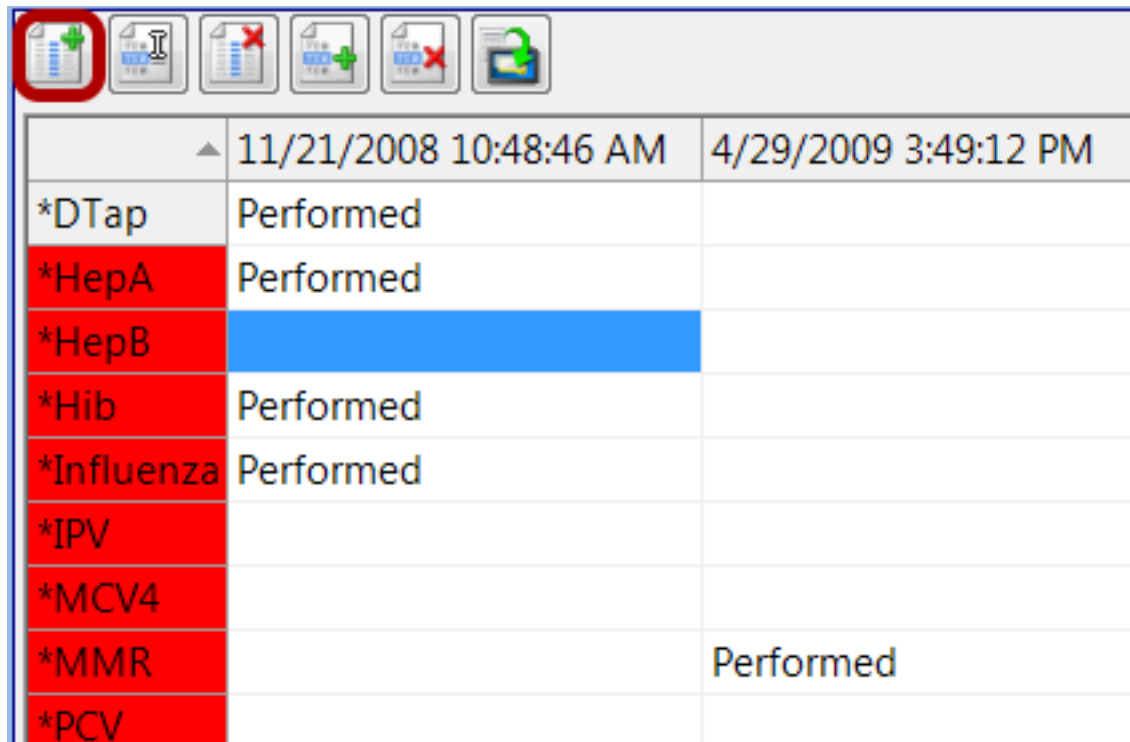
## Health Maintenance Alerts



Once Health Maintenance has been implemented on a patient, an alert window will appear whenever the chart is pulled, letting you know if Health Maintenance issues need to be addressed. Of course, you can review this at any time by going to the Health Maintenance tab.

## Addressing a Rule

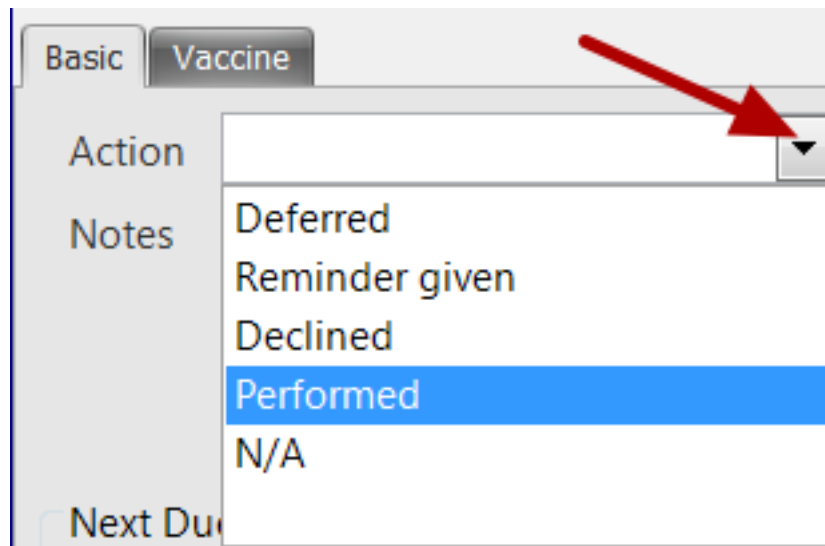
### Add Addressed Date



	11/21/2008 10:48:46 AM	4/29/2009 3:49:12 PM
*DTap	Performed	
*HepA	Performed	
*HepB		
*Hib	Performed	
*Influenza	Performed	
*IPV		
*MCV4		
*MMR		Performed
*PCV		

Click the Rule to address, and Click the Add Addressed Date button.

### Select Action



Basic Vaccine

Action

Notes

Deferred

Reminder given

Declined

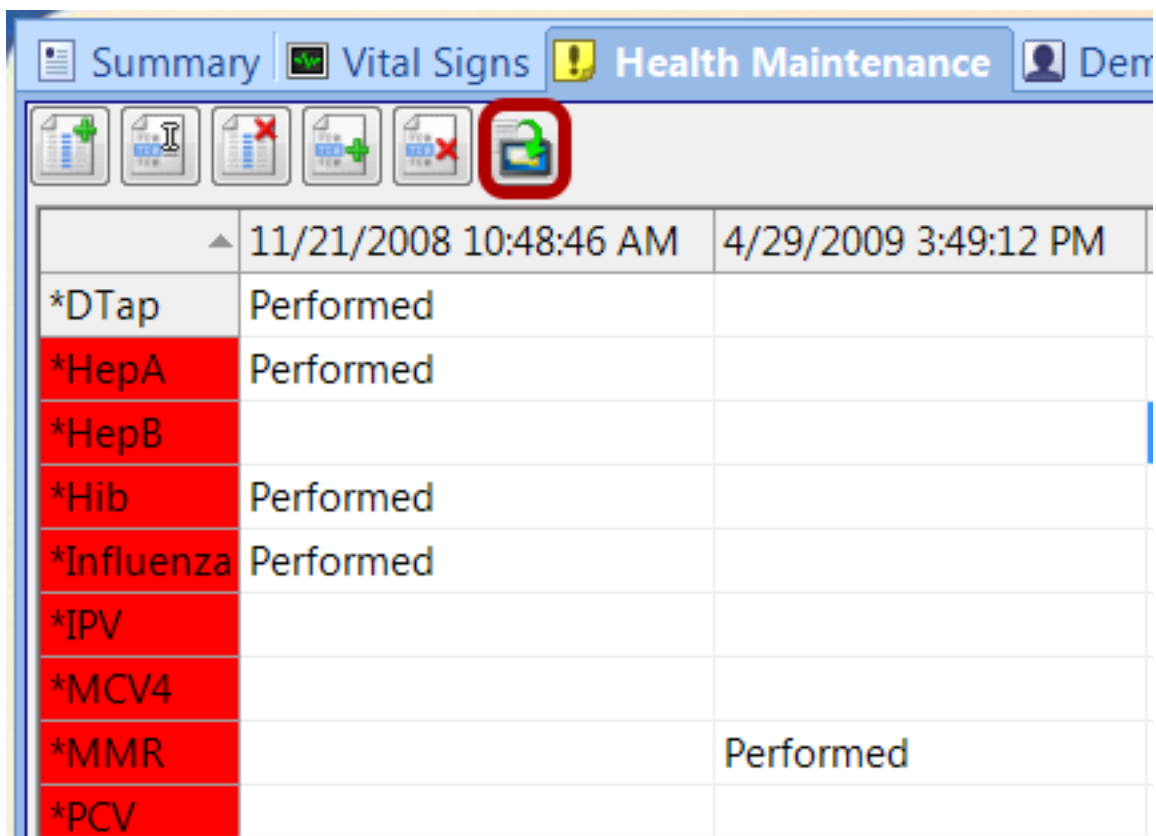
Performed

N/A

Next Due

In the lower region of the Health Maintenance section, Click the Action drop-down arrow and Click the appropriate action for that Rule.

## Transfer to SOAPnote



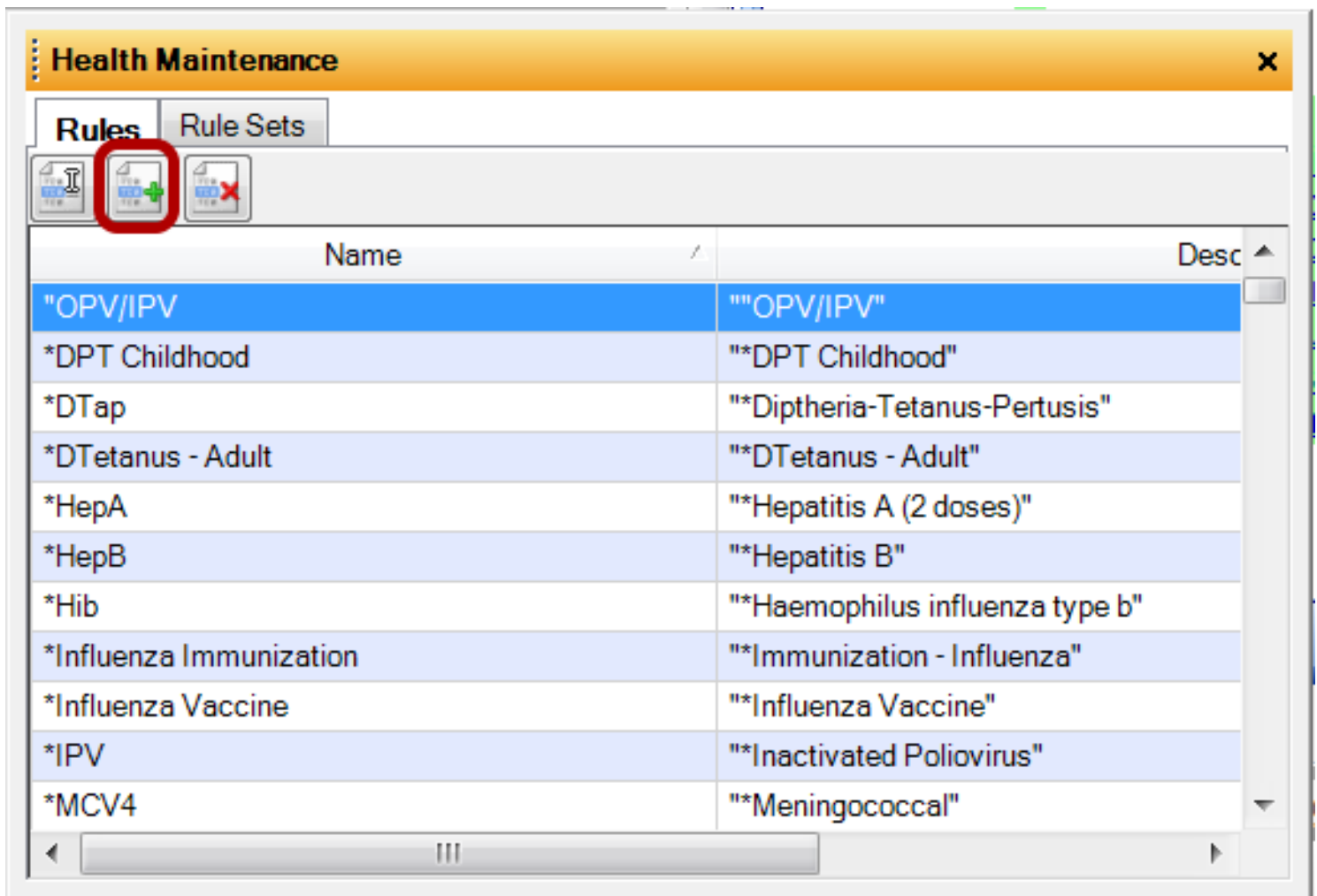
The screenshot shows a software interface with a blue header bar containing tabs: 'Summary', 'Vital Signs', 'Health Maintenance' (selected), and 'Dem'. Below the header is a toolbar with several icons. The icon for 'Transfer to SOAP Note' (a document with a green arrow) is circled in red. Below the toolbar is a table with immunization data.

	11/21/2008 10:48:46 AM	4/29/2009 3:49:12 PM
*DTap	Performed	
*HepA	Performed	
*HepB		
*Hib	Performed	
*Influenza	Performed	
*IPV		
*MCV4		
*MMR		Performed
*PCV		

Once the issues are addressed for that visit, Click the Transfer to SOAP Note button, and the Rules that have been addressed will be added to the Plan field in the current SOAP note.

## Create a Rule

### Create



Open Health Maintenance by clicking Tools > Health Maintenance Rules and sets and click on the Create Rule button (Green +)

## Choose Type

**Create Rule**

Type: **Basic**

Name:

Description:

Alert: 4 Weeks before due

Frequency

Interval: 0 Months

Ages / Dates:

Edit Add Remove

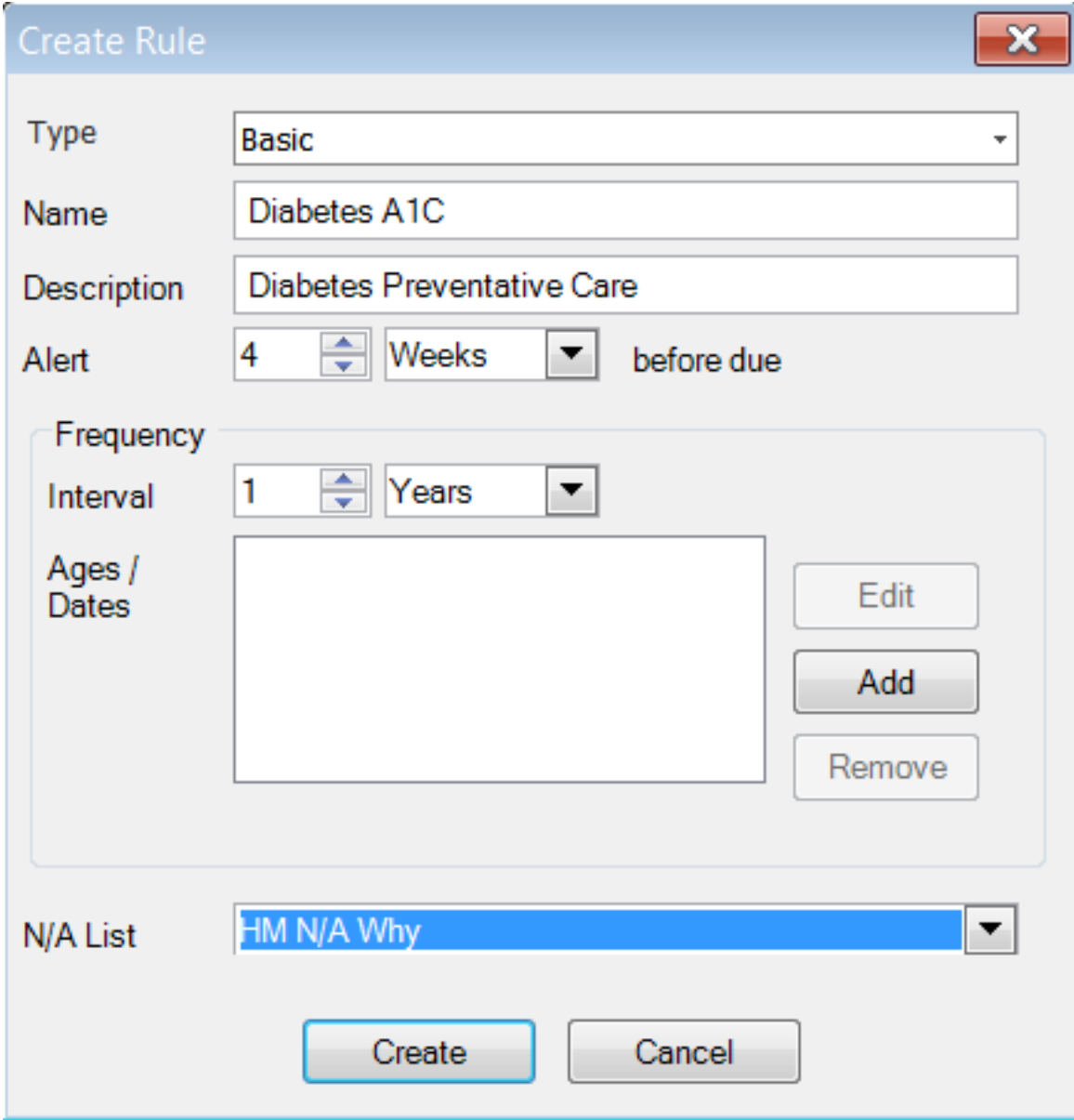
N/A List: HM N/A Why

Create Cancel

Choose either a Basic or Vaccine Rule type. Vaccine Types, by default, allow for documenting the Drug Name, Dose, Site, Manufacturer, Lot # and Expiration Date.



## Select Name and Description



The 'Create Rule' dialog box is a window with a title bar and a close button. It contains several input fields and a list. The 'Type' field is a dropdown menu set to 'Basic'. The 'Name' field is a text box containing 'Diabetes A1C'. The 'Description' field is a text box containing 'Diabetes Preventative Care'. The 'Alert' field consists of a spinner box set to '4', a dropdown menu set to 'Weeks', and the text 'before due'. The 'Frequency' section is a group box containing an 'Interval' field with a spinner box set to '1' and a dropdown menu set to 'Years', and an 'Ages / Dates' field which is a large empty text box. To the right of the 'Ages / Dates' field are three buttons: 'Edit', 'Add', and 'Remove'. The 'N/A List' field is a dropdown menu set to 'HM N/A Why'. At the bottom are two buttons: 'Create' and 'Cancel'.

Create Rule

Type: Basic

Name: Diabetes A1C

Description: Diabetes Preventative Care

Alert: 4 Weeks before due

Frequency

Interval: 1 Years

Ages / Dates

Edit

Add

Remove

N/A List: HM N/A Why

Create Cancel

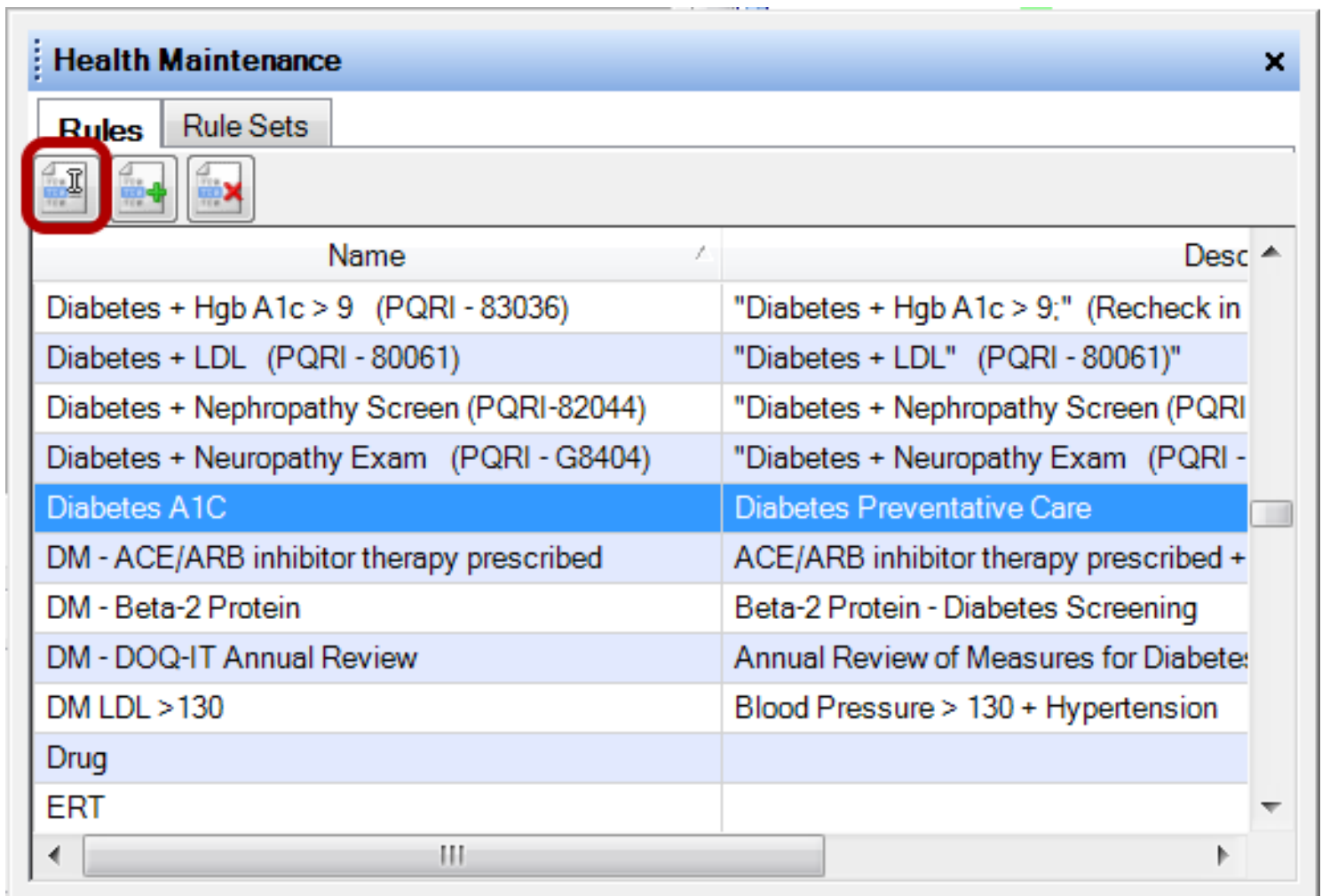
Type the Rule Names and Descriptions in their respective fields, and set the Alert interval, Frequency (at weeks, months, years, or at a particular age, etc. click Create.

**Alert:** How far in advance of the due date do you want to be alerted that an item is due.

**Frequency:** How often do you want this issue to be addressed (at regular intervals or at a specific age.

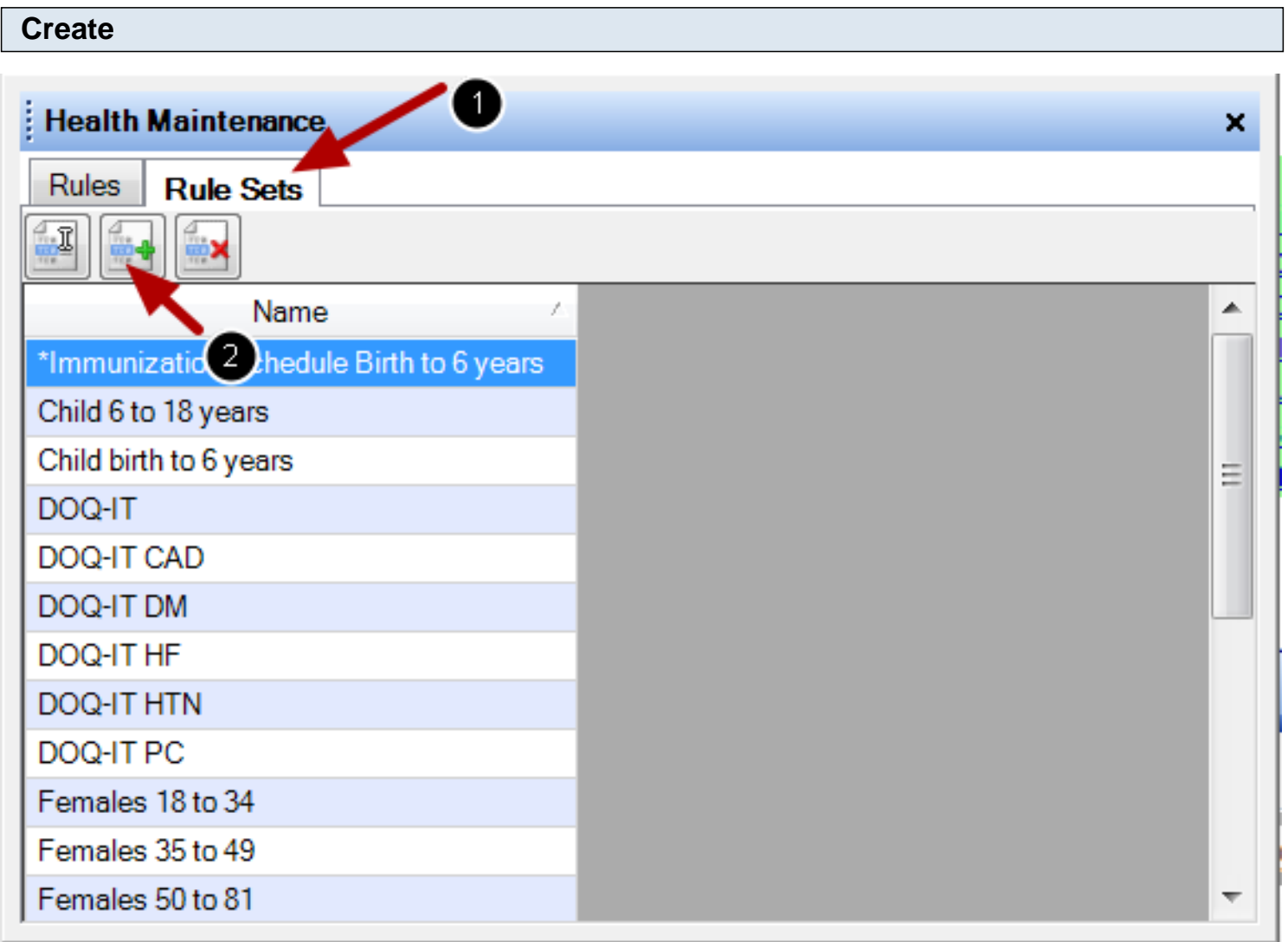
**N/A List:** this will be the exception list for the rule; i.e., why something is performed or not performed

## Editing a Rule



To edit a Rule, click the Rule to be edited, and then click the Edit Rule button. This action will bring up the Edit Rule dialog. Make the edits, and click Save.

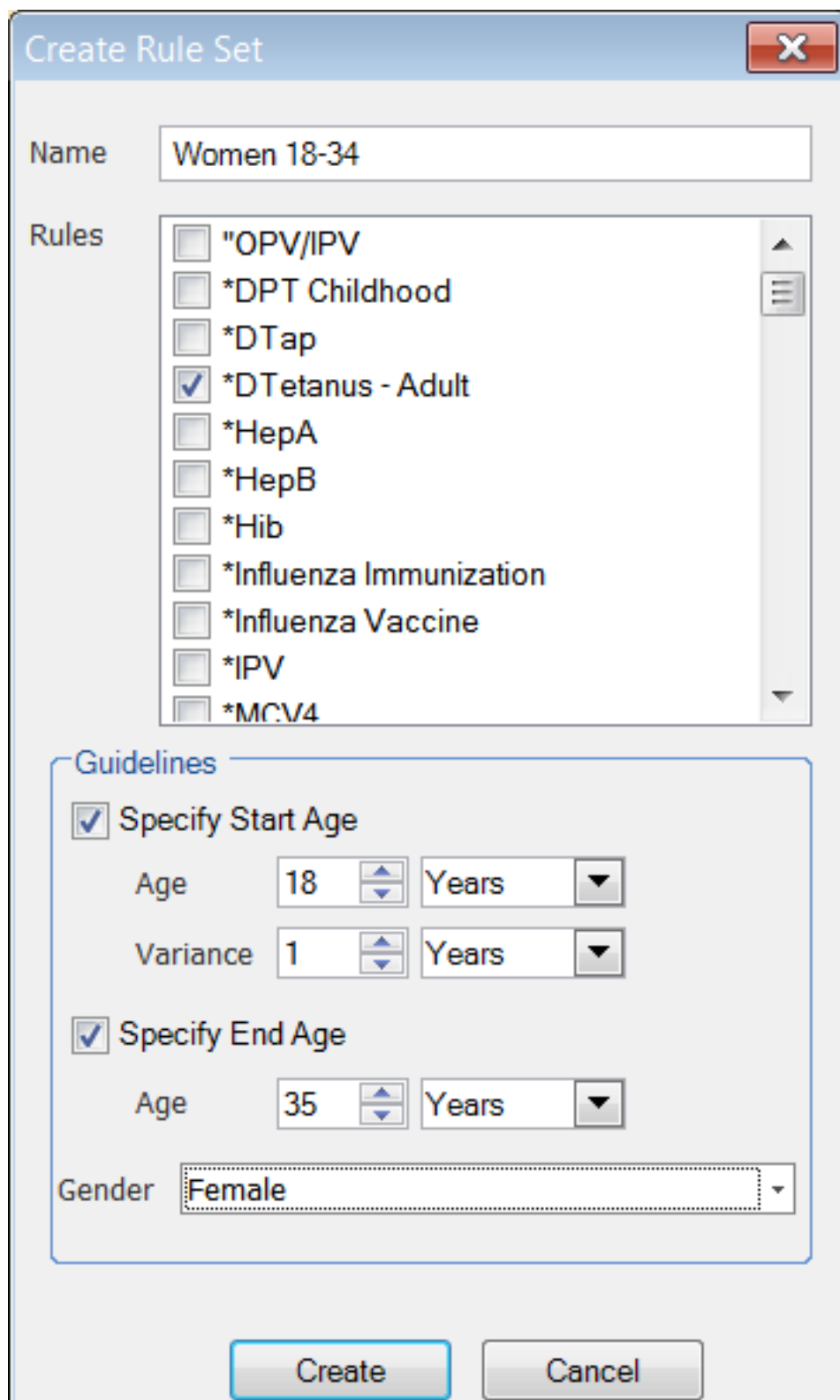
## Create a Rule Set



Open Health Maintenance by selecting Tools > Health Maintenance Rules and Sets.

1. Choose the Rule Sets Tab.
2. Click the Create Rule Set button. The Create Rule Set dialog opens.

## Choose Rules



The "Create Rule Set" dialog box is shown. It has a title bar with a close button. The "Name" field contains "Women 18-34". The "Rules" list contains several items, with "\*DTetanus - Adult" checked. The "Guidelines" section has two checked options: "Specify Start Age" and "Specify End Age". The "Specify Start Age" section has "Age" set to 18 and "Variance" set to 1, both in "Years". The "Specify End Age" section has "Age" set to 35 in "Years". The "Gender" dropdown is set to "Female". At the bottom are "Create" and "Cancel" buttons.

**Create Rule Set**

Name:

Rules:

- ☐ "OPV/IPV
- ☐ \*DPT Childhood
- ☐ \*DTap
- ☒ \*DTetanus - Adult
- ☐ \*HepA
- ☐ \*HepB
- ☐ \*Hib
- ☐ \*Influenza Immunization
- ☐ \*Influenza Vaccine
- ☐ \*IPV
- ☐ \*MCV4

**Guidelines**

☒ Specify Start Age

Age:    Years

Variance:    Years

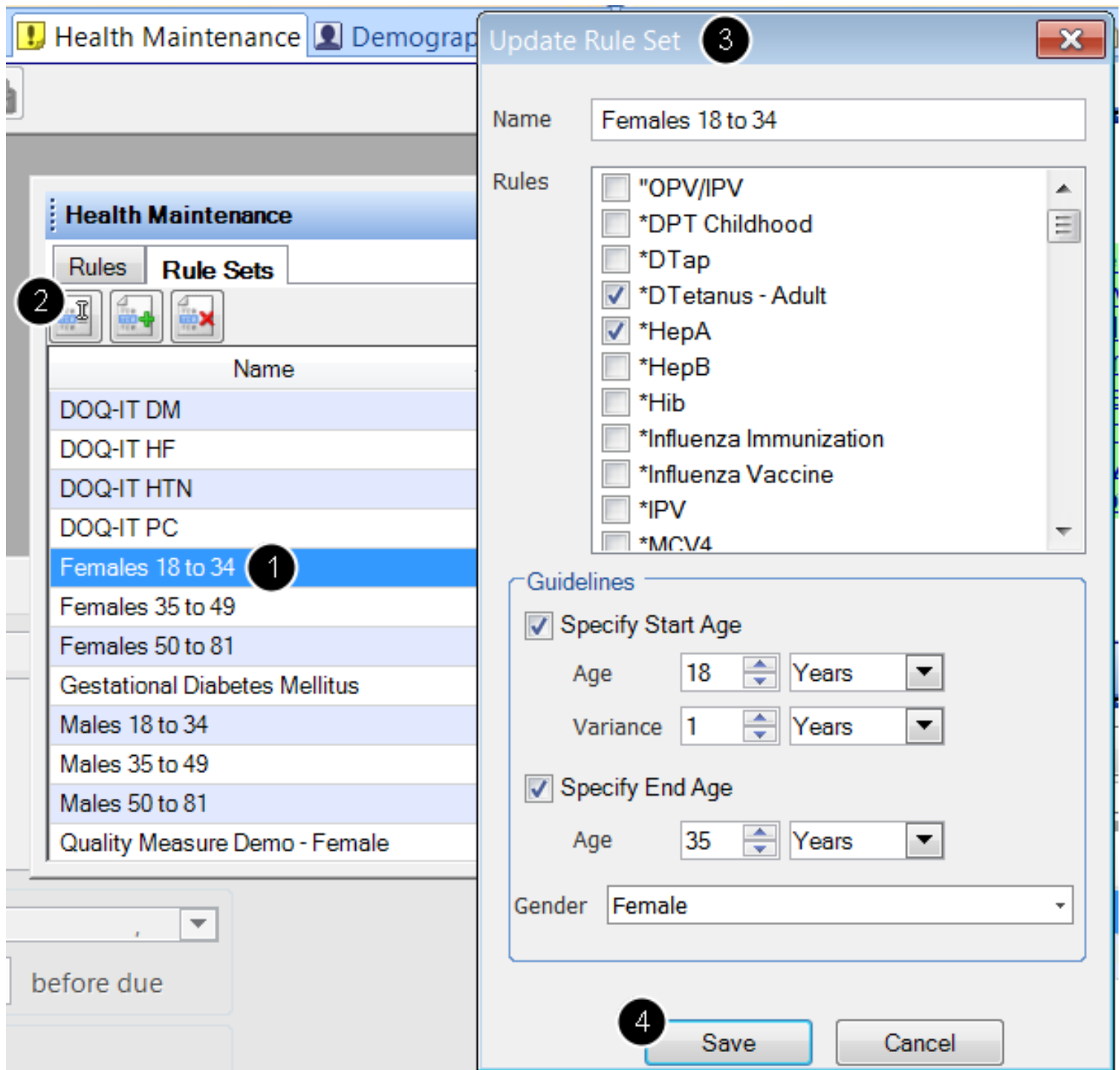
☒ Specify End Age

Age:    Years

Gender:

Click the Rule Set checkboxes to include them in the Rule Set, and then click the Create button. The checked Rule Set(s) will be added to the list. Also specify the guidelines for what age to begin this rule as well as how often the rule should be addressed. You can also specify an end age, and gender.

## Edit a Rule Set



To edit a Rule Set:

1. Click the Rule Set to be edited
2. Click the Edit Rule Set button
3. Make the edits
4. Click Save

## Using the Vaccine Rule Types

### Add Vaccine Type

The screenshot shows a software interface for creating a vaccine rule. On the left, a 'Health Maintenance' window displays a list of rules, with 'Diabetes A1C' selected. A circled '1' points to the 'Add' button (a green plus icon) in the 'Rules' tab. On the right, the 'Create Rule' dialog box is open. It has a title bar with a close button. The 'Type' dropdown is set to 'Vaccine' and is circled with a '2'. Below it are fields for 'Name' and 'Description'. The 'Alert' section shows '4' in a spinner box, 'Weeks' in a dropdown, and 'before due' text. The 'Frequency' section shows '0' in a spinner box and 'Months' in a dropdown. Below these is a large text area for 'Ages / Dates' with 'Edit', 'Add', and 'Remove' buttons. At the bottom of the dialog is an 'N/A List' dropdown set to 'HM N/A Why' and 'Create' and 'Cancel' buttons.

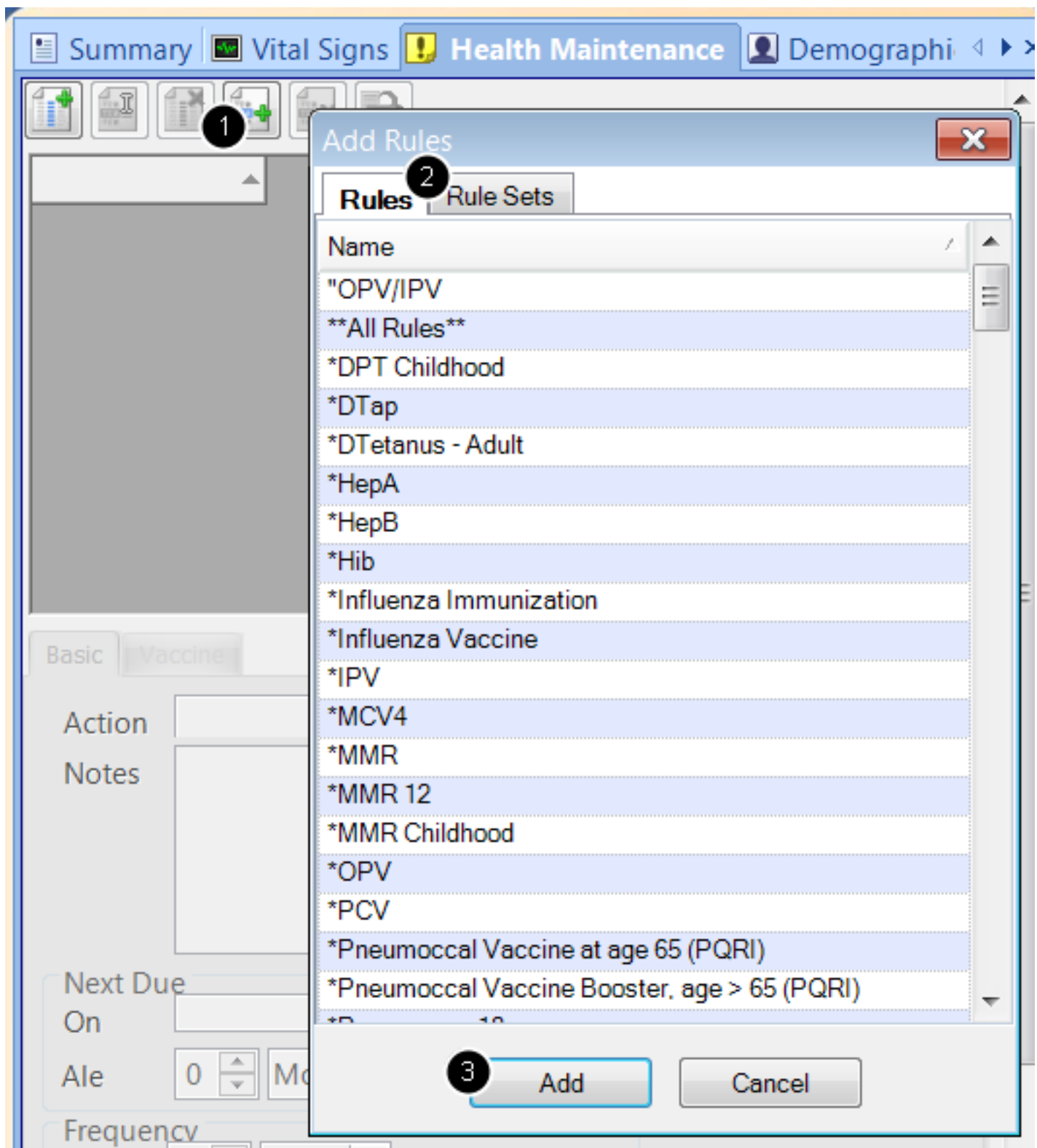
To add a vaccine type Rule, follow the instructions below. This is helpful for creating vaccines not found in the original database.

1. Click on the button to add a New Rule
2. Select a Vaccine Rule Type.

### Creating a Vaccine Rule Set

To create a vaccine rule set (for instance, a set of all childhood shots), see: [Create a Rule Set](#).

## Add Vaccine Rules to a Chart

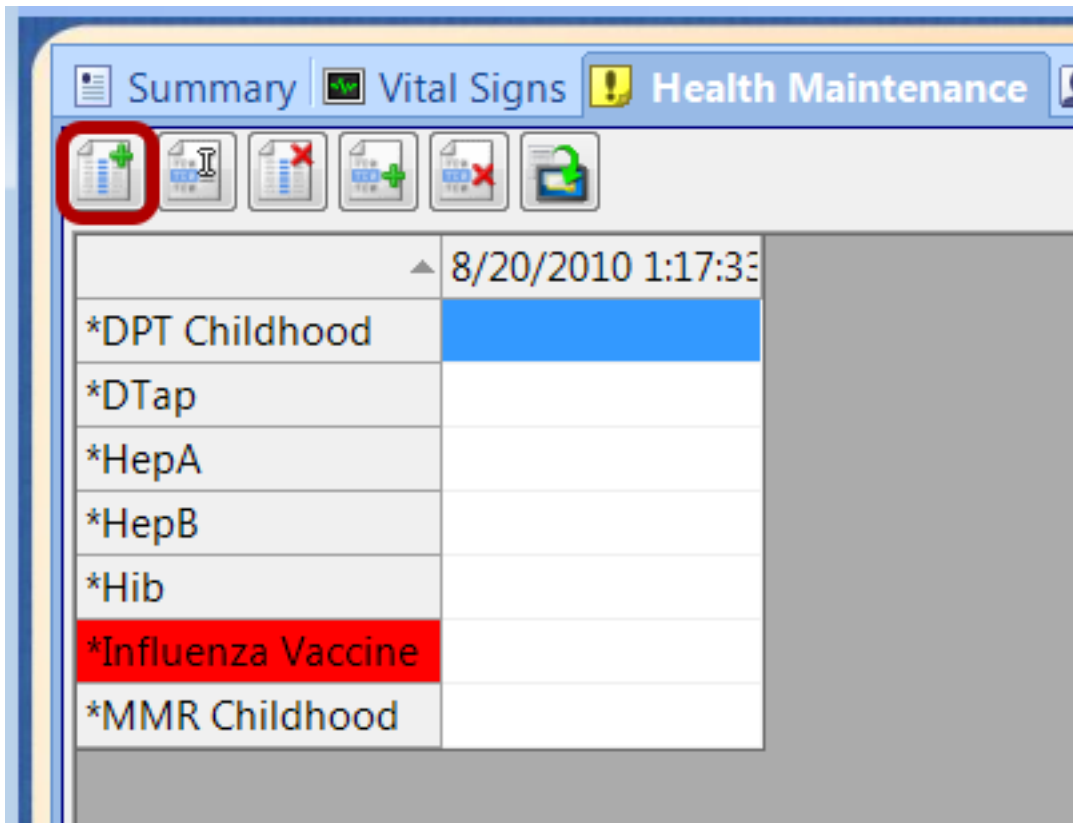


To add vaccine rules to a chart:

1. Click the "Add Rules" button in the Health Maintenance chart section
2. Select the rules or rule sets to add

### 3. Click Add

#### Add a Reading Date



The screenshot shows a software interface with three tabs: 'Summary', 'Vital Signs', and 'Health Maintenance'. The 'Health Maintenance' tab is active. Below the tabs is a toolbar with several icons: a document with a green plus sign (circled in red), a document with a pencil, a document with a red X, a document with a green plus sign, a document with a red X, and a document with a green checkmark. Below the toolbar is a table with a header row containing a date and time '8/20/2010 1:17:33'. The table has two columns. The first column lists vaccine types, and the second column is empty. The rows are: '\*DPT Childhood', '\*DTap', '\*HepA', '\*HepB', '\*Hib', '\*Influenza Vaccine' (highlighted in red), and '\*MMR Childhood'.

	8/20/2010 1:17:33
*DPT Childhood	
*DTap	
*HepA	
*HepB	
*Hib	
*Influenza Vaccine	
*MMR Childhood	

Next, add to document vaccines in a chart, click on the button to add a reading date.



## Fill in Information

The screenshot shows a medical software interface with a top navigation bar containing 'Summary', 'Vital Signs', 'Health Maintenance' (active), and 'Demographi'. Below the navigation bar is a toolbar with icons for adding, editing, deleting, and saving records. The main area displays a table of health maintenance items for a patient, dated 8/20/2010 1:17:33. The table lists several vaccines, with '\*Influenza Vaccine' highlighted in red. Below the table is a 'Vaccine' sub-form with fields for 'Action', 'By', 'Location', 'Notes', 'Next Due On', and 'Alert'. The 'Vaccine' tab is selected, and the 'Alert' field is set to '7 Days before due'.

	8/20/2010 1:17:33
*DPT Childhood	Performed
*DTap	
*HepA	
*HepB	
*Hib	
*Influenza Vaccine	
*MMR Childhood	

Basic

Vaccine

Action

Performed

By

Kaye L. Williamson

Location

@ Clinic

Notes

Next Due On

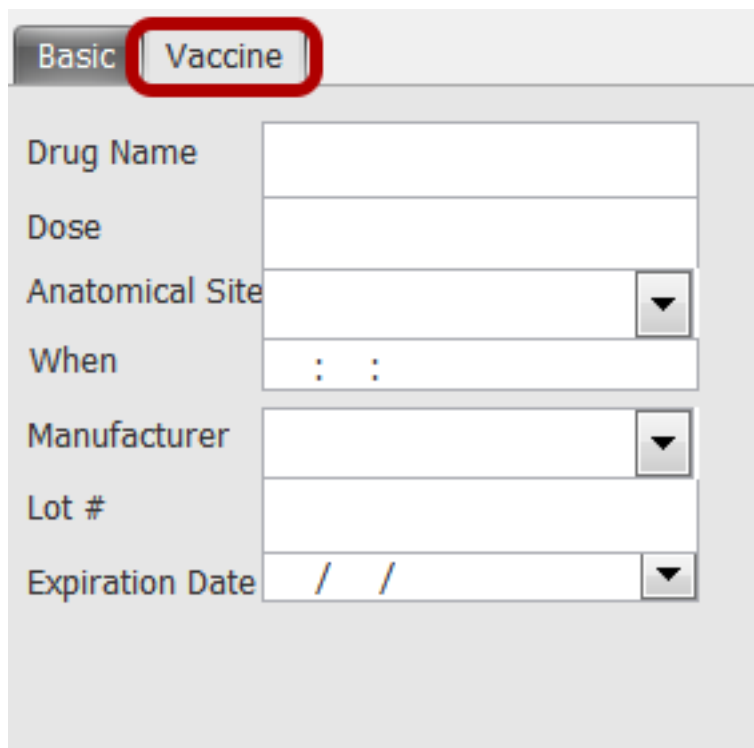
7

Days

before due

Click on the Vaccine tab and fill in the required information. The Next Due On information will determine when the next reminder for this patient will alert you to a coming due vaccine booster.

## Vaccine Tab



The screenshot shows a software interface with two tabs: 'Basic' and 'Vaccine'. The 'Vaccine' tab is selected and highlighted with a red circle. Below the tabs, there is a form with the following fields:

- Drug Name: Text input field
- Dose: Text input field
- Anatomical Site: Dropdown menu
- When: Time input field (format: : :)
- Manufacturer: Dropdown menu
- Lot #: Text input field
- Expiration Date: Date input field (format: / /)

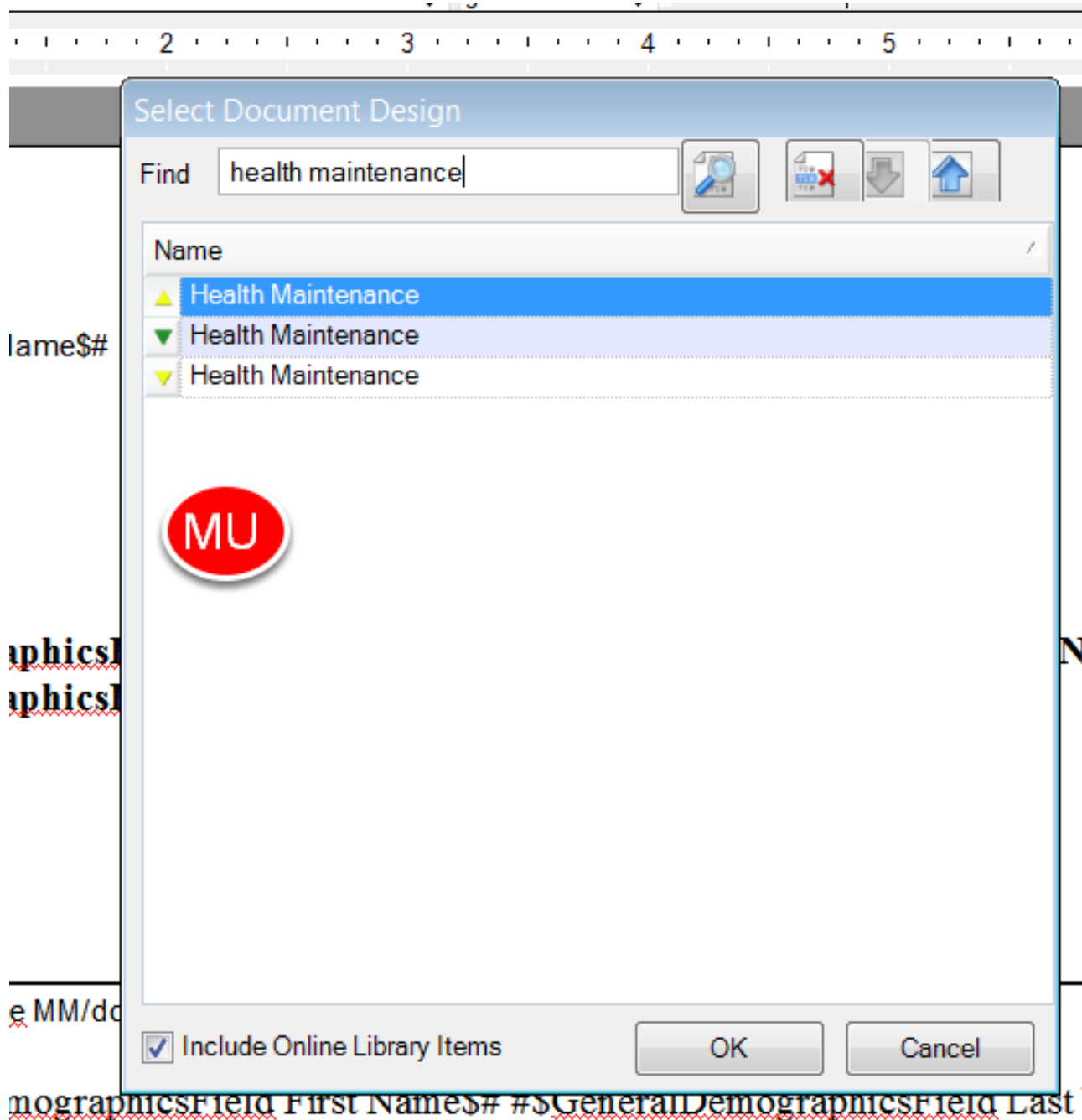
Click on the Vaccine tab to see additional information you can record.

# Generate a Health Maintenance Report

**\*REQUIRED FOR MEANINGFUL USE (MU) OPTIONAL MENU SET (CHOOSE 5 OF 10) - PATIENT REMINDERS**

[Click here to view Meaningful Use Criteria](#)

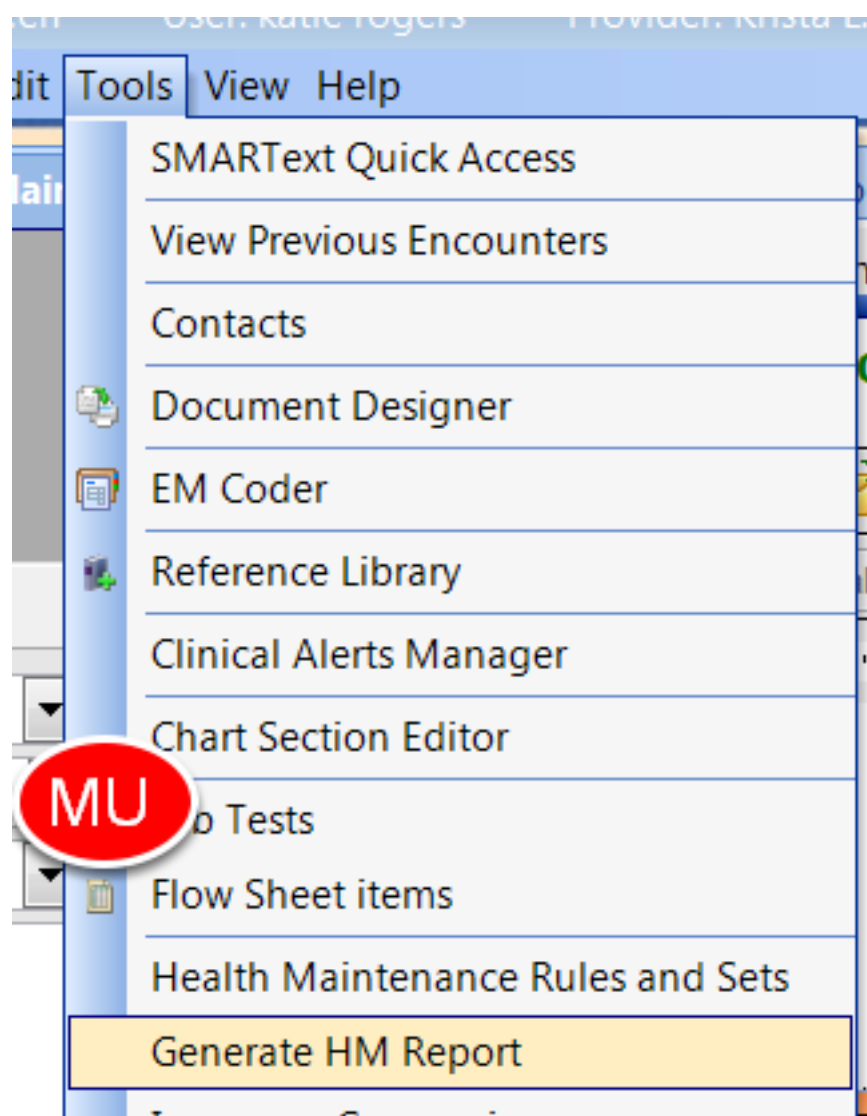
## Create a Health Maintenance Letter



You must first create a Health Maintenance Letter in Document Designer before you can print a Health Maintenance Report. To learn more about Document Designer, see the following link: [Document Designer](#). There is an existing design that can be used for generic Health Maintenance items, which

can be found by searching the available designs for "Health Maintenance".




## Generate Report



Once the report has been created, go to Tools > Generate HM Report.

## Select Rules

**Health Maintenance Report** x

Rules to find: \*\*All Rules\*\*  Due on or bef: 8/20/2010  

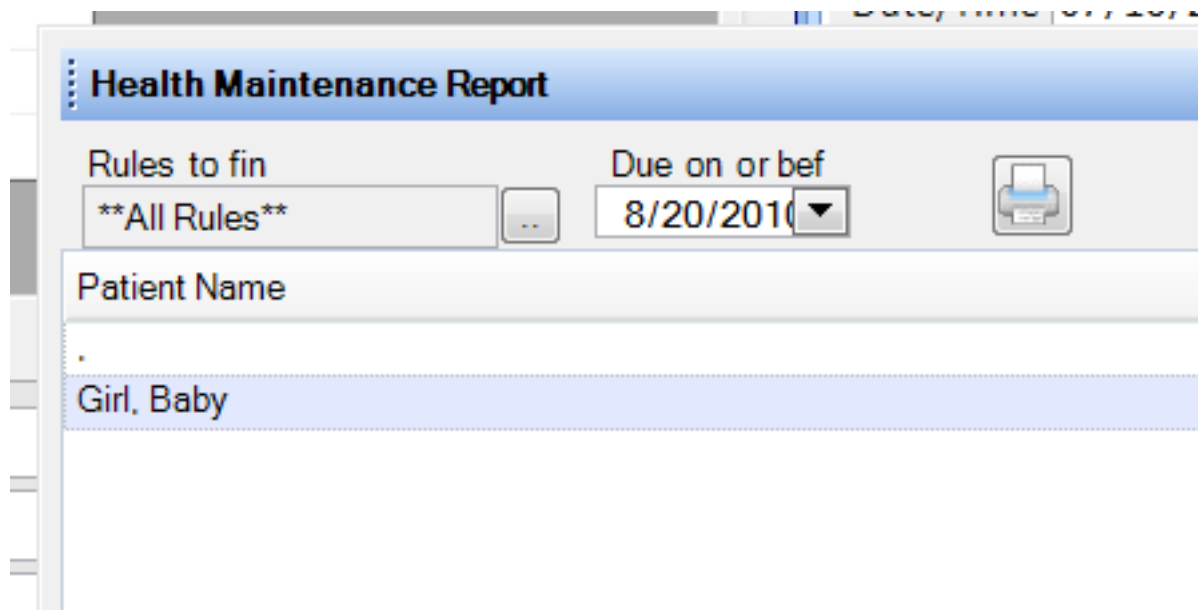
Patient Name

- .
- Girl, Baby

Remo

In the Rules to find field, click the All Rules list item, or click the Browse button to select one or more Rules or Rule Sets. A list of patients with selected rule(s) will display.

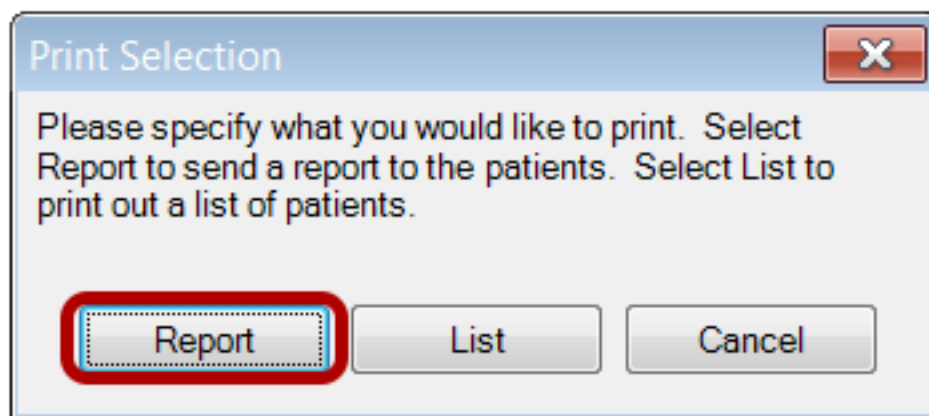
## Choose Dates



The screenshot shows a window titled "Health Maintenance Report". It contains two input fields: "Rules to fin" with the text "\*\*All Rules\*\*" and a small menu icon to its right, and "Due on or bef" with the date "8/20/2010" and a dropdown arrow to its right. A printer icon is located to the right of the date field. Below these fields is a "Patient Name" label followed by a text box containing "Girl, Baby".

In the Due on or before field, click the down-arrow, then click on the date you are wishing to search for rules due by. Click Print.

## Print



The screenshot shows a dialog box titled "Print Selection" with a close button (X) in the top right corner. The text inside reads: "Please specify what you would like to print. Select Report to send a report to the patients. Select List to print out a list of patients." At the bottom, there are three buttons: "Report", "List", and "Cancel". The "Report" button is highlighted with a red rectangular border.

To print a letter to the patient, press the Report button, and click the Health Maintenance list item in the Select Document Design list. Press the OK button.

## Save a Copy

Flow Sheets | Labs | SOAP Notes | **Correspondence Out**

Normal | Arial | 11 | **B** | *I* | U

1 2 3 4

**Date:** 09/05/2007

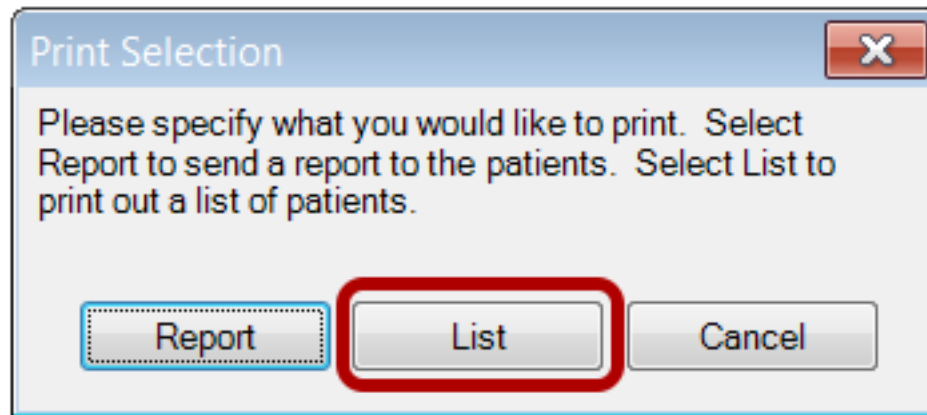
**Dear** Baby Girl,  
This letter is being mailed to you to inform you that there  
(or immunizations) that are due to be addressed.

Please call 8004557627 for more information or to make

Sincerely,

Kaye Yocham  
Printed on 09/05/2007 at 11:26

You will be prompted to Save a Copy of Document to Correspondence Out for each patient listed. Fill in the appropriate fields, and click the Create button. This will save a copy of the letter in the Correspondence Out section of each selected patient's chart.



To print a list of the patients with Health Maintenance issues to be addressed, press the List button and when the Print Preview dialog opens, click the Print button.



# Pick Lists

## Pick Lists - Overview

---

Pick lists provide an extremely powerful and flexible way to quickly enter data. They are predefined lists of data items. The items can be inserted into documentation from the pick list. What may not be obvious, in the beginning, is the different types of pick lists. Some are presented in the SMARTText Quick Access dialog, and others pop-up within documents while in the process of creating documentation. Once the different types of lists and their different functions are understood, their use becomes more intuitive. In the beginning, without a knowledge of the different lists and how they function, they may seem a bit inconsistent and illogical.

### Two Classes of Pick Lists

1. Pop-Up Pick Lists
2. Quick Access Pick Lists

### Five Types of Pick Lists

**F11 Pop-Up:** Enter a keyword (or a few letters); CPT code; or ICD code, and press F11 to get a pop-up list of local items.

**Shift + F11 Pop-Up:** Enter a keyword (or a few letters); CPT code; or ICD code, and press Shift + F11 to get a pop-up list of local and online items.

**Spacebar Pop-Up:** Enter a shortcut code and press space bar; if more than one ST item has a Shortcut matching the group of letters, then a list of those items is presented. If only one ST item has an exact Shortcut match, it is automatically inserted.



**Location - Quick Access:** Click in a field, and a list of items, ranked on past usage, presents in the Quick Access dialog.

**SMARTText - Quick Access:** Click on a ST item header and various types of pick lists are presented in the Quick Access dialog.

## Active Problems[

headache

Q	Description	Shortcut	Type	U
▲	"Migraine headache" (nonspecific, with status - ICD#346.92)	MigH	Dx	1
▲	"Subdural hematoma, nontraumatic" (ICD#432.1)	SubDH	Dx	1
▲	"Subarachnoid hemorrhage" (Traumatic - #852.00)	SubAra	Dx	1
▲	"Cervicogenic Headache" (ICD#723.9)	CerH	Dx	1
▲	"Tension headache" (ICD#339.10)	TenH	Dx	1
▲	"Cluster Headache" (ICD#346.20)	CluH	Dx	1
▲	"Temporal arteritis" (ICD#446.5)	TemA	Dx	1
▲	"Malaria" (ICD#084.6)	Malari	Dx	1
▲	"Headache" (nonspecific - ICD#784.0)	Hea	Dx	1
▲	"Headache following lumbar puncture" (ICD#349.0)	HeaLP	Dx	1


☐ Show Unused


Find

Enter a keyword (or a few letters); CPT code; or ICD code, and press F11 to get a pop-up list of local items.

## Shift + F11 Pop-Up

**Active Problems[**  
headache

Q	Description	Shortcut	Type	U
▲	"Migraine headache" (nonspecific, with status - ICD#346.92)	MigH	Dx	
▲	"Subdural hematoma, nontraumatic" (ICD#432.1)	SubDH	Dx	
▲	"Subarachnoid hemorrhage" (Traumatic - #852.00)	SubAra	Dx	
▲	"Cervicogenic Headache" (ICD#723.9)	CerH	Dx	
▲	"Tension headache" (ICD#339.10)	TenH	Dx	
▲	"Cluster Headache" (ICD#346.20)	CluH	Dx	
▲	"Temporal arteritis" (ICD#446.5)	TemA	Dx	
▲	"Malaria" (ICD#084.6)	Malari	Dx	
▲	"Headache" (nonspecific - ICD#784.0)	Hea	Dx	
▲	"Headache following lumbar puncture" (ICD#349.0)	HeaLP	Dx	
▼	Episodic tension-type headache		Dx	
▼	"Migraine Variants" (not intractable - ICD#346.20)	MigVar	Dx	
▼	Episodic cluster headache		Dx	
▼	"Subarachnoid hemorrhage" (traumatic - ICD#852.00)	SubAra	Dx	

123

☐ Show Unused

Find

Enter a keyword (or a few letters); CPT code; or ICD code, and press Shift + F11 to get a pop-up list of local and online items.

## Spacebar Pop-Up

**Active Problems[**  
AbdA

Q	Description	Shortcut	Type	U
▲	"Abdominal aortic aneurysm" (without mention of rupture - ICD#441.4)	AbdA	Dx	1
▲	"Abdominal aortic aneurysm, ruptured" (ICD#441.3)	AbdA	Dx	1

Enter a shortcut and press space bar; if more than one SMARText item has a shortcut matching the group of letters, then a list of those items is presented. If only one ST item has an exact Shortcut match, it is automatically inserted.

## Quick Access Pick Lists

Many SMARText items that offer pick lists will have a header displayed in blue, underlined text to signify that clicking on them will display pick list items for selection. The items are displayed in the SMARText Quick Access dialog, which by default, is docked to the right side of SOAPware.

### Pick Lists in Quick Access Based on Location


**Assessment[**

**Plan**

Actions:

Handouts: Bronchodilators, Nasal All

**Medications**

 SOAPNote

Seq	Description	Service	Type	Usage
1	"Allergic rhinitis" (season...	AllR	Dx	5
2	"Abnormal Sputum" (ICD...	AbnSpu	Dx	4
3	"Acne rosacea" (ICD#695...	AcnR	Dx	4
4	"Acute nasopharyngitis" [...	ColdX	Dx	4
5	"Acute Rhinitis" (ICD#460)	AcuR	Dx	4
6	"Administrative procedure/a...	AdmPro	Dx	4
7	"Adult respiratory distress s...	AduR	Dx	4
8	"Aphasia (from Head/Neck...	AphHN	Dx	4
9	"Aspiration of foreign body" ...	AspF	Dx	4
0	"Aspiration pneumonia" (L...	AspPne	Dx	4
	"Asthma - Acute Exacerbati...	AstAE	Dx	4
	"Asthma - Intrinsic, Stable" ...	AstI	Dx	4
	"Asthma" (nonspecific - 4...	Ast	Dx	4

Whenever entering a field, the SOAPware Quick Access pick list will present the most likely data items the user is going to need without the user having to do anything. The items in the list are SMARText items that have been previously used in that field.

## Pick Lists in Quick Access from Clicking a SMARTText Header

### Subjective

CHIEF COMPLAINT(S): [ ]

HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) as  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

ROS:

### Objective

Exam: GENERAL: Appearance: General appearance can be descri

### Assessment

SOAPNote

Drag a column header here to group by that column.

Active Item "CHIEF COMPLAINT(S):"

Selected	Description
<input type="checkbox"/>	( A - GENERAL and Unspecified )
<input type="checkbox"/>	( B - BLOOD and IMMUNE )
<input type="checkbox"/>	( D - DIGESTIVE )
<input type="checkbox"/>	( F - EYE )
<input type="checkbox"/>	( H - EAR )
<input type="checkbox"/>	( K - CARDIOVASCULAR )
<input type="checkbox"/>	( N - NEUROLOGICAL )
<input type="checkbox"/>	( P - PSYCHOLOGICAL )
<input type="checkbox"/>	( R - RESPIRATORY )
<input type="checkbox"/>	( S - SKIN )
<input type="checkbox"/>	( T - ENDOCRINE/METABOLIC/NUTRITIONAL )
<input type="checkbox"/>	( U - UROLOGICAL )
<input type="checkbox"/>	( W - PREGNANCY/CHILDBIRTH/FAMILY PLANNING...
<input type="checkbox"/>	( X - FEMALE GENITAL )
<input type="checkbox"/>	( Y - MALE GENITAL )
<input type="checkbox"/>	( Z - SOCIAL PROBLEMS )
<input type="checkbox"/>	( L - MUSCULOSKELETAL )
<input type="checkbox"/>	( Most Common Chief Complaints BUNDLE)

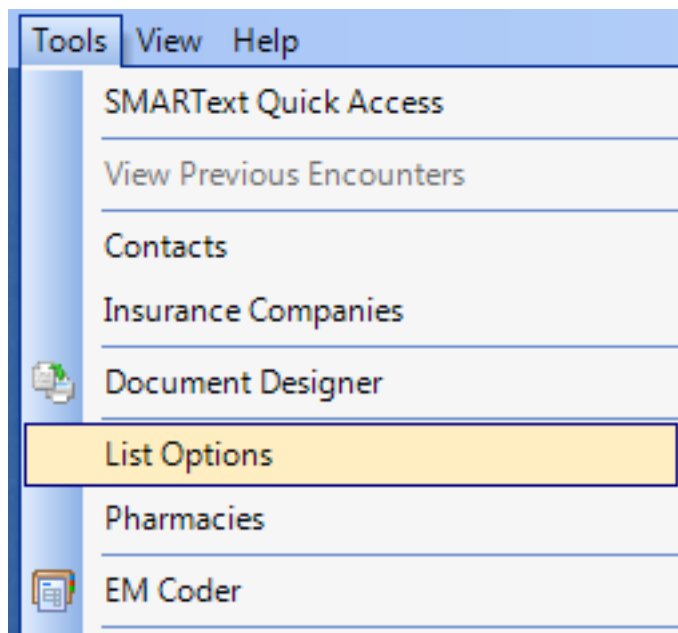
Many SMARTText Item offer pick lists (e.g. Chief Complaint, and HPI Item types.) These generally have the same function/action as Multi-Sel List types (to be discussed later). Another area using the same functionality as Multi-Sel Lists are the Structured Dx and Structured Rx Item types.

## Drop-Down Menu Lists Created within List Options

---

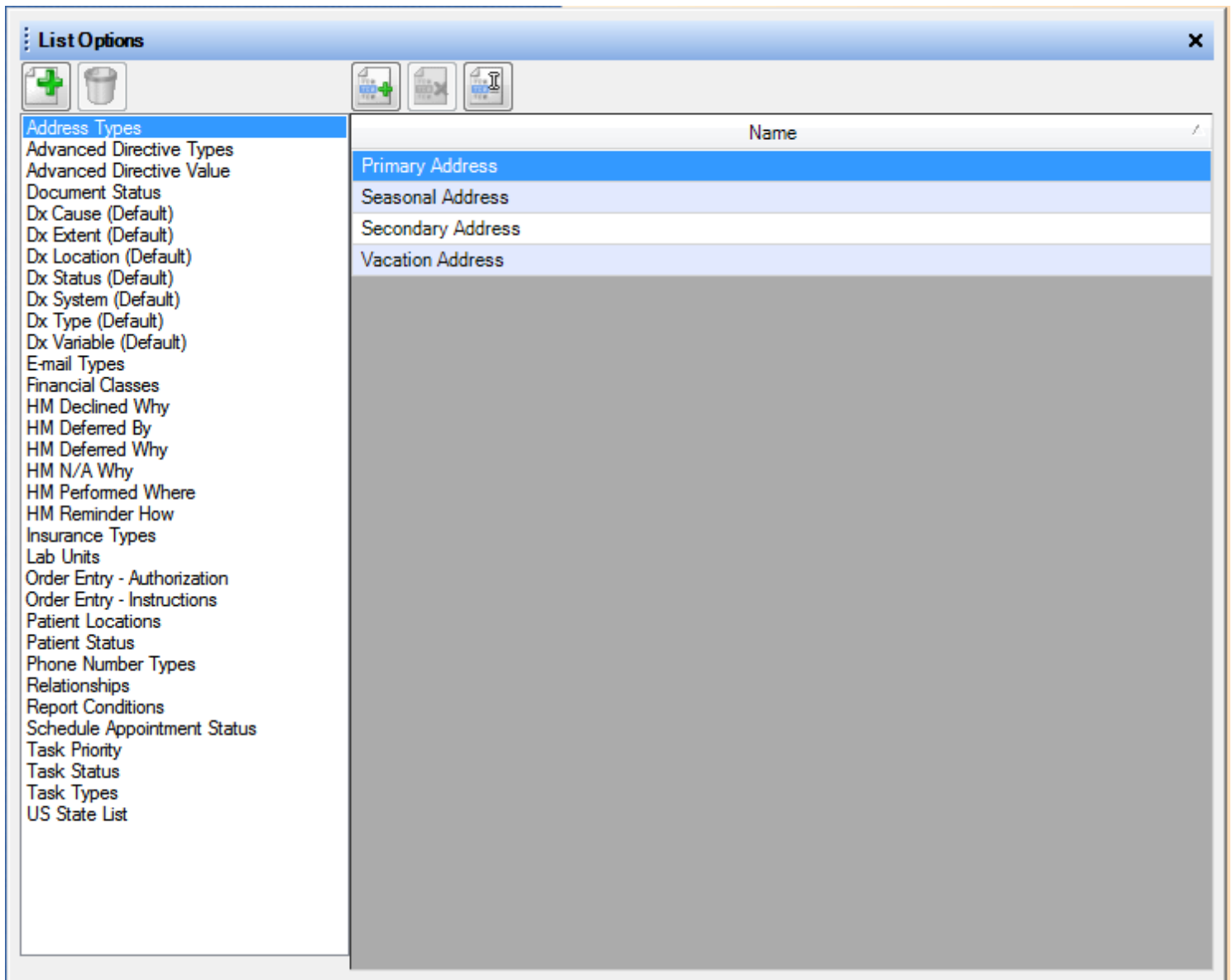
In many areas, there are Drop-Down Menu Lists from which items can be selected. Therefore, these are usually referred to as menu lists rather than pick lists. These are not related to SMARText Items, but are set up for all users to have in common. These are defaulted with SOAPware, but can be customized in List Options.

### List - Options



To change these lists, click Tools > List Options. This will provide you with all of the drop-down lists you can customize.

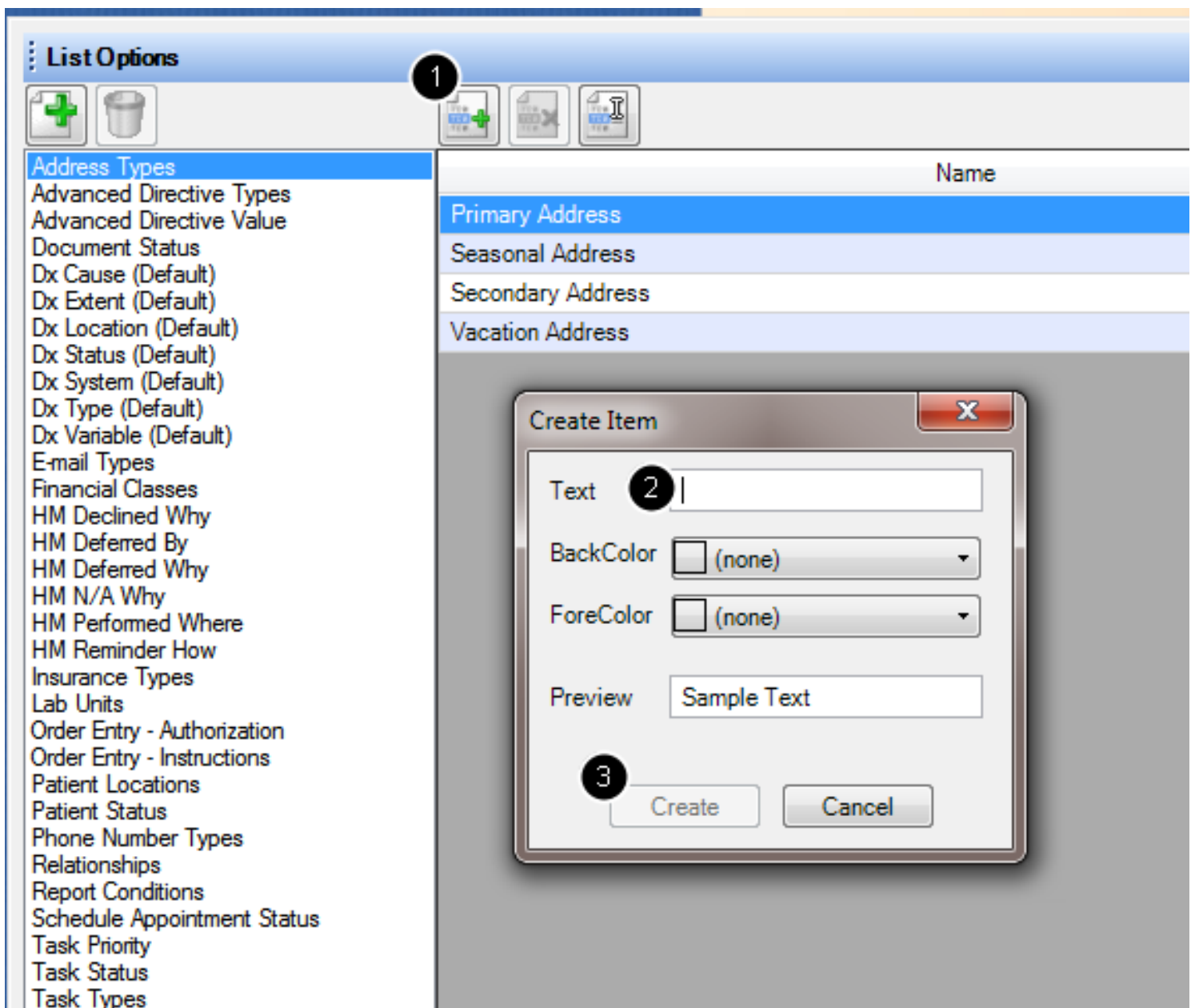
## List Types



There are many areas in SOAPware that allow you to add to the list options.



## Add a List Option



To add a list option:

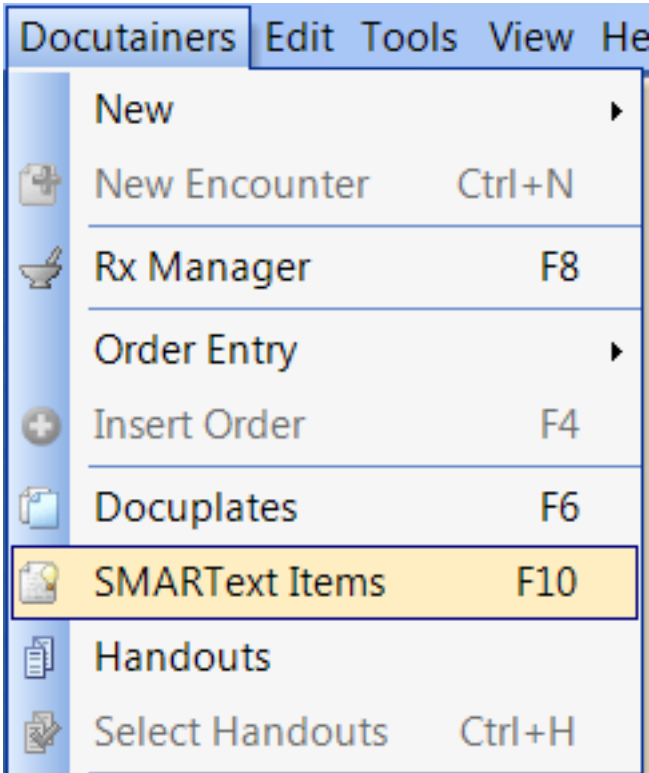
1. Click on the Add button.
2. Insert the text you want to appear for the list option item. You can also choose both background and foreground colors for this list item.
3. Click Create.

# **SMARText for the Everyday User**

# Code Expander/Macro

A macro can be very helpful when inserting strings of unstructured text that you type on a regular basis. By creating an expander code, you can quickly insert this text without having to type the entire string of text.

Open SMARText Items











Go to Docutainers > SMARText Items.

## Add an Item

**SMARText Items** ✕

Search List - By Type List - By Keyword

Find



Shortcut	Description	Type	Usage	Keywords	Last Modified
----------	-------------	------	-------	----------	---------------

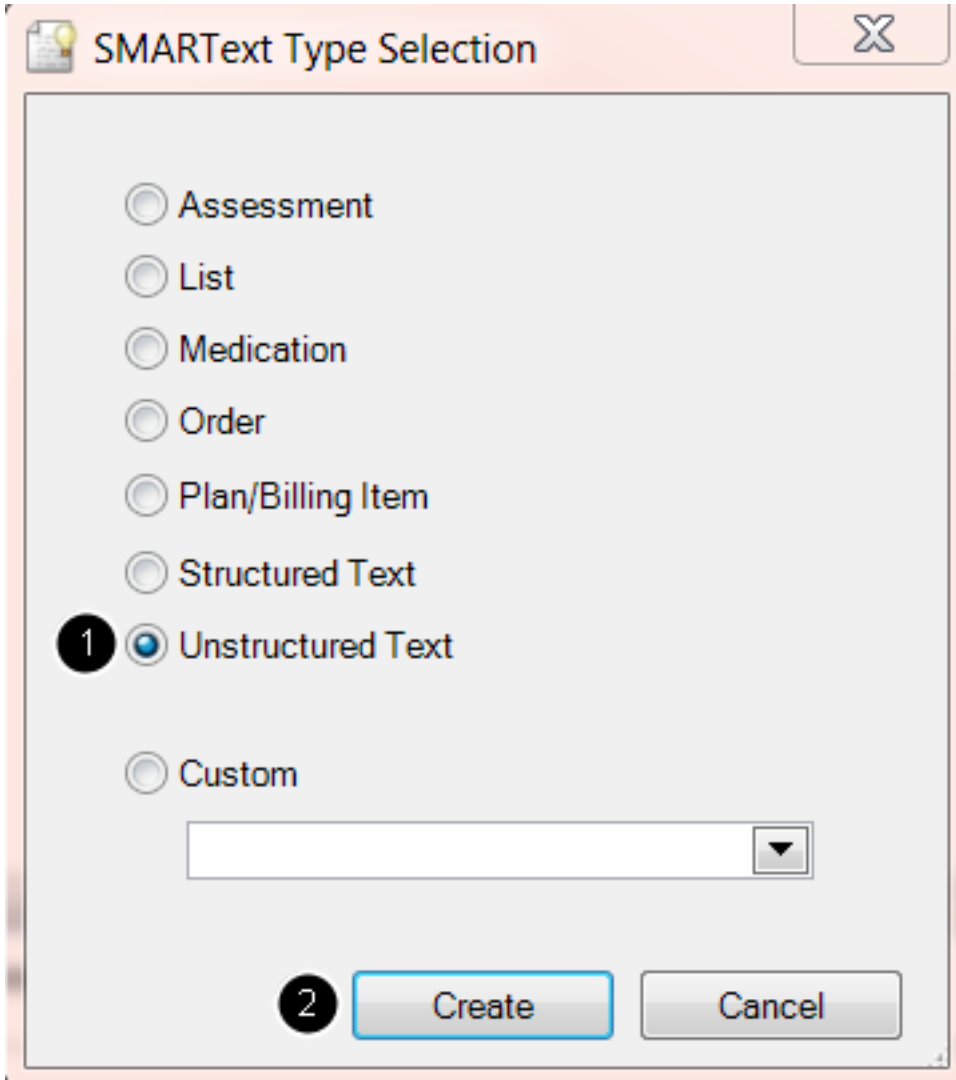
☒ Include Online Library Items. Insert

Filter

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Click on the Create button.

## Choose Item Type



The image shows a 'SMARTText Type Selection' dialog box. It has a title bar with a document icon and a close button (X). The main area contains a list of radio button options: 'Assessment', 'List', 'Medication', 'Order', 'Plan/Billing Item', 'Structured Text', 'Unstructured Text', and 'Custom'. The 'Unstructured Text' option is selected and marked with a circled '1'. Below the 'Custom' option is an empty text input field with a dropdown arrow. At the bottom, there are two buttons: 'Create' (highlighted with a blue border and marked with a circled '2') and 'Cancel'.

SMARTText Type Selection

☐ Assessment

☐ List

☐ Medication

☐ Order

☐ Plan/Billing Item

☐ Structured Text

1 ☒ Unstructured Text

☐ Custom

2 Create Cancel

1. Choose Unstructured Text

2. Click Create

## Create the Item

SMARTText Designer

Shortcut **1** KTR

Description **2** Katie Signature

Keywords **3** katie, signature, macro

☐ Display Header ☐ only when item is empty.

Advanced

General

Item Type **5** Free/Unstructured Text

[Katie Rogers, L.P.N.] **4**

Item Properties

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with  ☐ English List (or) ☐ End with

**6** Save Cancel

1. Type in a Shortcut (this will be what you want to type in for the text to expand)
2. Type in a Description (how you will identify your code).
3. Type in Keywords - single words separated by comma's and a space (these are used to search for the item)
4. Click in the large white text box until you see green brackets.
5. Type the text that you want to display within the green brackets.
6. Click Save.

## Inserting the Macro

INTENSITY/SEVERITY: Reports measurement (or degree) as moderate.

ONSET/TIMING: Reports occurrence as sudden.

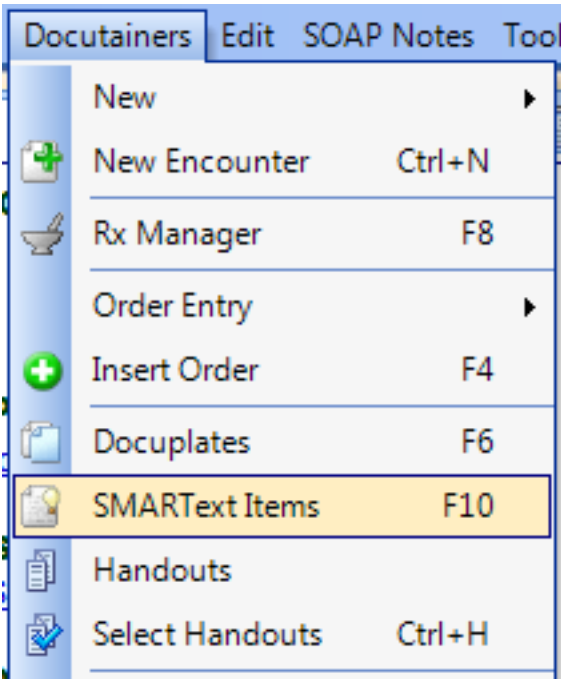
ROS: LUNGS/Respiratory: Denies symptoms such as sputum/phlegm production that is purulent.

Katie Rogers, L.P.N.

Now, you can type your shortcut into your SOAPnote or Summary and hit the space bar, the code will expand to display your text. This is often quite useful for creating a signature to enter at the bottom of documentation; denoting who created the documentation and for paragraphs of patient teaching.

# Creating SMARText Items in the SMARText Items Manager

SMARText Manager



Open the SMARText Manager by going to Docutainers - SMARText Items



## Create New

SMARText Items

Search

List - By Type

List - By Keyword

Find

Shortcut	Description	Type	Usage	Keywords	Last Modified
▲ AbdAnu	* Anus and perin...	Anum Perin Find	0	!!09, !09, (F), (M)...	12/1/2009
▲ AbdAor	*Abdominal aorti...	Dx	0	08.0.K99.CIR, 0...	12/1/2009
▲ AbdAorR	*Abdominal aorti...	Dx	0	08.0.K99.CIR, 0...	12/1/2009
▲ AbdC	*Abdominal Cont...	Dx	0	090827, 11.0.L8...	12/1/2009
▲ AbdDis	*Abdominal diste...	Dx	0	09.0.D25.DIG, 0...	12/1/2009
▲ AbdG	*Abdominal gas...	Dx	0	09.9.D08.DIG, 0...	12/1/2009
▲ AbdGua	* Guaiac testing...	Guaiac Finding	0	!!09, !09, !obj, (C...	12/1/2009
▲ AbdHer	* Hernia checkin...	Hernia Finding	0	!!09, !09, !obj, (C...	12/1/2009
▲ AbdLiv	* Liver/Spleen:"...	Organomegaly F...	0	!!09, !09, !obj, (C...	12/1/2009
▲ AbdMas	*Abdominal mas...	Dx	0	09.0.D24.DIG, 0...	12/1/2009
▲ AbdMasLLQ	*Abdominal mas...	Dx	0	09.0.D24.DIG, 0...	12/1/2009
▲ AbdMasRLQ	*Abdominal mas...	Dx	0	09.0.D24.DIG, 0...	12/1/2009
▲ AbdMasTer	* Mass/Tendern...	ABD Mass Tend...	0	!!09, !09, !obj, (C...	12/1/2009

☒ Include Online Library Items.

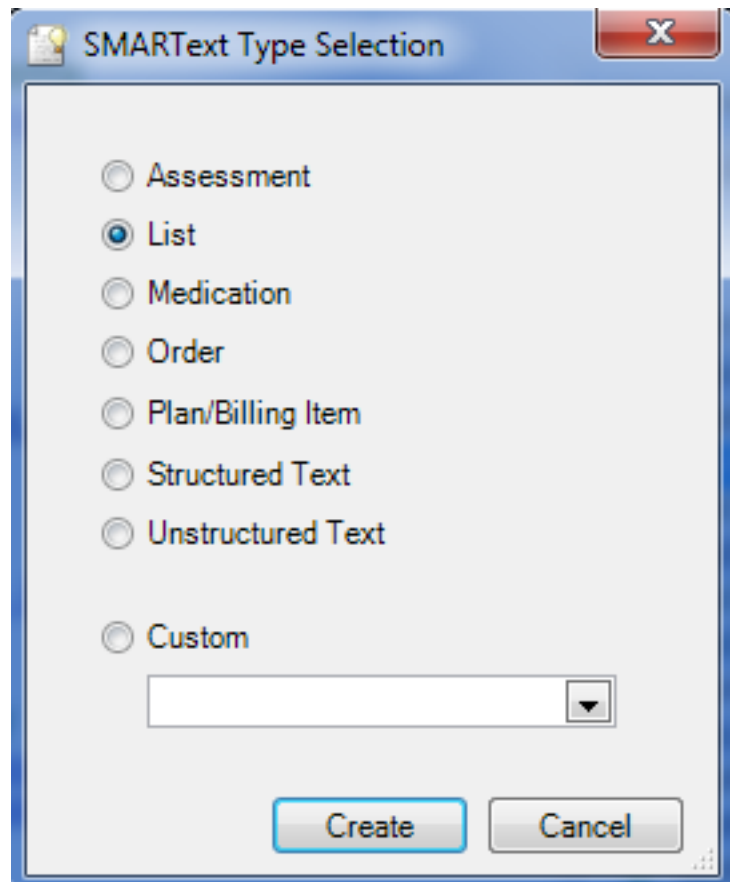
Insert

Filter

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Click the create new button.

## Item Type



The image shows a 'SMARText Type Selection' dialog box. It has a title bar with a close button (X). The main area contains a list of radio buttons for selecting an item type: 'Assessment', 'List' (which is selected), 'Medication', 'Order', 'Plan/Billing Item', 'Structured Text', 'Unstructured Text', and 'Custom'. Below the 'Custom' option is a text input field with a dropdown arrow. At the bottom are 'Create' and 'Cancel' buttons.

SMARText Type Selection

☐ Assessment

☒ List

☐ Medication

☐ Order

☐ Plan/Billing Item

☐ Structured Text

☐ Unstructured Text

☐ Custom

Create Cancel

Choose the item type and click create.

## SMARText Designer

SMARText Designer

Shortcut:

Description:

Keywords:

☒ Display Header:  ☐ only when item is empty.

Advanced

General

Item Type:

Item Properties

Item Settings:

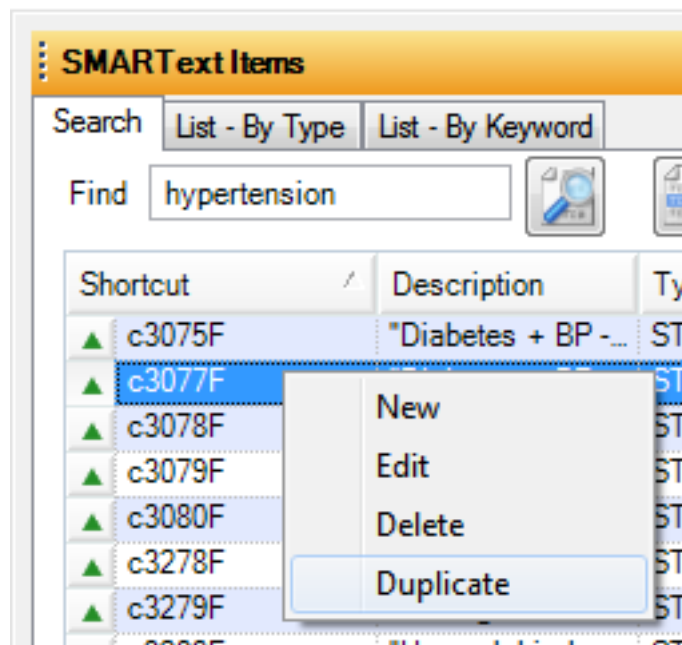
Item Separators:

- ☐ As Is
- ☒ Separate with
- ☐ Separate Lines
- ☐ English List (and)
- ☐ English List (or)
- ☐ End with

Save Cancel

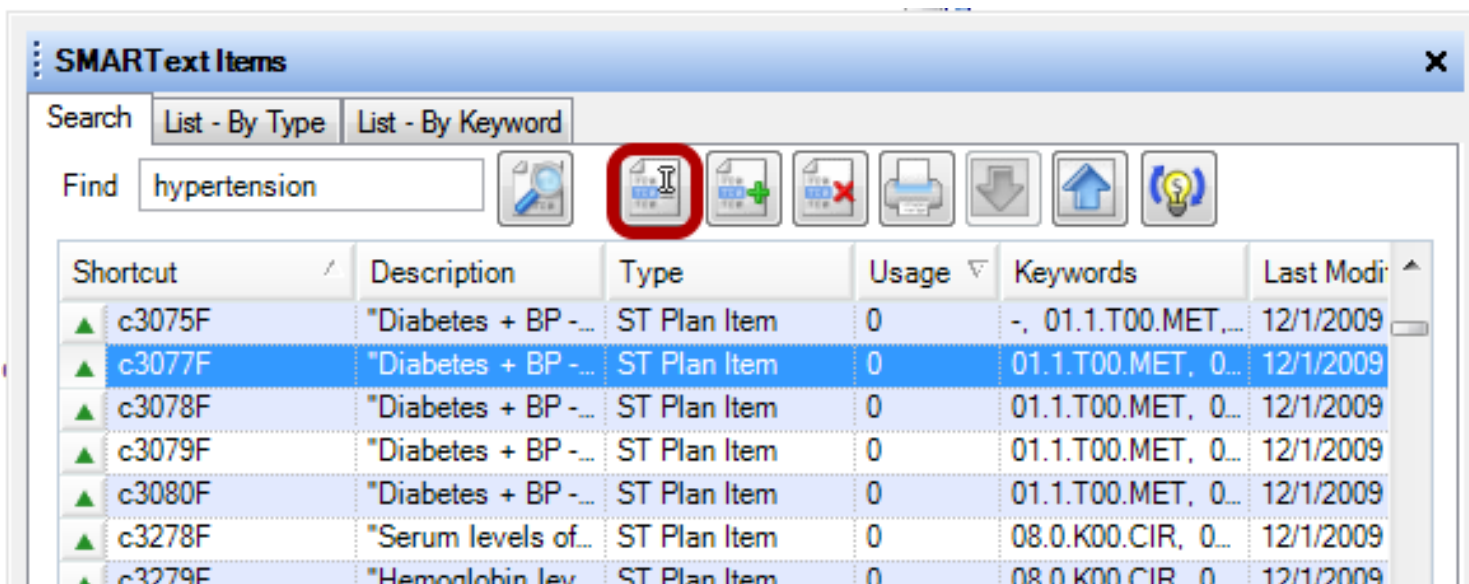
Use the SMARText Designer to assign a shortcut, description, keywords, and a Display Header. Click Save. For more specifics on how you use the SMARText Designer to create specific types of items.

## Duplicate



You can also duplicate SMARTText items to edit them without modifying the original item. To do this, Right-Click an existing SMARTText item in the manager and Click duplicate.

## Edit a SMARTText Item

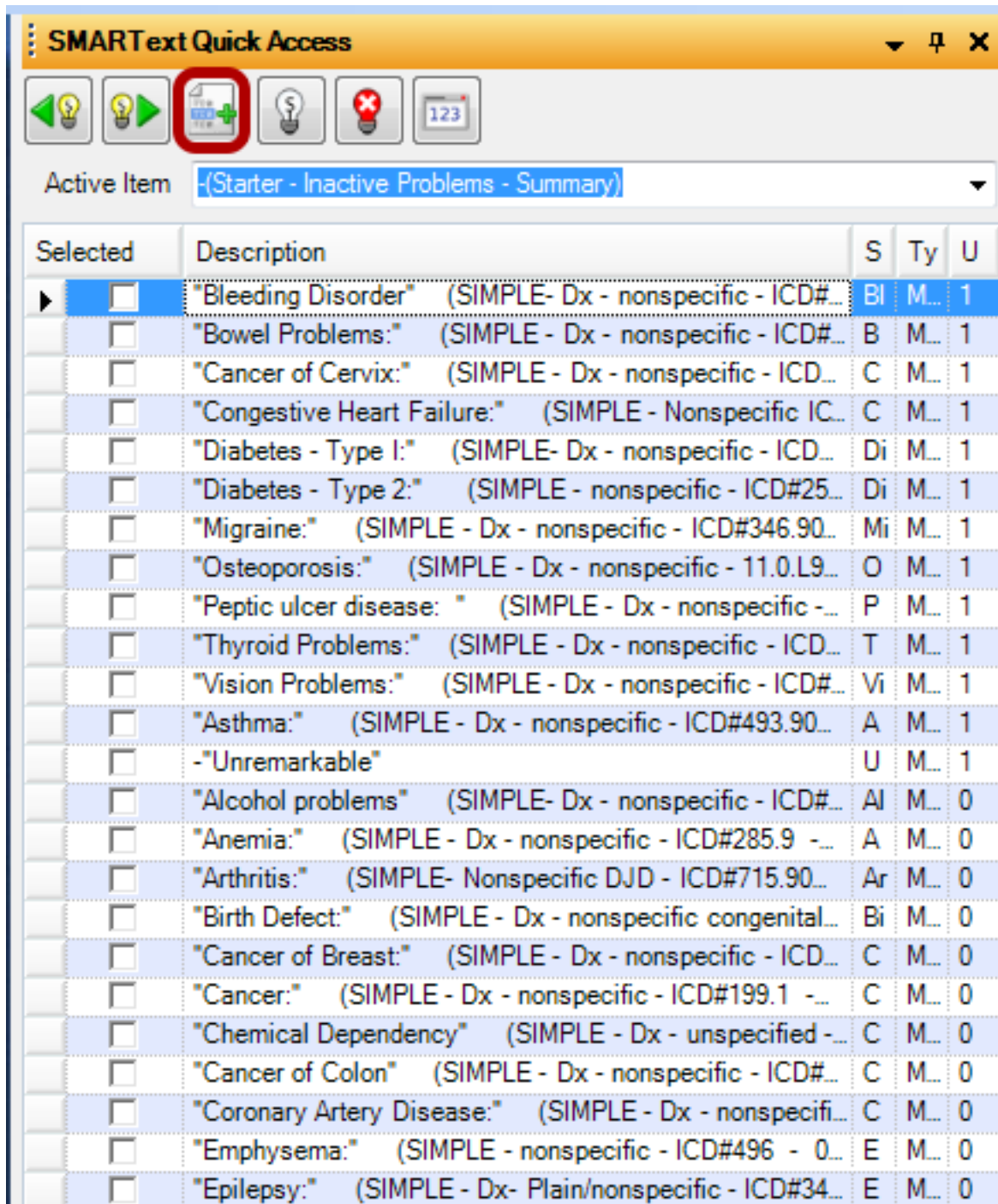


To edit a SMARTText item select the item in the SMARTText Items Manager, then click the Edit button. This will bring up the SMARTText Designer.

## Creating SMARText Items from Quick Access

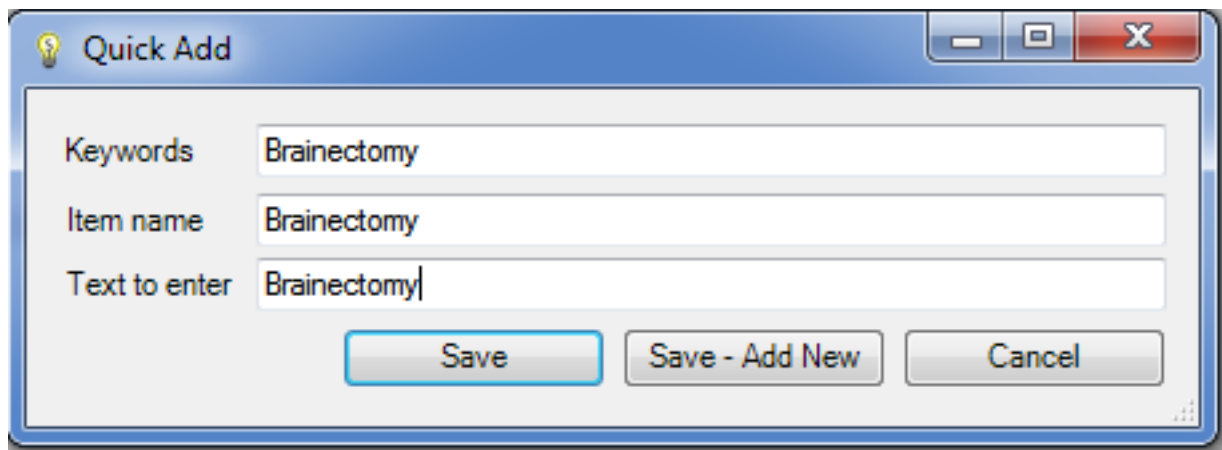
Most users will want to add and remove items from pick lists. This demo will show an easy means to add items to any pick list, anywhere.

### Quick Add



In Quick Access, Click the Add button on the mini toolbar at the top to present the Quick Add dialog as shown below.

## Assign Keywords, Description, and Value

A screenshot of a 'Quick Add' dialog box. The dialog has a title bar with a lightbulb icon and the text 'Quick Add'. It contains three text input fields: 'Keywords' with the value 'Brainectomy', 'Item name' with the value 'Brainectomy', and 'Text to enter' with the value 'Brainectomy'. Below the fields are three buttons: 'Save', 'Save - Add New', and 'Cancel'. The 'Save' button is highlighted with a blue border.

Quick Add

Keywords Brainectomy

Item name Brainectomy

Text to enter Brainectomy

Save Save - Add New Cancel

Type the Keyword, Description and Text to enter. Click Save.

## Using the Newly Added Item

SMARText Quick Access					
Active Item		(Starter - Inactive Problems - Summary)			
Selected	Description	S	Ty	U	
<input type="checkbox"/>	"Bleeding Disorder" (SIMPLE- Dx - nonspecific - ICD#...	Bl	M...	1	
<input type="checkbox"/>	"Bowel Problems:" (SIMPLE - Dx - nonspecific - ICD#...	B	M...	1	
<input type="checkbox"/>	"Cancer of Cervix:" (SIMPLE - Dx - nonspecific - ICD...	C	M...	1	
<input type="checkbox"/>	"Congestive Heart Failure:" (SIMPLE - Nonspecific IC...	C	M...	1	
<input type="checkbox"/>	"Diabetes - Type I:" (SIMPLE- Dx - nonspecific - ICD...	Di	M...	1	
<input type="checkbox"/>	"Diabetes - Type 2:" (SIMPLE - nonspecific - ICD#25...	Di	M...	1	
<input type="checkbox"/>	"Migraine:" (SIMPLE - Dx - nonspecific - ICD#346.90...	Mi	M...	1	
<input type="checkbox"/>	"Osteoporosis:" (SIMPLE - Dx - nonspecific - 11.0.L9...	O	M...	1	
<input type="checkbox"/>	"Peptic ulcer disease: " (SIMPLE - Dx - nonspecific - ...	P	M...	1	
<input type="checkbox"/>	"Thyroid Problems:" (SIMPLE - Dx - nonspecific - ICD...	T	M...	1	
<input type="checkbox"/>	"Vision Problems:" (SIMPLE - Dx - nonspecific - ICD#...	Vi	M...	1	
<input type="checkbox"/>	"Asthma:" (SIMPLE - Dx - nonspecific - ICD#493.90...	A	M...	1	
<input type="checkbox"/>	"Unremarkable"	U	M...	1	
<input type="checkbox"/>	"Alcohol problems" (SIMPLE- Dx - nonspecific - ICD#...	Al	M...	0	
<input type="checkbox"/>	"Anemia:" (SIMPLE - Dx - nonspecific - ICD#285.9 - ...	A	M...	0	
<input type="checkbox"/>	"Arthritis:" (SIMPLE- Nonspecific DJD - ICD#715.90...	Ar	M...	0	
<input type="checkbox"/>	"Birth Defect:" (SIMPLE - Dx - nonspecific congenital...	Bi	M...	0	
<input type="checkbox"/>	"Cancer of Breast:" (SIMPLE - Dx - nonspecific - ICD...	C	M...	0	
<input type="checkbox"/>	"Cancer:" (SIMPLE - Dx - nonspecific - ICD#199.1 - ...	C	M...	0	
<input type="checkbox"/>	"Chemical Dependency" (SIMPLE - Dx - unspecified - ...	C	M...	0	
<input type="checkbox"/>	"Cancer of Colon" (SIMPLE - Dx - nonspecific - ICD#...	C	M...	0	
<input type="checkbox"/>	"Coronary Artery Disease:" (SIMPLE - Dx - nonspecifi...	C	M...	0	
<input type="checkbox"/>	"Emphysema:" (SIMPLE - nonspecific - ICD#496 - 0...	E	M...	0	
<input type="checkbox"/>	"Epilepsy:" (SIMPLE - Dx- Plain/nonspecific - ICD#34...	E	M...	0	
<input type="checkbox"/>	"Glaucoma:" (SIMPLE - nonspecific - 04.0.F93.EYE)	Gl	M...	0	
<input type="checkbox"/>	"Hypertension" (SIMPLE - - Dx - nonspecific - ICD#4...	H	M...	0	
<input type="checkbox"/>	"Kidney disease:" SIMPLE - Dx - nonspecific - 10.0.U...	Ki	M...	0	
<input type="checkbox"/>	"Mental Illness:" (SIMPLE - Dx - nonspecific - ICD#v4...	M	M...	0	
<input type="checkbox"/>	"Obesity:" (SIMPLE - Dx - nonspecific - ICD#278.00...	O	M...	0	
<input type="checkbox"/>	"Strokes -Cerebrovascular Disease:" (SIMPLE - Dx - ...	C	M...	0	
<input type="checkbox"/>	"Tuberculosis:" (SIMPLE - Dx - nonspecific - 01.0.A7...	T	M...	0	
<input type="checkbox"/>	"Healthy, no disease:" (SIMPLE - nonspecific - ICD#6...	H	M...	0	
<input type="checkbox"/>	"High Cholesterol/Lipids:" (SIMPLE - Dx - nonspecific...	C	M...	0	
<input type="checkbox"/>	"Cancer of Prostate:" (SIMPLE - Nonspecific - ICD#1...	C	M...	0	
<input type="checkbox"/>	"Depression:" (SIMPLE - Nonspecific Dx - ICD#311)	D	M...	0	
<input type="checkbox"/>	"Cancer, Ovarian:" (SIMPLE- Nonspecific -Dx - ICD#...	C	M...	0	
<input type="checkbox"/>	"Hearing Problems:" (SIMPLE - Dx - nonspecific - 03...	H	M...	0	
<input type="checkbox"/>	"Miscarriage/Stillbirths:" (SIMPLE - Dx - nonspecific - ...	Mi	M...	0	
<input checked="" type="checkbox"/>	Brainectomy	S...		0	

Your newly created item will appear at the bottom of the list.

## Surgeries

[Brainectomy]

Notice that when the newly added item is selected in this fashion, it appears in the summary as black text rather than the blue, underlined text as the other items appear. When printed or stored permanently, by default, all the text is generally converted to just plain black. Quick-Add creates an item as an unstructured SMARTText item.



## Creating SMARText Pick Lists

### SMARText Items

**SMARText Items**

Search | List - By Type | List - By Keyword

Find

Icons: Add (circled in red), Remove, Print, Export, Import, Help

Shortcut	Description	Type	Usage	Keywords	Last Modified
▼ neudm	Neuropathy, dia...	Dx (us)	0	#357.2, diabetic...	
▼ stom	Stomatitis Oral P...	Dx (us)	0	#528.0, DxxDxx...	
▼ hypo	Hypogammaglo...	Dx (us)	0	#279.00, DxxDx...	
▼ adhd	Attention Deficit...	Dx (us)	0	#314.01, adhd...	
▼ drugrash	Eruption, drug (r...	Dx (us)	0	#693.0., (rash, d...	
▼ Costo	Costochondritis...	Dx (us)	0	#733.60, Costo...	
▼ dysc	Dysplasia, Cervi...	Dx (us)	0	#622.1., Cervical...	
▼ sebkeri	Inflamed seborrh...	Dx (us)	0	#702.11, DxxDx...	
▼ conren	Contusion, renal...	Dx (us)	0	#866.01., (blow...	
▼ fxtib	Tibial FX w/o Ma...	Dx (us)	0	#824.0, DxxDxxf...	
▼ mastod	Mastodynia Bre...	Dx (us)	0	#611.71., Breast...	
▼ Degener	Degeneration, lu...	Dx (us)	0	#722.52, Degen...	
▼ colosc	Colostomy acom...	Dx (us)	0	#569.60, acompl...	
▼ tons	Tonsillitis, strept...	Dx (us)	0	#034.0., DxxDxx...	
▼ FxFib	Fx upper end fib...	Dx (us)	0	#823.01, closed...	
▼ abdpainMultiSite	Abdominal pain...	Dx (us)	0	789.09, Abdomi...	
▼ HernIng	Inguinal hernia/u...	Dx (us)	0	#550.91, DxxDx...	
▼ 1enter	Infectious enterit...	Dx (us)	0	1enter, DxxDxx1...	
▼ 1polcol	polyp, colon	Dx (us)	0	1polcol, colon, D...	
▼ thrpenp	Thrombocytopen...	Dx (us)	0	#287.3., DxxDxx...	
▼ VacclPV	Vaccine for polio...	Dx (us)	0	#V04.0, DxxDxx...	

☒ Include Online Library Items.

Buttons: Insert, Filter

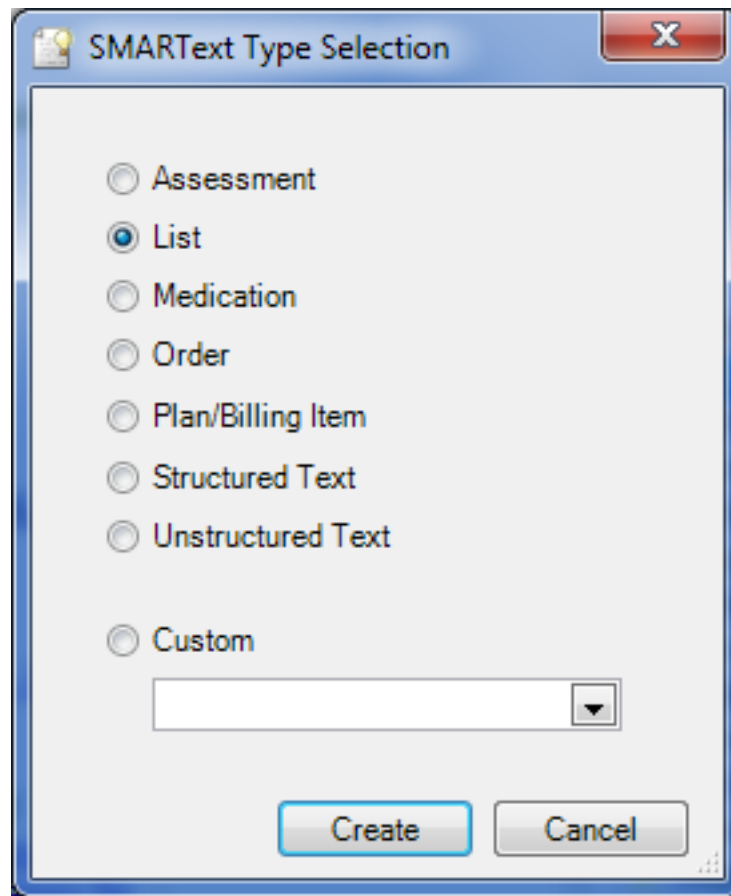
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In this example, we will be creating a pick list of diagnoses. Diagnosis items that are Structured Dx items are the type we suggest be entered into the Assessment field of SOAP encounter notes and in the Active/Inactive Problems in the Summary.

1. Click Docutainers in the menu bar menu (or Press F10), and Click the SMARText Items menu item to display the SMARText Items dialog.

2. Click the New Item button as shown in the screenshot below.

## Create Item



Click the List radio button in the SMARTText Type Selection dialog, and Click the Create button.

## SMARText Designer

SMARText Designer

Shortcut

Description

Keywords

☒ Display Header  ☐ only when item is empty.

Advanced

General

Item Type Multi-Sel List

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with  ☐ English List (or) ☐ End with

☐ Separate Lines

Save Cancel

This will open the newly created item's SMARText Designer dialog.

## Enter Shortcut

Type a Shortcut for this new Multi-Select List item. When creating documentation, use this shortcut, followed by pressing the space bar in order to insert the item. This action will insert a header into the chart documentation, that when clicked, presents a pick list in the Quick Access dialog. For this demo, we want to create a pick list for diagnosis items, so let's use the shortcut mydx. (Use any shortcut that will be easy to remember.)

## Enter Information

The image shows a screenshot of the 'SMARTText Designer' dialog box. The 'General' tab is active. The fields are as follows:

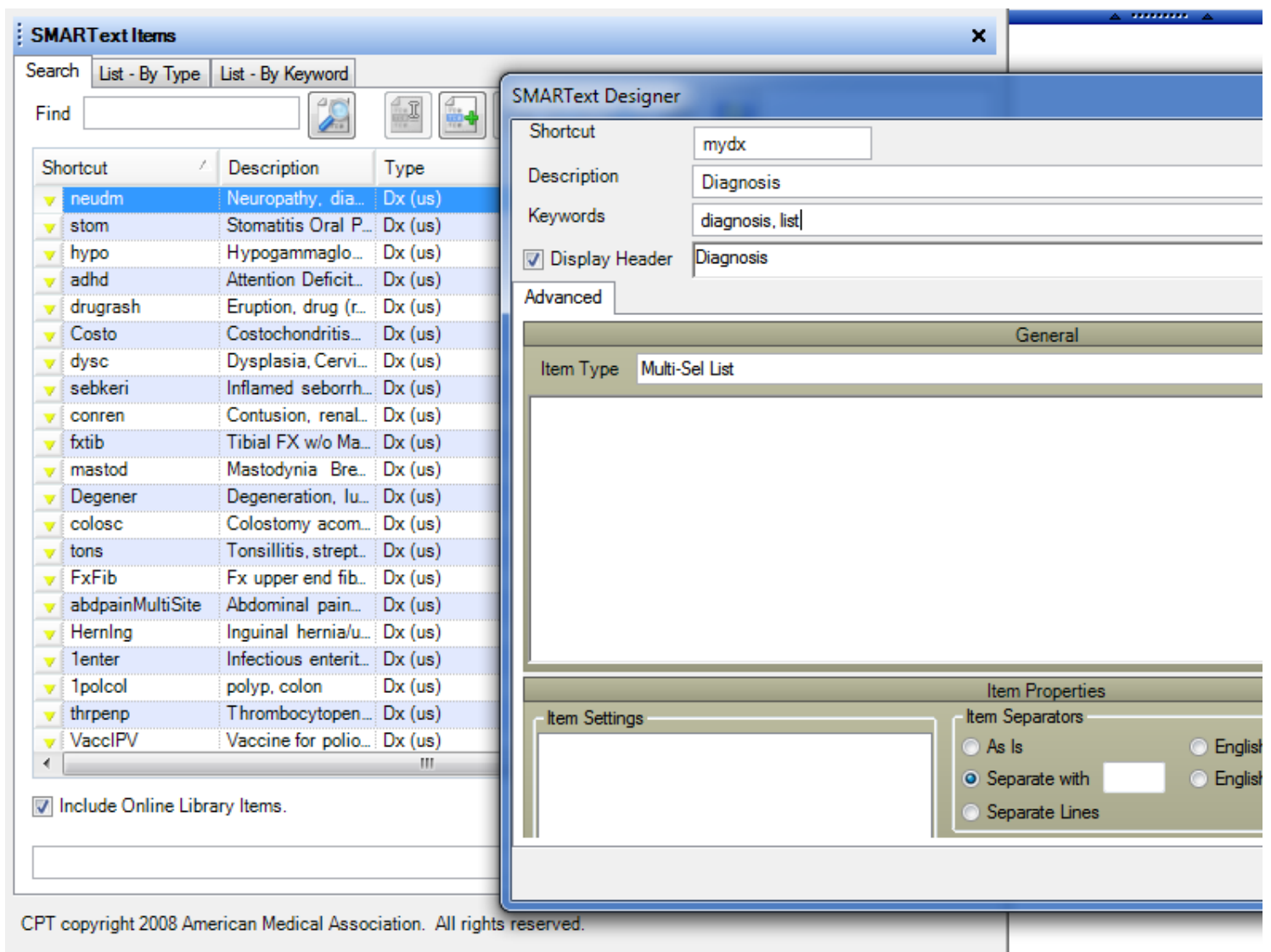
Field	Value
Shortcut	mydx
Description	Diagnosis
Keywords	diagnosis, list
Display Header	<input checked="" type="checkbox"/> Diagnosis
Advanced	
Item Type	Multi-Sel List

1. Type a Description to help identify this item. Let's use diagnosis.
2. Type Keywords to aid in looking up this SMARTText item when later doing searches (e.g. in the SMARTText Items Manager).
3. For the Display Header, Type diagnosis. This is what will display, as the header, when this item is inserted into documentation. The check in the Display Header checkbox designates that the header will be displayed when this item is used when creating documentation.
4. Click the only when item is empty checkbox. This will display the header only until an item is chosen from the list in Quick Access.

## Add List Items

We are now ready to add SMARTText items of the Structured Dx type to the SMARTText pick list of the Multi-Sel List type as demonstrated below. In order to explain the terminology, the Structured Dx SMARTText items that we add, below, will be sub-items in/of the Multi-Sel List SMARTText item we just created.

## Add Items to a Pick List Using SMARText Items in the Local Library



Items can be added to pick lists by dragging and dropping from the SMARText Items Manager into the pick list's SMARText Designer dialog. One fashion to accomplish this is to place the SMARText Items Manager display next to the our new pick list's SMARText Designer dialog so that both are visible (as shown above).

## Search for List Items

**SMARTText Items**

Search

Find

Shortcut	Description	Type
	-RFE- "Bursitis t...	Chief Finding
▲ AnkT	"Ankle Tendoniti...	Dx
▲ BicT	"Bicipital tenosy...	Dx
▲ BurT	"Bursitis/tendonit...	Dx
▲ deQ	"de Quervain's t...	Dx
▲ ElbB	"Elbow bursitis"...	Dx
▲ ElbT	"Elbow Tendoniti...	Dx
▲ FinT	"Finger Tendoniti...	Dx
▲ HanT	"Hand Tendoniti...	Dx
▲ HipT	"Hip Tendonitis"...	Dx
▲ KneT	"Knee Tendoniti...	Dx
▲ LatEpi	"Lateral Epicond...	Dx
▲ PatT	"Patellar tendoni...	Dx
▲ ShoTB	"Shoulder tendo...	Dx
▲ TenFA	"Tendonitis/teno...	Dx
▲ TenN	"Tendonitis" (...	Dx
▲ WriT	"Wrist Tendoniti...	Dx
▼ KneT	"Knee Tendoniti...	Dx
▼ tendonitis,ankle	Tenosynovitis, a...	Dx (us)
▼ tensh	Tendonitis, shou...	Dx
▼ AnkT	"Ankle Tendoniti...	Dx

☒ Include Online Library Items.

**SMARTText Designer**

Shortcut

Description

Keywords

☒ Display Header

Advanced

Item Type

Item Settings

Item Separators

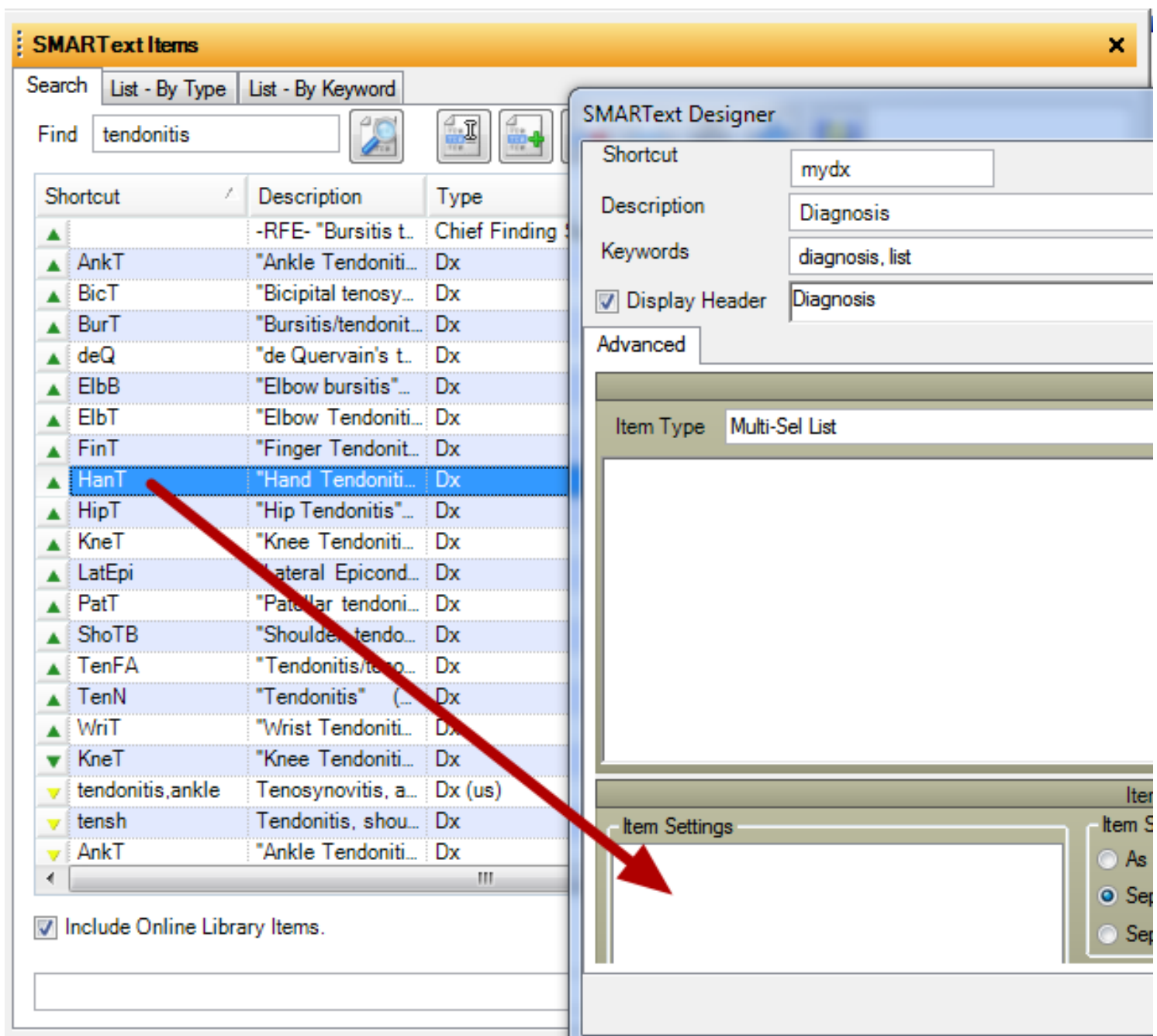
☐ As Is

☒ Separators

☐ Separators

In the SMARTText Items dialog, shown on the left side of the screenshot, search for the items to add to the pick list by typing in a keyword or word that would be associated with that item. For example, if we wanted to find a Structured Dx SMARTText item for Hand Tendinitis, we could search on either hand or tendinitis. Now, either press the Enter key or click the Search button to locate items that contain the keyword entered.

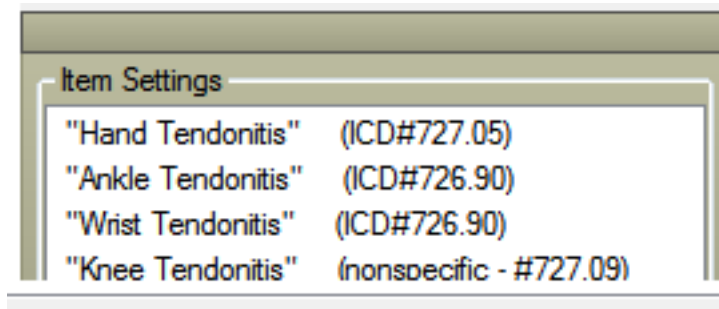
## Move List Items



Scroll through the list to find the item to add to the pick list. Click the desired list item to add while holding-down the left mouse button. Continue to hold-down the left mouse button and drag the item until the cursor/pointer is within the Item Settings area as outlined in red in the above screenshot. As you drag the item toward the SMARTText Designer dialog, the cursor/pointer will change to a black circle with a slash. When the cursor is in the correct location (i.e. Items Settings), it will have a box with a small plus. Drop the item into Item Settings by releasing the mouse button.

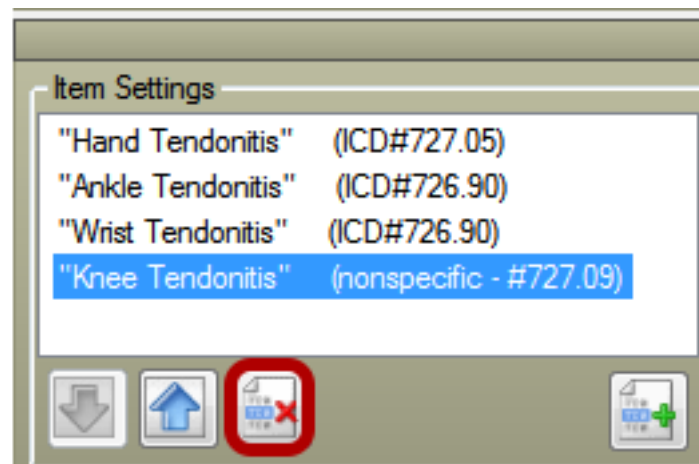
Repeat this for each item you want to add to the pick list.  
Click the Save button.

## Item Settings Box



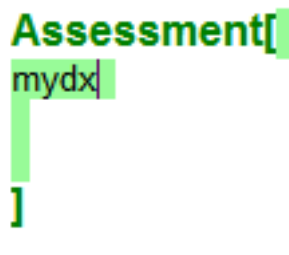
The items will be listed in the Item Settings box after dragging and dropping the items there.

## Remove Items from a Pick List



To remove any items, select the item you wish to remove, and Click the Remove Item button located below Item Settings.

## Add a Pick List Header to Documentation

A screenshot of a text field. The text "Assessment[" is in green. Below it, "mydx" is typed in black. To the right of "mydx", there is a green bracket "]" that is part of the pick list header.

This new pick list item is now ready for actual use. Type mydx into an encounter note, and Press the space bar. This inserts the header (i.e. diag.) into the document. Click diag. in the document to display the items added to the newly created pick list in the SMARText Quick Access dialog (usually docked on the right side). For example, in the SOAP encounter note screenshot above, "mydx" was typed (the shortcut) in the Assessment field.



## Press the Spacebar

Assessment[  
Diagnosis  
]

Next, the space bar is pressed. This causes the header for the newly created pick list to be inserted. In other words, pressing the space bar after typing the shortcut "mydx" causes this pick list item's header, Diagnosis., to be inserted into the documentation.

## Display the Pick List

Selected	Description
<input type="checkbox"/>	"Hand Tendonitis" (ICD#727.05)
<input type="checkbox"/>	"Ankle Tendonitis" (ICD#726.90)
<input type="checkbox"/>	"Wrist Tendonitis" (ICD#726.90)
<input type="checkbox"/>	"Knee Tendonitis" (nonspecific - #727.09)

Click on the diagnosis header to display the pick list in the SMARTText Quick Access.

## Choose Pick List Items

Assessment  
Diagnosis[ Hand Tendonitis ICD#726.90 Hand ]

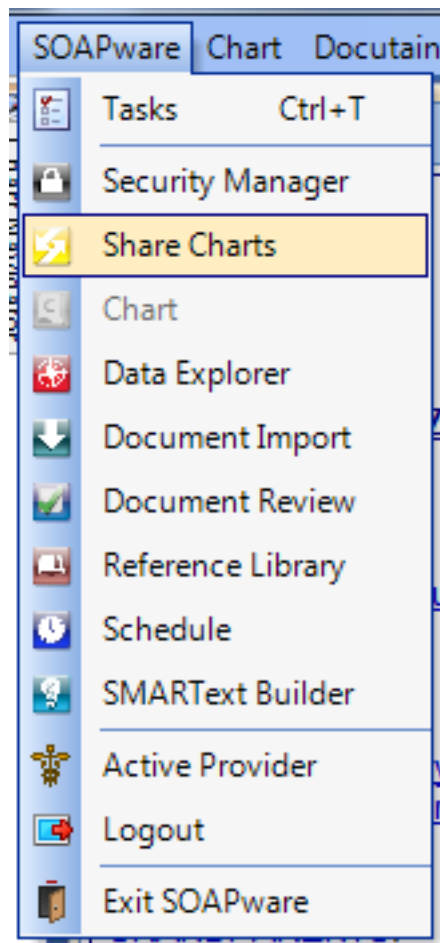
Selected	Description
<input checked="" type="checkbox"/>	"Hand Tendonitis" (ICD#727.05)
<input type="checkbox"/>	"Ankle Tendonitis" (ICD#726.90)
<input type="checkbox"/>	"Wrist Tendonitis" (ICD#726.90)

After the Quick Access dialog displays a list of items, select an item by clicking in the checkboxes next to them. This action places a check in the box, and the checked item will be inserted into the Assessment field. The header (i.e diag.) disappears once a pick list item is selected because we earlier selected "Display only when empty" when creating the pick list in SMARTText Designer.

# **Document and Chart Management**

## Chart Sharing Feature

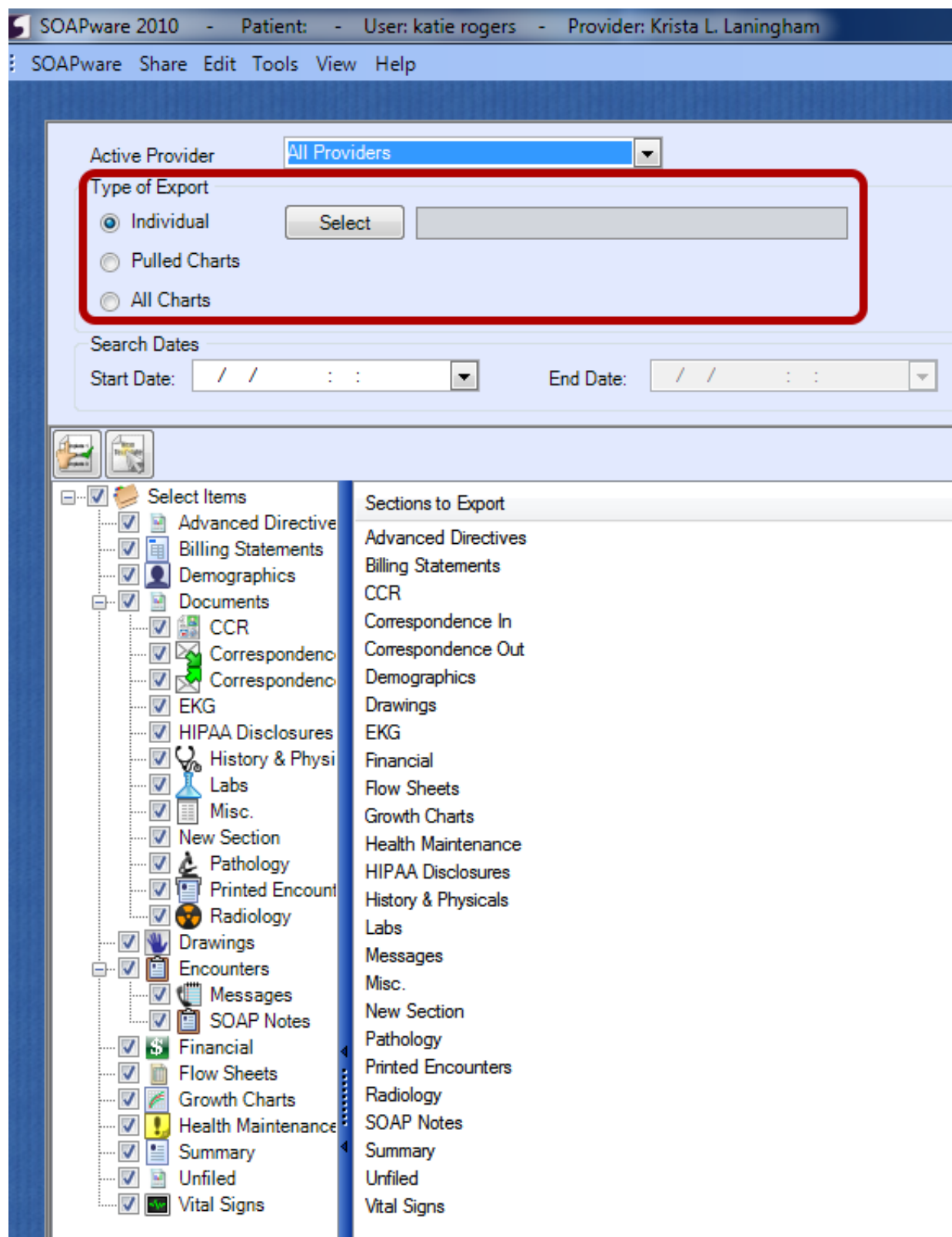
### Chart Sharing Security & Interface Basics



To open the Chart Sharing workspace, Click SOAPware in the menu bar, and Click the Share Charts menu item.

The Chart Sharing workspace has three main areas. At the top of the screen is the Chart Selection section, where the charts to export/copy are defined; In the middle is the Data Selection section to select the chart sections to be exported; and at the bottom is the Progress section to define the location where the copies of the records (i.e.exported data or copy of the chart) will be placed. It also displays the progress of the export once it begins.

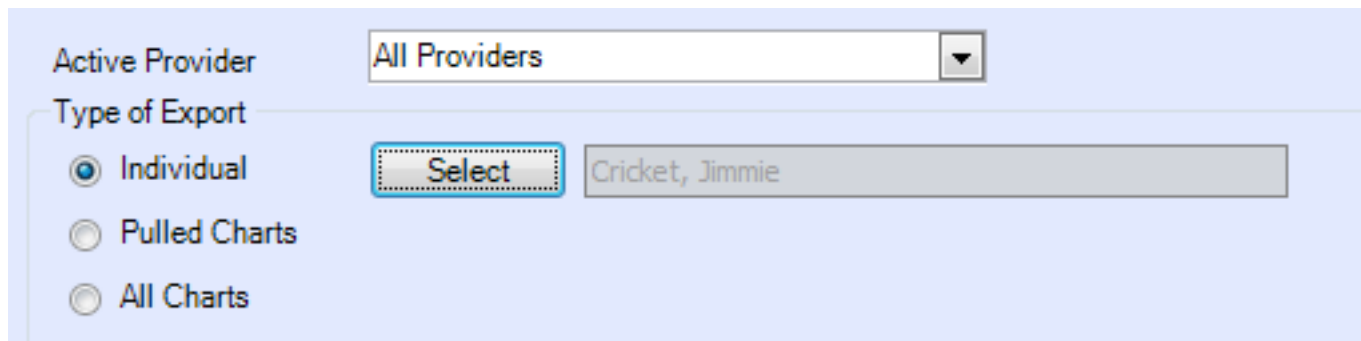
## Selecting Charts to Share



To select the charts for export, use the Chart Selection area, at the top of the Chart Sharing workspace. The options in this area determine the charts selected for export/copy. For instance, to export all charts in SOAPware, Click the All Providers menu item in the Active Provider drop-down menu. Then, Click the All Charts radio button for the Type of Export. That's all there is to it. With these settings, all charts

in the Chart Rack will be exported.

## Select Charts



Active Provider: All Providers

Type of Export:

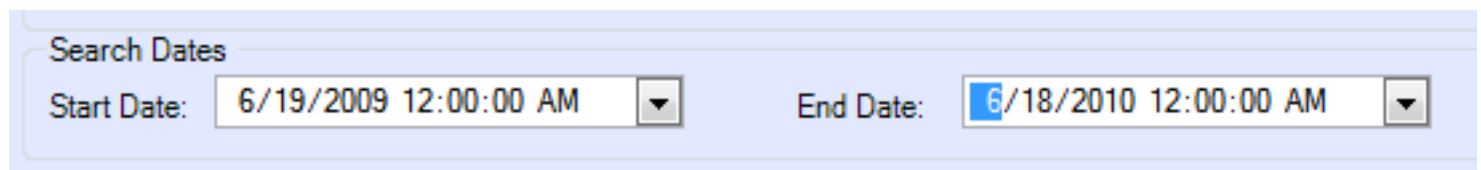
- ☒ Individual
- ☐ Pulled Charts
- ☐ All Charts

Select button: Select

Text box: Cricket, Jimmie

On the other extreme, to export/copy a single chart, Click the Individual radio button in the Type of Export section; then Click the Select button. This opens the Chart Rack for the selection of an individual patient chart.

## Search Dates



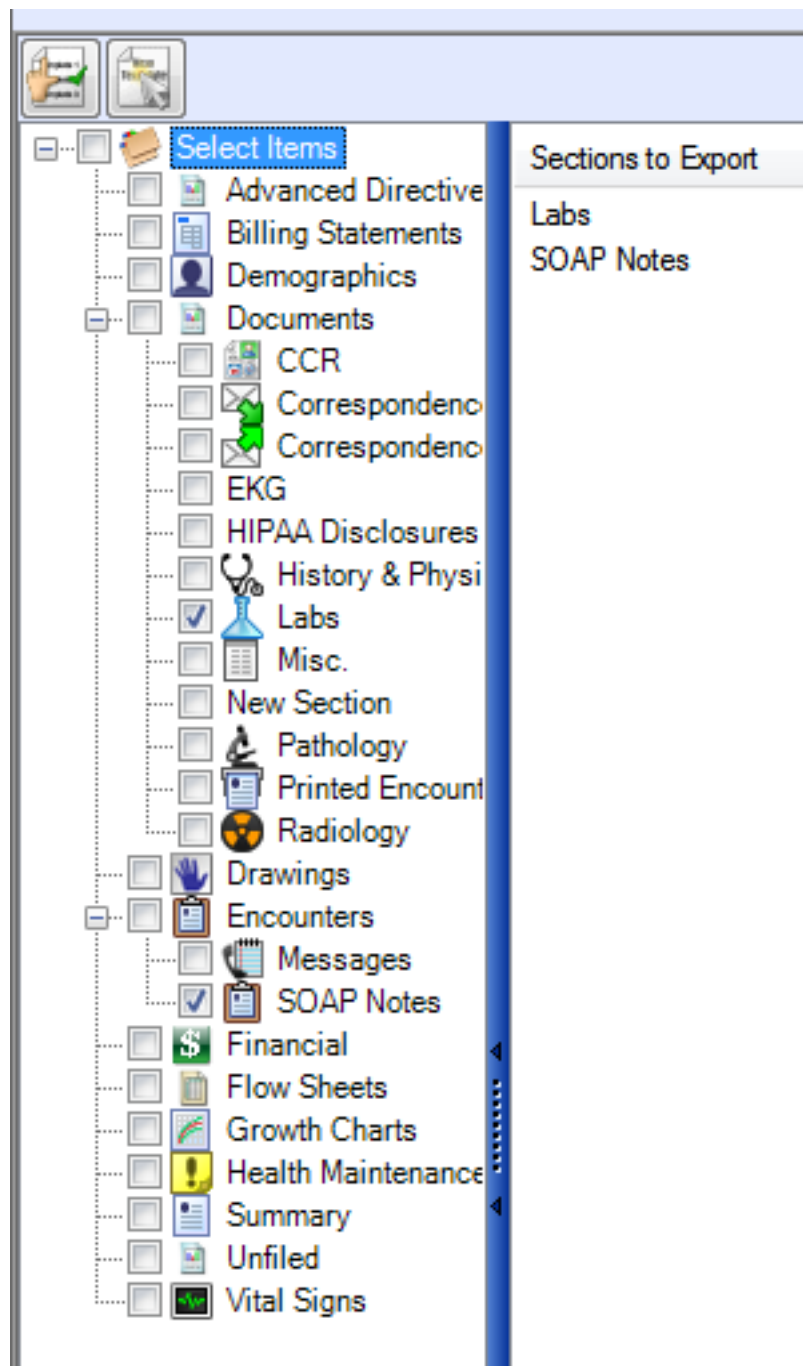
Search Dates

Start Date: 6/19/2009 12:00:00 AM

End Date: 6/18/2010 12:00:00 AM

Exported information can be limited by setting date parameters. Use the Search Dates area to enter a date or a date range, and SOAPware limits the exported information to items created within the specified date parameters. If search dates are not entered then all documents within the chart sections selected will be exported.

## Selecting Chart Sections to Share



After selecting charts to share (i.e. copy or export), choose the chart sections that you wish to share. Selection is accomplished in the middle area of the Chart Sharing workspace.

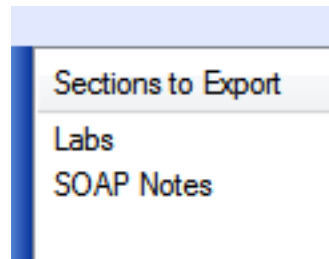
On the left is a list of chart sections similar to what is displayed in Chart Navigator. On the right, SOAPware lists the chart sections you have selected to include in the export.

Note: By default, everything is selected in order to export the entire chart.

To export less than the entire chart (for example, only SOAPnotes and Labs), you will need to edit the

selected items. To change the selection, click the "Select Items" checkbox at the top left. This clears the selection list. Next, place a checkbox in each individual chart section that you wish to export.

## Sections to Export



Select as few as one chart section or check them all. Once the chart sections to export are selected, it's time to export. The selected sections will be displayed to the right under Sections to Export.

## Selecting the Export Location

The last stage in sharing (i.e. copying, exporting) charts is to define the location where the exported information needs to be saved. This is accomplished in the progress section at the bottom of the Share Charts workspace (see above)

## Browse for Location

Click the Browse button on the far right. This displays the Browse For Folder dialog where the location is selected for the exported copy. In order to create a new location, Click the Make New Folder button. Once the location is selected, Click OK.

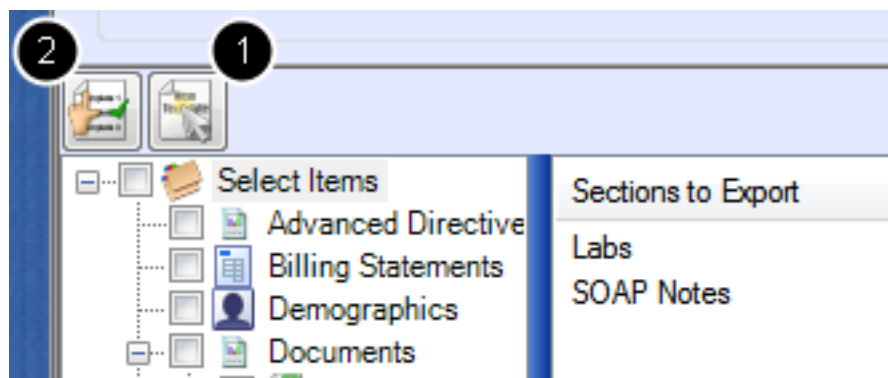
## Export

The last step to share charts is to Click the Export button. This initiates the export process. After clicking Export, settings for the export can't be changed. A green progress bar tracks across the bottom as the export progresses. An export can take seconds to minutes, depending on the size of the file. When it is complete, the green bar is completely full.

At the selected export location, you will find one copy (i.e. PDF file) for each chart exported. Each is titled with the patient's name, birth date, and chart number in order to make it easier to find specific

exported copies.

## Saving Export Formats



You can save your export formats if you want to have it available for use in the future.

1. To save a format, click the "Create Format" button underneath the search dates section of the workspace.
2. To use a previously saved format, click the "Insert Format" button.

## HIPAA Regulations (encrypted email)

When you email any patient records, it is important to remember that your email has to be encrypted to meet HIPAA Regulations.



## Chart Merger Feature

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If you accidentally create two charts for the same patient, this function will allow you to merge them into one chart.

### **Disclaimer statement addressing information that may be lost during Chart Merge process**

VERY IMPORTANT: Most of the documentation from both charts will be present in the merged chart. However, the Demographics, Insurance, & Custom Demographics, Vital Signs and Summary sections will only be retained in the chart being merged To. The Demographics, Insurance & Custom Demographics, Vital Signs, and Summary of the chart merged From will not be saved. Before you begin, look carefully at the Demographics, Insurance, & Custom Demographics, Vital Signs, and Summary sections. Copy data from one chart to the other if necessary, to make sure that one of the charts has all the data you need in those sections. It is recommended that the use of this feature be limited, in security, to one person, or a small number of experienced staff.

Note that a backup of your SOAPware data is recommended prior to merging patient charts.

### **Explanation of feature and its use**

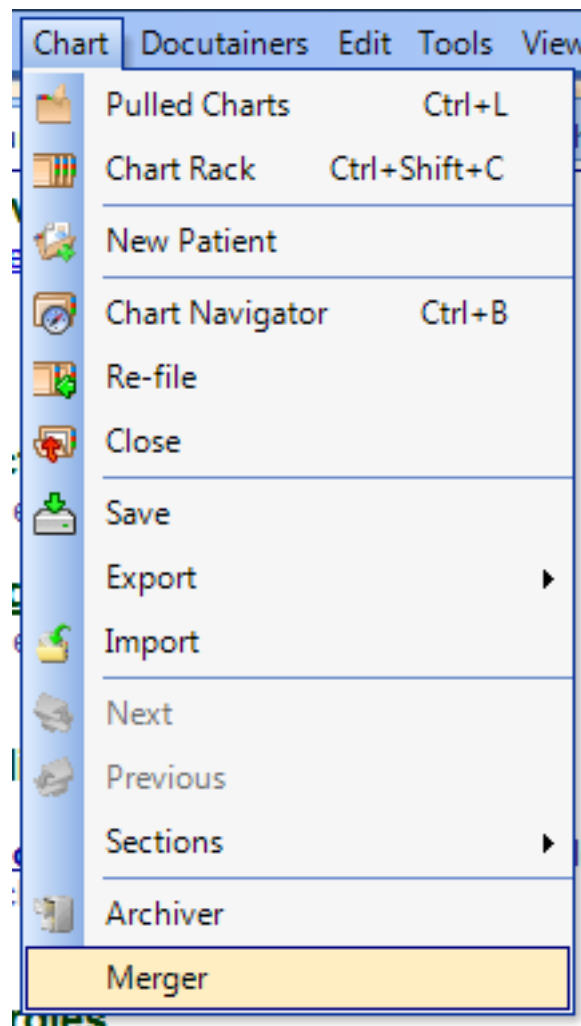
The Chart Merger is a tool that allows you to merge two patient charts. You do this by selecting a chart to merge from and a chart to merge to.

The Demographics and Summary of the chart selected to merge to will be retained, and the documentation from both charts will be present in the merged chart. Note that a backup of your SOAPware data is recommended prior to merging patient charts.

### **Security Concerns**

This is a feature that you will need to want to restrict access to just one or two people in the clinic. You cannot un-merge charts.

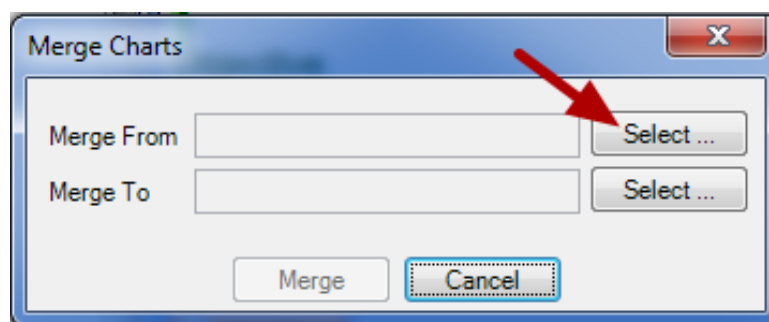
## Directions to Merge Charts



To use the Chart Merger, open it by selecting "Merger" from the Chart menu.

The Merge Charts dialog box will open, allowing you to select the chart to Merge From and the chart to Merge To.

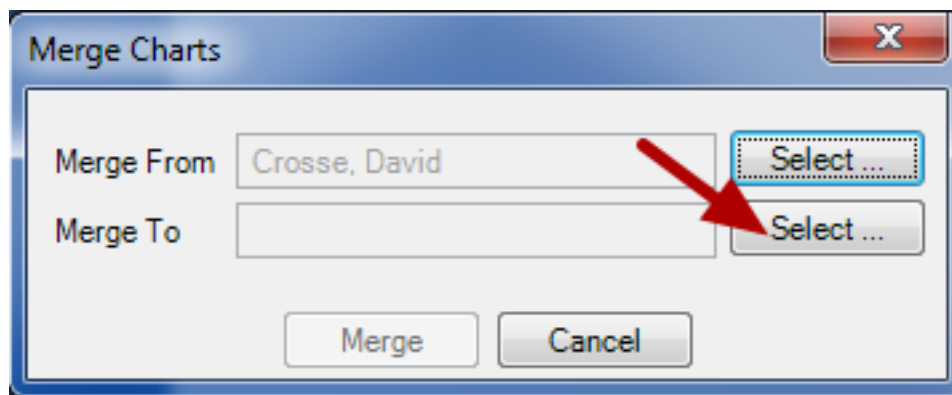
### Merge From



First, select the chart you wish to Merge From. To do this, click the "Select" button that corresponds to the Merge From field. This will open the Merge From dialog box, which will allow you to select a patient chart by either typing information into the Search field, or by clicking on a letter and selecting the chart.

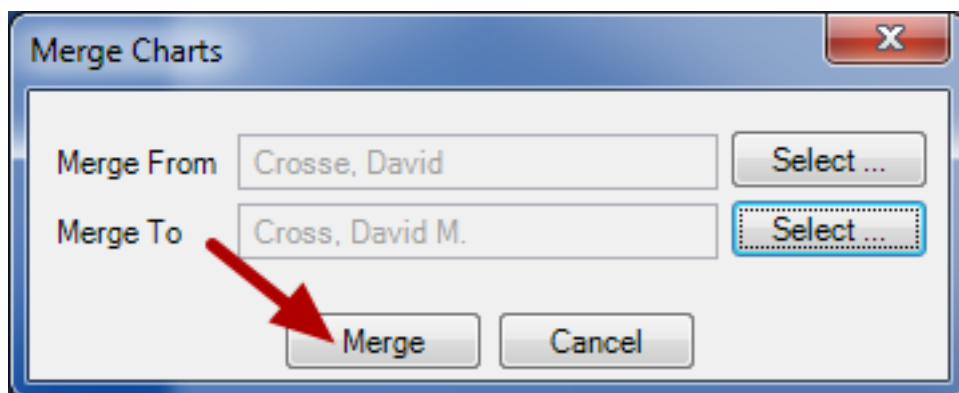
Once you have selected the chart to merge from, click "Select" at the bottom of the window.

## Merge To



Then, you will need to select the chart you wish to Merge To. This will open the Merge To dialog box, which will allow you to select a patient chart by either typing information into the Search field, or by clicking on a letter and selecting the chart. Once you have selected the chart to merge to, click "Select" at the bottom of the window.

## Merge



In the Merge Charts dialog box, the charts you have selected will be displayed in the Merge From and Merge To fields. Click "Merge" to merge the charts. It is recommended that you check the chart that was selected in the Merge To field to ensure a complete and accurate merge.

## Chart Archiving Feature

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The Chart Archiver is a tool that allows you to archive a patient's chart, removing it from the Chart Rack. This is useful for keeping the chart rack cleared of inactive charts, reducing the amount of time you spend looking for the charts you need.

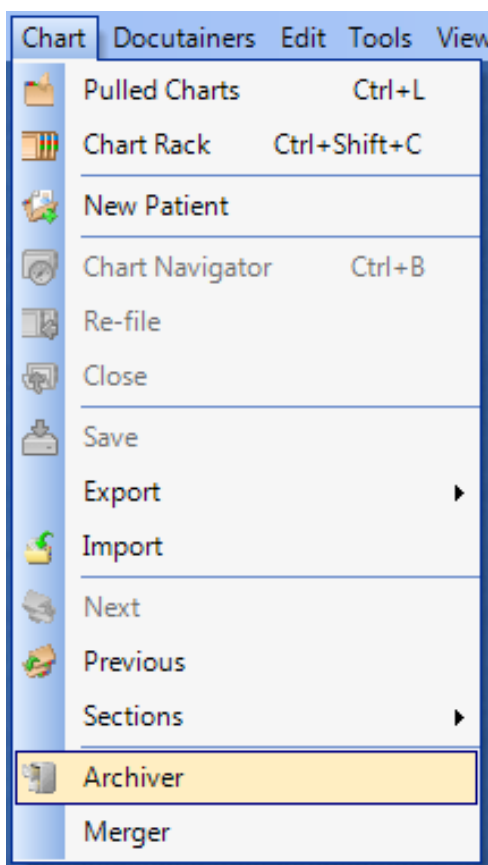
You can also un-archive a chart at any time using the Chart Archiver, placing it back on the Chart Rack and making it available for use.

**\*\*You must sign off all documents in a chart to be able to archive the chart. To check if the chart has any unsigned documents, go to Docutainers -- unsigned. From here, the provider can sign off any documents that need to be signed off.**

### Introduction to Feature and its Purpose

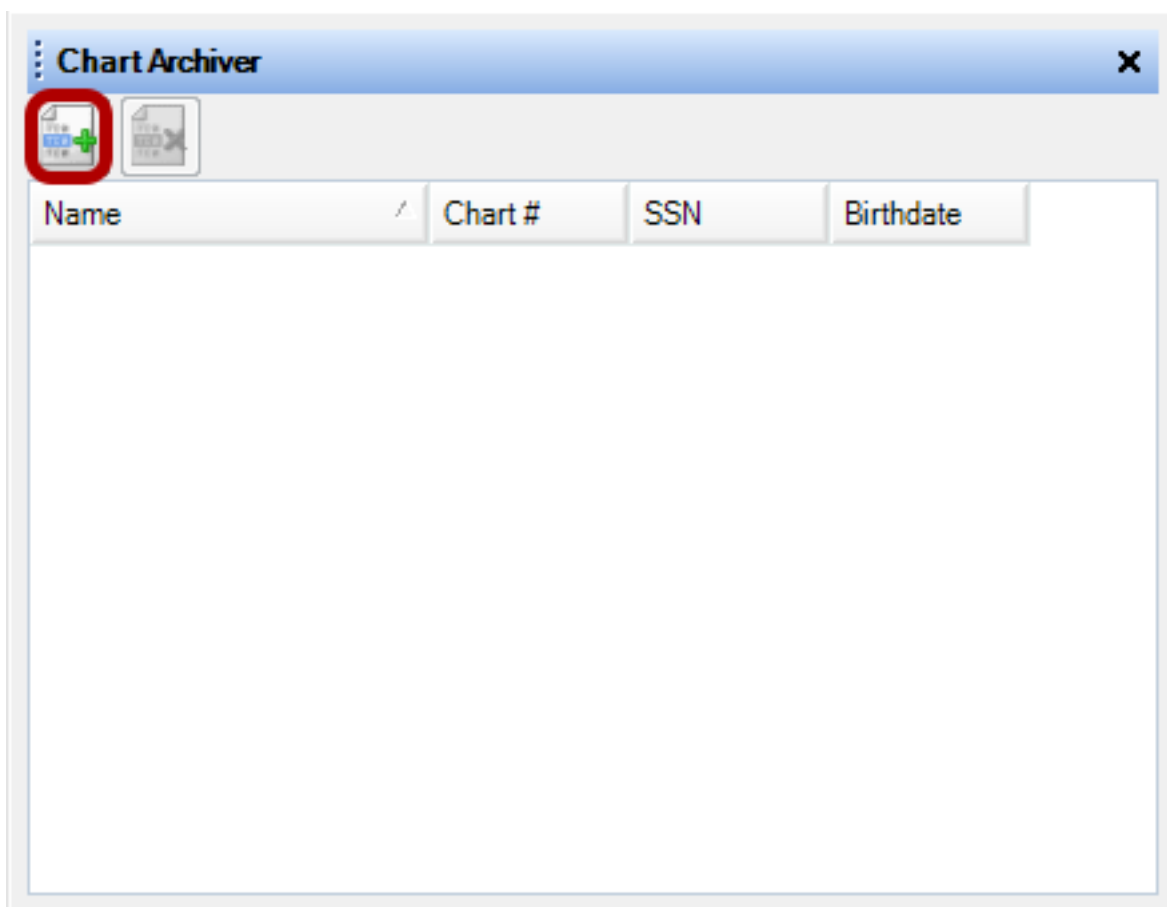
The Chart Archiver displays all charts that have been archived. Above the list of archived charts, there are two buttons: Archive Chart and Un-archive Chart.

### Open Chart Archiver



To archive a chart, click the Archive Chart Button (or press Control + Alt + A). The Archive Chart tool will then open.

## Directions to Archive Charts



Click the Archive Chart button.

## Select the Chart to Archive

Archive Chart

Search  Type

\* A B C D E F G H I J K L M N O P Q R S T U V W < >

Name	Chart Number	SSN	Birth Date	Provider
Carlisle, Red				Kaye L. Yocham



Provider  Total Active Patients: 21

Archive Cancel

1. Select the chart you wish to archive, either by typing the patient's last name (or another field, chosen from the drop down menu) or by clicking on the appropriate letter and selecting the chart from the list.
2. Once you have selected the chart you wish to archive, click the Archive button. The chart will be removed from the chart rack and placed on the list of archived charts.

## Chart Archiver

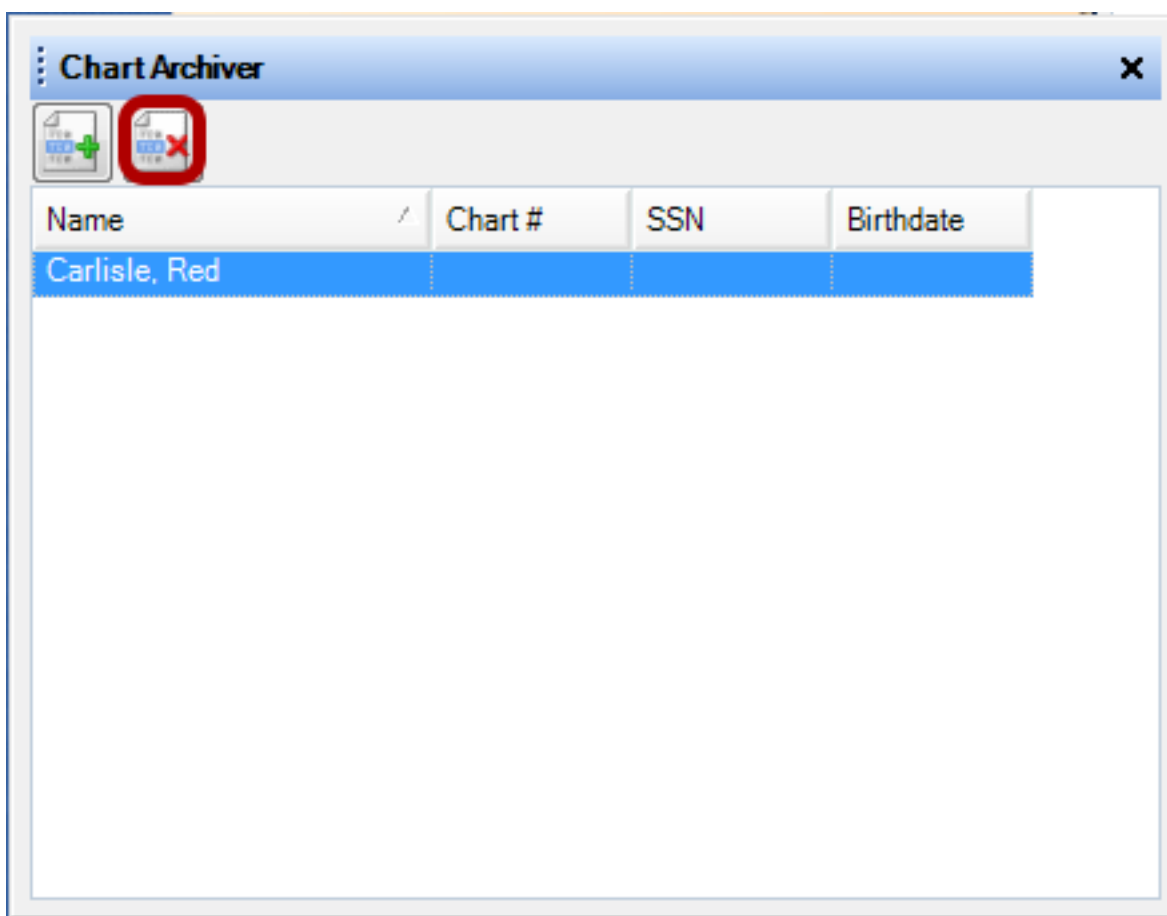
Chart Archiver

Name	Chart #
Carlisle, Red	

After you have archived the chart, it will appear in the list of archived charts.

## Directions to Un-Archive Charts

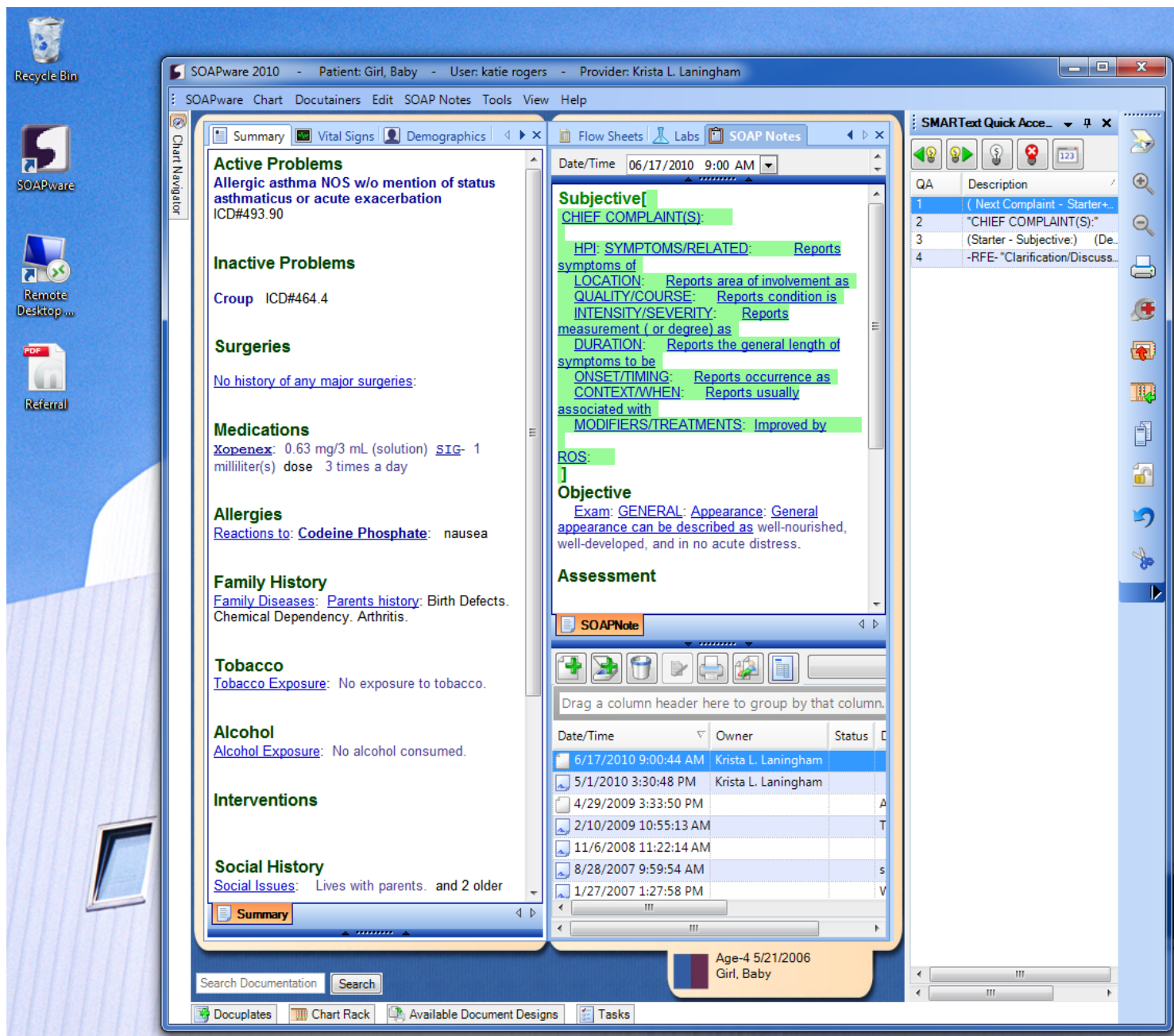


To un-archive a chart, select it from the list of archived charts by clicking on it and press the Un-archive Chart Button (or press Control + Alt + U). The chart will be removed from the list of archived charts and placed back on the Chart Rack.

## Drag and Drop Files into SOAPware

Drag and Drop files into almost any area of the patient chart. You will have the ability to drop a file by either attaching it to an existing docutainer or you can drop directly into an open field.

### Restore Down SOAPware



First you must make SOAPware smaller (make sure that you have a chart open) by clicking on the Restore Down button in the upper right hand corner of your SOAPware screen.

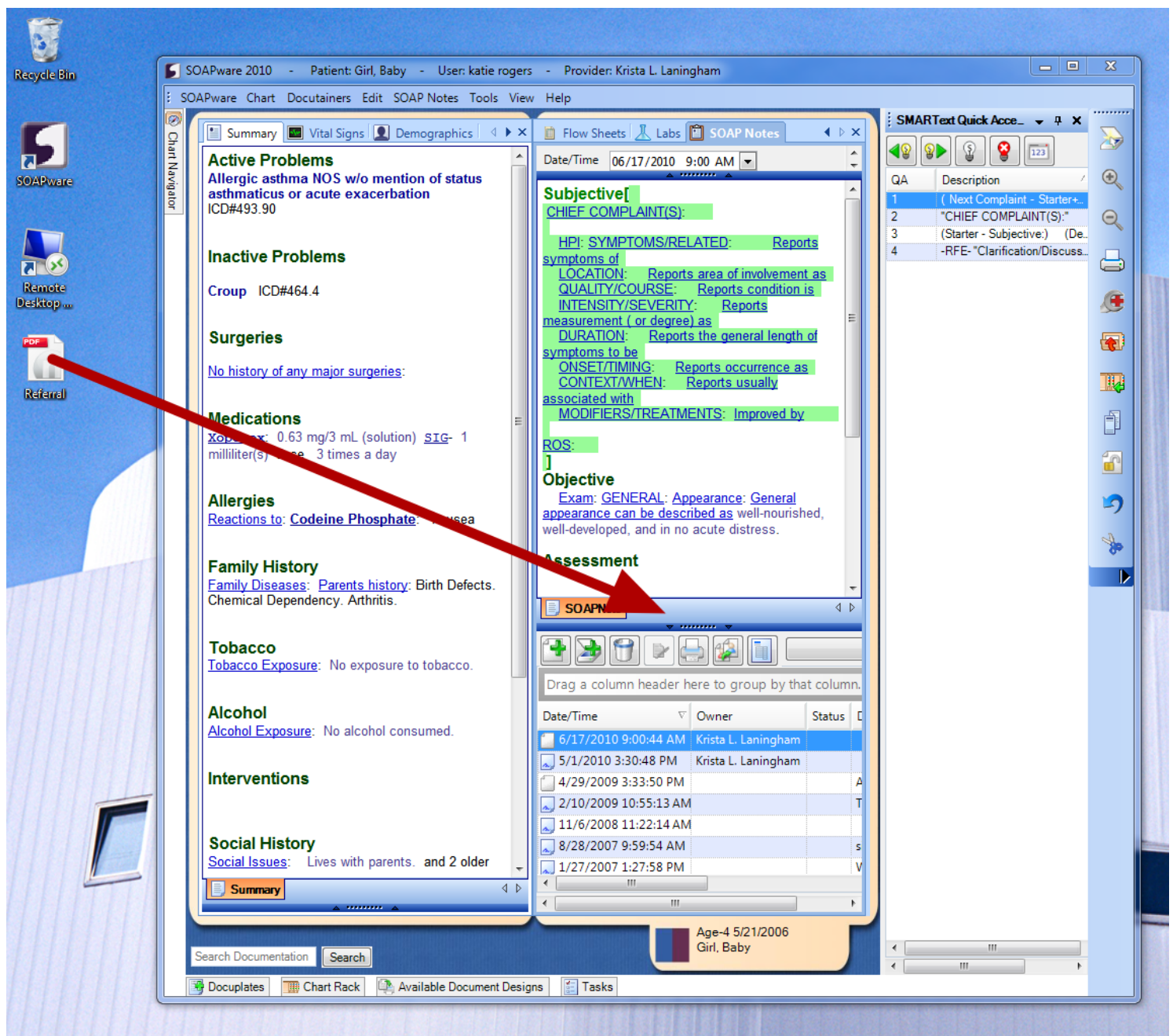


## Choose the File on Your Desktop



Choose a file that has been stored on your desktop.

## Drag and Drop to SOAPware



Left click your mouse button over the file, while continuing to hold the button down, drag the file until your mouse arrow is to the left of the lower tab of your docutainer (in this example we will use a SOAPNote).

The file will look like a black circle with a slash through it.

When your mouse arrow is in the correct location next to the tab, it will look like a small faint box with a small plus, drop it by removing your finger from the mouse button.

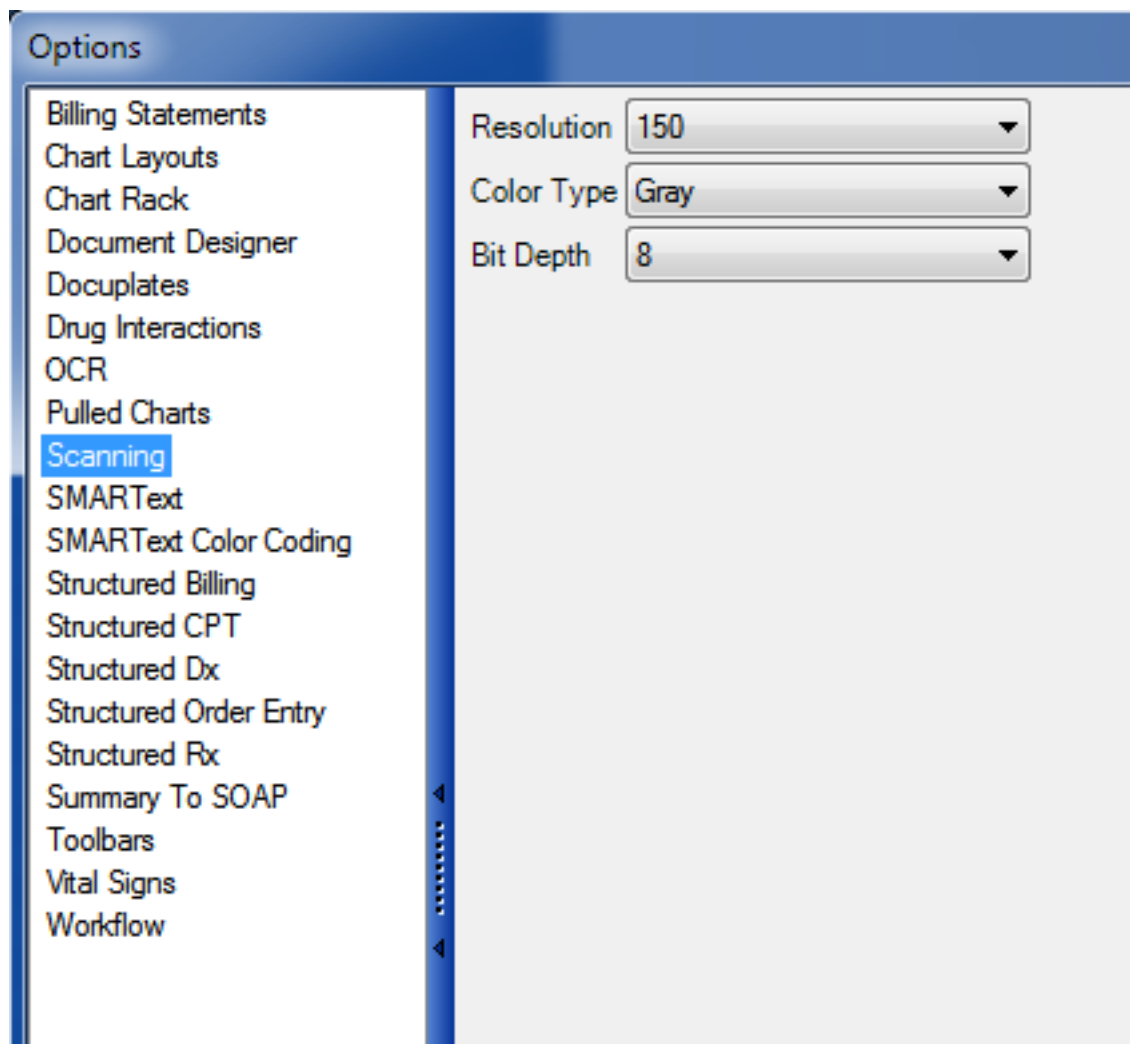
## Scanning Set-Up & Options

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There are several options that you can set to customize Scanning settings for your needs. To access the Scanning Options area, Click Tools, Options, and Select Scanning from the tree view.

SOAPware Scanning allows you to initiate an image scan from within SOAPware, and to have the resulting image imported directly into the current Document as a new Document Item.

### Setting Options



These settings determine the quality of your scanned images. Remember that the higher resolution you set, the clearer the picture, but the slower the scanning time will be. To find these, go to Tools - Options.

**Resolution:** This controls the dots per inch. The higher the resolution is set, the larger your database will get.

**Color Type:** You will be able to select Black and White, Gray or Color. Black and White will be the most accurate and fastest option. If you want to convert color documents, you certainly can. Both Gray

and Color will affect the Bit Depth of the conversion as well.

**Bit Depth:** Affects the granularity of the conversion. If you have a Gray or Color type set, the higher the bit depth you select, the clearer the picture will be.

## Scan Directly into SOAPware

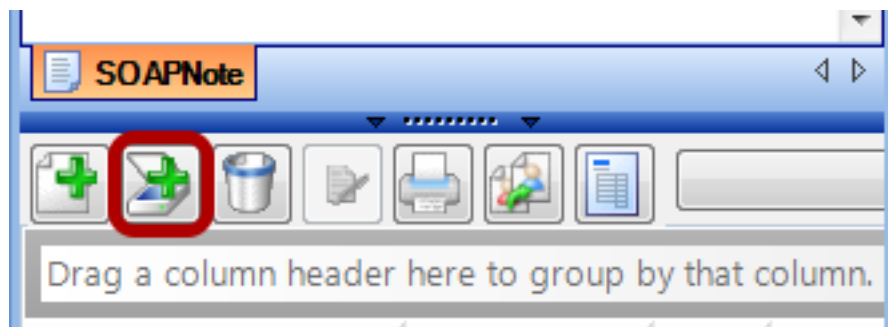


With an unsigned Document open in SOAPware, click Docutainers, New Image from Scan or click the scan button in the Common Toolbar. This will launch the scanning software for your default scanner. Follow the manufacturer's directions to scan as you normally would.

## Scanned Images

After the scan is completed, the new scanned image will appear in the current Document as a new Image Document Item. The ability to rename the scanned image tab is accomplished by right-clicking over the tab and selecting rename.

## Scanning as a New Docutainer



If you would like for your scanned document to have its own docutainer, you can use the scan button below the splitter bar to scan as a new docutainer.

## Scanning Multi-Paged Documents

If you have a self-feed scanner, you will have the option to scan in multi-page documents. To use this, you can click the scan button just like with a single page document. When the scan is completed, you will have one tab per page.

## Scanned Signatures

A handwritten signature in black ink that reads 'Randall Oates MD.' The signature is written in a cursive style.

You can also scan in signatures which can be included on document designs. It is recommended that you scan the signature to your desktop and use Provider Manager to import the signature.

To use this signature on document designs, use the data item found under Misc > Clinician > Signature. This will use the signature stored in Provider Manager.

## Drawings

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The SOAPware Drawings section is designed to give an easy way of creating informational pictures, either for reference or to be given to a patient.

SOAPware comes with a large number of pre-made image templates that can be used as a starting point, or simply start with a blank document. Any of the existing templates may be edited or appended at any time.

### Interface

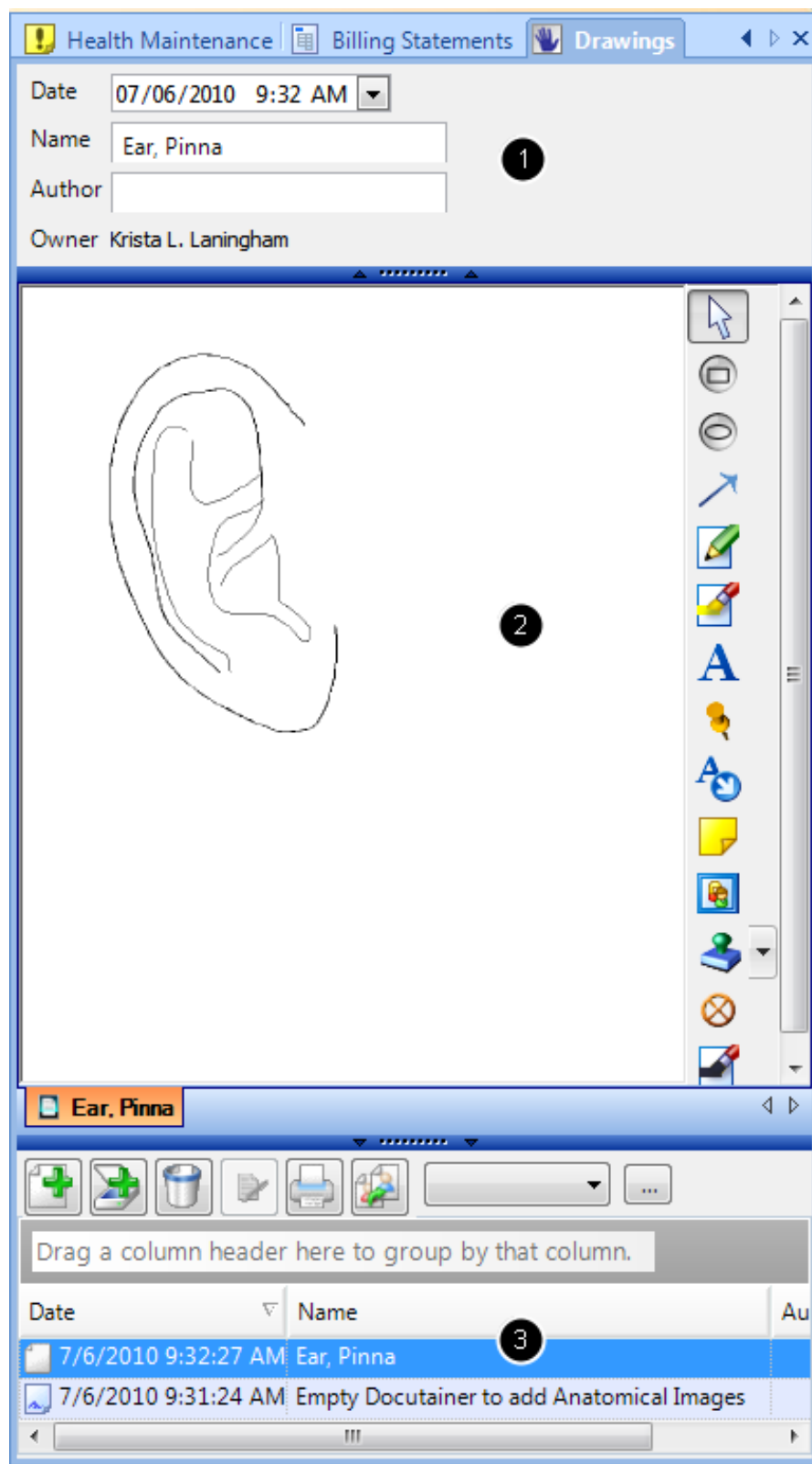
Command buttons are located at the bottom of the Drawings window and have picture buttons that display helpful information when the mouse cursor hovers over them.

There is now a column that contains the name of the owner of the drawing.

Now documents have associated document demographics, accessible by clicking the top splitter bar of the chart section.

Also, by clicking the bottom splitter bar, you can view a list of all drawings in the current chart.

## Three Interface Areas

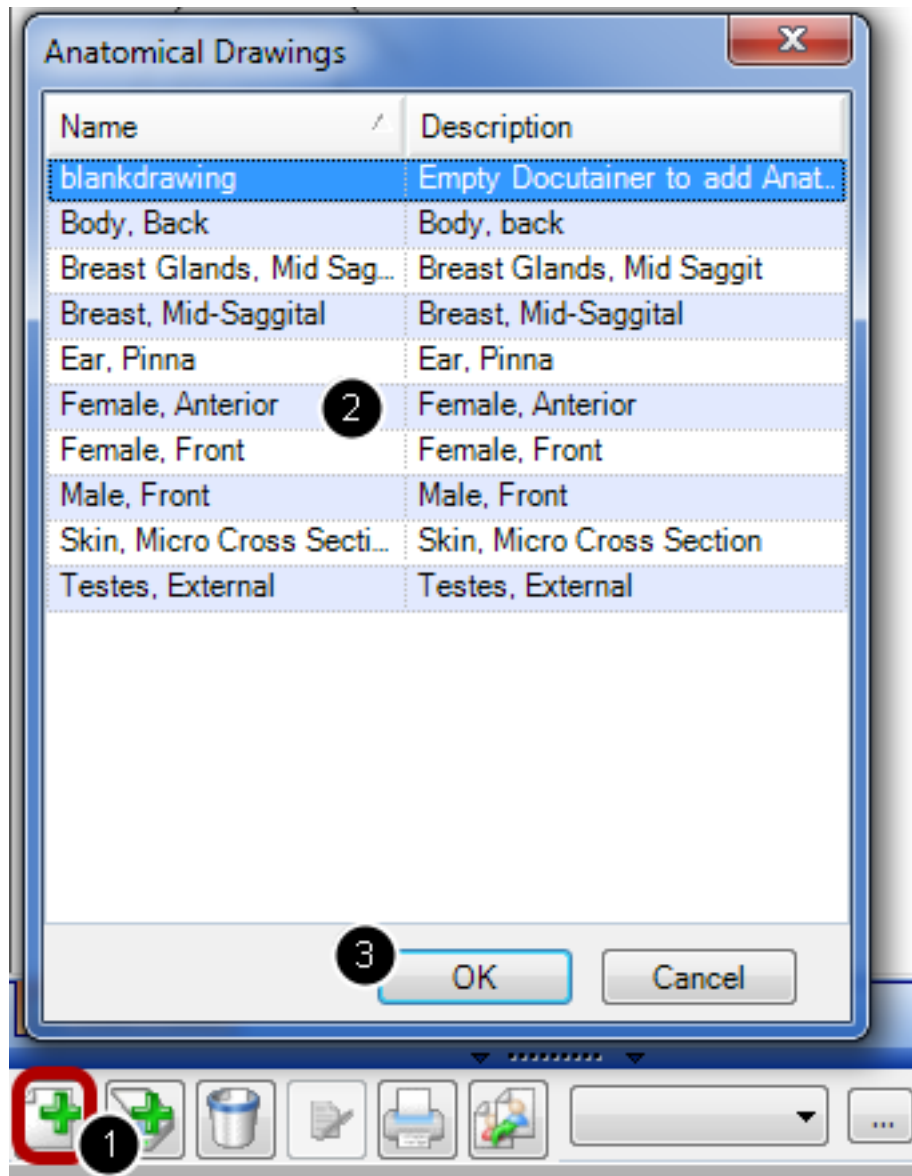


The Drawing window features three main parts:

1. Document demographics, located above the anatomical image.

2. The Drawing window, where the anatomical image and the controls for editing and manipulating it are displayed.
3. The Document list, located below the anatomical image. Here you will find controls for adding, removing, signing off, printing, and reassigning a drawing.

### Adding New Drawings



To add a new drawing, enter the drawings section of the patient chart:

1. Click the New Drawing Button.
2. The Image Template dialog box will open. Here, you will see a list of all available image templates for use in SOAPware. Select the image template you wish to use by selecting it
3. Click Ok. The new Drawing will be created and placed into the chart for you to edit and annotate as needed.



**NOTE:** The list of drawing templates comes from the available docuplates for drawings. To increase the number of drawings available, you can download drawings from the online library or create your own drawing docuplate.

## Removing Drawings

To remove a drawing from a patient chart, select the drawing that you wish to remove and click the Remove Documents Button.

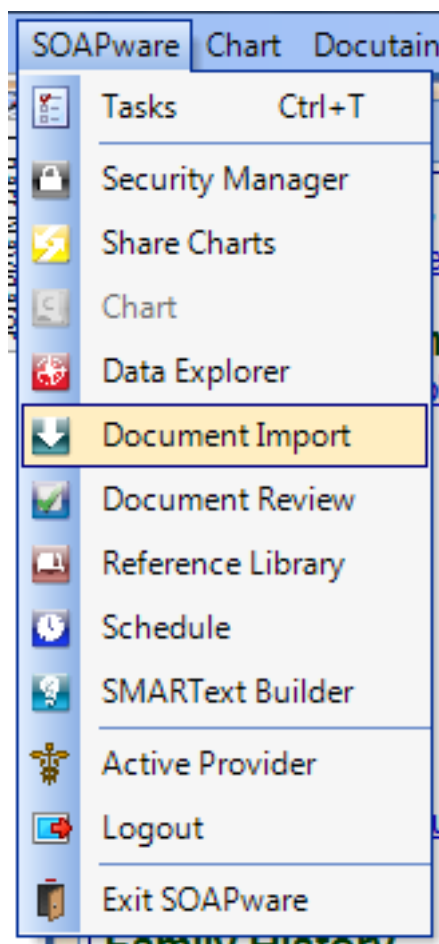
SOAPware will ask you to confirm that you wish to remove the document. If you are certain you wish to remove the document, Click Yes, and the drawing will be removed.

## Document Importer

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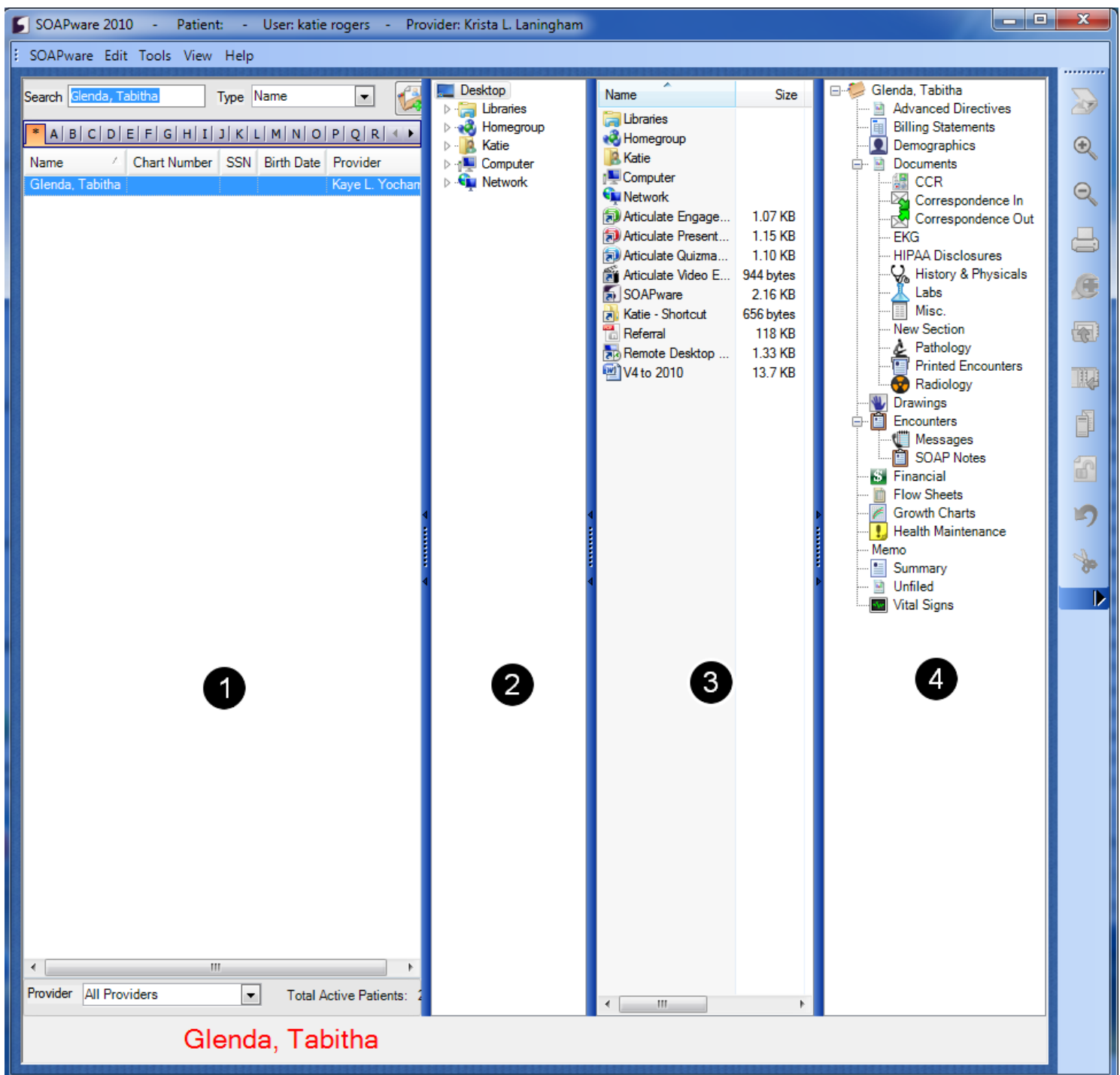
There are 2 main mechanisms for adding outside documents to SOAPware. In each viewer, there is a Scan button allowing for the addition of documents directly into a patient's open SOAPware chart. The Document Import workspace is the second option and is the main mechanism for importing documents into SOAPware. Document Importer is the topic for the rest of this discussion. The Document Import workspace is used for importing documents and files from outside of SOAPware directly into patient charts without having to open each, individual patient chart in the Chart workspace. It is especially useful when dealing with large numbers of files spanning multiple charts, such as when you need to import documents created during bulk scanning operations.

### Document Import Workspace



To access Document Import, Click SOAPware in the menu bar, and Click the Document Import menu item. The workspace in Document Import consists of four vertical columns and the patient name panel at the bottom.

## Four Areas

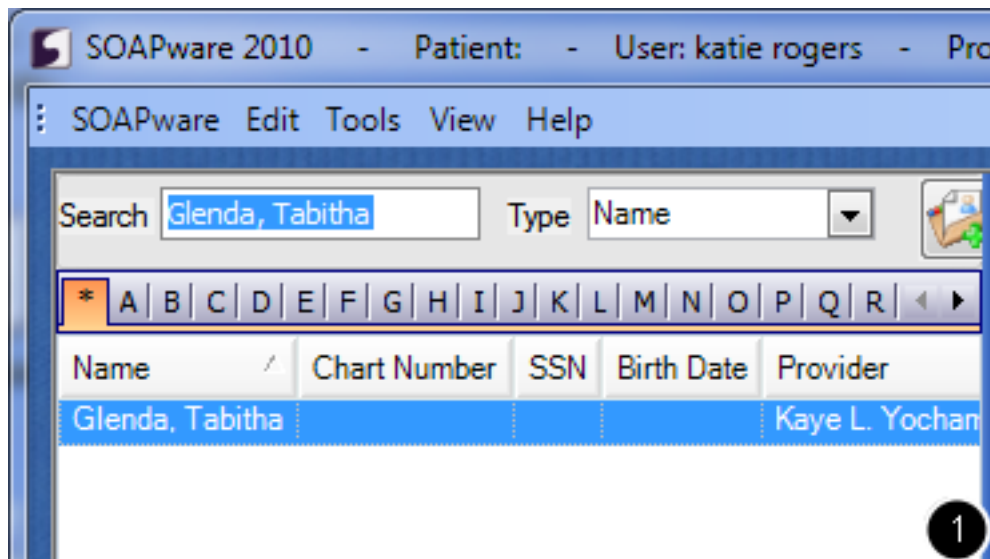


1. Mini-Chart Rack - The first column/panel on the left is a list of patient charts, arranged alphabetically. This is similar in function to the Chart Rack. The name of the patient selected from this list is displayed in the patient name panel at the bottom.
2. Folder Browser - The second column/panel is a folder-browsing column/panel and allows for the finding and selection of folders (i.e. folders containing document to be imported). This is the same view that Windows creates when My Computer or Windows Explorer are selected.
3. Folder Contents - The third column/panel displays the contents of the folder selected in the second column. Right-clicking in this area allows the view or sorting options for the display to be changed.

4. Chart Sections - The fourth column/panel (right-most) shows the chart sections for the active patient whose name is displayed in the patient name panel. This is similar to Chart Navigator.

Click-and-drag the vertical splitter bars between columns to resize or hide the columns.

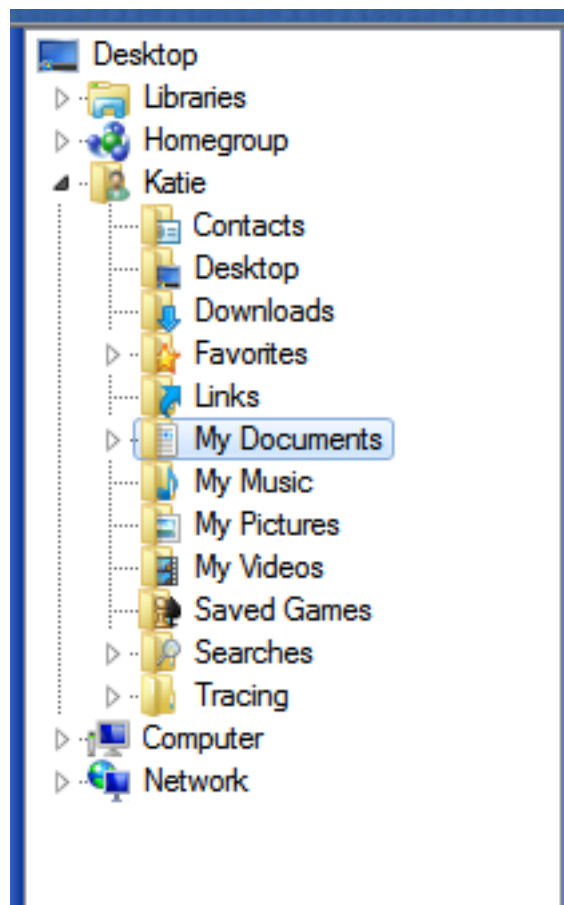
### Select Patients in Mini-Chart Rack



Retrieving patient charts follows the same methods as utilized in the Chart Rack. Patients are usually selected by typing their names or by typing other identifiers into the Search box.

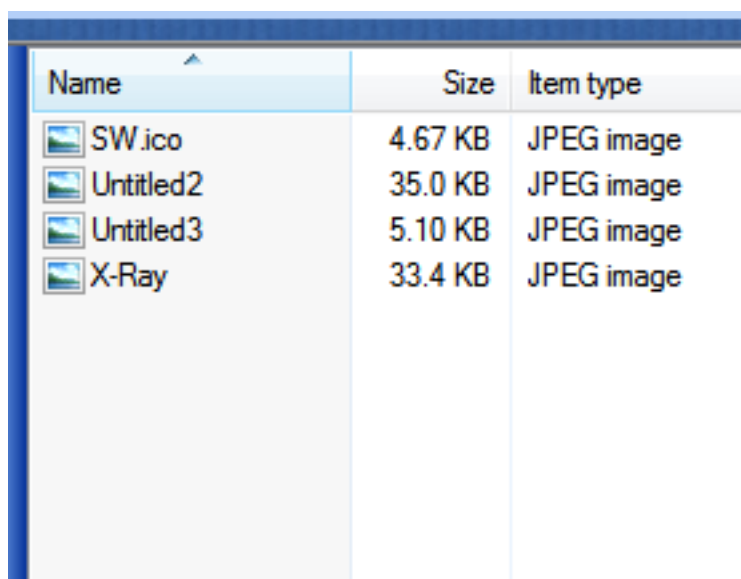
It is also possible to create a new chart by clicking the Create Chart button. The new chart will be automatically selected after creation. Once a chart is selected, the name of the patient will appear in large red letters in the patient name panel at the bottom of the Document Import workspace.





## Select Files for Import



Folder browsing/selection occurs in the second column/panel. The Folder Browser panel displays a table of contents view of the disks, folders, and network locations available to the current computer. Clicking a folder in the hierarchical list will display its contents in the Folder Contents panel to the right. Double-click a folder (or Click the + next to it) to expand it to show the sub-folders contained within it.

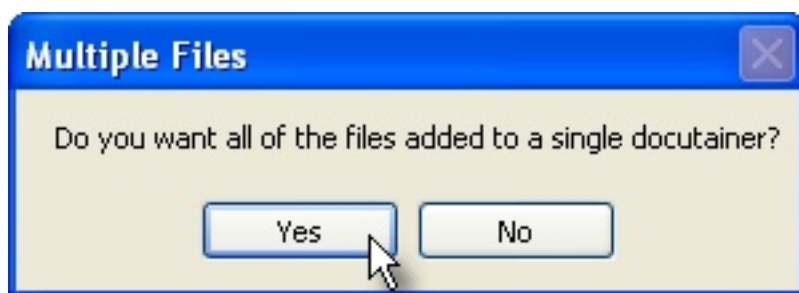
## Select Files to Import in Folder Contents



Name	Size	Item type
 SW.ico	4.67 KB	JPEG image
 Untitled2	35.0 KB	JPEG image
 Untitled3	5.10 KB	JPEG image
 X-Ray	33.4 KB	JPEG image

Once a folder is selected, the file or files to import can be found in the Folder Contents panel to the right of the Folder Browser panel. This display can include any/all the files or documents contained in the selected-active folder or disk location.

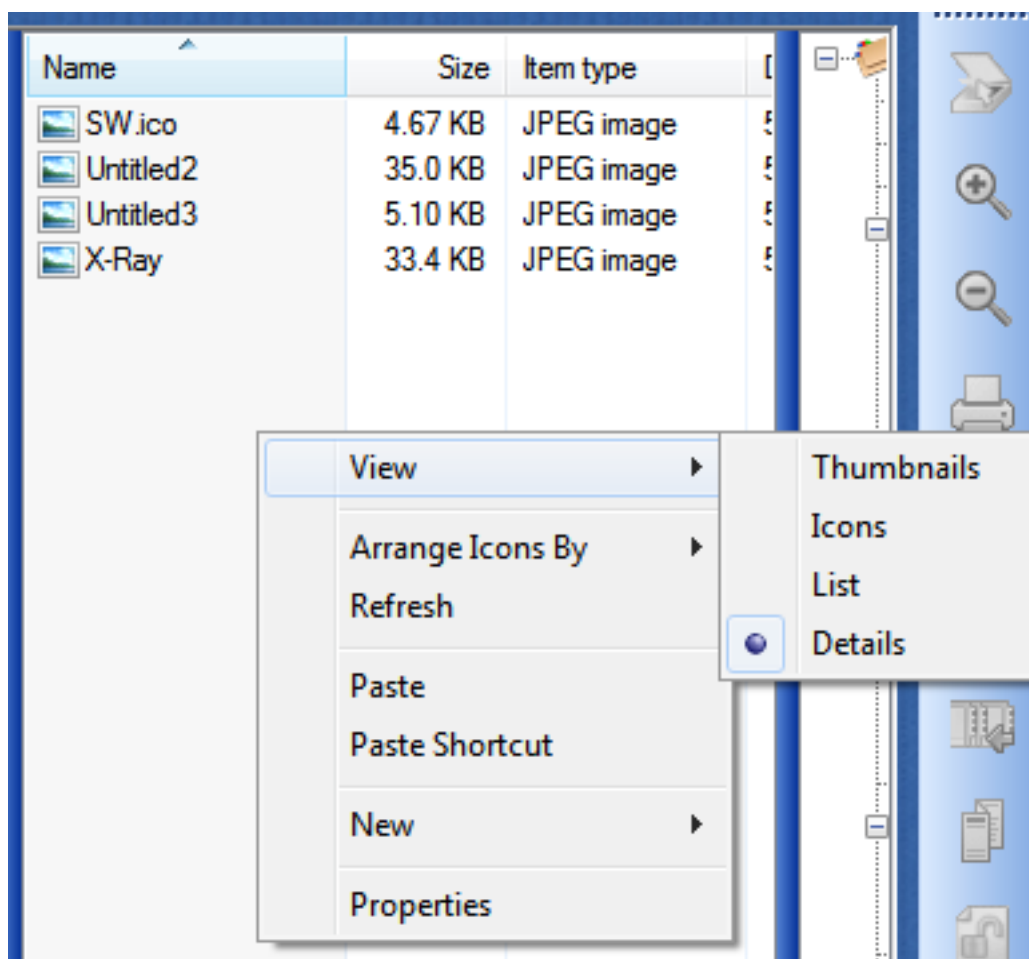
## Selecting Multiple Items for Import



Press and hold-down the Ctrl or Shift keys while Clicking on multiple items in order to select multiple items to import in one step. When importing multiple items, a prompt is presented to choose from 2 options:

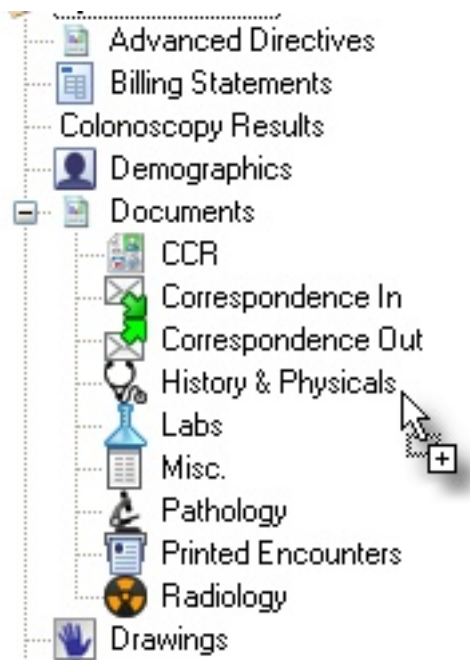
1. Import multiple documents in a single docutainer
2. Import single documents in separate docutainers. This option offers an opportunity to create a new task for each document.

## View Files Options



By default, the documents/files are displayed in a Thumbnails view, but other viewing options are available. Right-click in the Folder Contents panel; Click the View menu item, and Click a menu item for one of the 5 view options (i.e. Thumbnails, Large Icons, Small Icons, List, Details).

## Select the Chart Section to Receive the Import



Documents/files to import are drag-and-dropped into the appropriate chart section (the 4th or right-most panel). To do this, Click on the document/file to import; Click-hold down the mouse button; drag to the desired chart section, and Release the mouse button to drop the document/file into the selected chart section. When dragging the document/file across the chart sections, the mouse pointer will change to a plus sign in a box when it is over a chart section that will accept that type of document.



## Create Task List Items for Imports

Add Document Task

Task Info

Description

X-Ray.jpg

Owner

Krista L. Laningham

Assigned To

Krista L. Laningham

Due

6/21/2010

Reminder

/ / : :

Priority

Normal

Action/Status

Type

Correspondence In

Notes

Docutainer Info

Date

05/04/2010 1:51 PM

Name

X-Ray.jpg

Author

Source

Condition

Status

Owner

☐ Apply To All

Add

Cancel

When the document/file is dropped into the chart section (i.e. by releasing the mouse button), the Add Document Task dialog appears allowing for the automatic creation of a new task item.

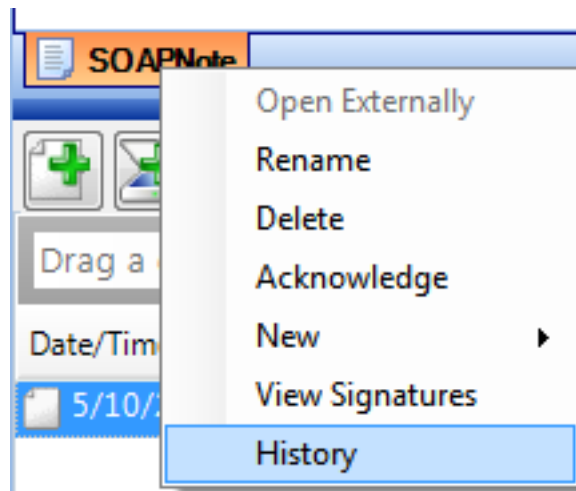
## Document History

---

With the Document History option, you can view the history of documents in a patient chart. This allows for complete tracking of the changes to a document over time. This includes signatures, added documents, updated fields, etc.

You can view who changed a document (User column), and when it was changed.

### Access and use of Document History



To access a document's history, open a patient chart, and right-click over the document tab in the lower left. In the screenshot below, we are in the SOAPnote section, outlined in red. When the right-click menu opens, click the History menu item.

## View Events

The screenshot shows a 'Document History' window with a table of events. The table has five columns: User, Computer, When, Type, and Comment. The events listed are all 'Field Updated' events by 'katie rogers' on 'KATIELAPTOP (192.168.1.72)' on 6/21/2010. The 'View Events' dropdown menu is open, showing the following options: All, Field Updated, DocumentAdded, and DocumentModified. The 'All' option is currently selected.

User	Computer	When	Type	Comment
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:27 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:27 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:23 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:23 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:26:19 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:17:01 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:17:01 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:16:53 AM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	6/21/2010 8:16:53 AM	Field Updated	Updated

View Events - All

- All
- Field Updated
- DocumentAdded
- DocumentModified

well-developed, and in no acute distress.

**Assessment**

Click the View Events drop-down menu to choose the event type.

## View Document

**Document History**

User	Computer	When	Type	Comment
Krista L. Laningham	KATIELAPTOP (192.168.1.72)	6/17/2010 7:49:03 PM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	5/11/2010 9:25:32 AM	DocumentModified	UnNamed Docutainer
katie rogers	KATIELAPTOP (192.168.1.72)	5/10/2010 3:20:50 PM	Field Updated	Updated
katie rogers	KATIELAPTOP (192.168.1.72)	5/10/2010 3:20:50 PM	Field Updated	Updated

**Subjective**  
CHIEF COMPLAINT(S):

HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports measurement ( or degree) as  
DURATION: Reports the general length of symptoms to be  
ONSET/TIMING: Reports occurrence as  
CONTEXT/WHEN: Reports usually associated with  
MODIFIERS/TREATMENTS: Improved by

ROS:

**Objective**  
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.

View Events - All

Close

In the screenshot above, we have clicked All, to view all events. Click a list item to select and view its information in the lower section of the Document History dialog.

## Another Option

Review

Item History

Insert Exam Headers

Insert Exam Headers and Items

Current Document

Current Section

Entire Chart

Also, right-click in any field in an open chart to access the document history. When the context menu opens, click Item History and then Current Document menu items.

## Co-Signatures

Co-Signatures have been implemented for sites that need the ability to have a supervisor signature for providers such as residents.

### Set up Supervisors

**Providers**

Providers

- Kaye L. Yocham
- Krista L. Laningham**
- Rena O'Dell
- Rita Pense
- Shannon Shores

**General** Misc Codes Signature

**Name**

Title Firs M Las Suffi

Krista  L  Laningham

**Address**

Clini SOAPware 2008 - Tr

Stre 4220 N. Crossover Rd.

City Fayetteville Stat AR Zip Cod 72703-

**Contact Information**

Phone 800455762750

Fax # (866) 237-9073

Email

**Physician Numbers**

DEA # AO9705697-0 State ID

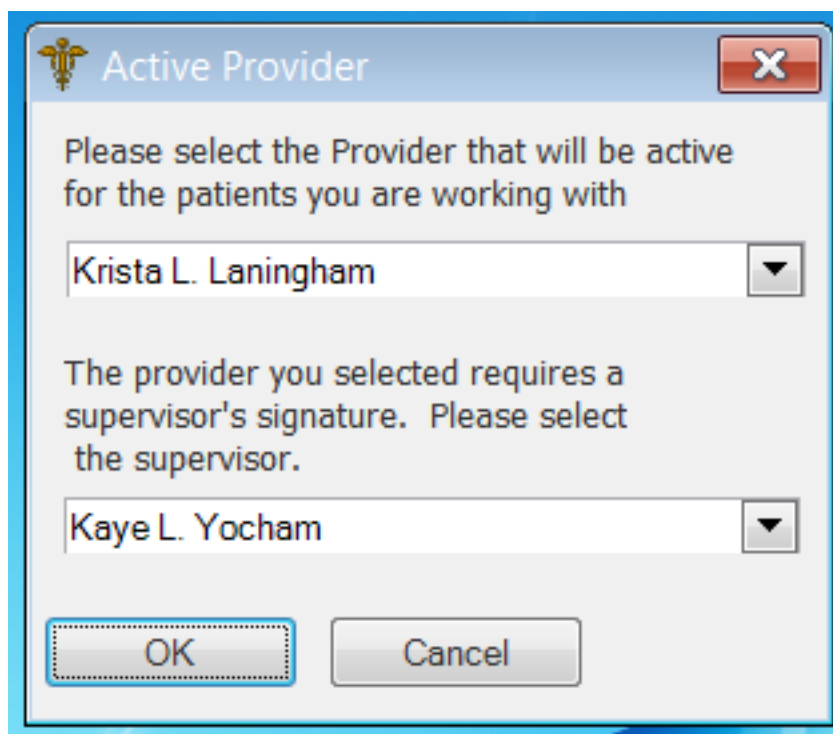
NPI# 1205037611 UPIN#

☒ Is Supervisor

Update

You need at least 2 providers in SOAPware and one of them must NOT be marked as a supervisor. To require a supervisor signature, go to Menu bar > Tools > Provider Manager and uncheck the box at the bottom of the Provider Manager dialog. It is the box in front of Is Supervisor.

## Supervising Signature



When a provider who needs a supervising signature signs into SOAPware, a dialog window will appear that asks the user to select a supervisor.

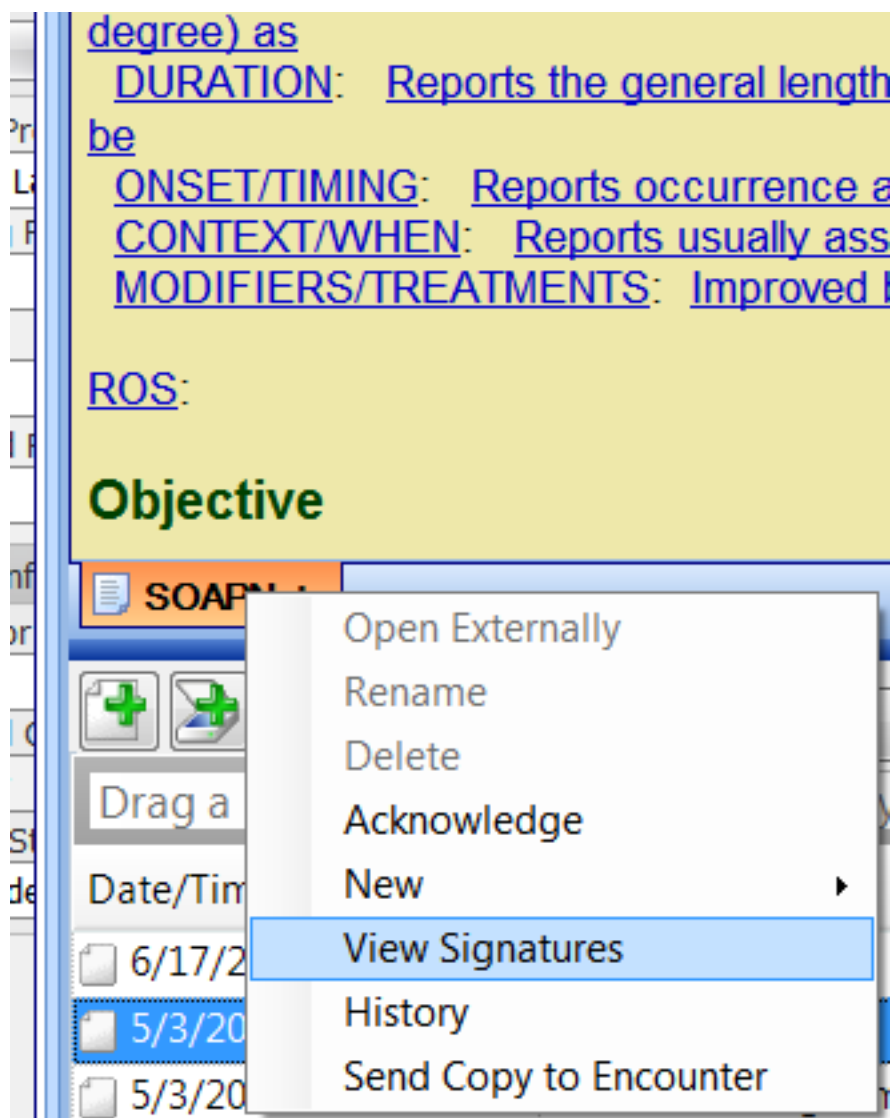
## Signing

The provider needing a supervisor signature will sign off a document. Then a Task will be created for the supervising provider in SOAPware.

The supervising provider will review and then sign the document.

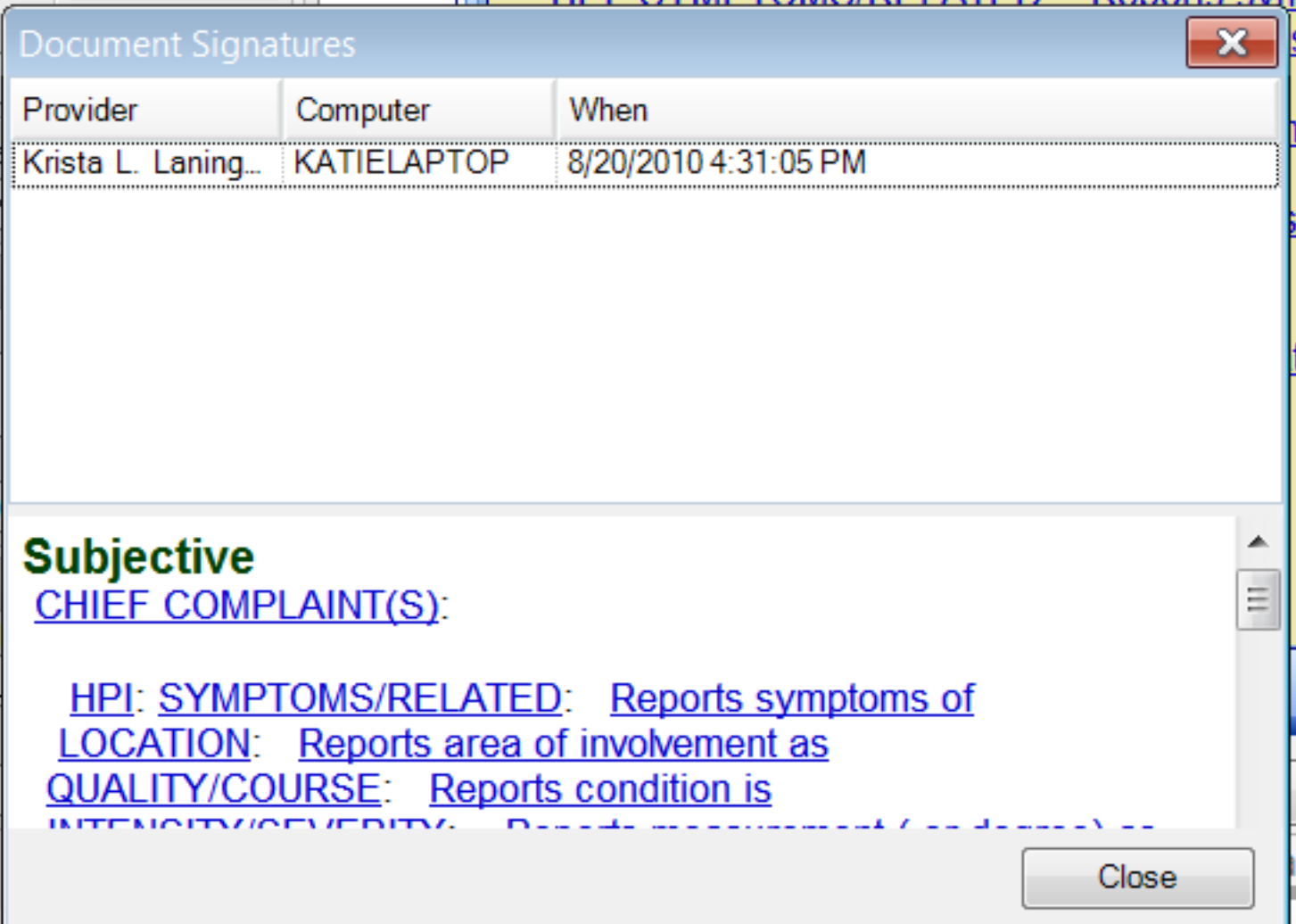
## Signature History

### View Signatures



After a document is signed off, you can view the signature(s) on the document. This will show who signed the document and when it was signed. To access this, right click on the orange SOAPnote tab at the bottom of the SOAPnote. Select View Signatures.

## Signature



The screenshot shows a window titled "Document Signatures" with a close button in the top right corner. Below the title bar is a table with three columns: "Provider", "Computer", and "When". The table contains one row of data. Below the table is a large text area displaying a preview of the document content. The preview starts with the word "Subjective" in bold green, followed by "CHIEF COMPLAINT(S):" in blue. Below this, there are several lines of text in blue, including "HPI: SYMPTOMS/RELATED: Reports symptoms of", "LOCATION: Reports area of involvement as", and "QUALITY/COURSE: Reports condition is". The preview area has a vertical scrollbar on the right. At the bottom right of the window is a "Close" button.

Provider	Computer	When
Krista L. Laning...	KATIELAPTOP	8/20/2010 4:31:05 PM

**Subjective**  
CHIEF COMPLAINT(S):

HPI: SYMPTOMS/RELATED: Reports symptoms of  
LOCATION: Reports area of involvement as  
QUALITY/COURSE: Reports condition is  
INTENSITY/SEVERITY: Reports amount / severity

Close

The Document Signatures window will show the provider, the computer, and the time that the document was signed. It also gives a preview of the document in the lower portion of the window.



# Drug Courses

## Drug Course Creation

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A new concept for SOAPware 2010 is the ability to have pick lists of customized Drug Courses for each individual medication. Meaning, each Drug Course can be displayed using your own customized text in the format you prefer.

### What is a Drug Course?

What is a Drug Course? Drug Courses are the directions given (written) when prescribing a medication including, dose, route, frequency, substitutions, refills, etc.

Now, prescription details can match a format the prescribing clinician prefers.

For example, a Drug Course pick list item for Amoxicillin might include:

500mg tab, 1 tid, #30, Substitution-Allowed, R-0 or

250mg chewables 1 po tid for 10 days. Substitution-Not Allowed, 0 Refills

instead of:

500 mg (tablets) Dose- 1 each Freq- 3 times a day Route - orally Quantity-#30  
Substitution-Allowed Refills- 0

### Drug Courses

The user can create a prescription in whatever format is preferred, and have SOAPware store the values for future use. Even for the same drug, this process can be infinitely repeated to have as many different courses for that drug as desired. Subsequently, when the drug is prescribed, the user simply picks from the list of pre-defined Drug Courses in order to fill in the all the prescription sub-items one step.

In earlier versions of SOAPware, the user had to first select the drug form, and then select a series of multiple sub-items for each Sig (i.e. Dose, Frequency, Route, etc.), dispense amounts, substitution status and refills. This created the need to have multiple, completed prescriptions for each medication, because a new one had to be created for each set of Form/Sig values.

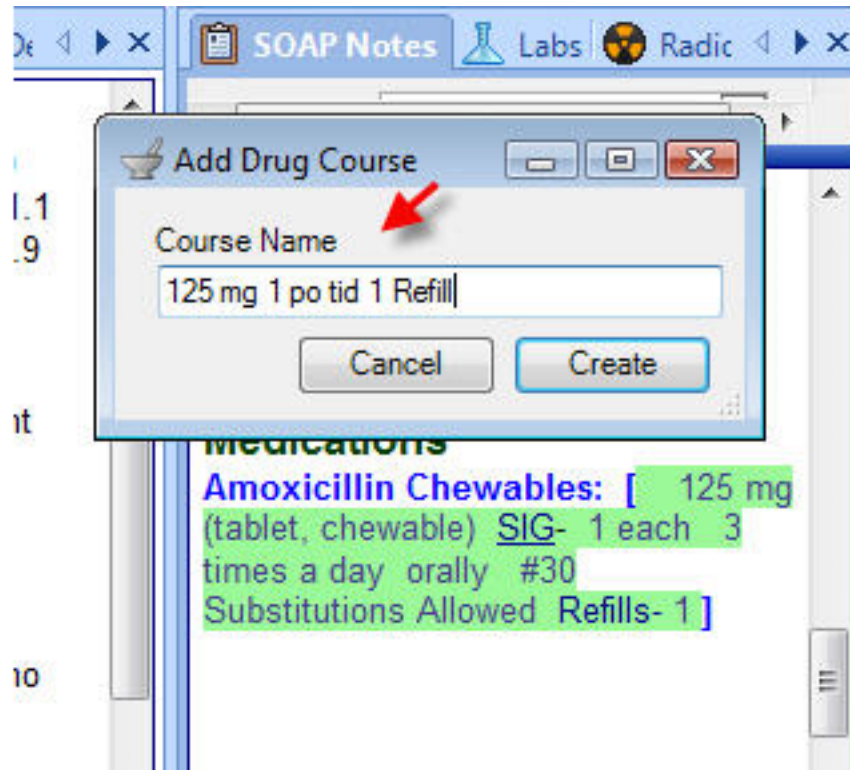
Other consideration regarding Drug Courses include:

- \* Many different medications can have the same Drug Course.
- \* Drug Courses can be pre-defined, stored and selected via pick lists.
- \* Selecting a particular Drug Course will automatically place that course's values into the

prescription.

\* Each Drug Course can be displayed using your own custom text (500 mg. tablet BID or 500 mg tab bid etc.).

## Creating Drug Courses



**IMPORTANT:** to use this feature optimally, go to the Tools menu>Options>Structured Rx>Click on the Headers tab and then make sure that there is NOT a check next to, "Visible only when empty. Sig Header". Log out of SOAPware and log back in for this to take effect.

Insert SMARText medication into the medication field of the SOAPnote. To do this, type in the medication name and then press Shift F11 on the keyboard to search SMARText. Double click on the medication to insert it into the field.

Select the strength, SIG, Quantity, Substitutions and Refills.

Now, to create a new Drug Course, Right-click the drug name, and Click the Store Drug Course menu item. In the Store Drug Course dialog, Type the the Drug Course Description, for example, 125 mg 1 po tid. Click Create.

## Create as Many Courses as you Need for the Medication

**SOAP Notes** Labs Radic

**Plan**

Note the three different drug courses for Amoxicillin Chewables

**Medications**

Amoxicillin Chewables: [ 400 mg (tablet, chewable) SIG- 1 each 3 times a day orally #30 Substitutions Allowed Refills- 0 ]

SMARText Quick Access

Active Item n Chewables 250mg #30 1 tid

Description	
>	X
one po bid for 10 days	X
125 mg 1 po tid 1 Refill	X
400mg 1 po tid, no R...	X

Repeat the above steps for as many Drug Courses as needed for the medication.

## Removing a Course

To remove a course, Click the X that is located in Quick Access next to the Description of the one to remove.

# Flow Sheets

## Managing Flow Sheets

---

Flow Sheets allow the user to track and study ongoing patient treatment. For example, you could use Flow Sheets to monitor such things as coagulation therapy, weight loss, and diabetes treatment.

### Tips

Flow Sheets in SOAPware are created as Docuplates, and can be found listed in the Docuplate Manager.

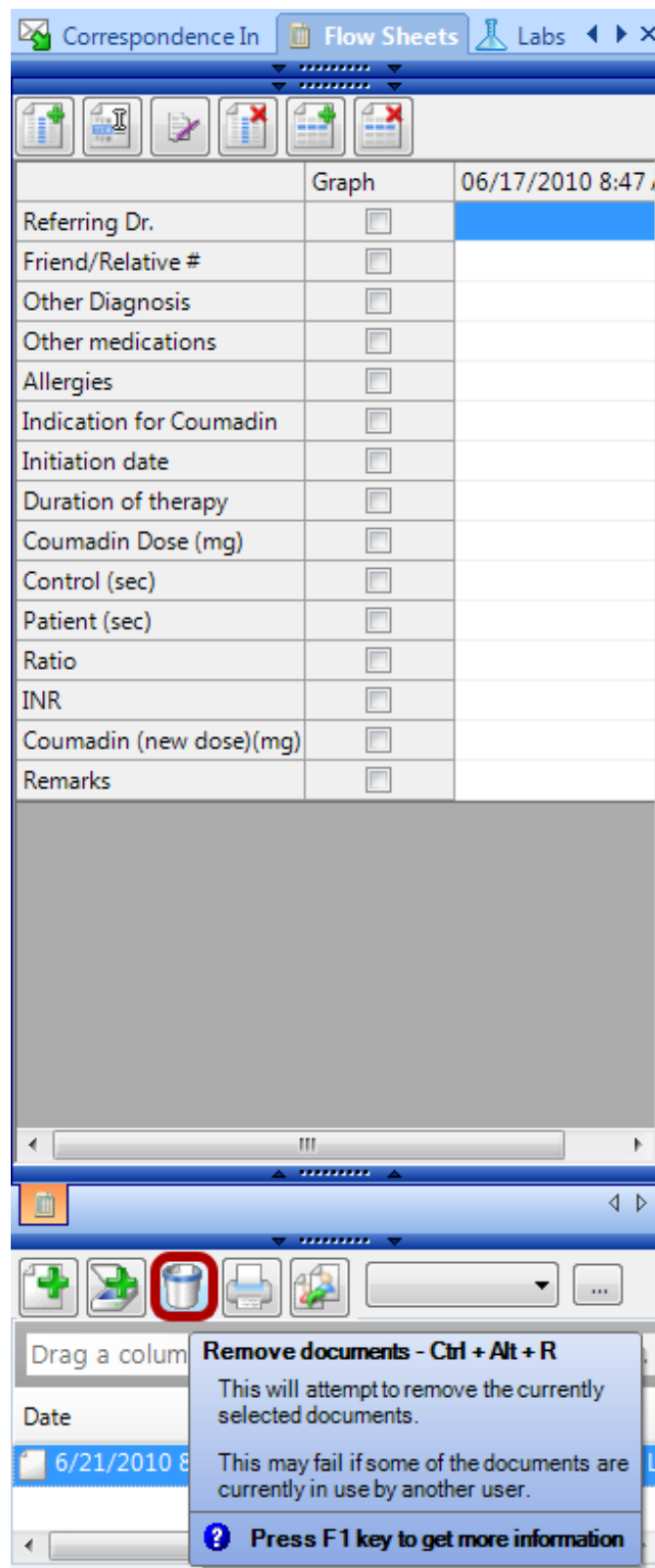
It is now possible to create a Flow Sheets tab that can be saved as part of a Chart Layout.

Plotting graphs has been greatly simplified in SOAPware. A check box has been added to each managed item, which when checked, automatically appears in a graph above the body of the Flow Sheet.

Certain Flow Sheet Items, such as vital signs readings and lab report values, are automatically filled on creation of a new Flow Sheet if data for them exists in the patient chart.

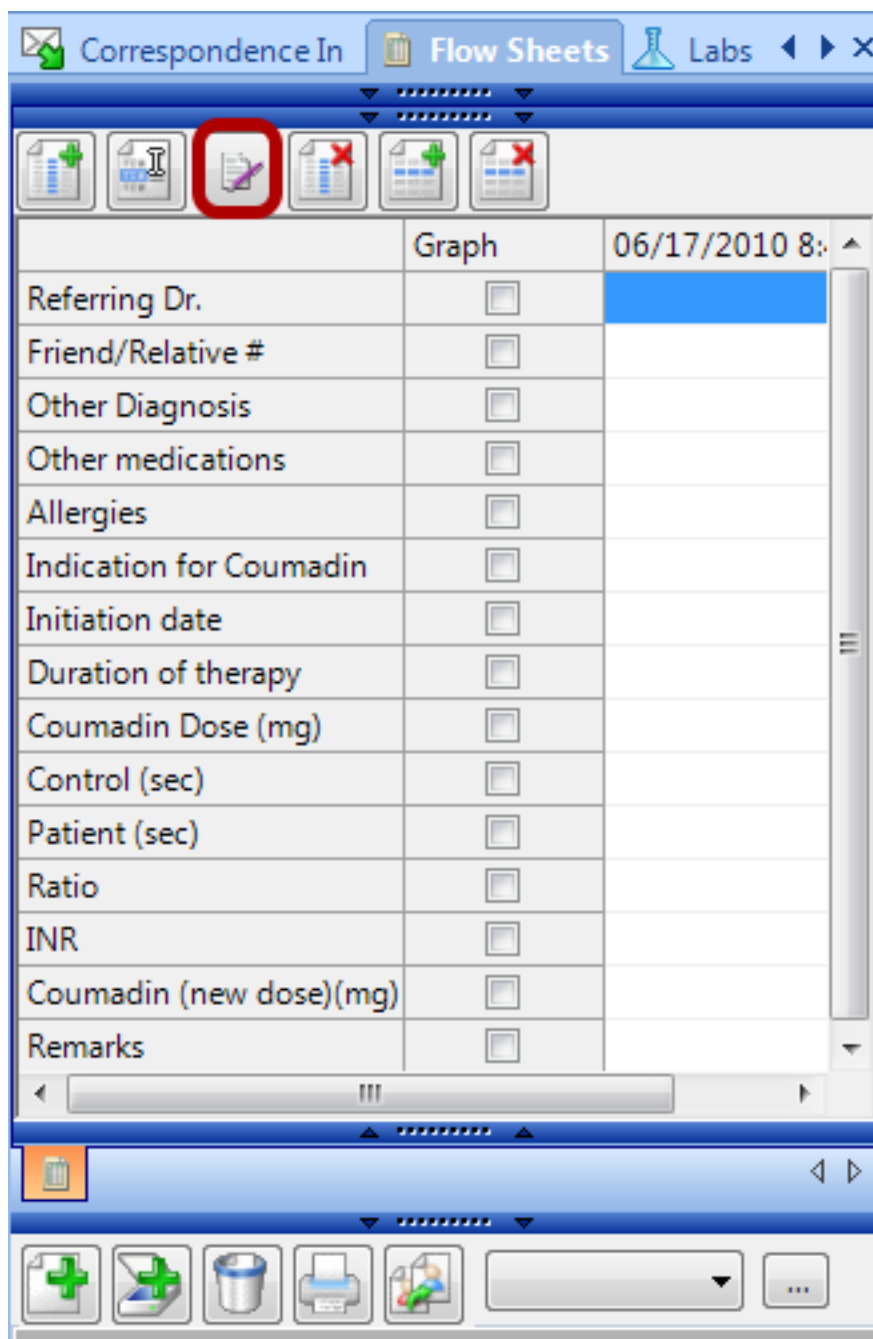
It is possible to drag and drop a vital sign from the Vitals Signs section and add it as an item in a Flow Sheet.

## Removing a Flow Sheet from the Patient Chart



To remove a Flow Sheet from a patient chart, first select the Flow Sheet that you wish to remove by Clicking on it in the Flow Sheets list. Then, Click the Remove Document Button (or Press Ctrl + Alt + R). SOAPware will ask you to confirm that you wish to remove the selected document. Click Yes if you are certain you wish to do so, and the Flow Sheet will be removed.

## Signing Off on a Flow Sheet



To sign off on a Flow Sheet, first select the Flow Sheet that you wish to sign off by Clicking on it in the Flow Sheets list. Then, Click the Sign Off Document Button (or Press Ctrl + Alt + S).

SOAPware will display the Sign Off Documents dialog box and ask you to confirm that you wish to sign off on the document. Click Yes if you are certain you wish to do so, and the Flow Sheet will be signed off.



## Printing a Flow Sheet

The screenshot shows the 'Flow Sheets' window. At the top, there are tabs for 'Correspondence In', 'Flow Sheets', and 'Labs'. Below the tabs is a toolbar with icons for adding, editing, deleting, and printing flow sheets. The main area displays a list of flow sheets with columns for 'Graph', 'Date', and 'Owner'. The 'Print' icon in the toolbar is highlighted with a red circle.

	Graph	06/17/2010 8:
Referring Dr.	<input type="checkbox"/>	
Friend/Relative #	<input type="checkbox"/>	
Other Diagnosis	<input type="checkbox"/>	
Other medications	<input type="checkbox"/>	
Allergies	<input type="checkbox"/>	
Indication for Coumadin	<input type="checkbox"/>	
Initiation date	<input type="checkbox"/>	
Duration of therapy	<input type="checkbox"/>	
Coumadin Dose (mg)	<input type="checkbox"/>	
Control (sec)	<input type="checkbox"/>	
Patient (sec)	<input type="checkbox"/>	
Ratio	<input type="checkbox"/>	
INR	<input type="checkbox"/>	
Coumadin (new dose)(mg)	<input type="checkbox"/>	
Remarks	<input type="checkbox"/>	

Drag a column header here to group by that column.

Date	Name	Owner
6/21/2010 8:46:58 AM	Coumadin flow sheet	Krista L. L

To print an existing Flow Sheet, first select the Flow Sheet that you wish to print by Clicking on it in the Flow Sheets list. Then, Click the Print Document Button (or Press Ctrl + Alt + P).

The Print dialog box will open. Select the printer you wish to use, and Click Print. The selected Flow Sheet will print.

## Reassigning a Flow Sheet

	Graph	06/17/2010 8:
Referring Dr.	<input type="checkbox"/>	
Friend/Relative #	<input type="checkbox"/>	
Other Diagnosis	<input type="checkbox"/>	
Other medications	<input type="checkbox"/>	
Allergies	<input type="checkbox"/>	
Indication for Coumadin	<input type="checkbox"/>	
Initiation date	<input type="checkbox"/>	
Duration of therapy	<input type="checkbox"/>	
Coumadin Dose (mg)	<input type="checkbox"/>	
Control (sec)	<input type="checkbox"/>	
Patient (sec)	<input type="checkbox"/>	
Ratio	<input type="checkbox"/>	
INR	<input type="checkbox"/>	
Coumadin (new dose)(mg)	<input type="checkbox"/>	
Remarks	<input type="checkbox"/>	

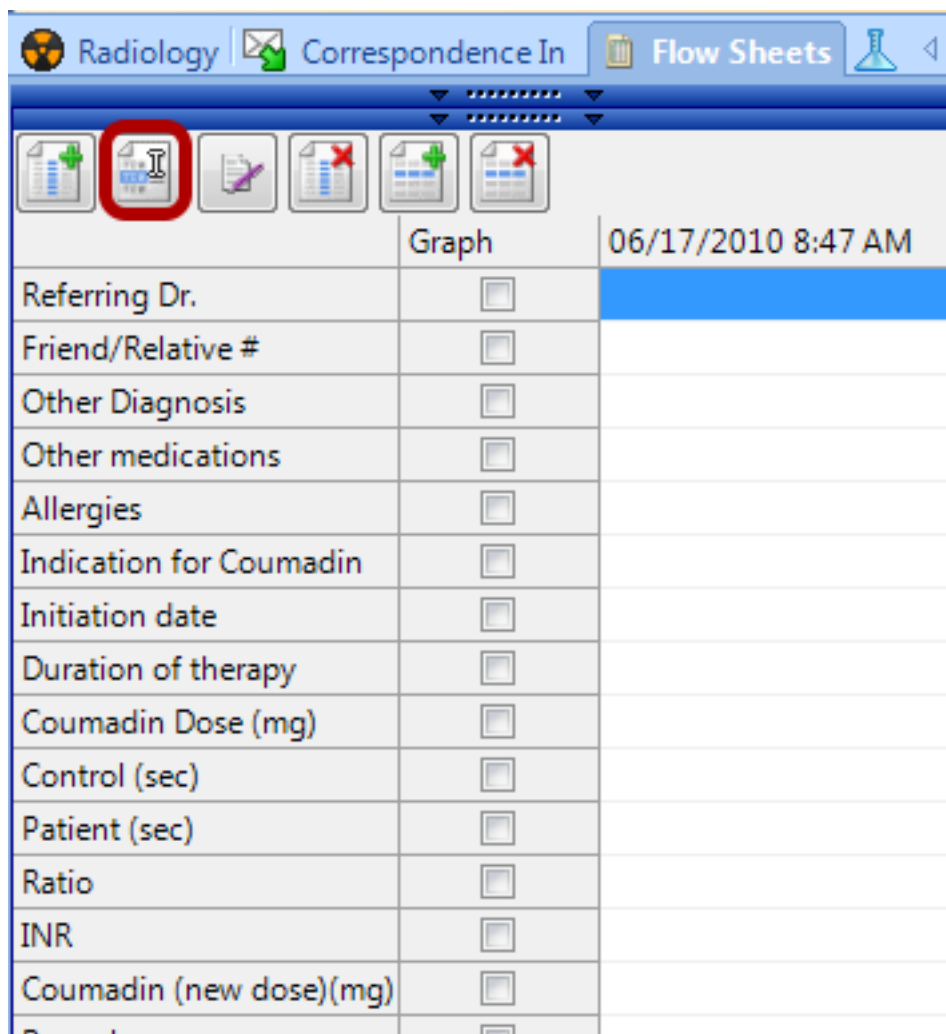
Date	Name	Owner
6/21/2010 8:46:58 AM	Coumadin flow sheet	Krista L. L

To reassign a Flow Sheet, select the Flow Sheet you wish to reassign and click the Reassign Documents Button (or press Control + Alt + R).

The Document Owner dialog box will be displayed. Use the drop down menu to choose the user you wish to assign the Flow Sheet to, and click "Okay".

## Using Flow Sheets

### Editing a Flow Sheet Reading Date or Column Header

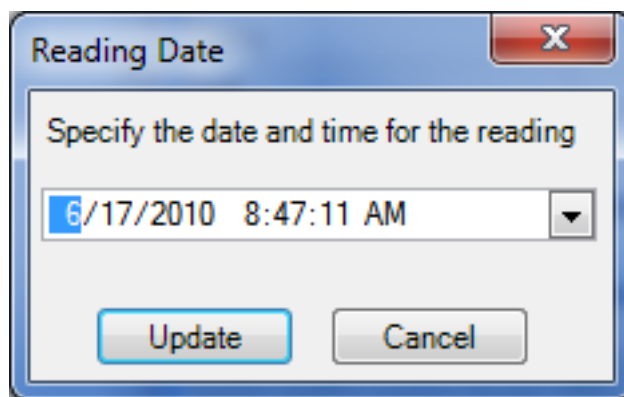


The screenshot shows the 'Radiology' tab selected in the top navigation bar. Below the navigation bar, there is a toolbar with several icons. The icon for 'Edit Reading Date' (a document with a pencil) is highlighted with a red circle. Below the toolbar, there is a table with columns for 'Graph' and '06/17/2010 8:47 AM'. The table contains the following rows:

	Graph	06/17/2010 8:47 AM
Referring Dr.	<input type="checkbox"/>	
Friend/Relative #	<input type="checkbox"/>	
Other Diagnosis	<input type="checkbox"/>	
Other medications	<input type="checkbox"/>	
Allergies	<input type="checkbox"/>	
Indication for Coumadin	<input type="checkbox"/>	
Initiation date	<input type="checkbox"/>	
Duration of therapy	<input type="checkbox"/>	
Coumadin Dose (mg)	<input type="checkbox"/>	
Control (sec)	<input type="checkbox"/>	
Patient (sec)	<input type="checkbox"/>	
Ratio	<input type="checkbox"/>	
INR	<input type="checkbox"/>	
Coumadin (new dose)(mg)	<input type="checkbox"/>	

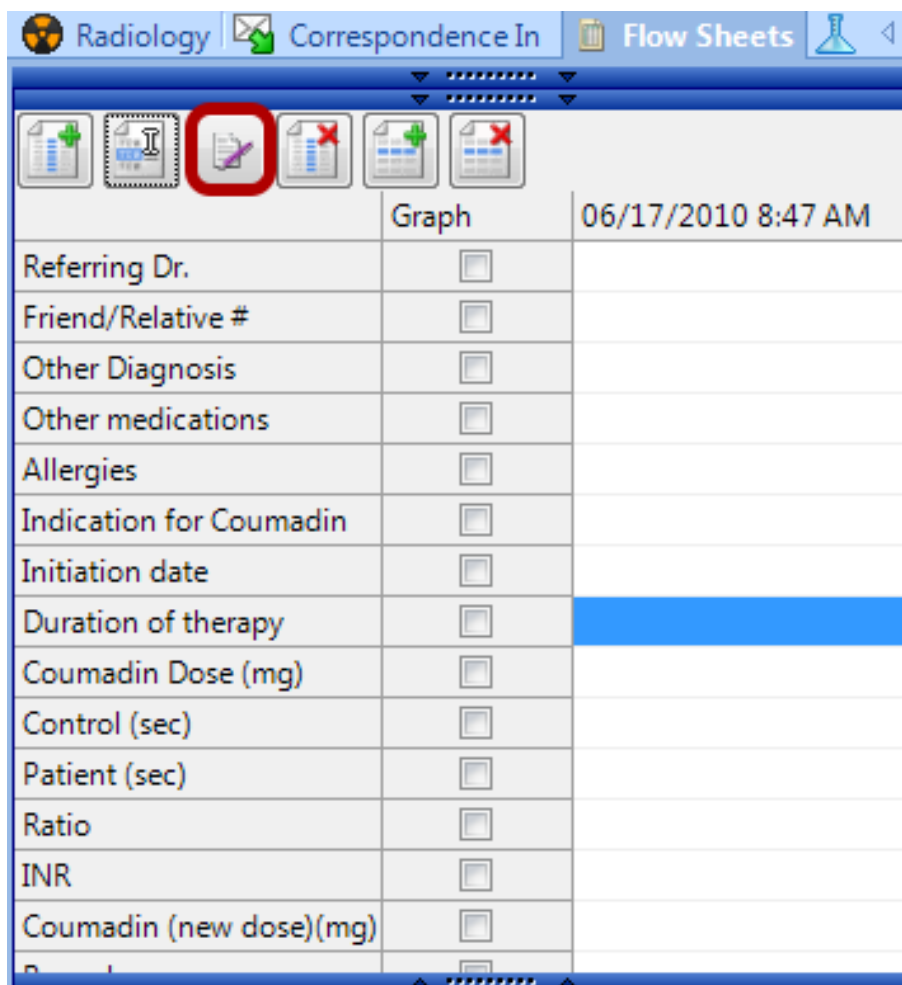
To edit the Reading Date for a column, first select the column you wish to edit by Clicking on it. Then, Click the Edit Reading Date Button (or Press Ctrl + Alt + E).

## Reading Date



The Reading Date dialog box will open. Click the arrow to open the drop down calendar, and select the desired date by clicking on it. Then, click the time fields and type in the desired time. When you are finished, Click Update. Your changes will be applied.

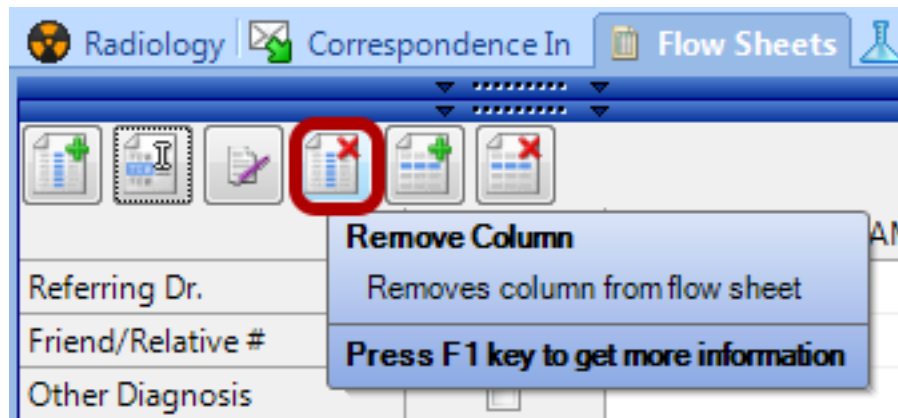
## Signing Off on a Flow Sheet Reading Date



To sign off on a Reading Date, first select the Reading Date that you wish to sign off by Clicking on it in the Flow Sheet. Then, Click the Sign Off Reading Date Button (or Press Ctrl + Alt + S).

SOAPware will display the Sign Column dialog box and ask you to confirm that you wish to sign off on the Reading Date. Click Yes if you are certain you wish to do so, and the Reading Date will be signed off.

### Removing a Flow Sheet Reading Date or Text Column

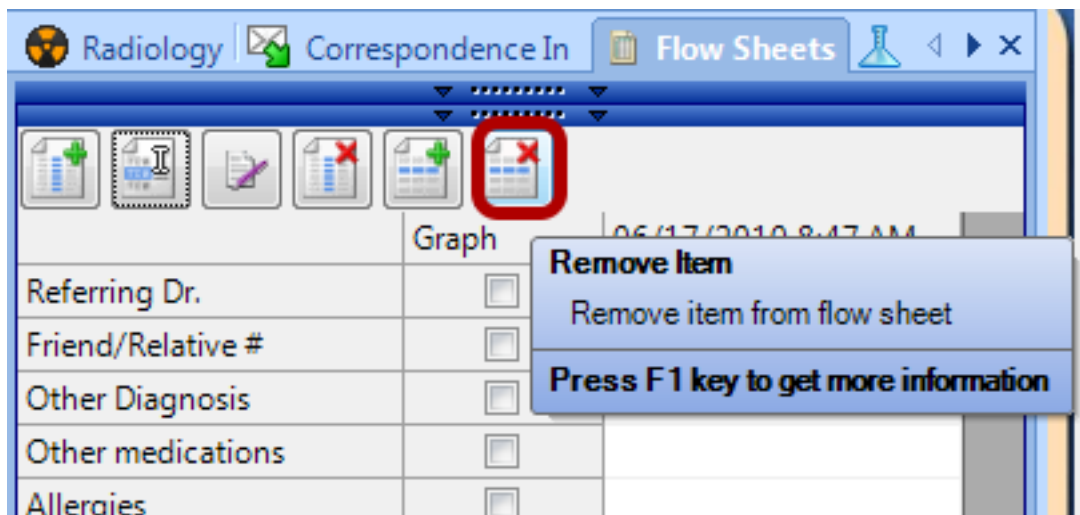


To remove a Reading Date or Text Column from a Flow Sheet, first select the Reading Date or Text Column that you wish to remove by Clicking on it in the Flow Sheet. Then, Click the Remove Reading Date Button (or Press Ctrl + Alt + R).

SOAPware will ask you to confirm that you wish to remove the selected Reading Date or Text Column. Click Yes if you are certain you wish to do so, and the Reading Date or Text Column will be removed.

Note that if the Reading Date or Text Column has been signed off, it cannot be removed.

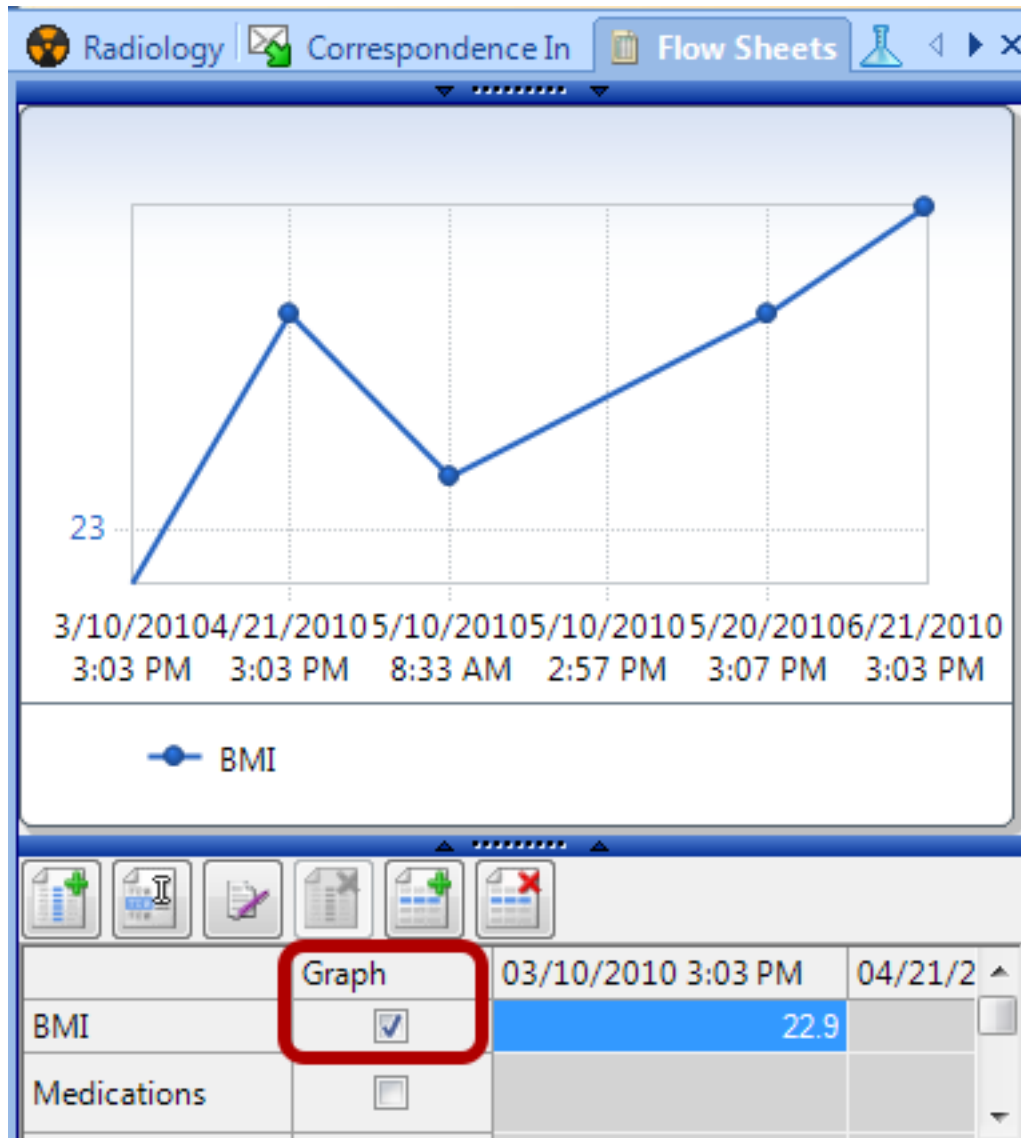
### Removing a Flow Sheet Item from the Flow Sheet



You can remove Flow Sheet Items from a Flow Sheet within a patient chart. This is useful for special cases in which the final Flow Sheet design is only applicable to a single patient.

However, if you find that you frequently need to remove Flow Sheet Items from an existing Flow Sheet, you should create a new Flow Sheet that serves your needs using the Docuplate Manager.

## Graphing Data from a Flow Sheet



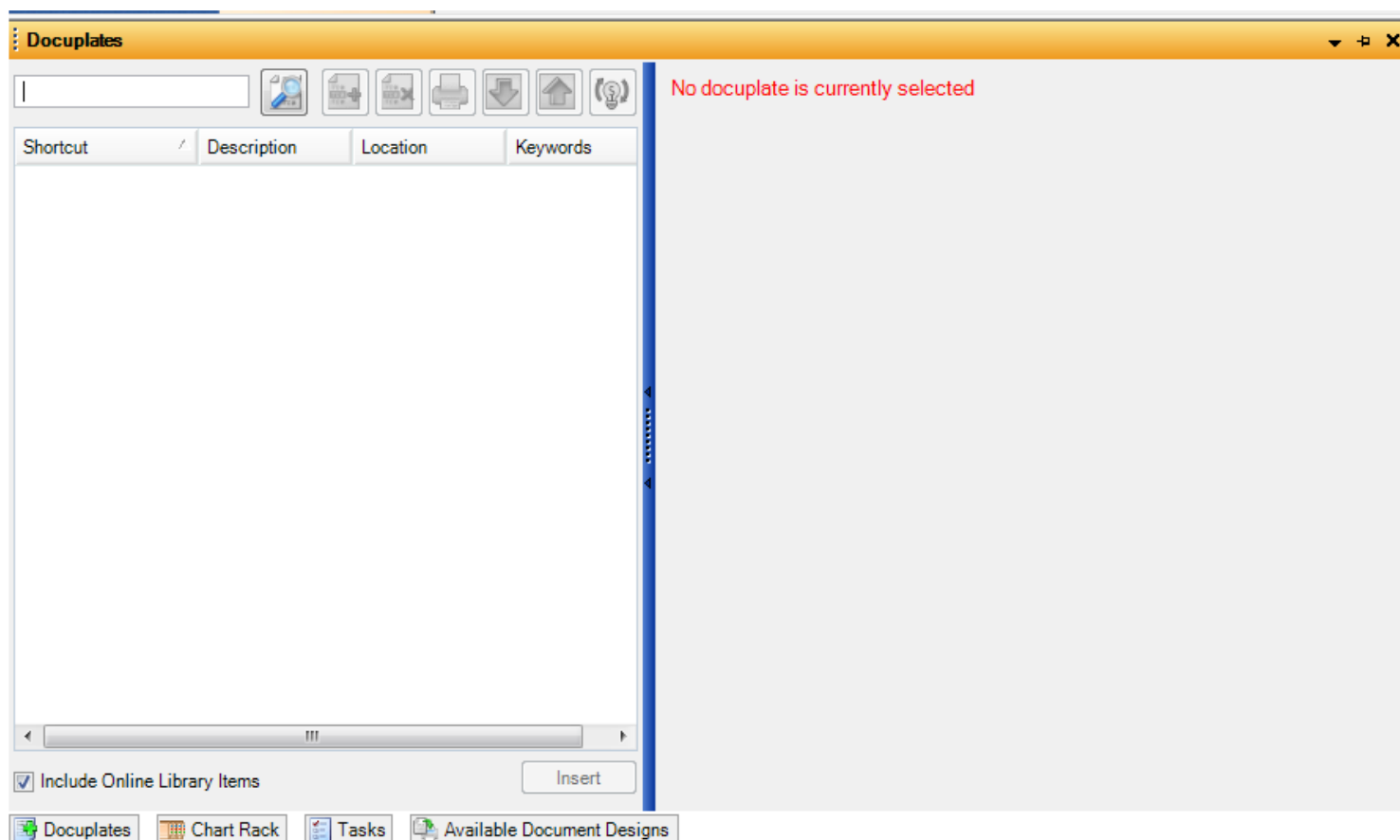
To Graph items from a Flow Sheet, place a check in Graph column box that corresponds with the item you wish to view in a Graph. A Graph containing the selected items will automatically be created in the Graph area of the Flow Sheets section of the patient chart.

Hovering over any part of a particular line on the graph will bring the entire line forward and fade the others into the background. This allows you to easily view the graph for a particular vital sign, without having to un-select the other graphed readings.

To display the values of a single point on the graph, hover the mouse cursor over the point you wish to view. The item, date, time, and value will be displayed.

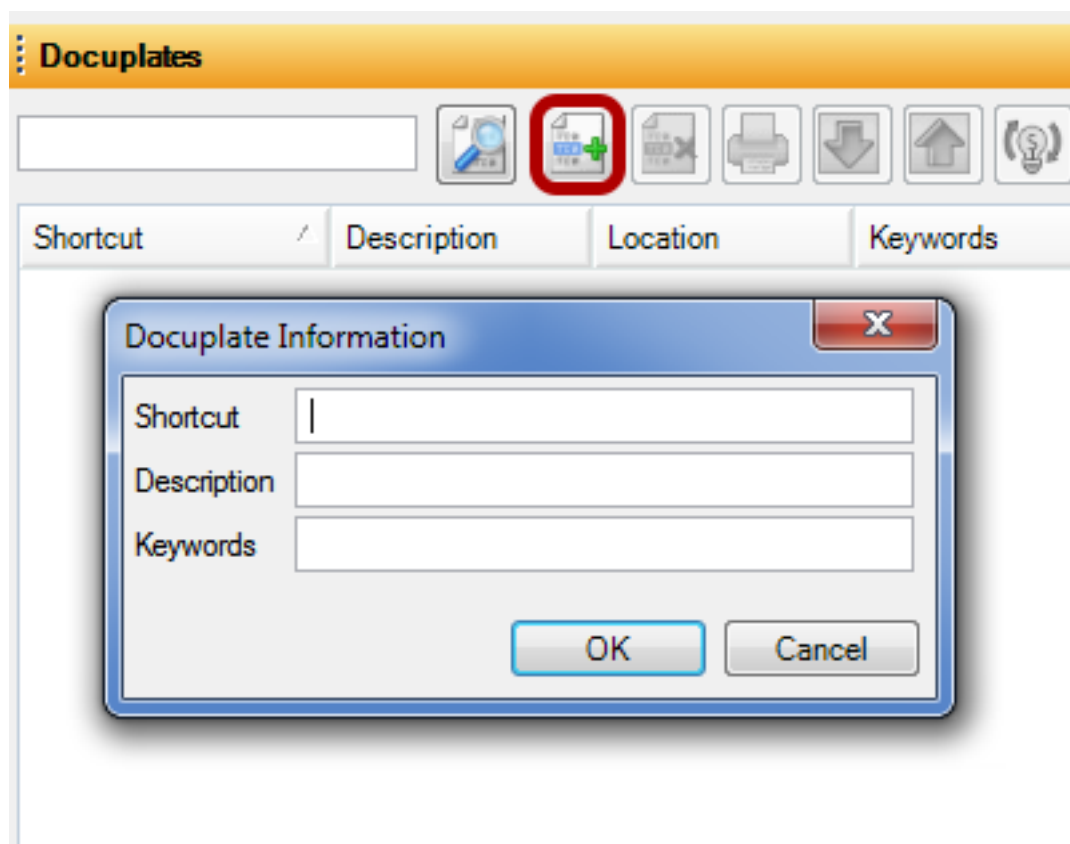
## Creating a New Flow Sheet Docuplate

### Creating a New Flow Sheet in the Docuplate Manager



To create a new Flow Sheet in the Docuplate Manager, you will first create the flow sheet that you want in a test patient's chart. Then, you must open the Docuplate Manager (open the docket tab or hit F5). Note that you should open the Docuplate Manager while the Flow Sheets section of the patient chart is open.

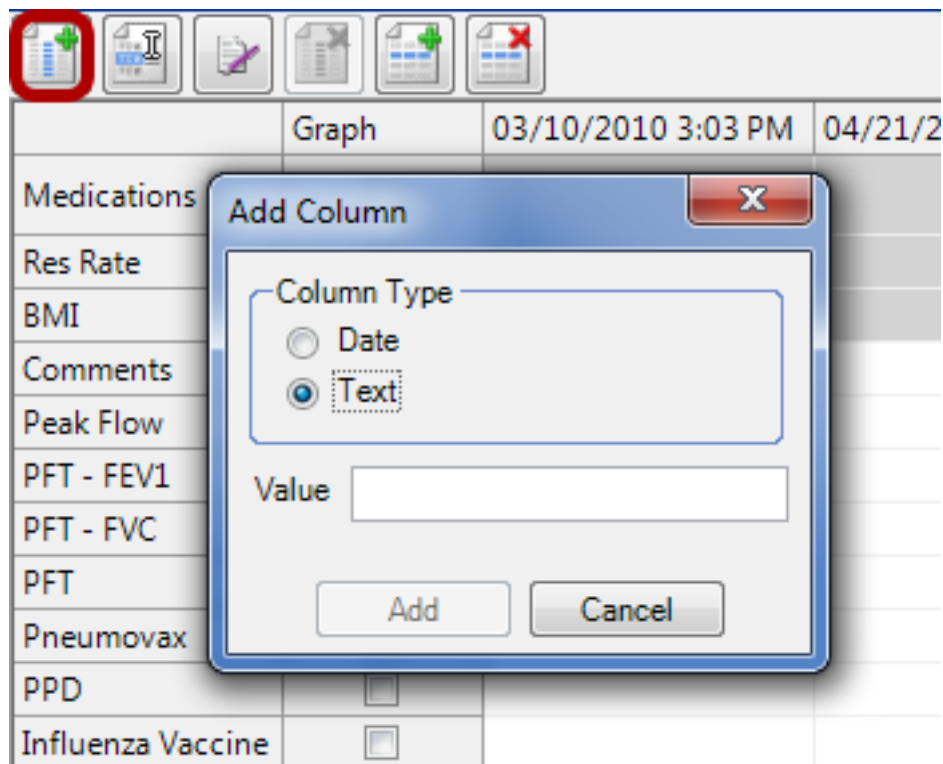
## New Docuplate



Once you have opened the Docuplate Manager, Click the New Docuplate Button (or Press Ctrl + Alt + N). The Docuplate Information dialog box will open. Give your new Flow Sheet Docuplate a Shortcut, a short Description, and a few relevant Keywords. Click Okay, and a new Flow Sheet will be created in the Docuplate Manager.

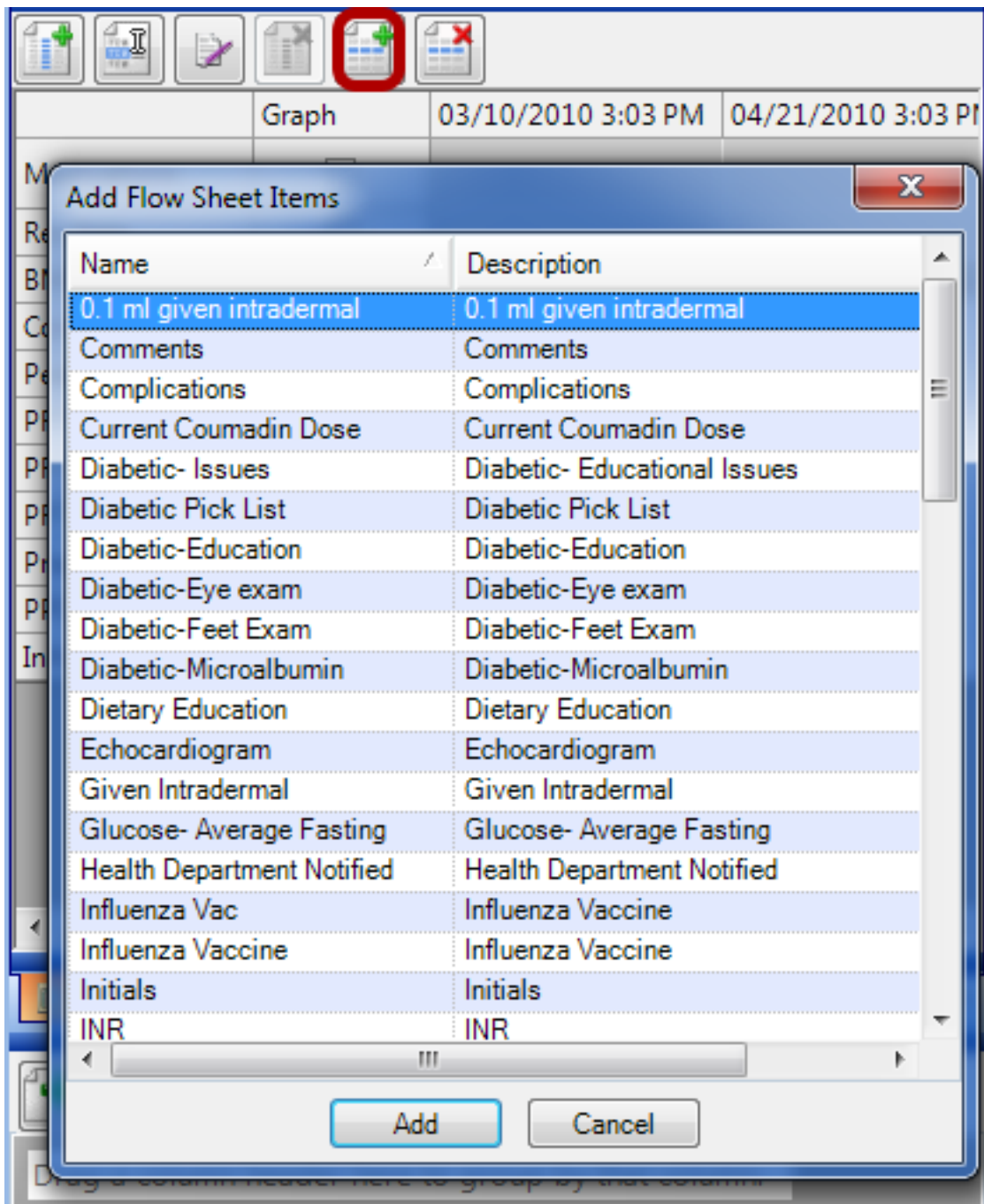


## Add Column



To insert a Fixed Column, Click the Add Column Button (or Press Ctrl + Alt + N). The Add Column dialog box will open. Enter the text for the column's Header and Click Okay. Alternatively, select the Date option instead so that the column will have a date header. The new column will be added to your Flow Sheet.

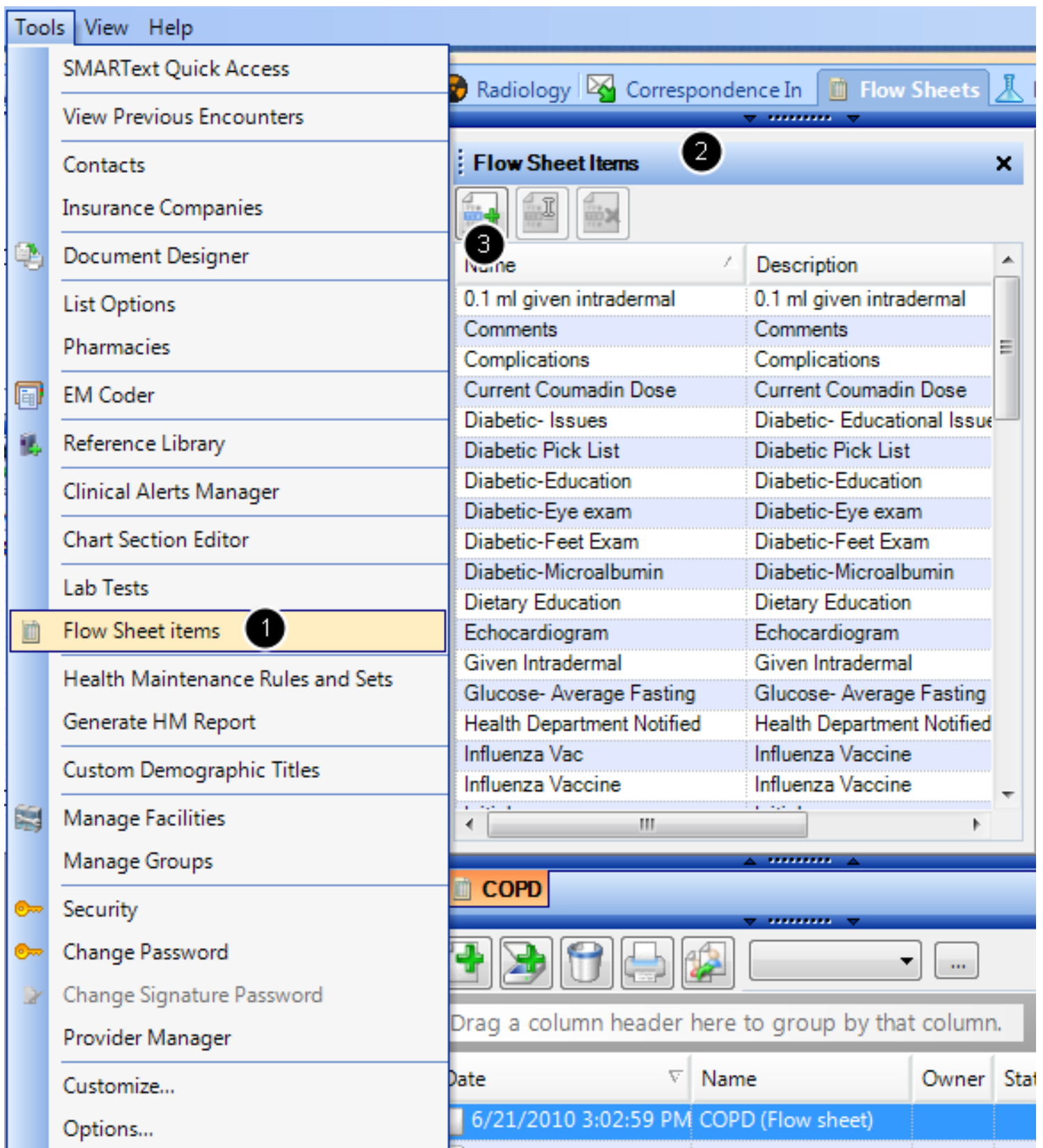
## Insert Flow Sheet Item



To insert Flow Sheet Items for your new Flow Sheet, click the Insert Flow Sheet Items Button (or Press Ctrl + Alt + I). This will open the Add Flow Sheet Items dialog box.

Select the Flow Sheet Item you wish to add by Clicking on it, and then Click Add. The selected Flow Sheet Item will be added to your new Flow Sheet.

## Creating a New Flow Sheet Item

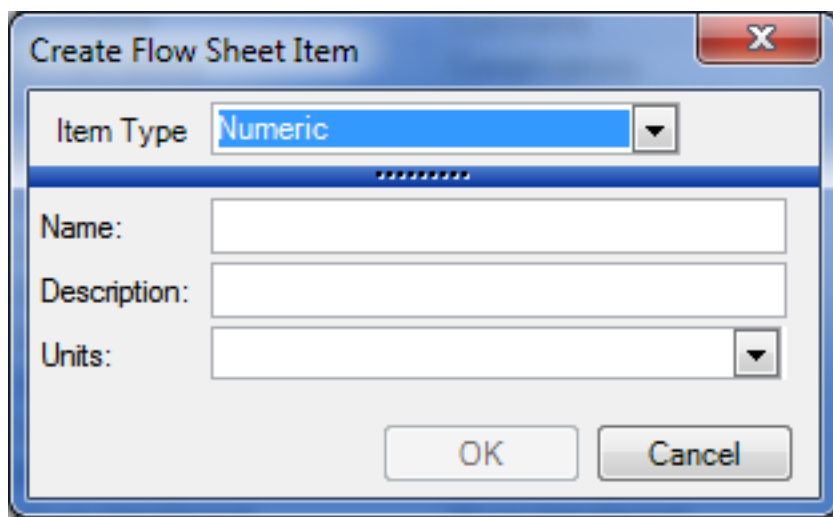


1. To create a new Flow Sheet Item, you must first access the Flow Sheet Item manager by selecting Flow Sheet Items from the Tools menu, located on the main SOAPware menu bar.

2. The Flow Sheet Item manager will open. To add a new Flow Sheet Item, Click the Add Flow Sheet Item Button (or Press Ctrl + Alt + N). The Flow Sheet Item Editor will open.

3. Click the Add Item button. There are four Types of Flow Sheet Items that can be created. They are Numeric, Pick List, Start/Stop, and Text. Following are instruction for creating an item of each type.

### Creating a Numeric Flow Sheet Item

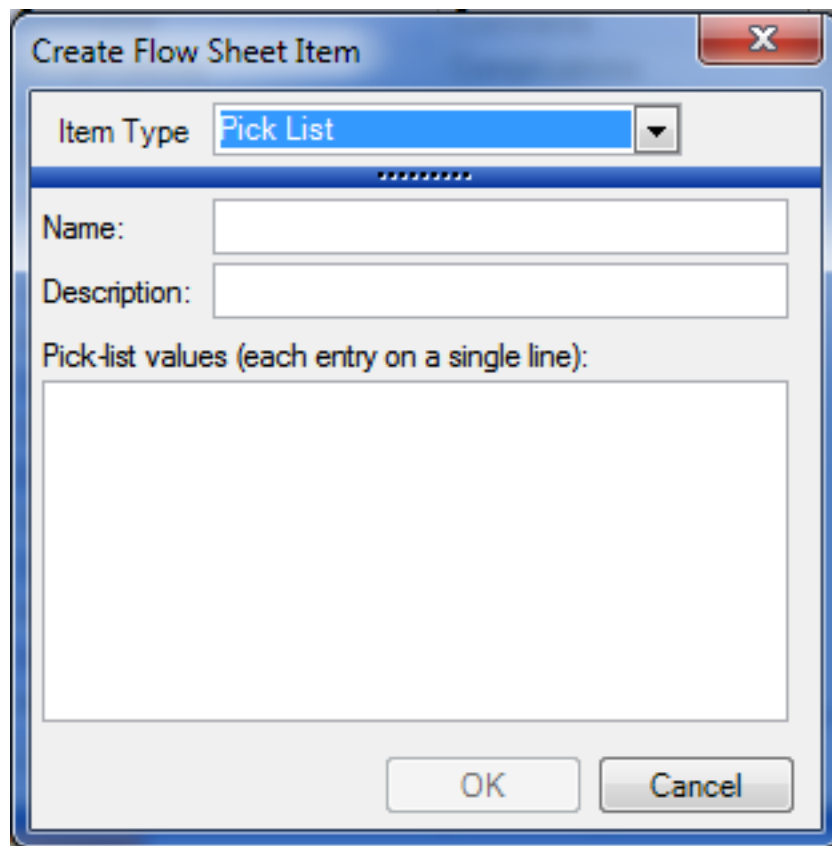


The screenshot shows a dialog box titled "Create Flow Sheet Item". At the top, there is a red close button with an "X". Below the title bar, there is a section labeled "Item Type" with a dropdown menu currently showing "Numeric". A horizontal dashed line separates this section from the input fields below. There are three input fields: "Name:" followed by a text box, "Description:" followed by a text box, and "Units:" followed by a dropdown menu. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Give your new Numeric item a name and a short description. Then, using the Units drop down box, choose a unit of measurement for the item.

When you are finished, Click Okay, and your new item will be added to the list of available Flow Sheet Items.

## Creating a Pick List Flow Sheet Item



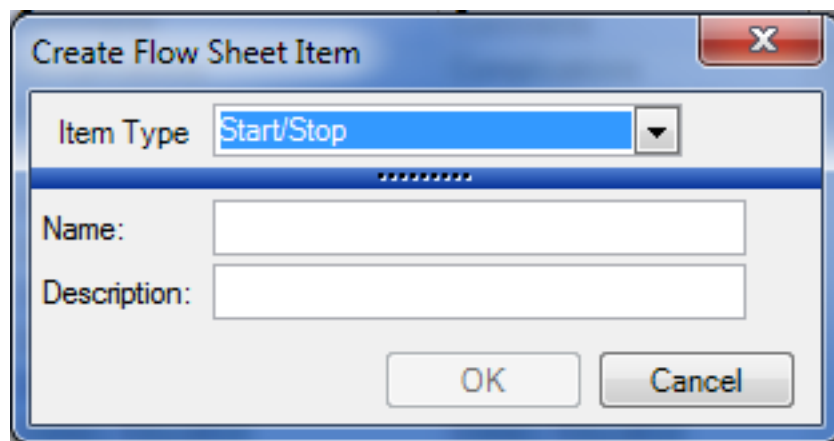
The dialog box is titled "Create Flow Sheet Item" and has a close button (X) in the top right corner. It contains the following fields and controls:

- Item Type:** A dropdown menu with "Pick List" selected.
- Name:** A text input field.
- Description:** A text input field.
- Pick-list values (each entry on a single line):** A large text area for entering multiple values.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Give your new Pick List item a name and a short description. Then, type in your desired choices, entering one per line.

When you are finished, Click Okay, and your new item will be added to the list of available Flow Sheet Items.

## Creating a Start/Stop Flow Sheet Item



The dialog box is titled "Create Flow Sheet Item" and has a close button (X) in the top right corner. It contains the following fields and controls:

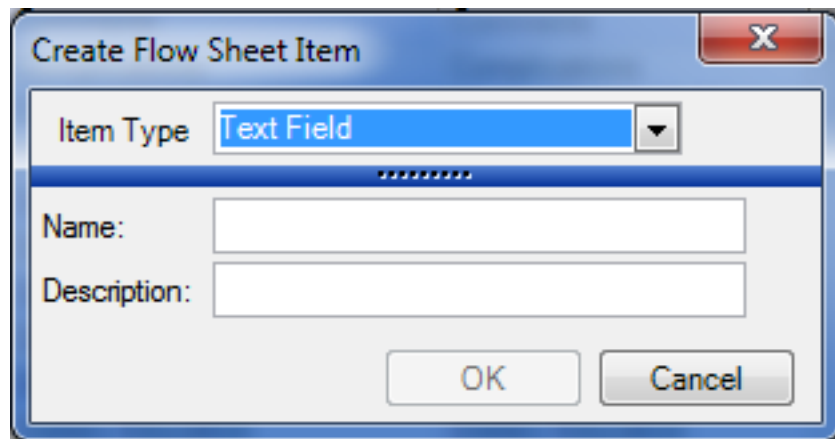
- Item Type:** A dropdown menu with "Start/Stop" selected.
- Name:** A text input field.
- Description:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Give your new Start/Stop item a name and a short description.

When you are finished, Click Okay, and your new item will be added to the list of available Flow Sheet

Items.

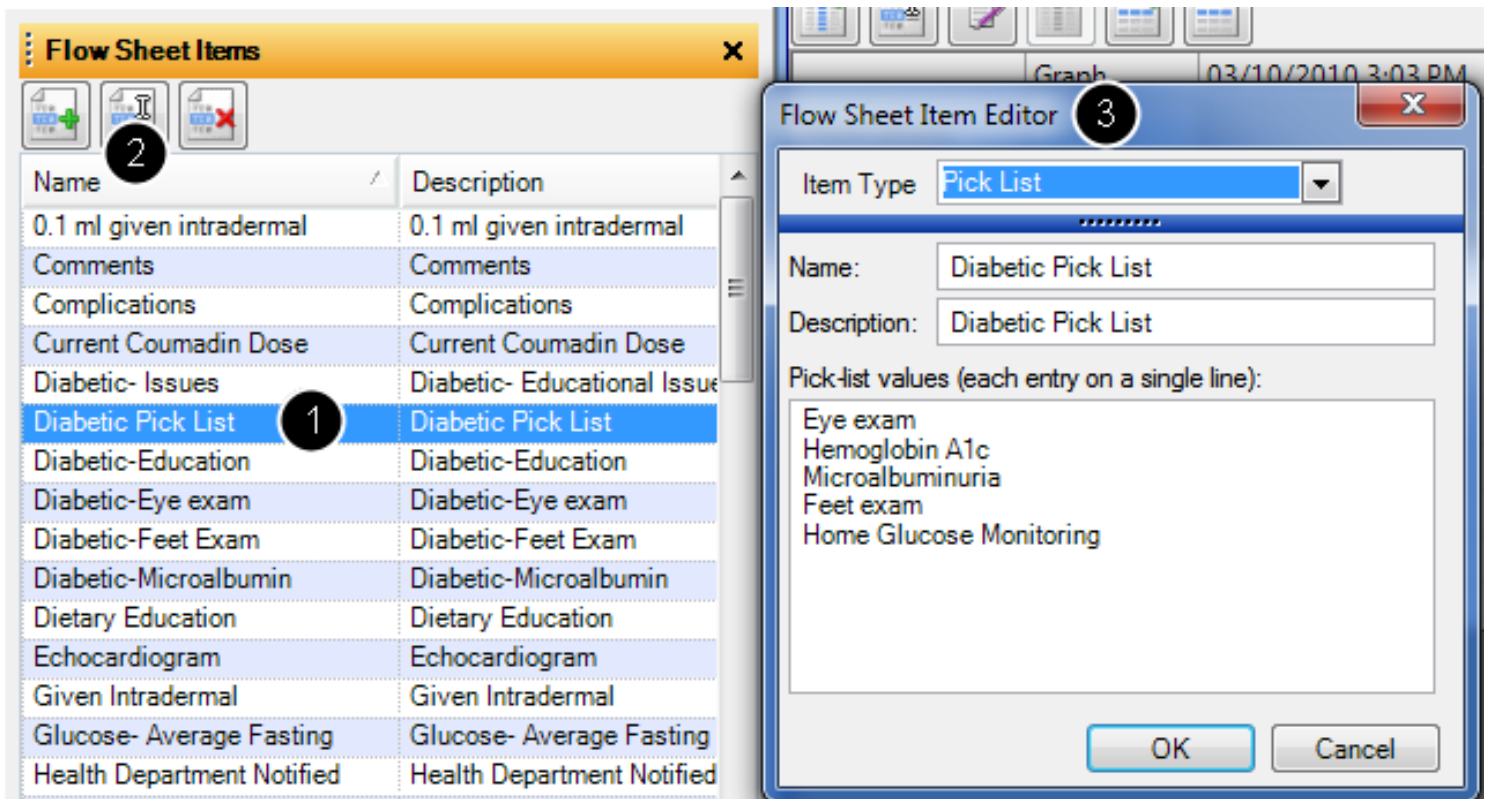
## Creating a Text Field Flow Sheet Item



The 'Create Flow Sheet Item' dialog box is shown. It has a title bar with a close button (X). Inside, there is a label 'Item Type' followed by a dropdown menu currently set to 'Text Field'. Below this is a horizontal separator line. There are two text input fields: 'Name:' and 'Description:'. At the bottom right are 'OK' and 'Cancel' buttons.

Give your new Text Field item a name and a short description. When you are finished, Click Ok, and your new item will be added to the list of available Flow Sheet Items.

## Editing an Existing Flow Sheet Item



The image shows two overlapping windows. On the left is the 'Flow Sheet Items' window, which contains a table of items. On the right is the 'Flow Sheet Item Editor' dialog box, which is open for editing a selected item.

**Flow Sheet Items Table:**

Name	Description
0.1 ml given intradermal	0.1 ml given intradermal
Comments	Comments
Complications	Complications
Current Coumadin Dose	Current Coumadin Dose
Diabetic- Issues	Diabetic- Educational Issue
<b>Diabetic Pick List</b>	<b>Diabetic Pick List</b>
Diabetic-Education	Diabetic-Education
Diabetic-Eye exam	Diabetic-Eye exam
Diabetic-Feet Exam	Diabetic-Feet Exam
Diabetic-Microalbumin	Diabetic-Microalbumin
Dietary Education	Dietary Education
Echocardiogram	Echocardiogram
Given Intradermal	Given Intradermal
Glucose- Average Fasting	Glucose- Average Fasting
Health Department Notified	Health Department Notified

**Flow Sheet Item Editor Dialog Box:**

The dialog box has a title bar with a close button (X). It contains a label 'Item Type' followed by a dropdown menu set to 'Pick List'. Below this is a horizontal separator line. There are two text input fields: 'Name:' (containing 'Diabetic Pick List') and 'Description:' (containing 'Diabetic Pick List'). Below these is a text area labeled 'Pick-list values (each entry on a single line):' containing the following text:  
Eye exam  
Hemoglobin A1c  
Microalbuminuria  
Feet exam  
Home Glucose Monitoring  
At the bottom right are 'OK' and 'Cancel' buttons.

1. Select the Flow Sheet Item you wish to edit by Clicking on it.
2. Then, Click the Edit Flow Sheet Item Button (or Press Ctrl + Alt + N).
3. The Flow Sheet Item Editor will open. Make any necessary changes and Click Okay. Your changes will be applied.

# **Introduction to Document Designer**

## About Document Designer

---

Document Designer (DD) can be used to design and edit documents which can be printed from SOAPware, i.e. referral letter, reports, etc. Documents can be created using free text or free text combined with commands and macros that automatically transfer data from a patient chart, e.g. patients name, demographics, vital signs, EKG/ECG reports, etc.

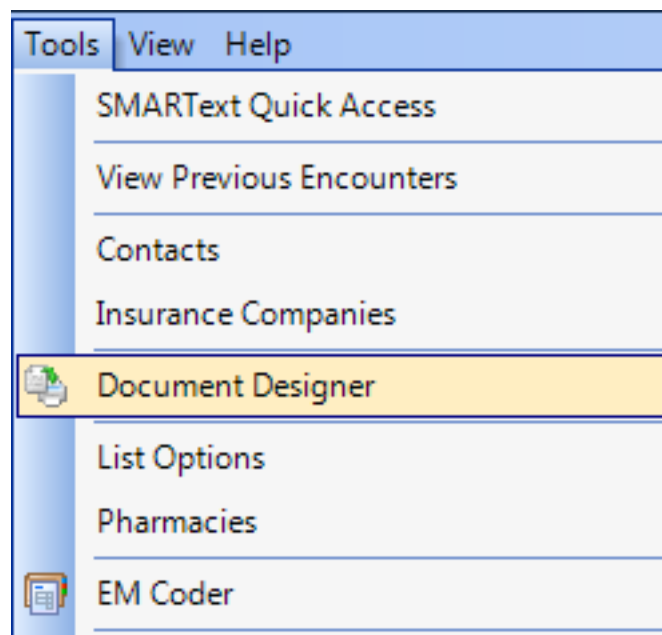
### **\*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - ENCOUNTER SUMMARIES TO PATIENTS**

[Click here to view Meaningful Use criteria](#)

#### **Importance of Demographics, Provider Manager, and Contacts**

The Demographics, Provider Manager, and Contacts section of the patient chart needs to be filled out completely in order for information from these areas to be pulled onto a final document design.

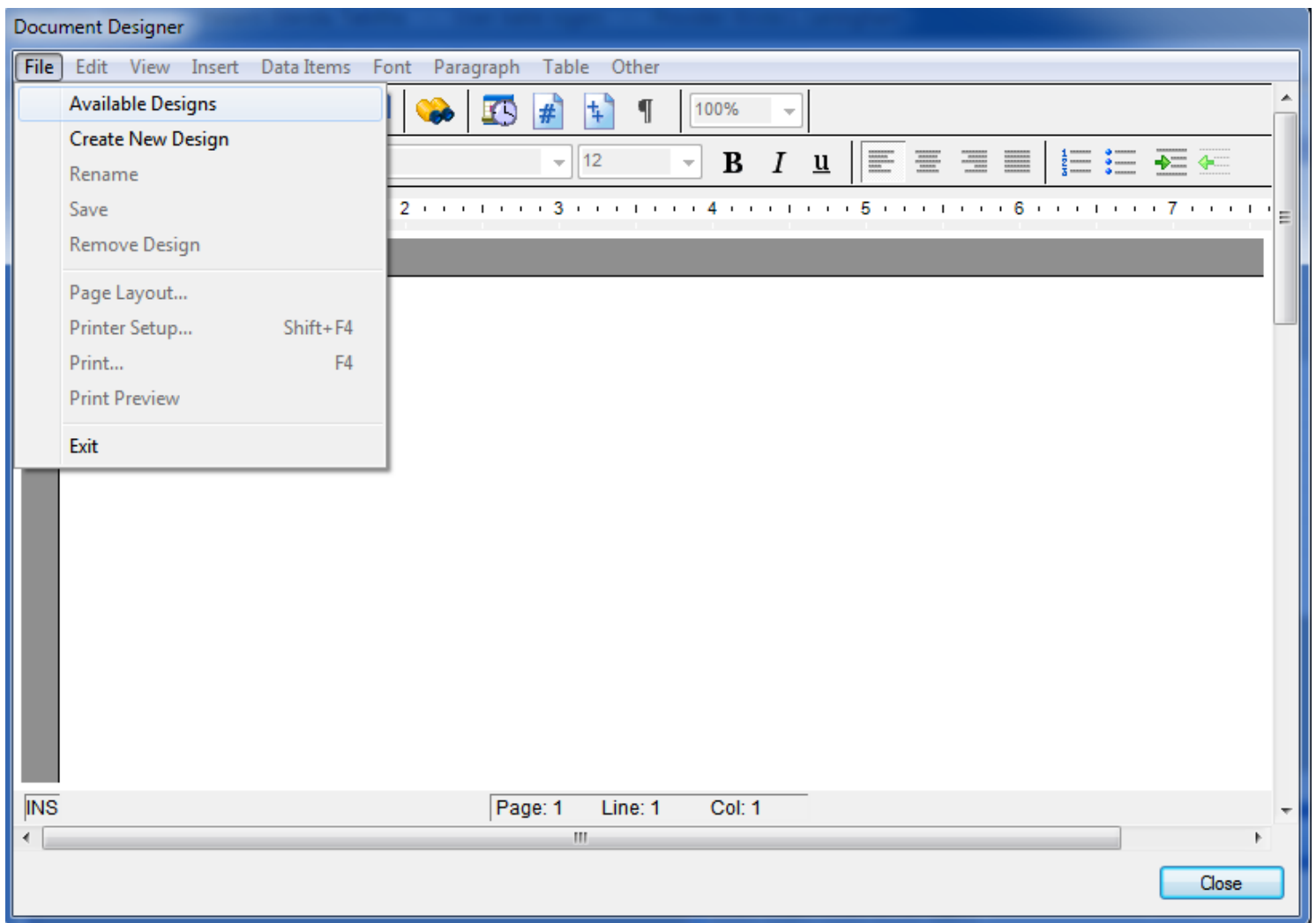
#### **Using Document Designer**



To access Document Designer, Click Tools in the menu bar, and then Click the Document Designer menu item.

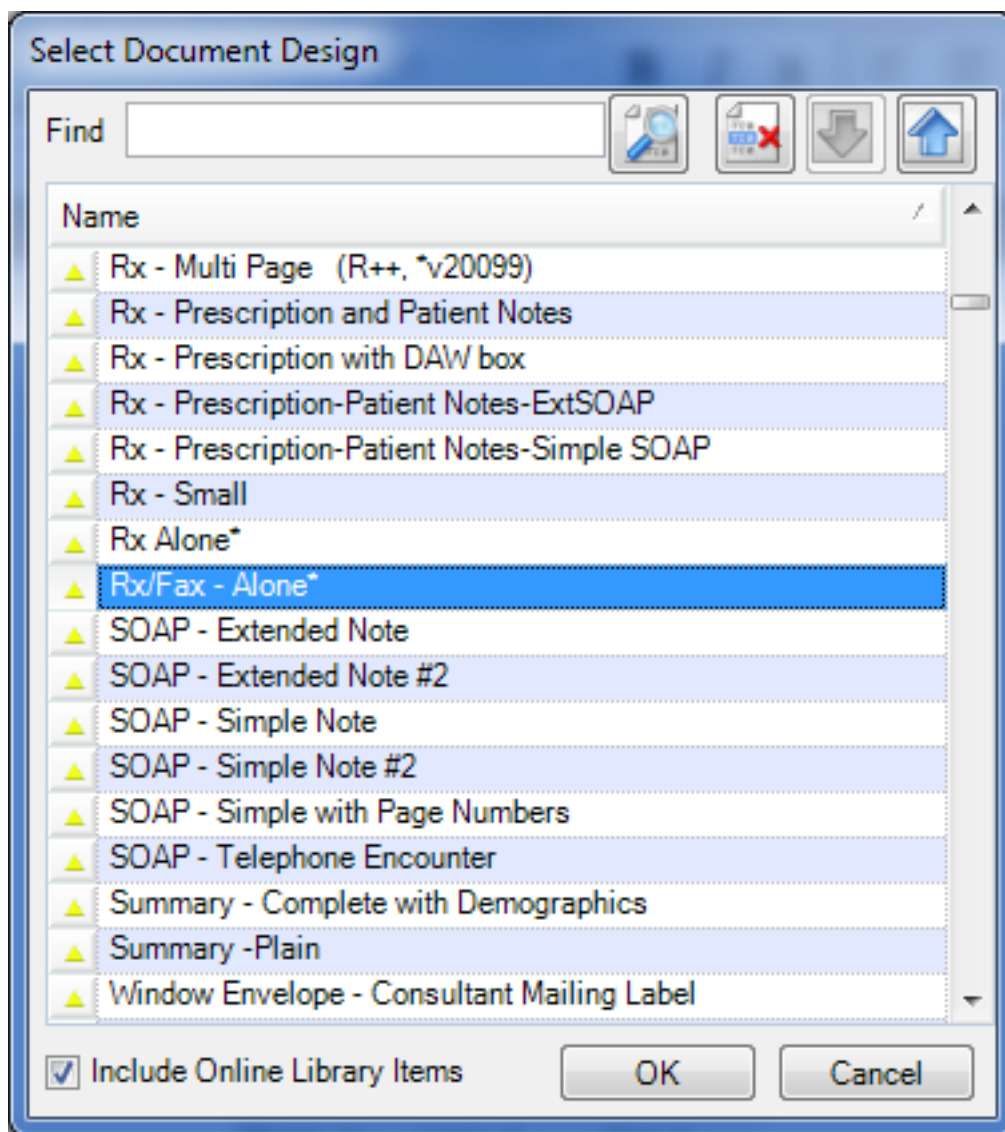


## Available Designs



Click File, and then Click the Available Designs menu item. The available document designs will be displayed.

## Select Design



To view a particular design, Click a document design in the list (i.e. select/highlight), and Click the OK button. For example, Rx/Fax - Alone\* is one of items in the list of document designs.

## Examples of a Document Design

Document Preview

File Edit View Insert Font Paragraph Table Other Help

Normal Arial 14 B I u 100%

1 2 3 4 5 6 7

**PRESCRIPTION:** (Give to the pharmacist)

Krista L. Laningham

SOAPware 2008 - Training  
4220 N. Crossover Rd.  
Fayetteville, AR 72703

DEA - AO9705697-003

**PATIENT:** Jim, Slim    **Age:** 78

**DATE:** 06/24/2010    **TIME:** 14:10

**ADDRESS:**  
1539 COUNTY LINE RD  
Home Town, AR 72711  
,

**Rx:**

Diovan (Valsartan): 40 mg (tablet) SIG- 1 tab(s) once a day orally #\*\*30\*\* Substitutions Not Allowed Refills-  
Comment- Notes-

INS Page: 1 Line: 1 Col: 1

Current Document: Rx/Fax - Alone\* Print Fax Store Close

Here is an example of a prescription to be printed.

## The Design View

Rx/Fax - Alone\*

File Edit View Insert Data Items Font Paragraph Table Other

Normal Arial 14 B I U

1 2 3 4 5 6 7

**PRESCRIPTION:** (Give to the pharmacist)

\_\_\_\_\_  
#CurrentProvider Full Name\$#

\_\_\_\_\_  
#ClinicInfo Address\$#

DEA - #CurrentProvider DEA\$#  
#CurrentProvider StateID\$#

**PATIENT:** #GeneralDemographicsField Last Name\$#, #GeneralDemographicsField First Name\$#  
#GeneralDemographicsField Middle Initial\$# **Age:** #GeneralDemographicsField Age\$#

**DATE:** #InsertDateTime MM/dd/yyyy\$# **TIME:** #InsertDateTime HH:mm\$#

**ADDRESS:**  
#GeneralDemographicsField Address\$#  
,

**Rx:**  
#RxPlaceholder\$#

\_\_\_\_\_  
#ClinicianSignature\$#

**Dr:** \_\_\_\_\_  
#CurrentProvider Full Name\$# #CurrentProvider Full Name\$#

Substitution permitted Dispense as written

\_\_\_\_\_  
**Regarding Refills:** After 12 months a medical history update and exam is necessary for any refills. Bring in all your prescription bottles for us to double check when you return for office visits.

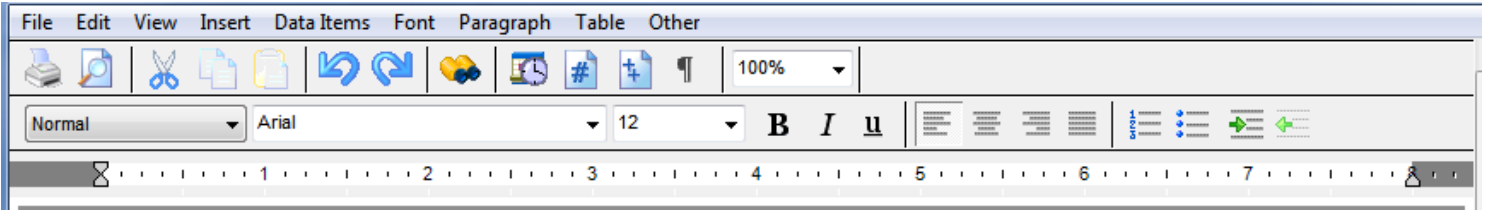
INS Page: 1 Line: 1 Col: 2

Close

This is an example of a prescription document design viewed within Document Designer. Free-text has been typed to customize the look of the design, and several command phrases (items that have ##\$#) are included. These pull information from either the patient's chart or from other areas in SOAPware to the document design.

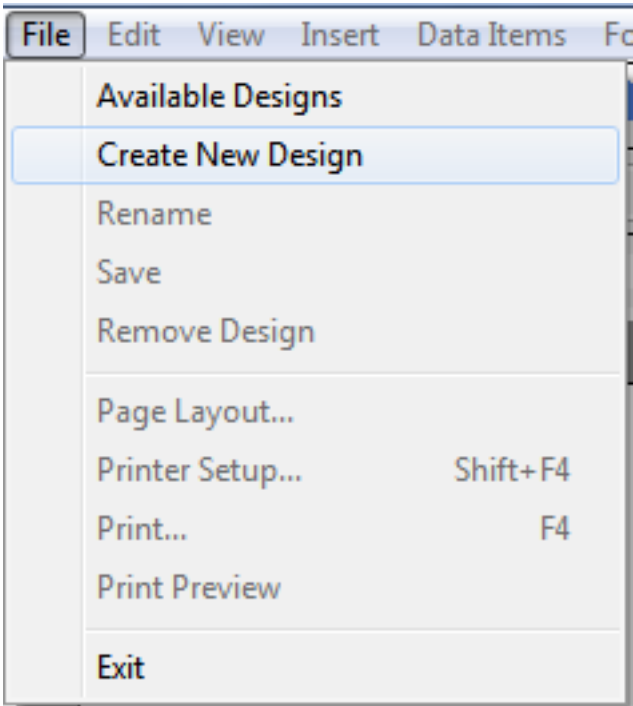
# Creating a Basic Document Design

## User Interface



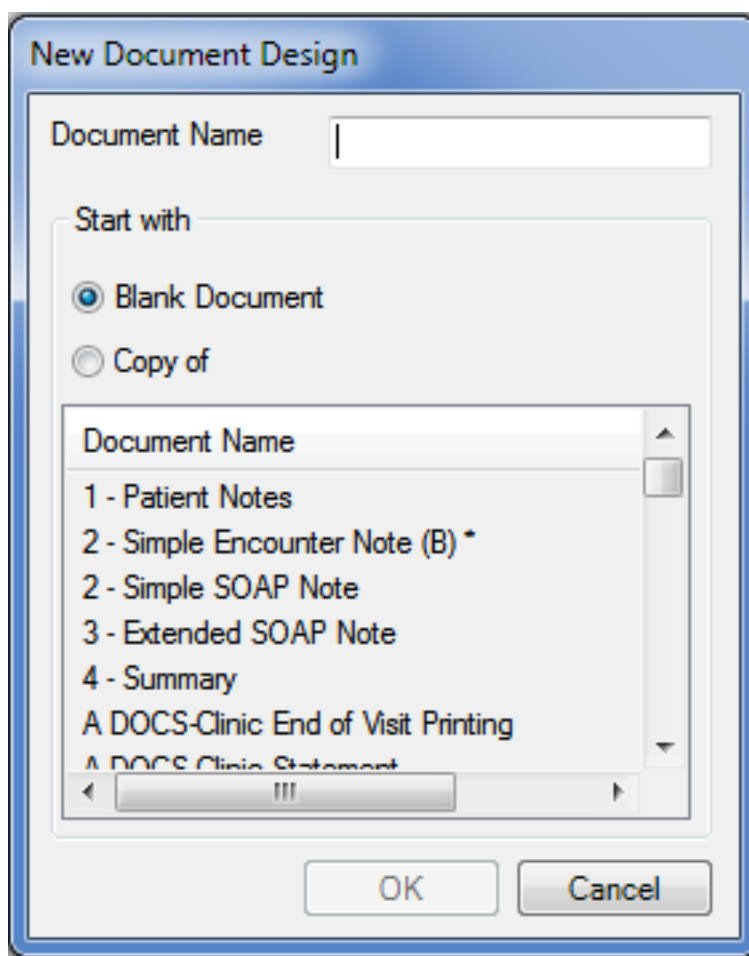
The menus and action buttons available allow the user to create or edit a design. Note that many of the functions within Document Designer resemble Microsoft Word, and allow easy customization to any design. To see what each action button represents, point to it with the mouse. A text balloon will appear explaining its function.

## Creating a New Design



To create a new document design, Click File, and Click the Create New Design menu item.

## New Document Design



Type the new Document Name. Click either the Blank Document or Copy of (i.e. an existing document) radio button. Click OK.

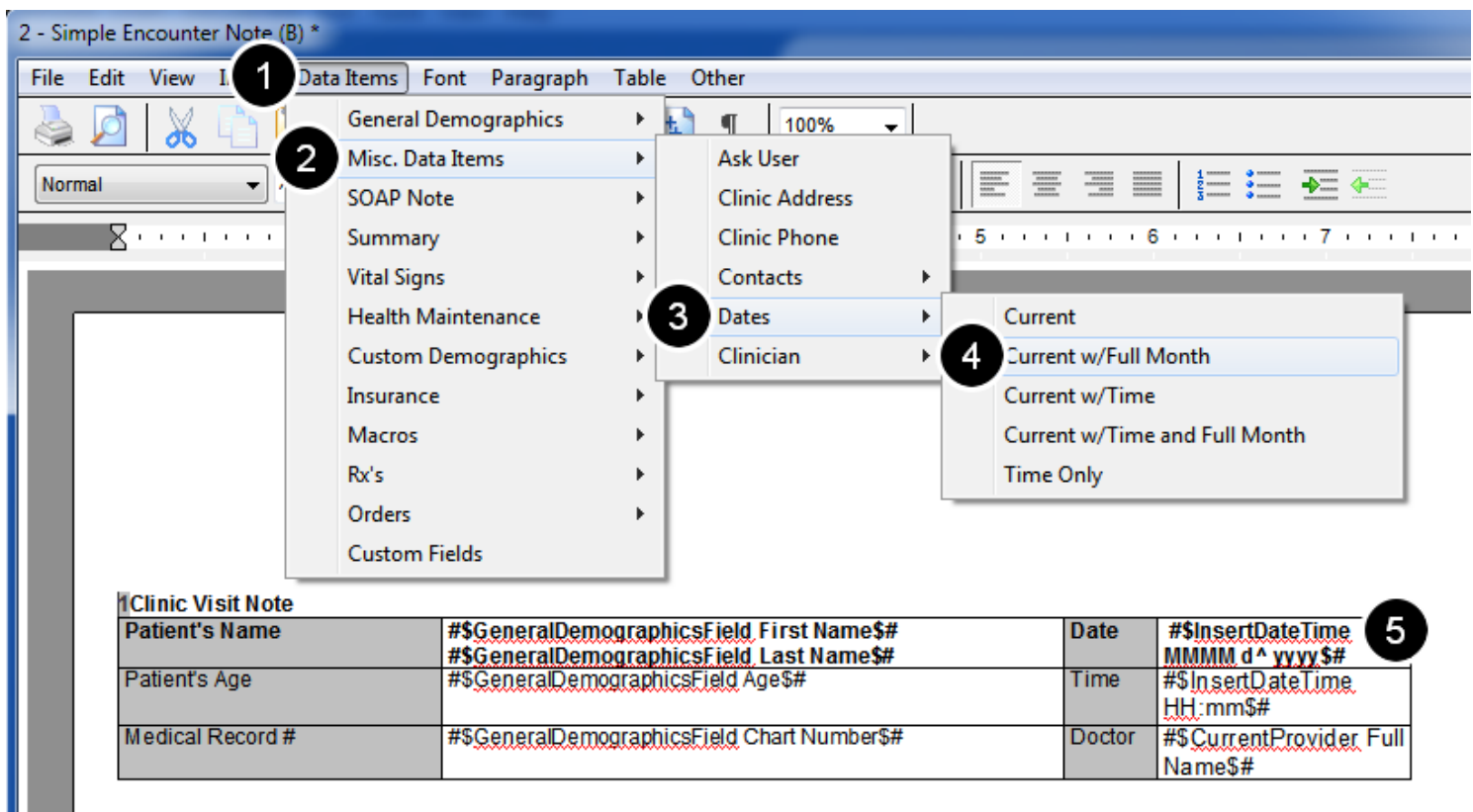
## New Design Recommendations

Making a decision, beforehand, on the content and layout of the design will expedite creation and minimize guesswork. As a suggestion, when creating new designs, create them as a copy of an existing design, or copy and paste content from an existing Word document. Then modify the design by using the commands in the Data Items menu to pull information from the patient chart to the design.

## Entering and Editing Text

You can use document designer much like a word processor, but you also have the added ability to use data items to pull information automatically onto the report.

## Using Data Items and Macros



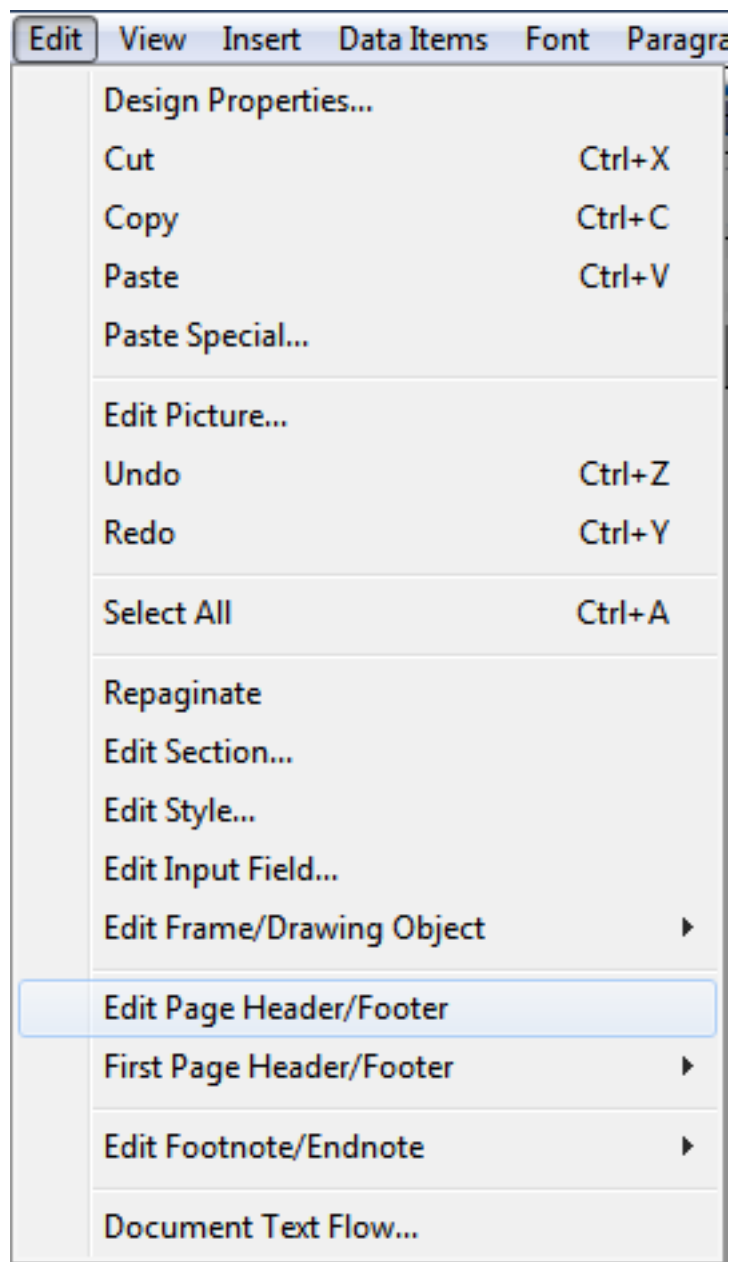
The Data Items menu houses all the commands that pull information from either the patient's Demographics (including the Insurance and Custom Demographics), the Provider Manager, the SOAPnote, Summary, or Contacts.

For example:

1. Click Data Items in the menu bar
2. Click the Misc. Data Items menu item
3. Click the Dates menu item
4. Click Current w/Full Month.
5. This will insert the command to pull the current date with the full month on to the Document Design

## Advanced Document Design

### Headers and Footers

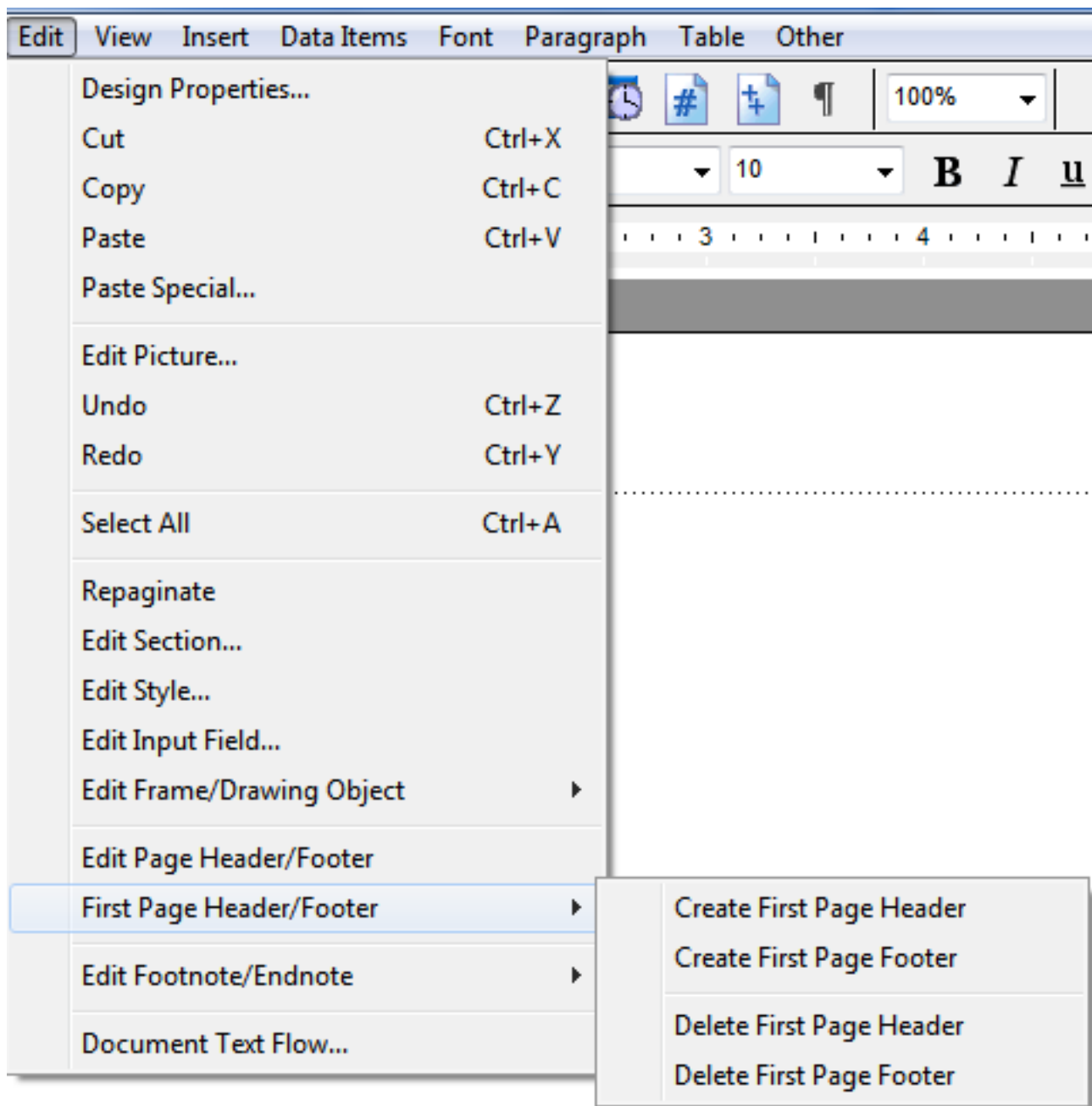


Create headers and footers that include text and/or graphics. Examples of content include page numbers, dates, a clinic's logo, letterheads, etc.

To create/designate First Page Header/Footer Click on the Edit menu and Click on Edit Page Header/Footer.



## Adding the Header



A dotted line will appear across the top and the bottom of the document design delineating the area to place the header or footer.

Now, Click Edit in the menu bar again. Click First Page Header/Footer>Create First Page Header (or Footer).

## Editing the Header

Dr. Krista L. Laningham  
1250 West Oak Drive  
Cinnamon, CO 45879

Insert the information for your header or footer, and then make the changes to the font, justification, font size, etc.

## Creating a Second Page Header/Footer

ALCOHOL: ##SummaryField Alcohol ,,\$#  
INTERVENTIONS/STUDIES:  
##SummaryField Interventions ,,\$#  
SOCIAL HISTORY: ##SummaryField Social History ,,\$#  
LAST PRINTED: ##InsertDateTime MM/dd/yyyy\$#

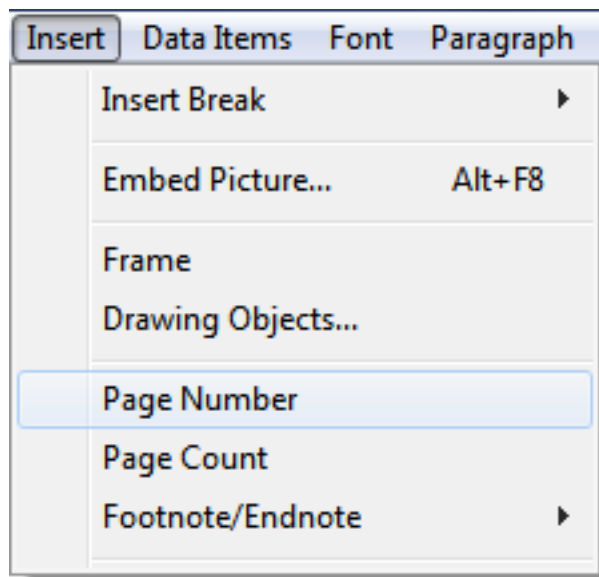
Dr. Krista L. Laningham  
1250 West Oak Drive  
Cinnamon, CO 45879

NS

Page: 2 Line: 5 Col: 1

IMPORTANT: While still in the Edit phase, place the cursor at the bottom of the first page and then Press the Enter Key until a second page is created. Once the second page is created, the dotted-delination will appear allowing the user to create the second page information.

## Inserting Page Numbers



To insert page numbers and total page counts, Click the Insert menu, and then Click either Page Number or Page Count.

## Emptying a Block

The Empty Block Start and Empty Block End commands, available from the Insert menu, allow you to have SOAPware leave out a section of your report when printing if that section doesn't contain any information. To use this command, "wrap" the commands around the section that SOAPware needs to ignore when empty.

Example: To do this in the Document Designer, select Empty Block Start from the Insert menu. Then, press Enter to go to the next line. Type "MEDICATION", followed by a colon. **Bold** the word "medication". Press enter, and select Data Items, SOAPnote, and Medications. Then, press Enter, and select Empty Block End from the Insert menu.

The end result will look like this:

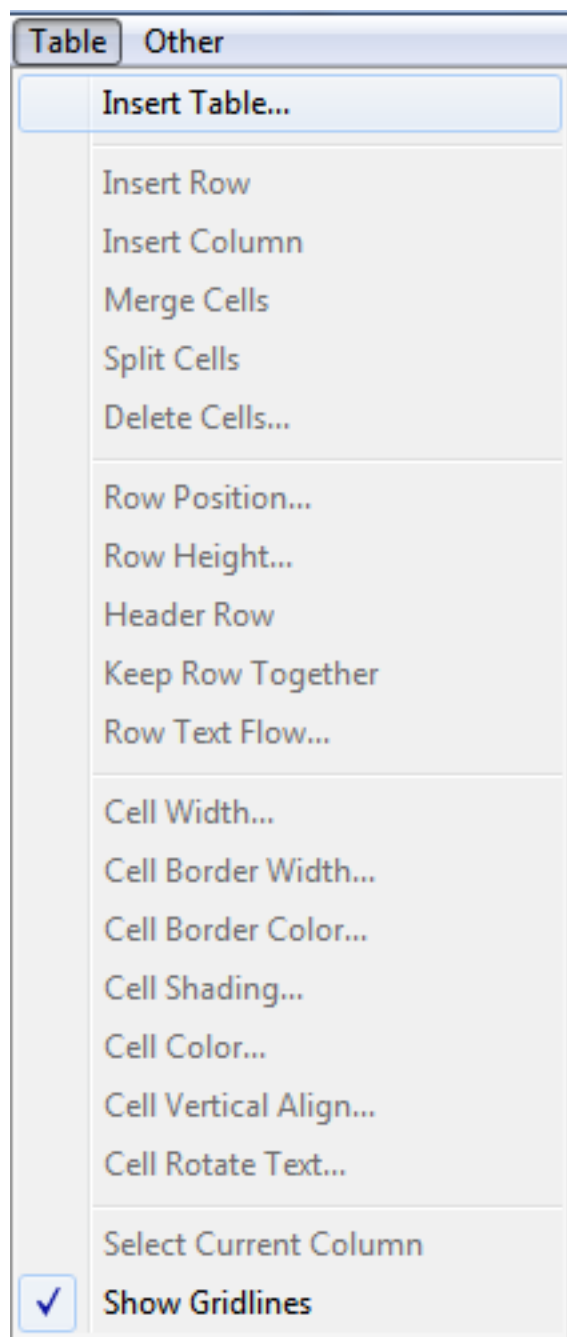
#\$RemovelfEmptyStart\$#

**MEDICATION:**

#\$EncounterField Medications ,,\$#

#\$RemovelfEmptyEnd\$#

## Creating Tables

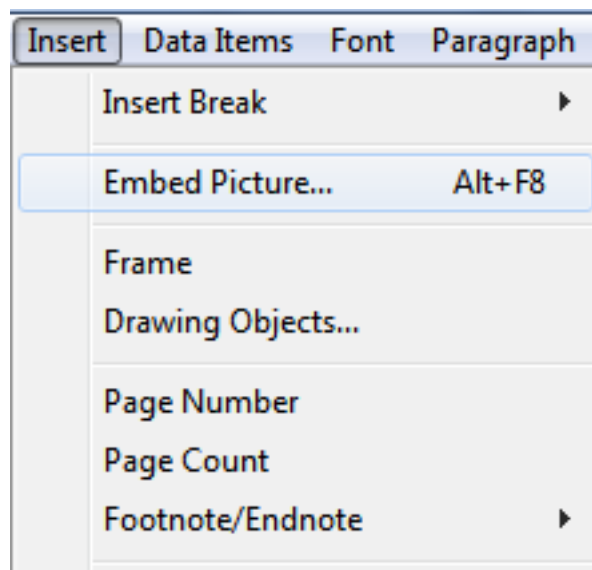


Using tables are ideal for formatting text that needs to be in columns/rows. To insert a table, Click Table in the menu bar, and then Click the Insert Table menu item. Indicate the number of rows and columns.

## Editing the Table


The table will display with the cell borders as faint lines. Fill in the cells with text as needed. Use the Table menu to modify and elegantly customize the table.

## Using Images

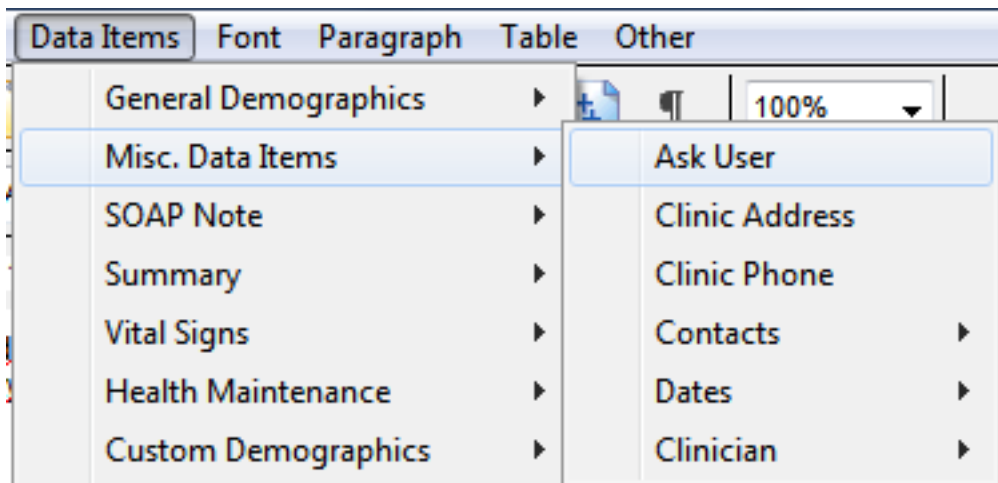


To insert an image, such as a logo, Click Insert, and then Click Embed Picture. Select the Image, and then Click Open. Once the image has been embedded, Click on the image and then resize as needed.

## Inserting a Signature

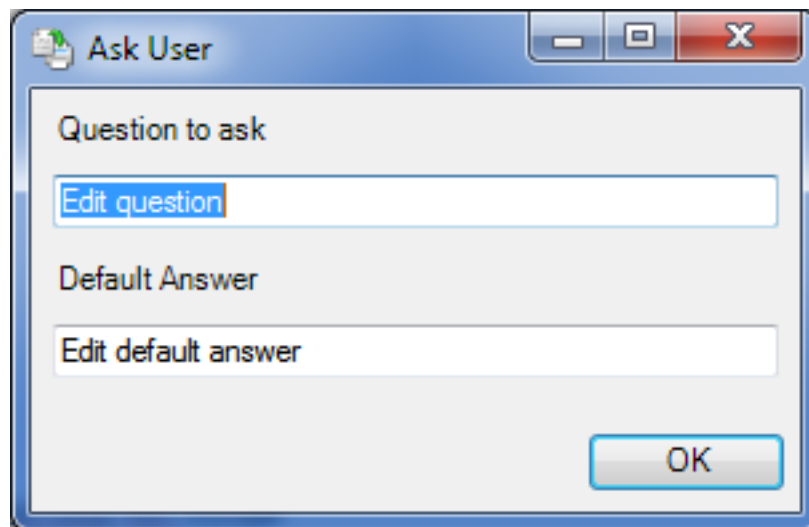
To embed a signature, scan the signature to a file on the computer and then follow the same instructions as for inserting an image (above).

## Ask User



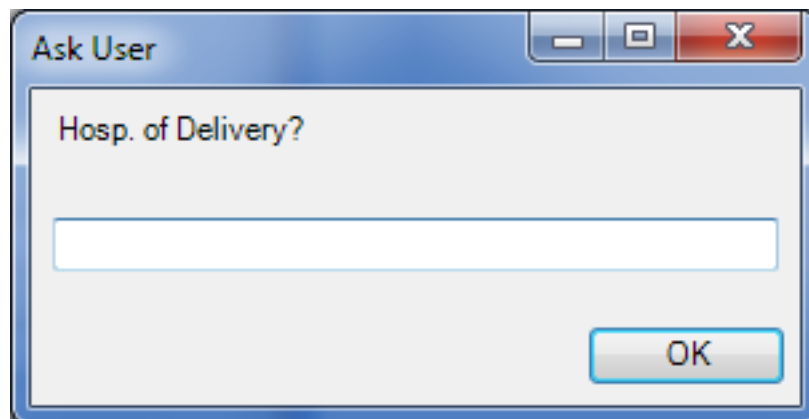
The Ask User commands allows the user to add unique, auto-populating commands, that are not available in the Data Items menu. This command inserts a custom question that can be used to insert additional information before printing the design. Click Data Items in the menu bar; Click Misc. Data Items, and then Click the Ask User menu item.

## Ask User Question



Type the question to be asked. (It is not necessary to remove Edit default answer.)

## Printing with an Ask User Question



When a document has been selected from a SOAPware Chart to print and the Ask User command was used, this is what will display.

## Quick Print Key Commands

---

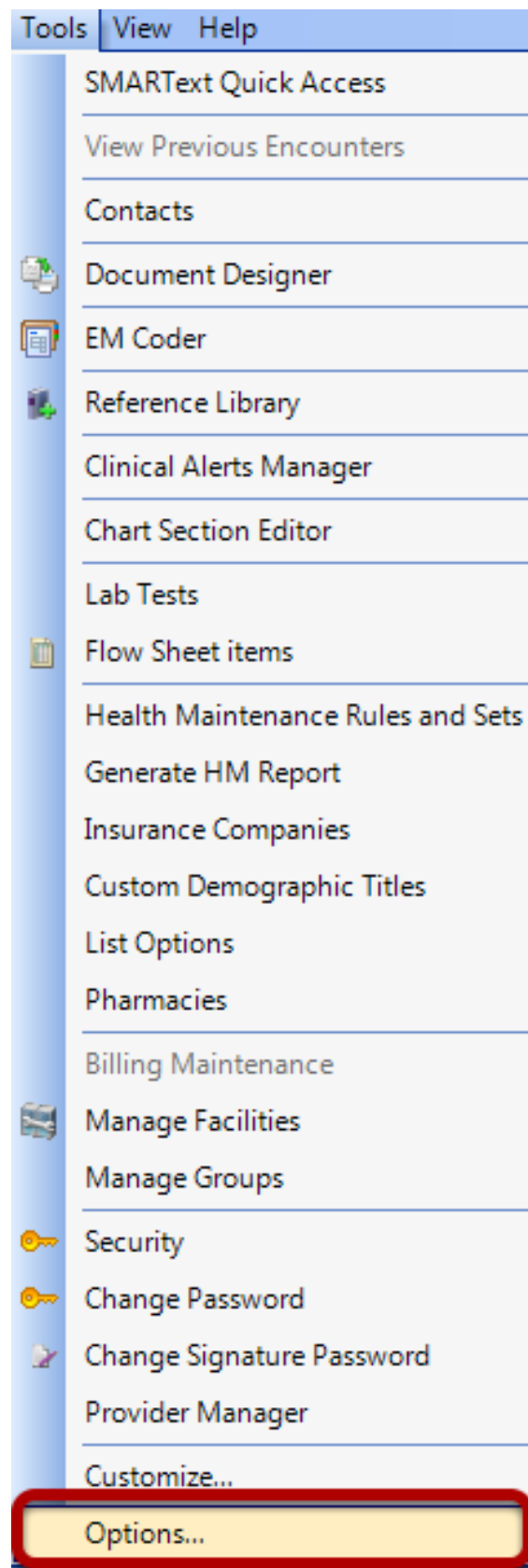
To save time when printing the four most commonly used document designs, it is recommended to set up Quick Print key commands. The following key commands can be designated to directly print a document design, without having to scroll through the print menus.

### Quick Print Key Commands

The Quick Print list includes:

- \* **Ctrl + F1**
- \* **Ctrl + F2**
- \* **Ctrl + F3**
- \* **Ctrl + F4**

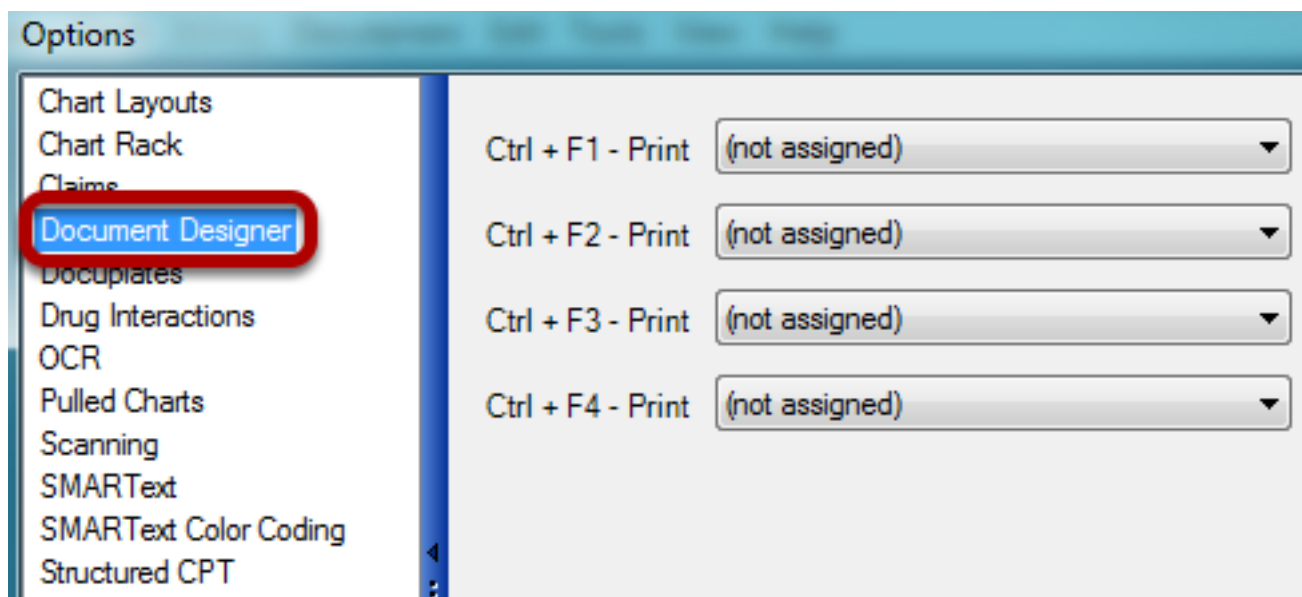
## Tools -Options



Click on Tools > Options.



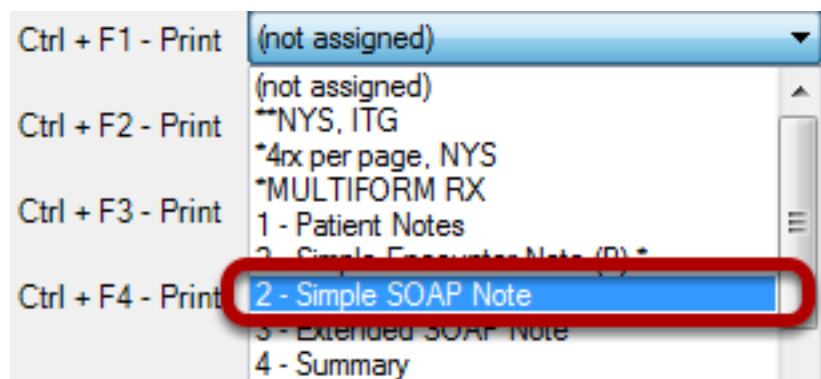
## Options Dialog



Click the Document Designer list item.

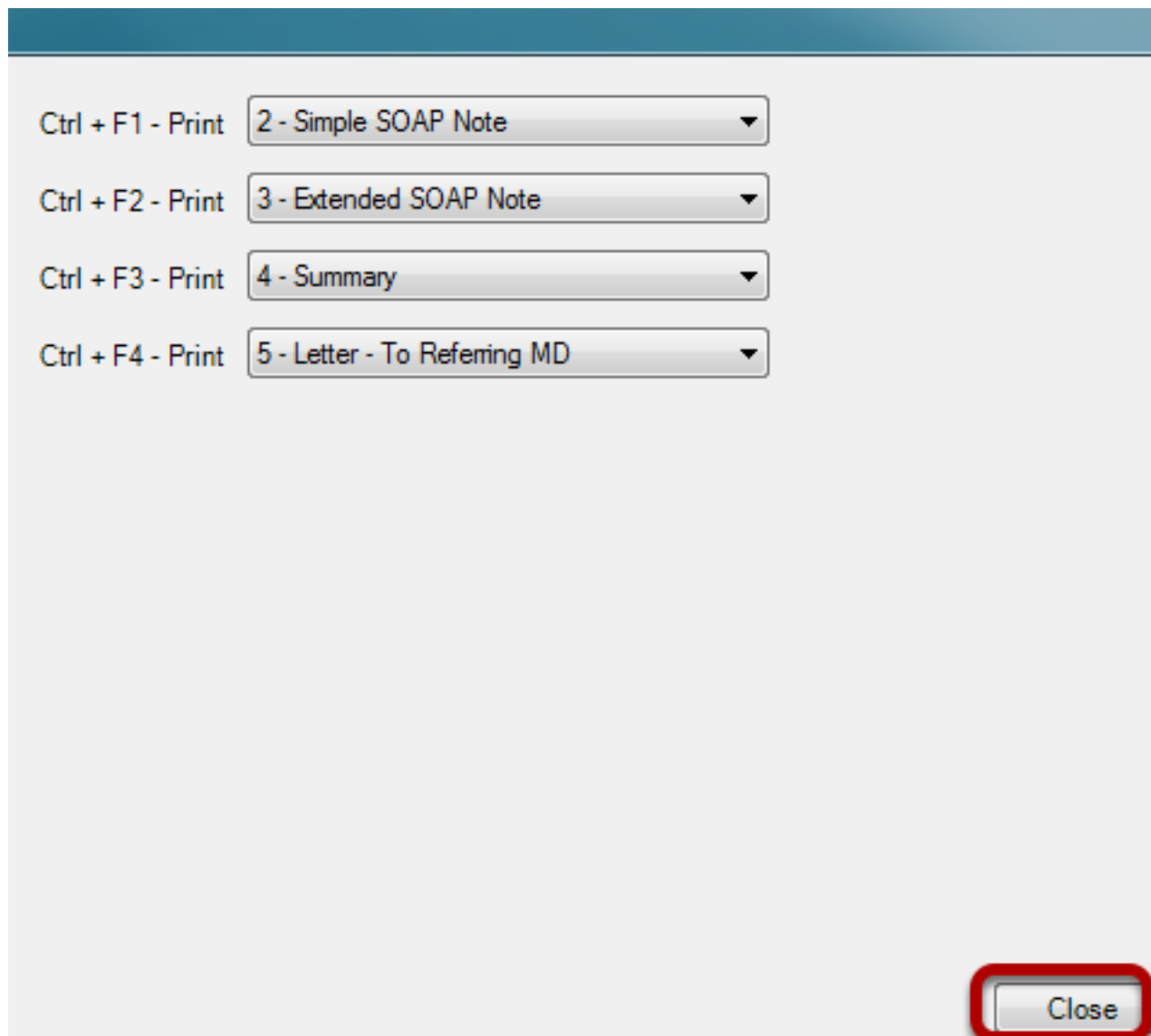
On the right side of the Options dialog, all four Quick Print commands are listed. Each is associated with a drop-down list of available document designs.

## Designate Document Designs



Select document designs to print for each Quick Print key command.

## Save Changes made within the Options dialog



The screenshot shows a dialog box with a blue header bar. Below the header, there are four rows, each with a keyboard shortcut on the left and a dropdown menu on the right. The first row shows 'Ctrl + F1 - Print' next to a dropdown menu containing '2 - Simple SOAP Note'. The second row shows 'Ctrl + F2 - Print' next to a dropdown menu containing '3 - Extended SOAP Note'. The third row shows 'Ctrl + F3 - Print' next to a dropdown menu containing '4 - Summary'. The fourth row shows 'Ctrl + F4 - Print' next to a dropdown menu containing '5 - Letter - To Referring MD'. In the bottom right corner, there is a 'Close' button, which is highlighted with a red rounded rectangle.

Ctrl + F1 - Print	2 - Simple SOAP Note
Ctrl + F2 - Print	3 - Extended SOAP Note
Ctrl + F3 - Print	4 - Summary
Ctrl + F4 - Print	5 - Letter - To Referring MD

Close

Once finished selecting a document design for each Quick Print key command, Click the "Close" button. Changes will not be saved until the user logs out of SOAPware.

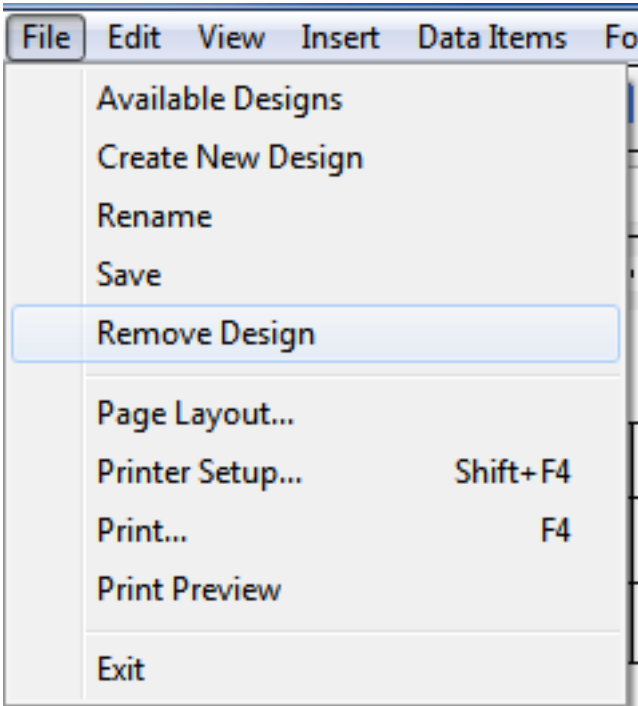
**Note:** Do not set up printing of a prescription as a Quick Print key command. We recommend printing prescriptions from Rx Manager to ensure that an account of each prescription printed is stored under the Rx history tab in the Rx Manager. For more information, see: [Default Rx Print Designs](#).

# Saving and Printing a Document Design

## Saving a Document Design

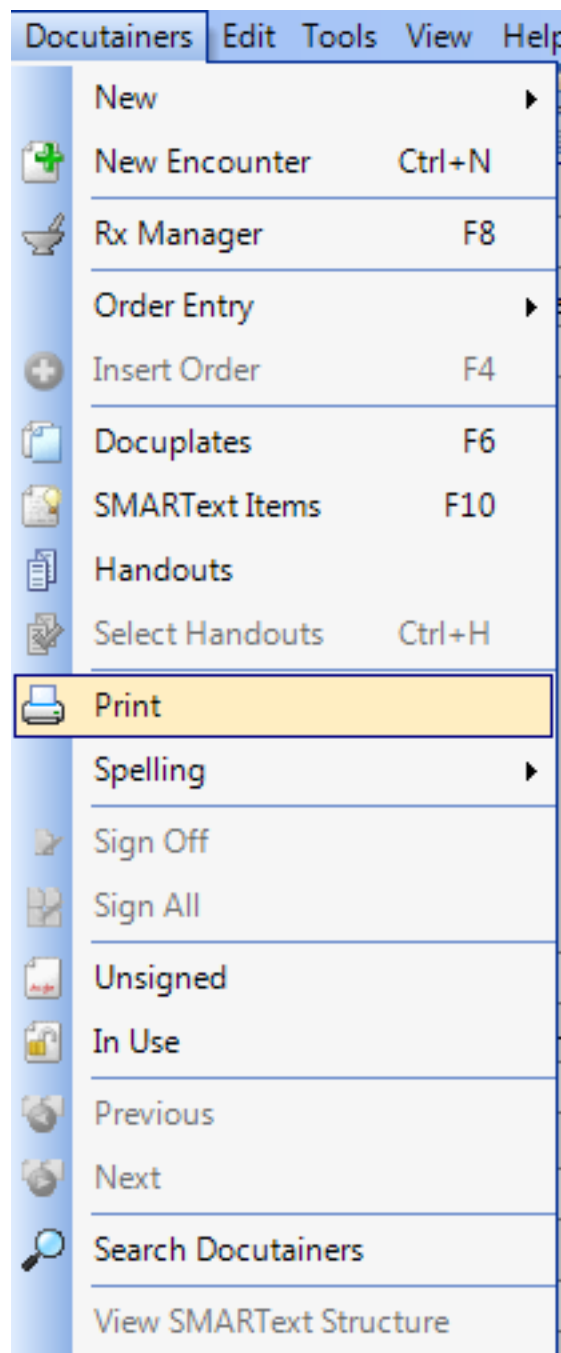
To save an edited document design, Click File in the menu bar, and then Click Save. It is always a good idea to close Document Designer, and then test by printing the document.

## Deleting a Document Design



To delete a document design, Click File and choose Remove Design.

## Printing a Document



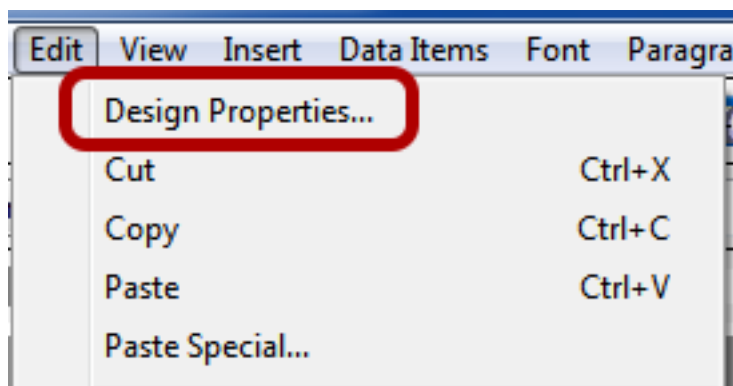
To print a document design, go to Docutainers - Print. This will pull up the available document designs, where you can choose which design you would like to print.

## Document Designer Properties

---

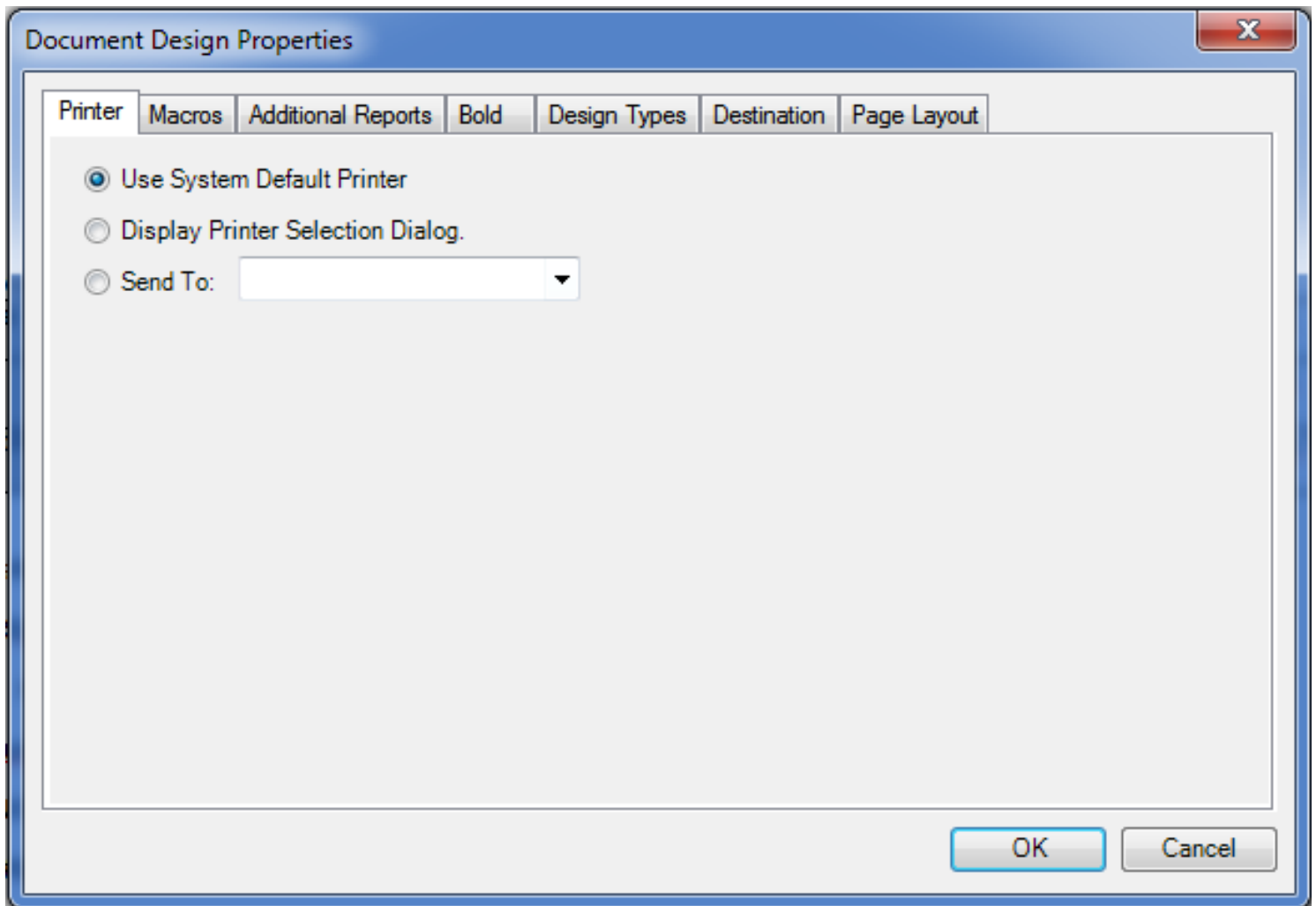
Once the document has been completed, there will be other, very important commands that you will need to consider adding to your document. These commands are hidden in the background, but are embedded within the design. The Design Properties dialog offers the user a variety of options for controlling how a document design functions. These options are specific to the design so each can be controlled to an even greater extent.

### Document Design Properties



To access the Design Properties dialog, Click Edit in the menu bar, and then Click the Design Properties menu item.

## Printer

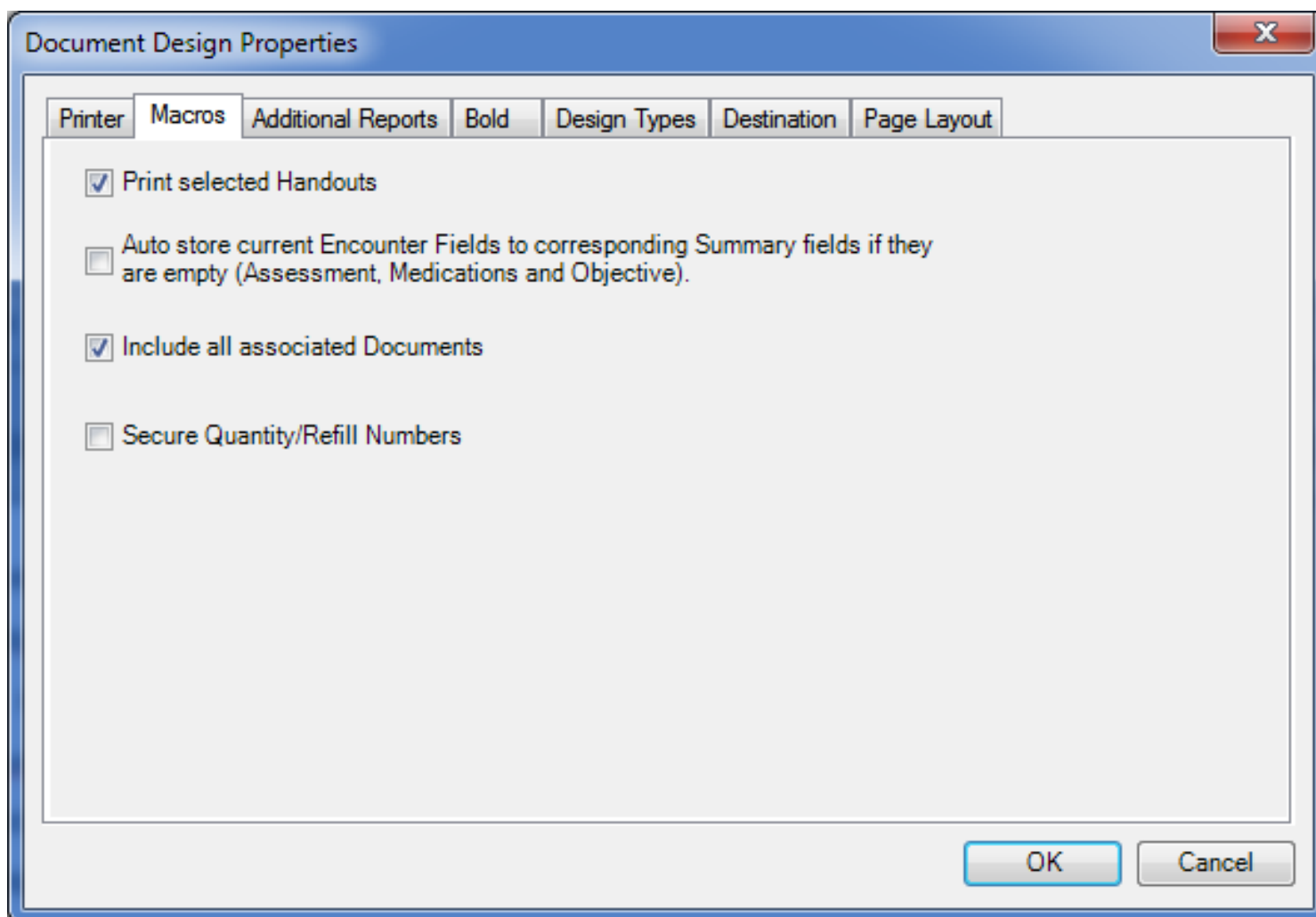


**User System Default Printer:** tells SOAPware to send the document design to the default printer.

**Display Printer Selection Dialog:** allows the user to choose a local printer to send document.

**Send to:** sends the document to the selected designated printer or fax.

## Macro



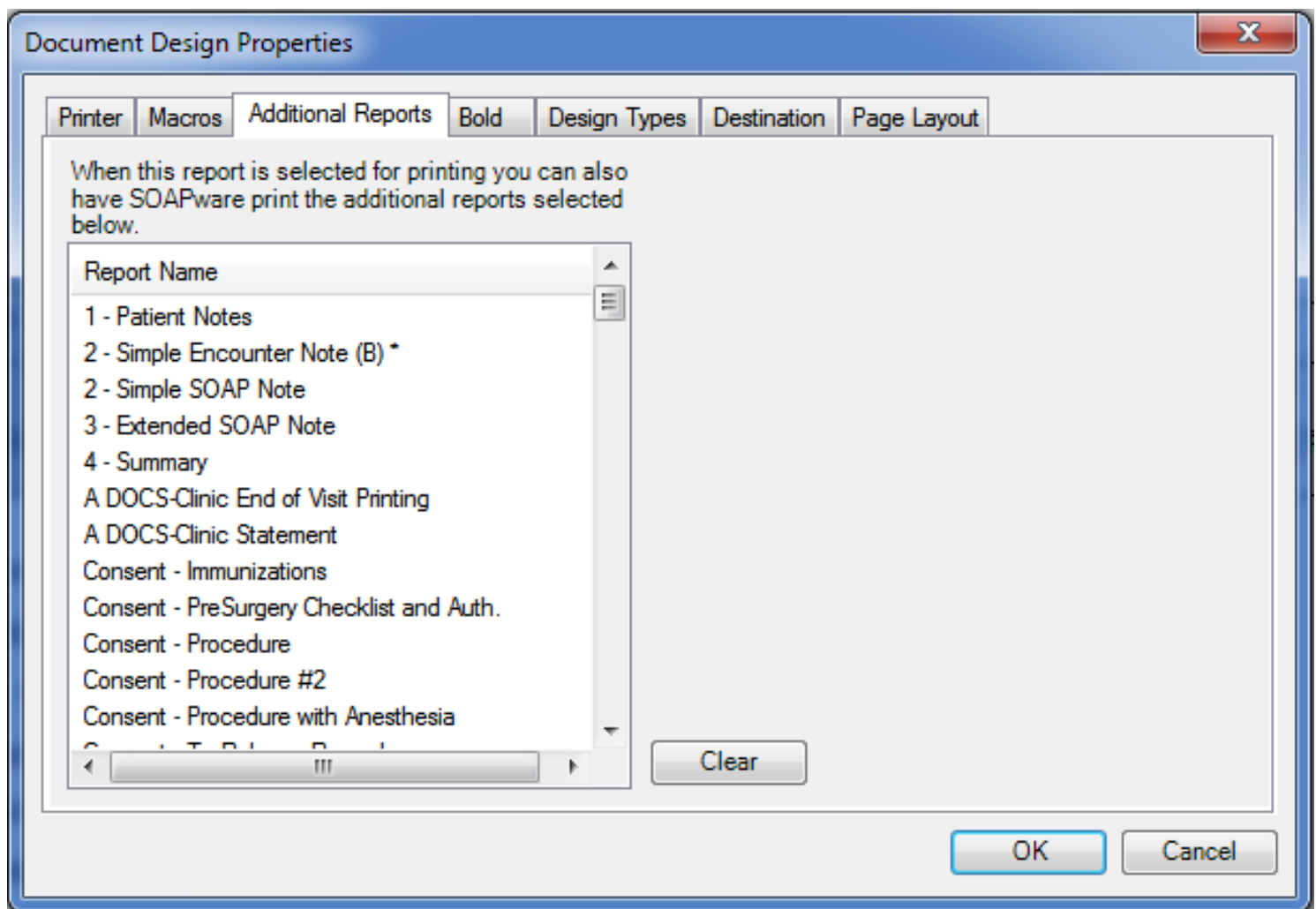
**Print Selected Handouts:** when you print the report, any handouts selected in the Plan field of the SOAPnote will also print.

**Auto Store Current Encounter Fields to corresponding Summary fields if they are empty** (Assessment, Medications and Objective): sets SOAPware to transfer information from the currently active SOAPnote to the Summary side of the patient chart when printing, if it corresponds to an empty Summary field.

**Include all associated Document Items:** allows a design that prints to include any other documents that have been attached to that docutainer to print as well. For example, it would print all documents that are attached to a SOAPnote docutainer.

**Secure Quantity/Refill Numbers:** this command places double asterisks (\*\*) before and after the refill number making it difficult to add a numeric value to increase refills on a printed prescription.

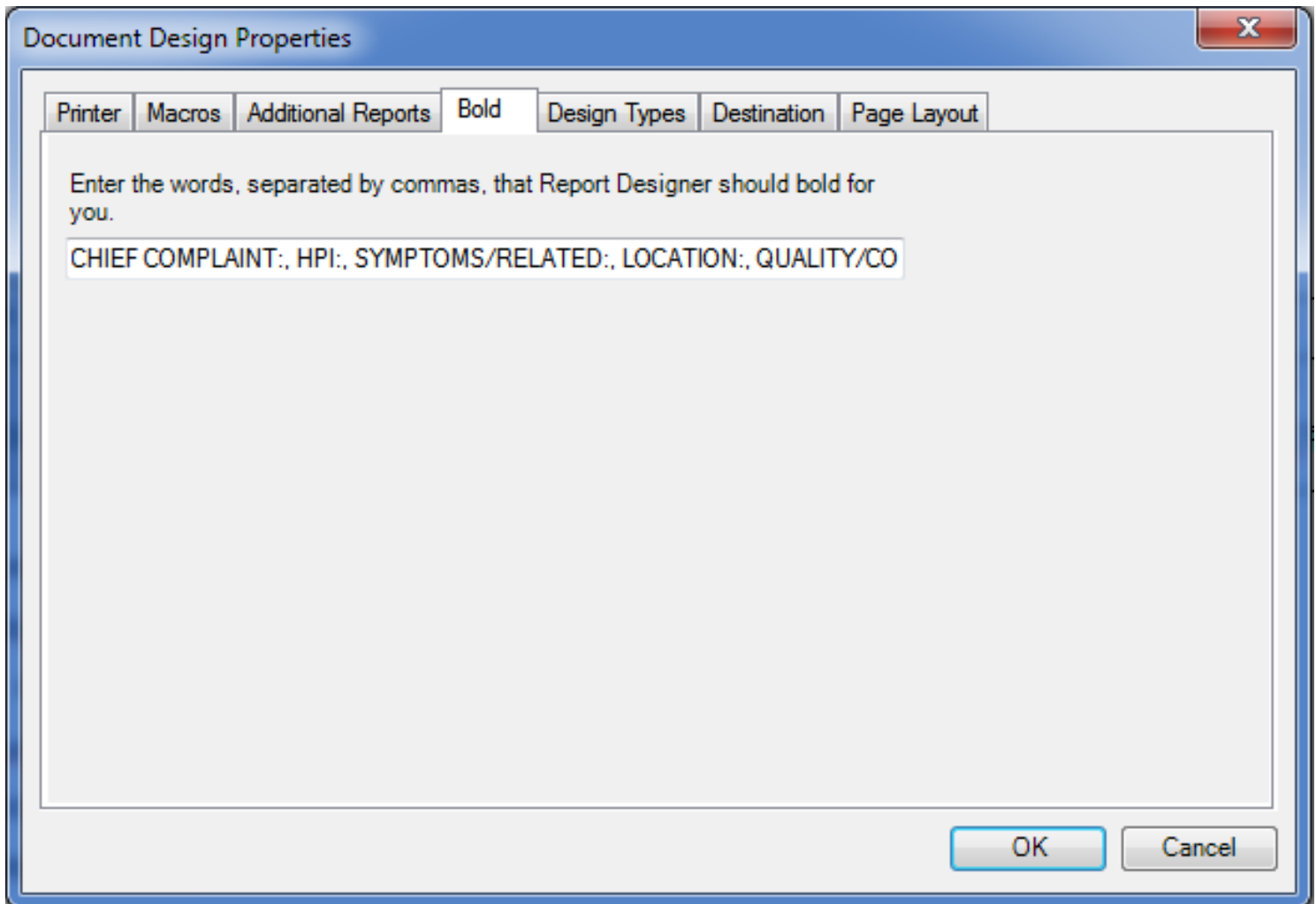
## Additional Reports



The selected additional document designs will print when this design is printed. For example, when a referral letter is printed a soap encounter note could be printed simultaneously.

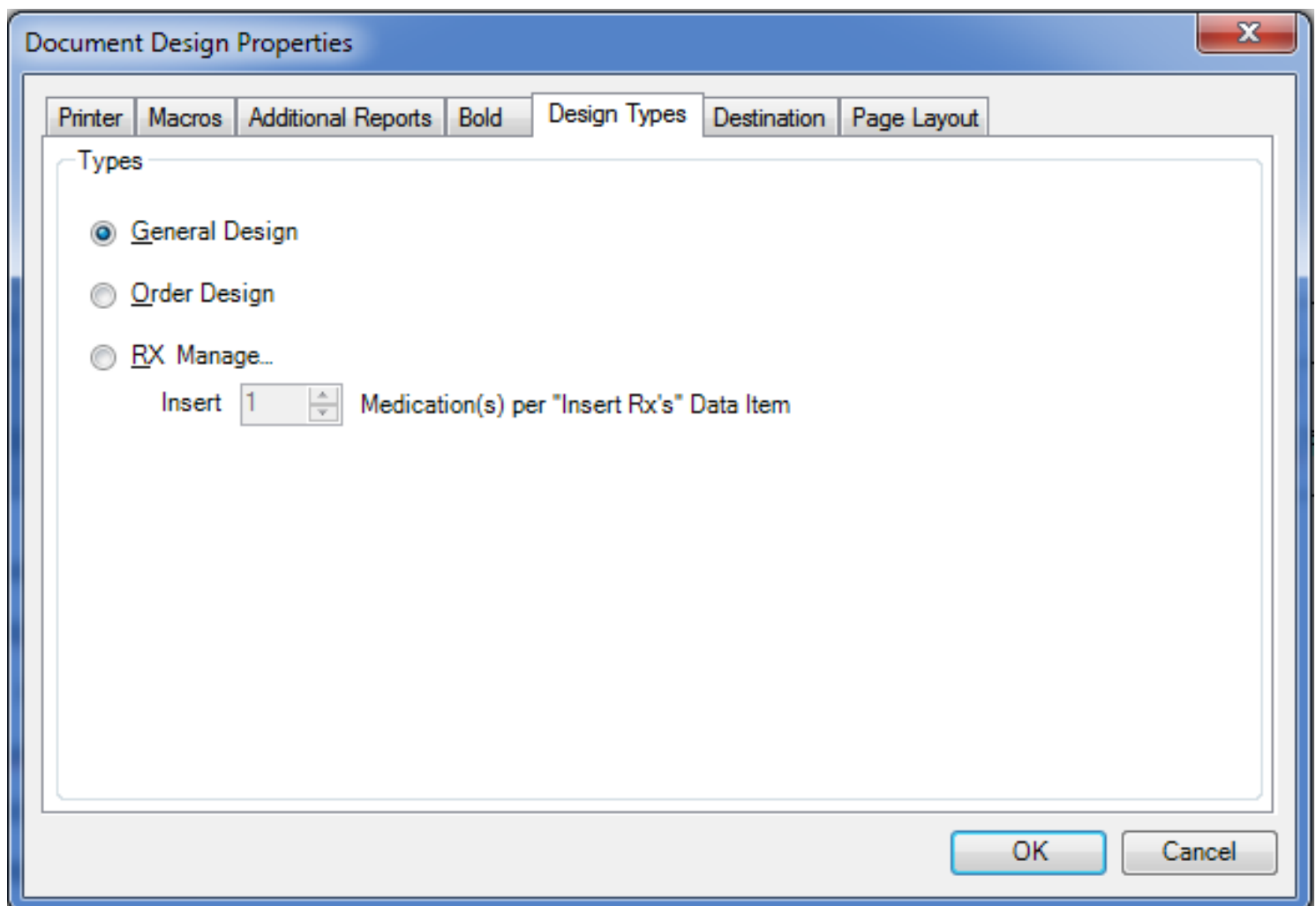


## Bold



This setting allows the user to automatically apply bold formatting to specific words. To specify the words to be made bold, enter them in the text box separated by commas.

## Design Types

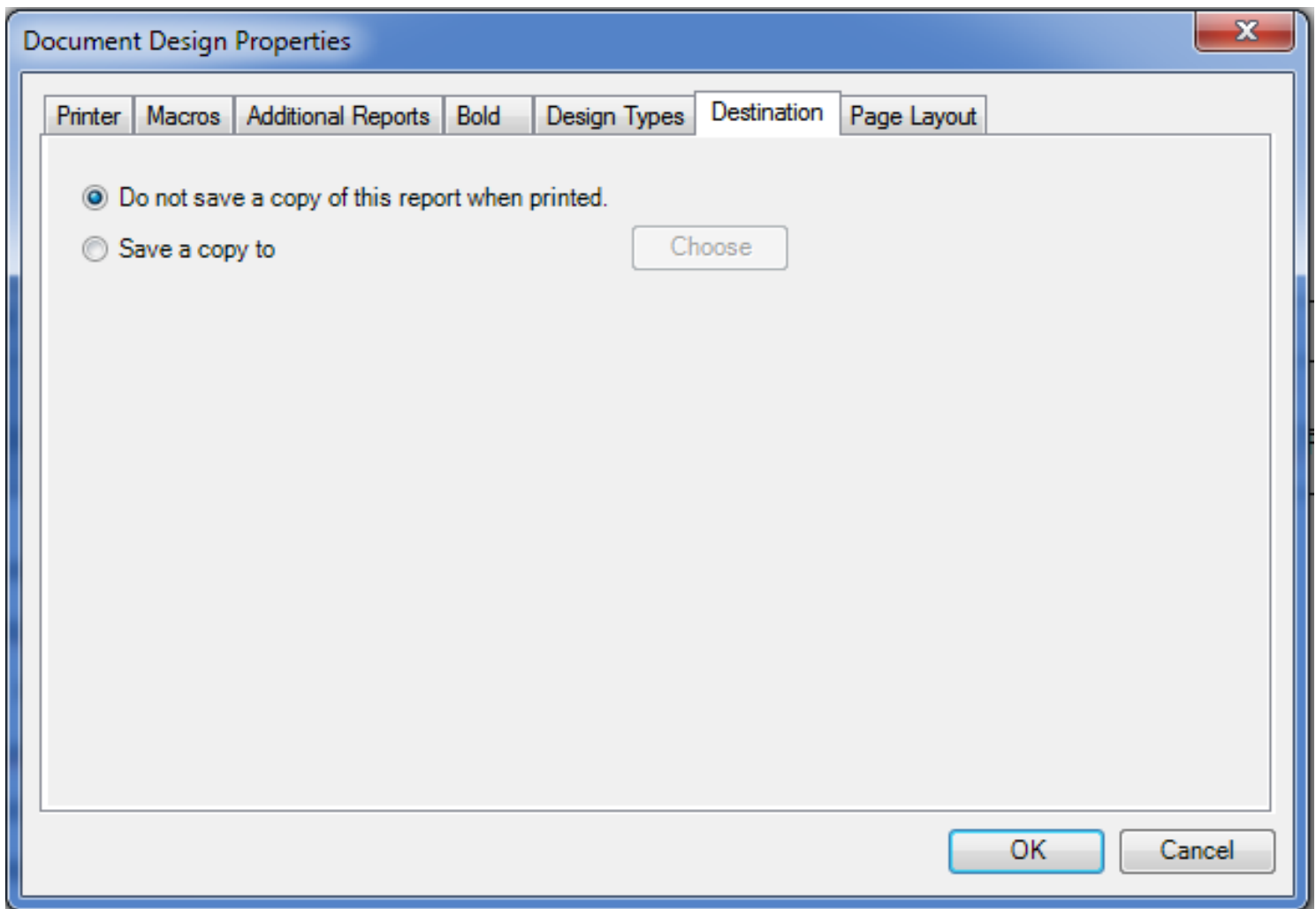


**General Design:** applies to all print designs other than Order or Rx Manager.

**Order Design:** applies to any design that is created to be used within Order Manager.

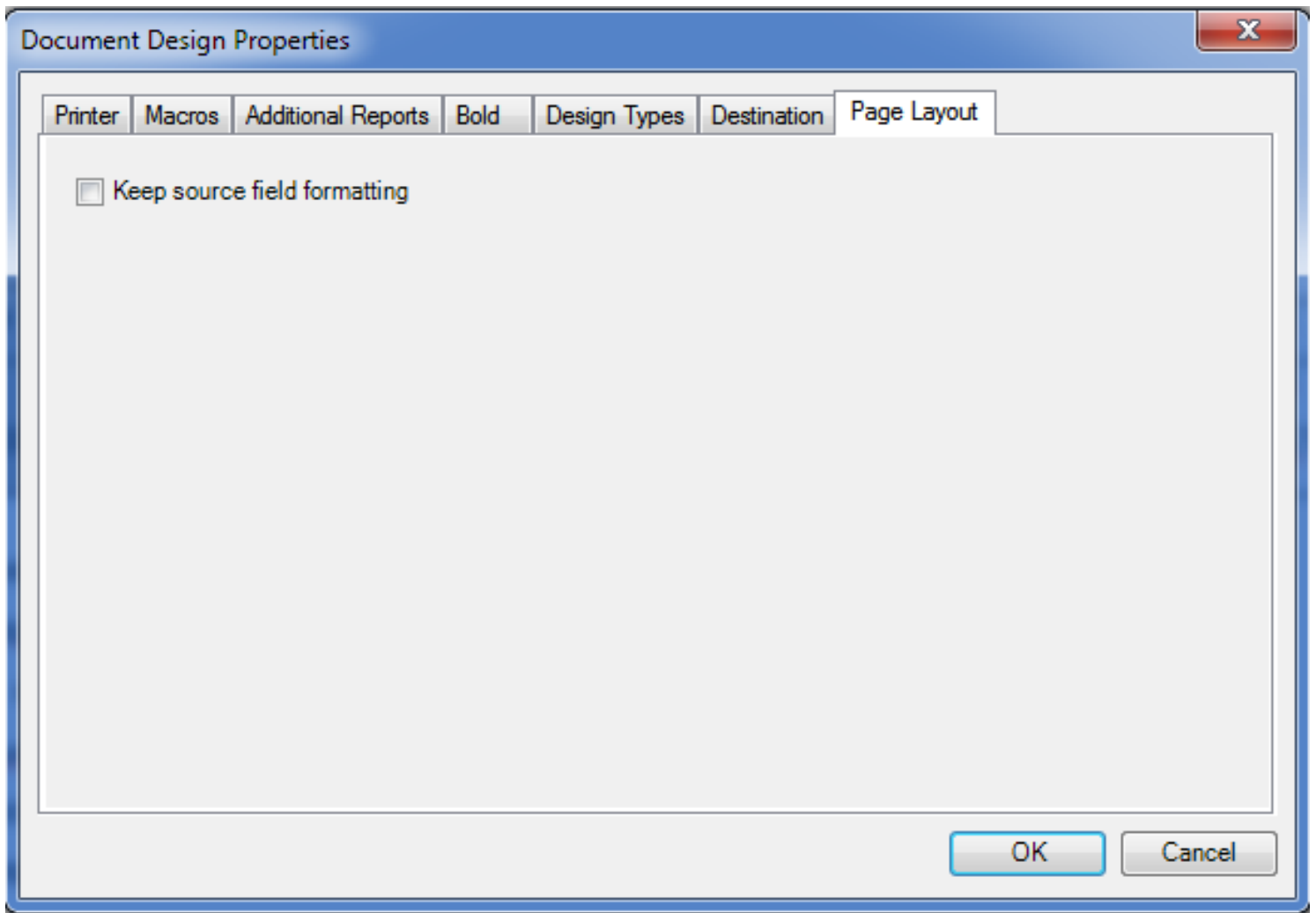
**Rx Manger:** applies to a prescription design that needs to specify how many prescriptions will print per page.

## Destination



The Destination tabs allows the option of saving a copy of the printed document to a specific chart section in Chart Navigator. Or, Click Do not save a copy of this report when printed.

## Page Layout



Keep source field formatting: source field formatting will be preserved that exists in the original docutainer.

## Document Designer Commands

### Data Items - General Demographics

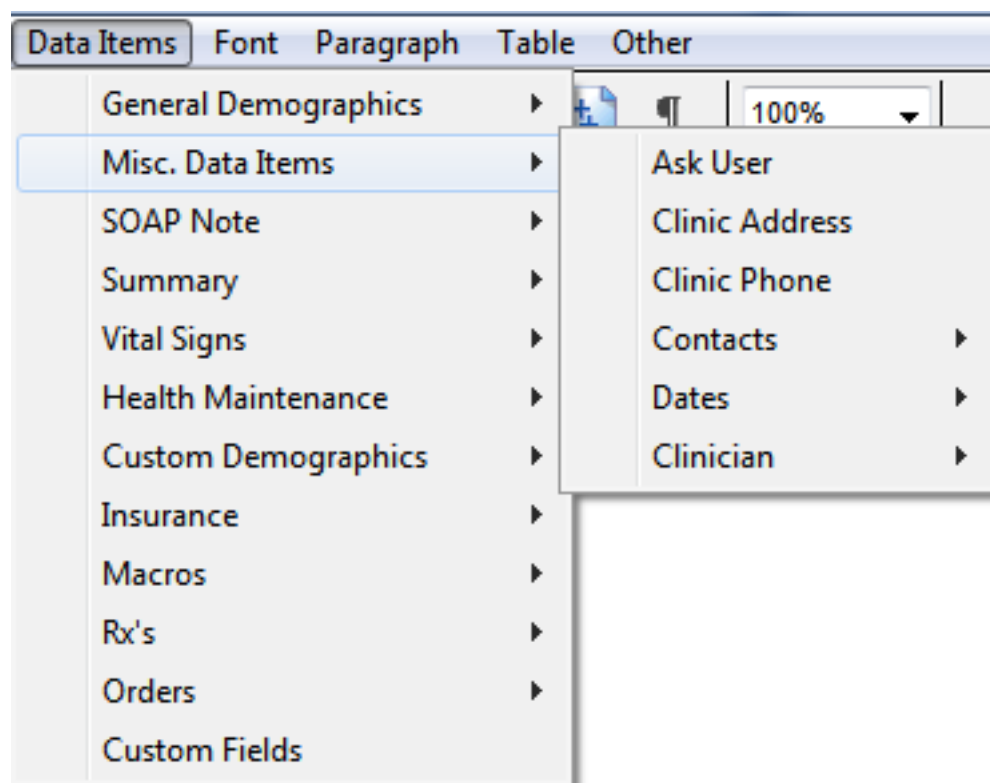
Data Items	Font	Paragraph	Table	Other
General Demographics				Address
Misc. Data Items				Age
SOAP Note				Birth Date
Summary				Cell Phone
Vital Signs				Chart Number
Health Maintenance				Email Address
Custom Demographics				First Name
Insurance				Home Phone
Macros				Last Name
Rx's				Marital Status
Orders				Middle Initial
Custom Fields				Name Suffix
				Patient Name
				Patient Picture
				Primary Care Physician
				Primary Physician
				Exclude From Reporting
				Sex
				Social Security
				Title
				Work Phone

The General Demographics data item list includes:

Address  
Age  
Birth date  
Chart Number  
E-Mail Address  
First Name

Home Phone  
Last Name  
Marital Status  
Middle Initial  
Name Suffix  
Patient Name  
Primary Physician  
Sex  
Social Security  
Title  
Work Phone

## Miscellaneous Data Items



The Misc. Data Items list includes:

Ask User  
Clinic Address  
Clinic Phone

### **Contacts:**

Address  
Fax  
First Name

Last Name  
Name  
Phone  
Select  
Suffix  
Specialty

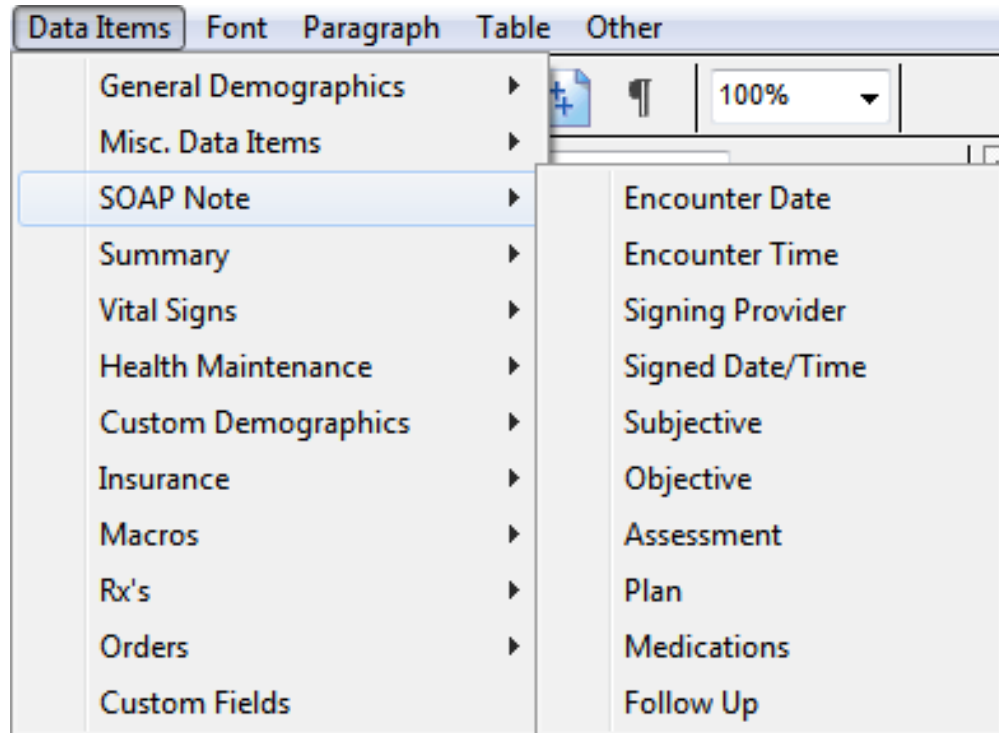
**Dates:**

Current Date  
Current Date with Full Month  
Current w/Time  
Current w/Time and Full Month

**Clinician:**

Full Name  
First Name  
Last Name  
DEA  
05 State ID

**SOAPnote**

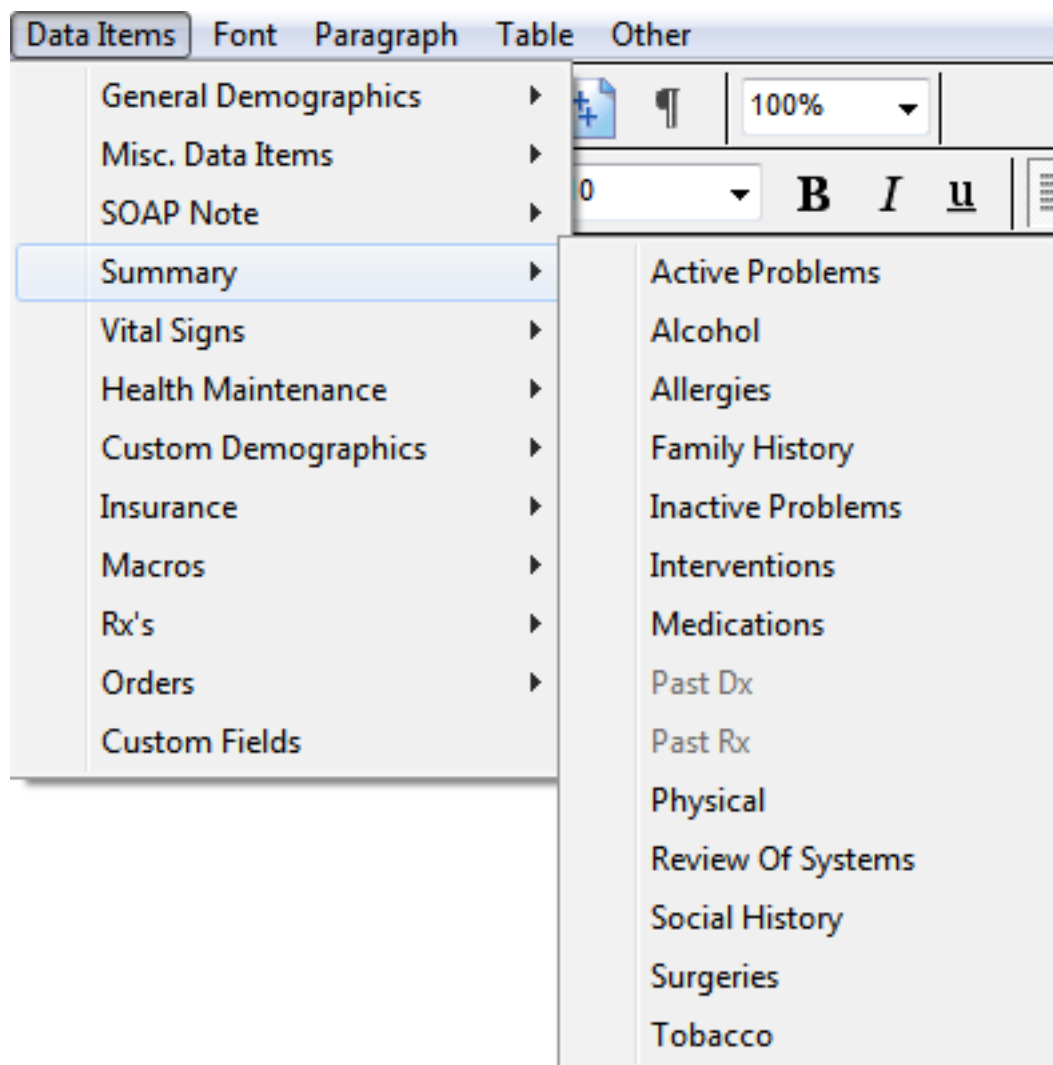


The SOAPnote data item list includes:

Encounter Date

Encounter Time  
Subjective  
Objective  
Assessment  
Plan  
Medications  
Follow Up

## Summary



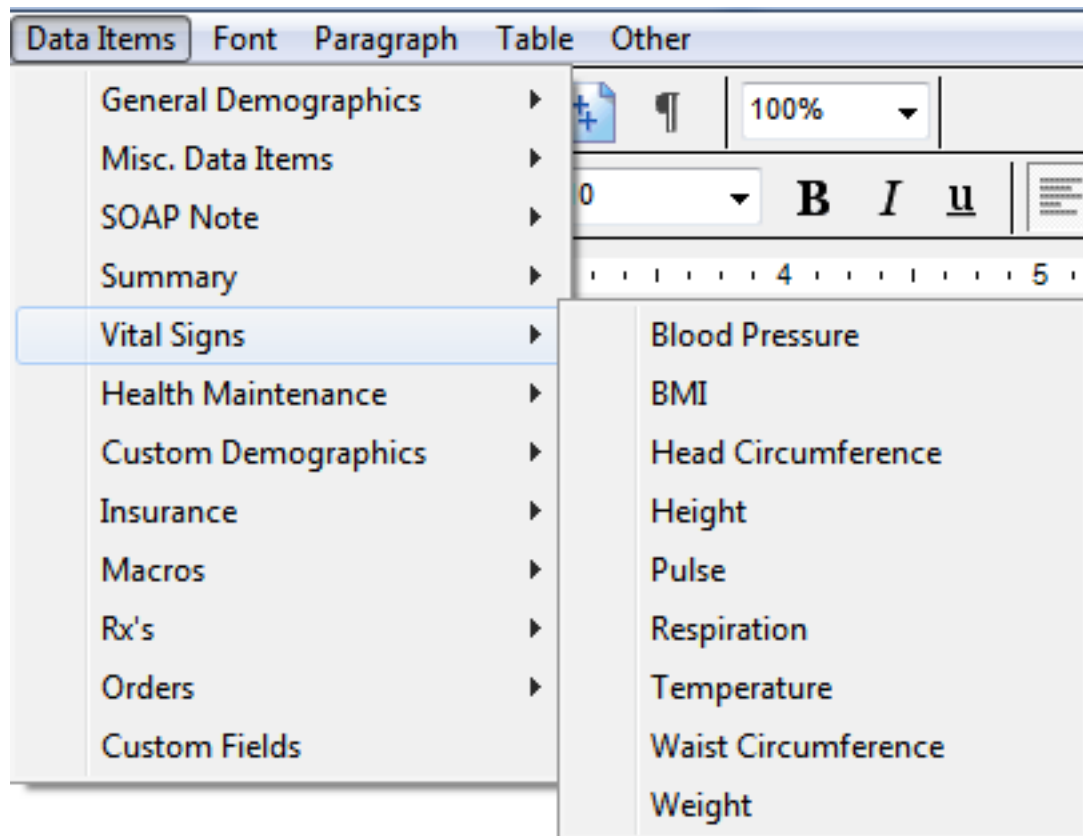
The Summary data item list includes:

Active Problems  
Alcohol  
Allergies  
Family History  
Inactive Problems  
Interventions



Medications  
Past Dx  
Past Rx  
Physical  
Review of Systems  
Social History  
Surgeries  
Tobacco

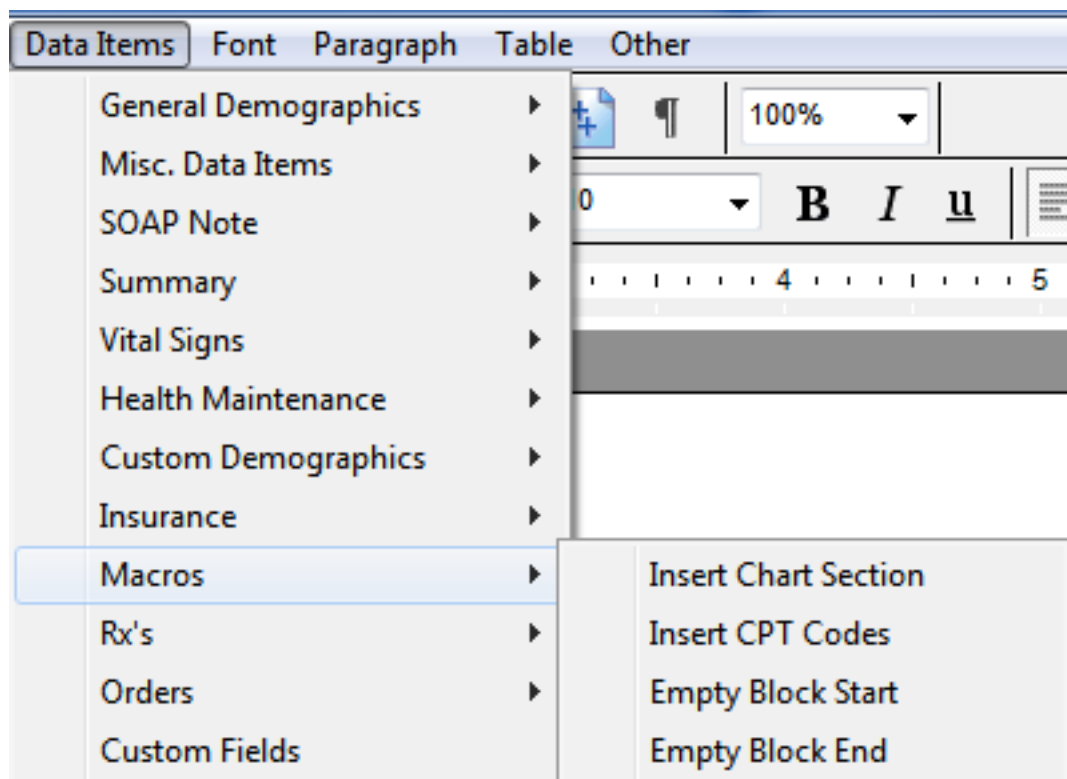
## Vital Signs



The General Demographics data item list includes:

Blood Pressure  
BMI  
Head Circumference  
Height  
Pulse  
Respiration  
Temperature  
Weight

## Macros



The Macros list includes:

Insert Chart Section

Insert CPT Codes

Empty Block Start

Empty Block End

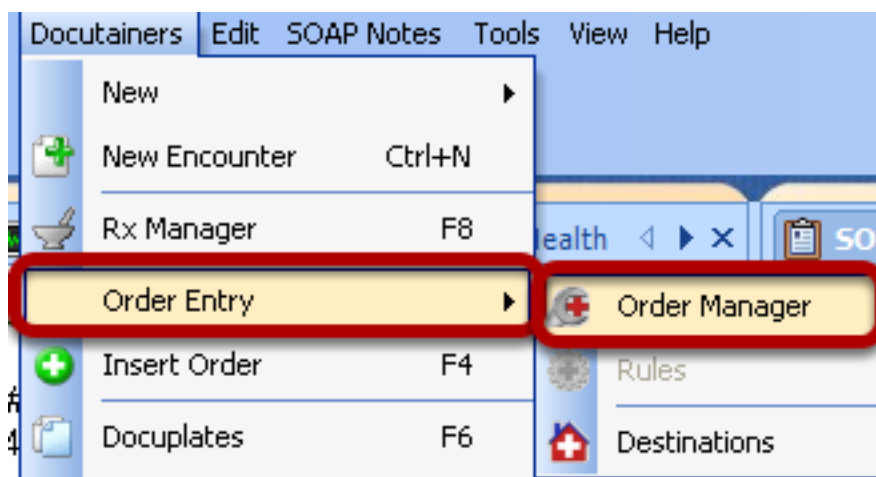
# Order Entry

## Order Manager

This section is a continuation of Order Entry Set Up. If Set Up has not been done, please do this first and return to this page before continuing.

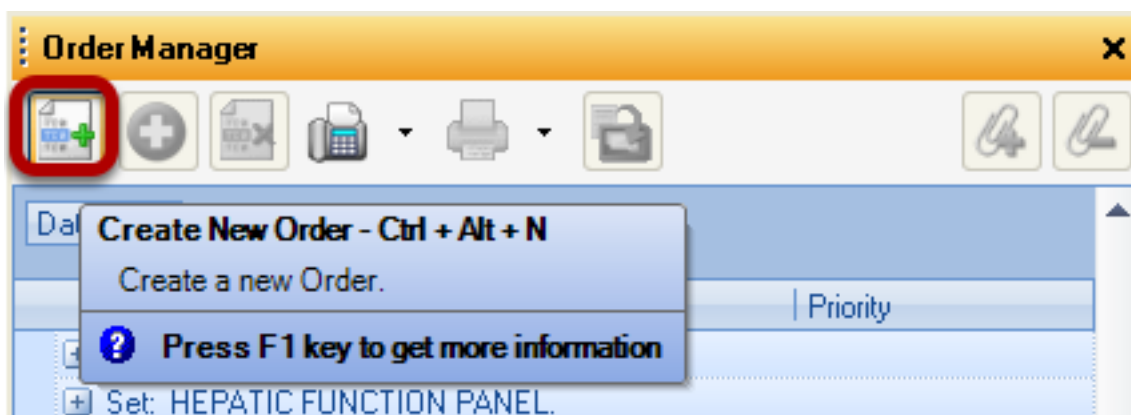
*In the Security settings, there is an option to cancel the creation of a Task Item. It is generally **NOT** a good idea to allow Task Item creation to be canceled. If this option is activated, it is possible to skip creating a Task Item by clicking Cancel. The order will still be placed for the patient, but without an associated Task Item.*

### Placing an Order in Order Manager



With a patient chart and SOAPnote open, Click Docuainers, Order Entry and then Click Order Manager to place an order.


### Order Manager Display Window



Click the Create new Order button.

## Place Order Display Window

**Place Order** ✕

Find  

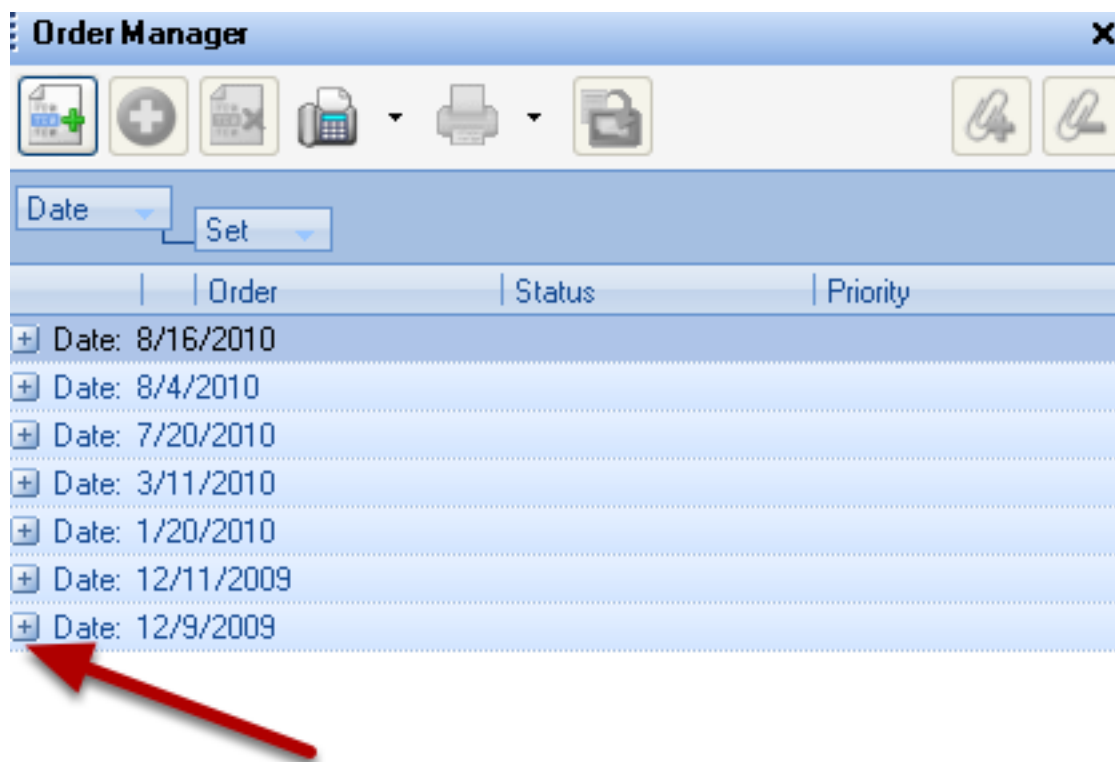
Shortcut	Description	Type
c82947s	"Schedule - LAB - Glucose (FBS) Serum/Plasma" (CPT#829...	Order Entry
c82947s	"Schedule - LAB - Glucose (Random) Serum or Plasma" (CPT...	Order Entry
c80069o	ORD - "RENAL FUNCTION PANEL" (LAB - Renal Panel - 80...	Order Entry
c82962o	ORD - "GLUCOSE BLOOD TEST" (LAB - Whole Blood, by Glucose Monitoring	Order Entry
c80048o	ORD - "METABOLIC PANEL TOTAL CA" (LAB - BMP/Chem...	Order Entry
c80053o	ORD - "COMPREHEN METABOLIC PANEL" (LAB - CMP/Ch...	Order Entry
c82947o	ORD - "ASSAY, GLUCOSE, BLOOD QUANT" (LAB - FBS, Se...	Order Entry
c82962o	ORD - "GLUCOSE BLOOD TEST" (LAB - Whole Blood, by Gl...	Order Entry
c82947o	ORD - "ASSAY, GLUCOSE, BLOOD QUANT" (LAB - Random,...	Order Entry
c82948o	ORD - "REAGENT STRIP/BLOOD GLUCOSE" (LAB - Finger...	Order Entry

< >

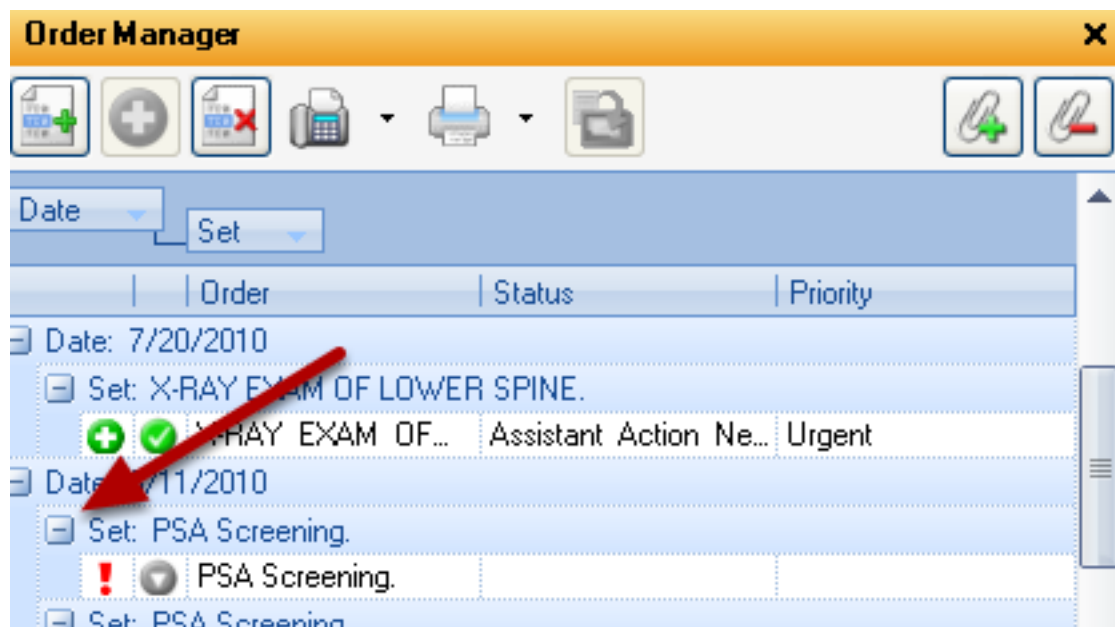
Select Cancel

Type the Shortcut or keyword in the Find field, and Click the Search button. *This only searches the local database and does not search the online library.*

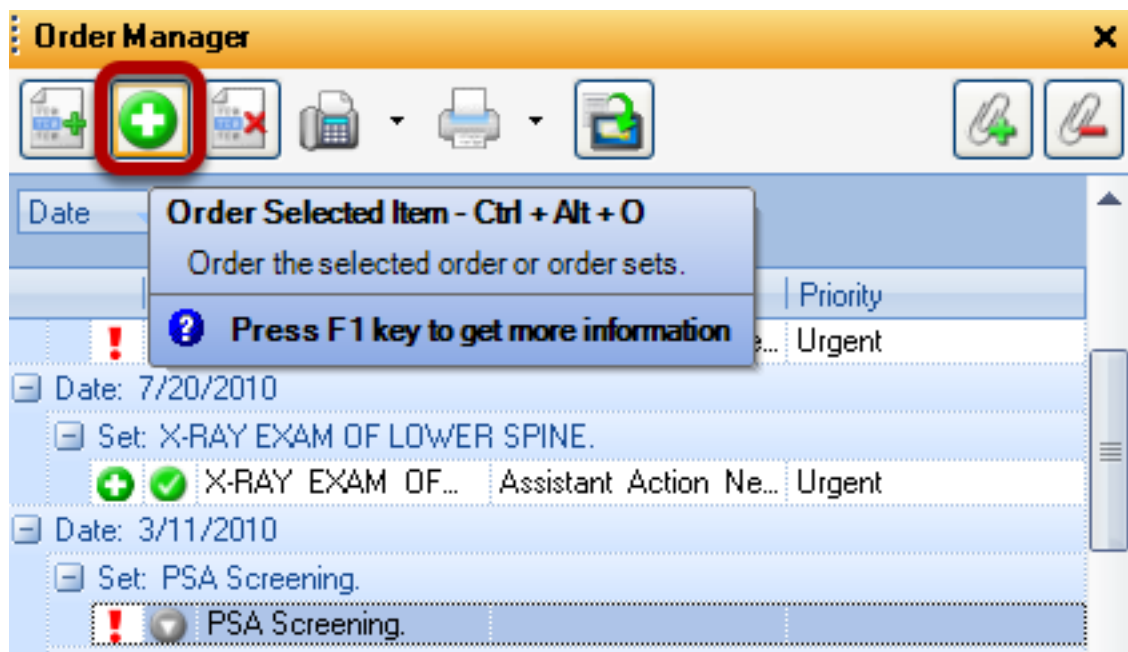
When the preferred Order Entry item appears in the list of items, Double-click the order list item or Click on the order list item and Click the Select button.



The first time Order Manager is used Click on the plus sign (+) next to Date.



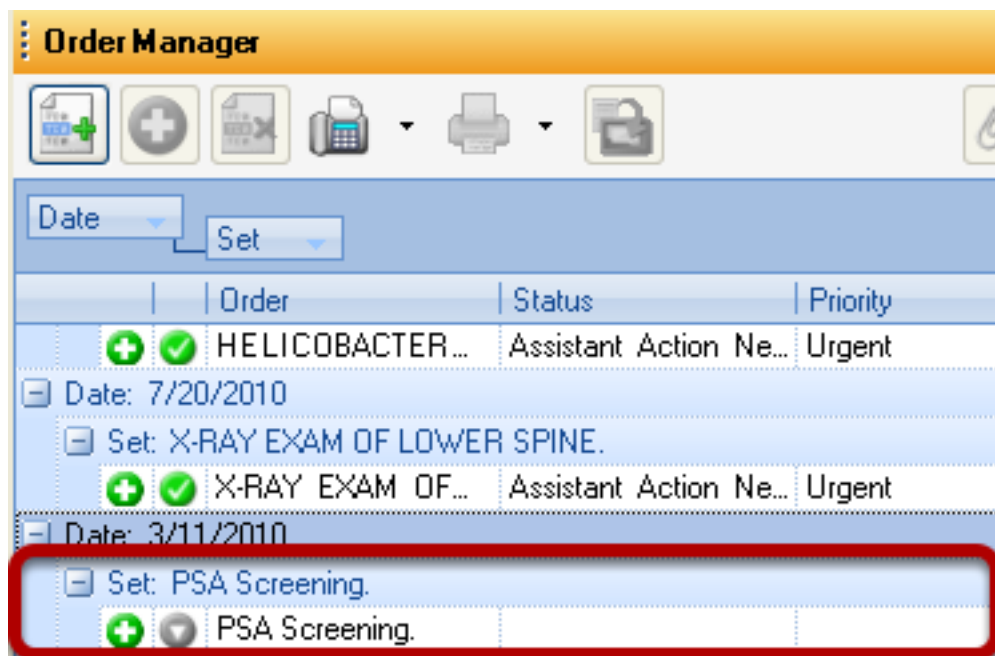
Click on the plus sign (+) next to Set. Notice the " !" in front of the order. This is a warning that the order has not yet been placed or performed.



To place the order, Click the Order Selected Item Button.

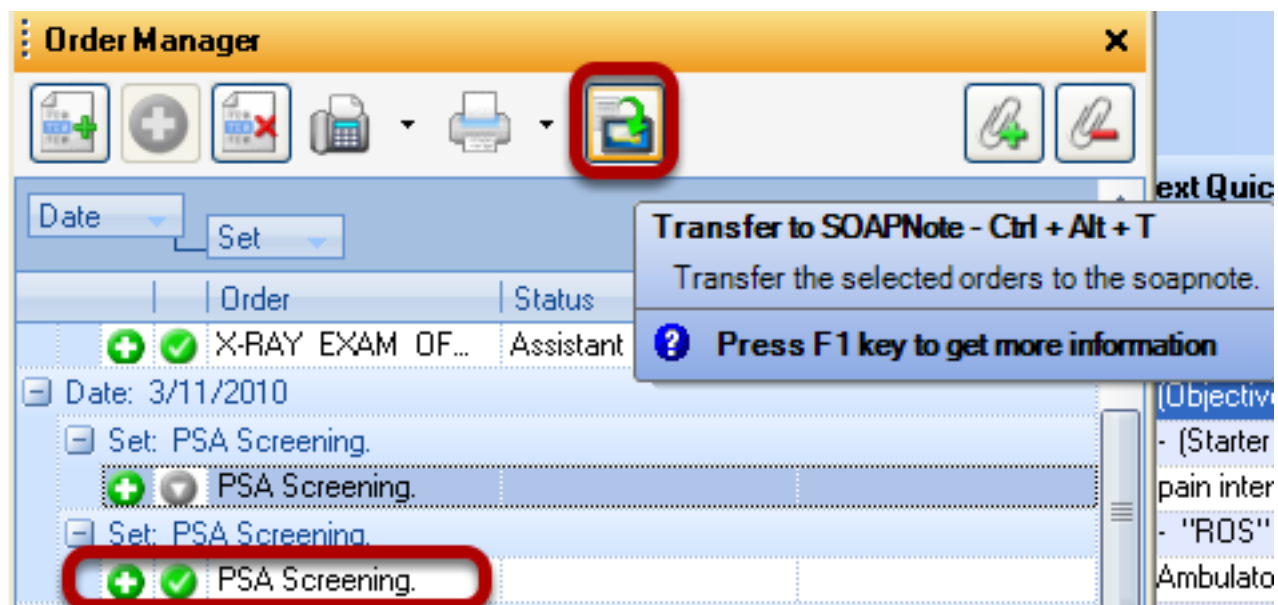
Task Order			
Description	PSA Screening.		
Owner	Rena Thornton	Assigned To	Doodle Bugs
Due	8/16/2010	Reminder	8/16/2010 1:21:02 PM
Priority		Action/Status	
Type	Orders		
Notes			
		Select	Cancel

Click to select the user the task needs to be assigned to from the Assigned To drop-down menu, and then Press the Select button. *This step can be skipped if Assigned To has been pre-defined.*



This completes the placing of the order and replaces the " ! " with a " + ". In most situations, the orders still need to be transferred into the Plan field of the current SOAPnote.

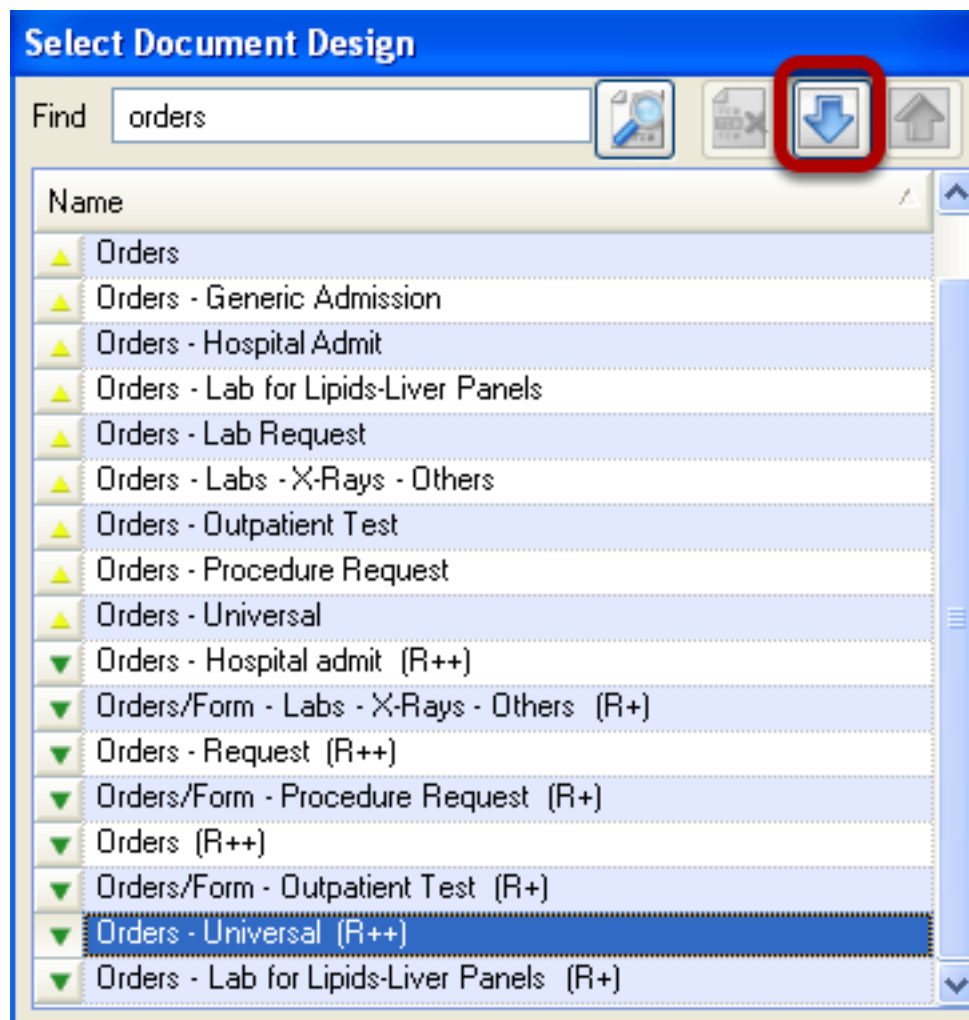
### Transferring an Order to the SOAPnote



Click to highlight the order item to transfer. Next, Click the Transfer to SOAPnote button. A green check mark indicated the order has been transferred to the Plan field of the SOAPnote.



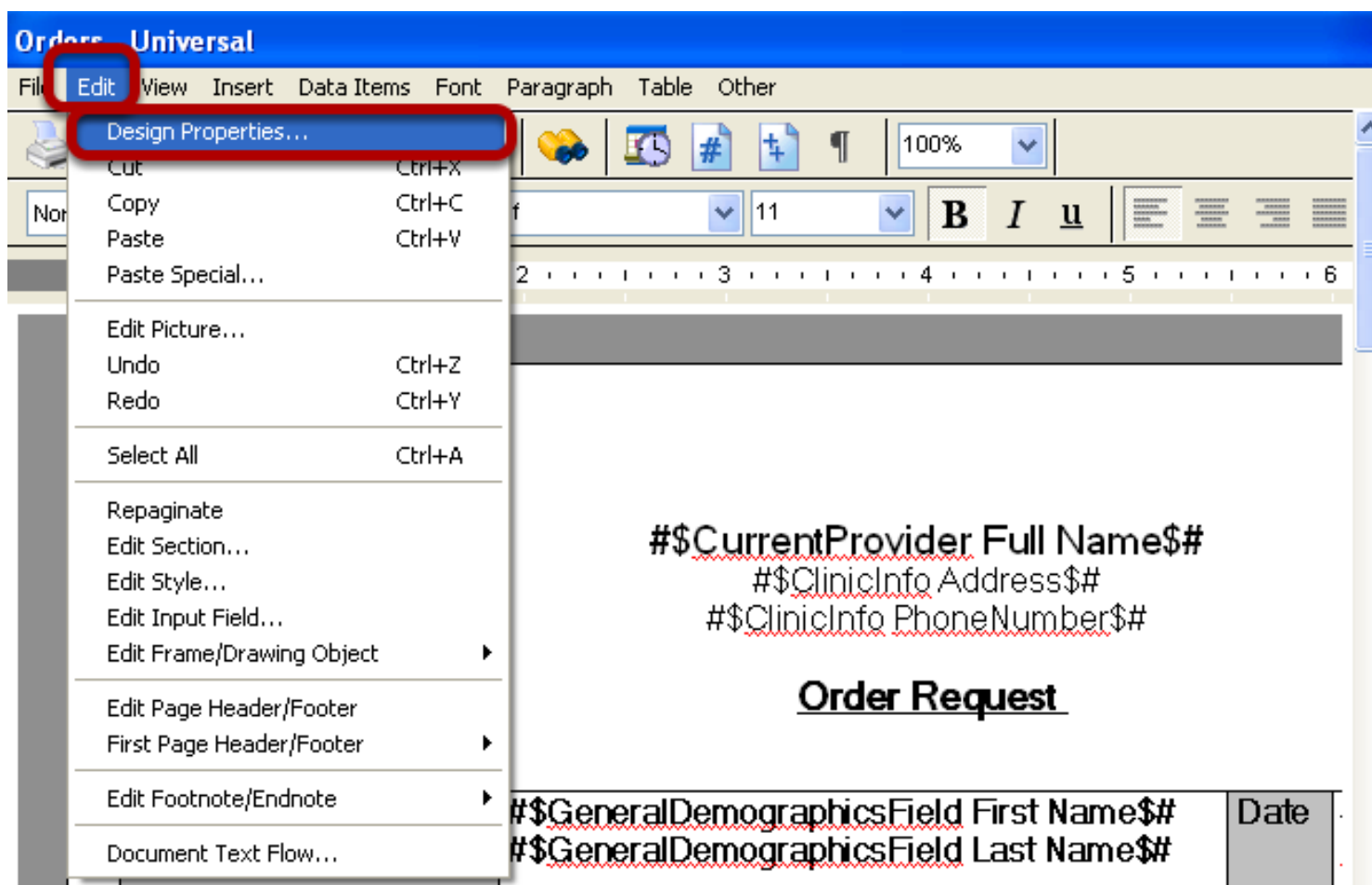
## Selecting an Order Design in Document Designer for Faxing and Printing



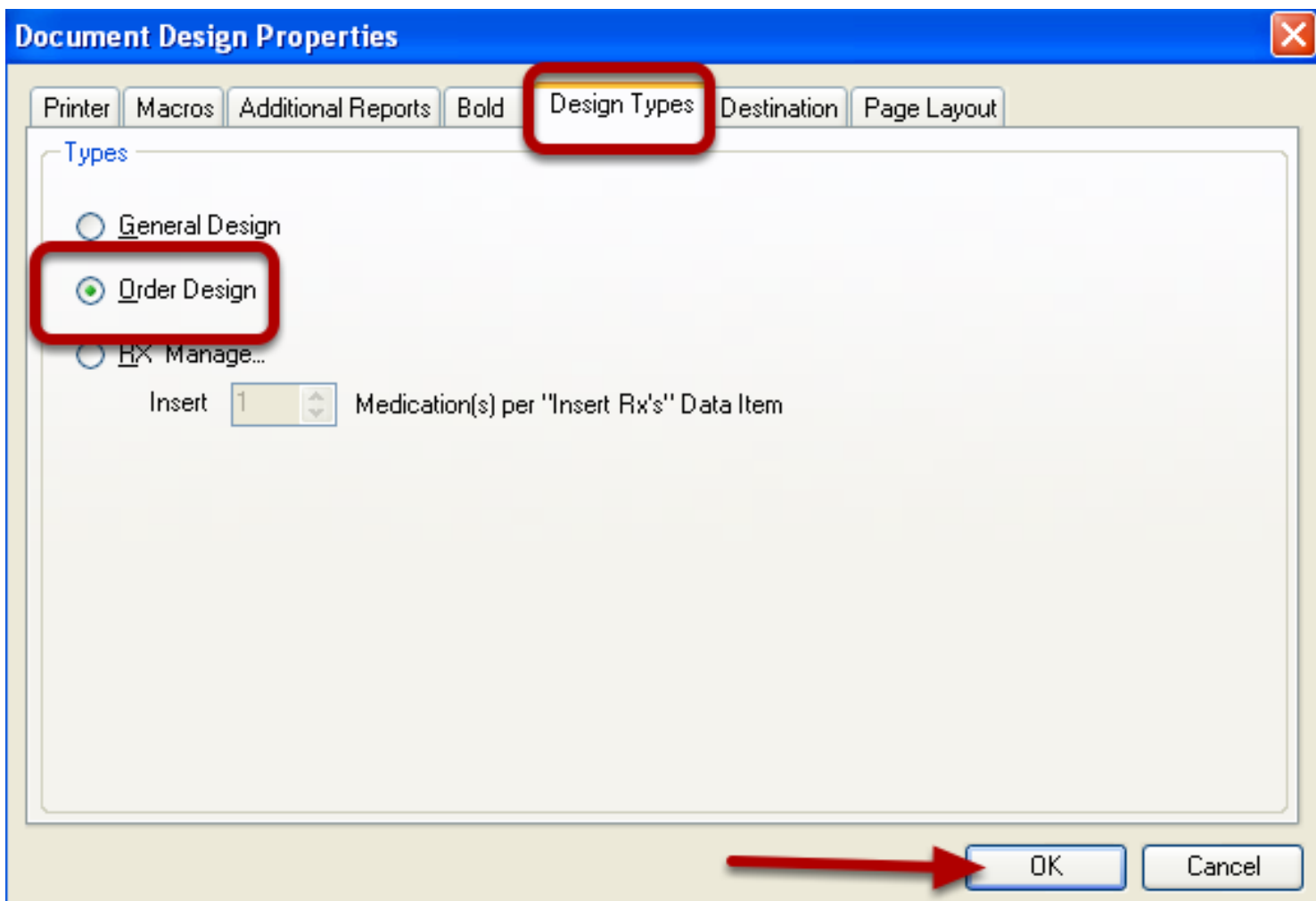
An Order Design will need to be downloaded from Document Design and selected as the Order Design when faxing and printing. This will be done from the Tools menu item and clicking on Document Designer.

In Document Designer:

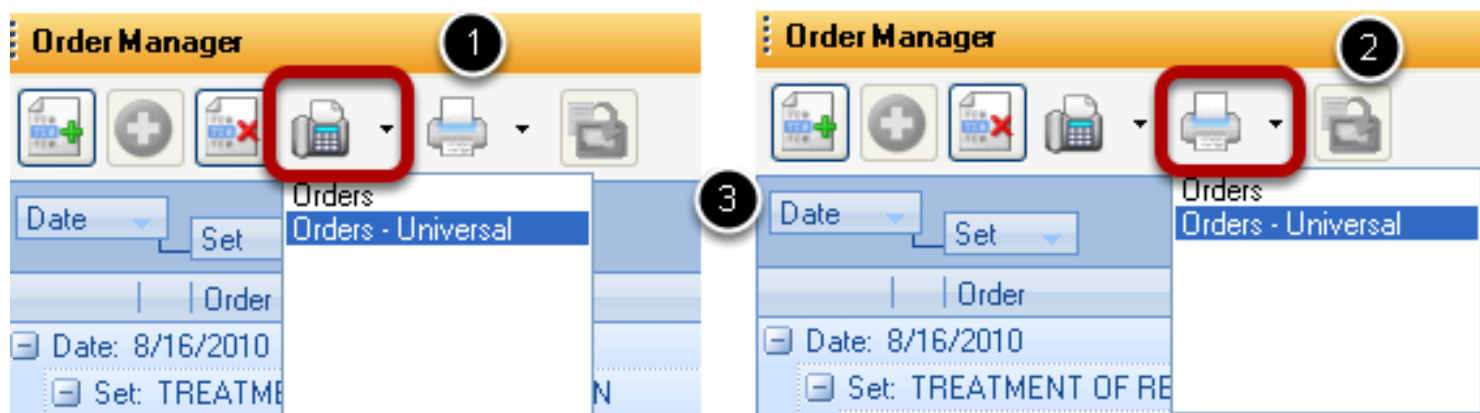
- 1) Go to the File menu item.
- 2) Click on Available Designs.
- 3) In the Find field, search for Orders. You will see two Order Design options; Orders and Orders Universal. Preview Design by clicking on the name of the Design to highlight, then Click Ok.
- 4) If the triangle next to the Design is facing down, the Design will need to be downloaded before used. Click on the blue facing down arrow to download.



With the Order Design displayed in the window, Click on the Edit menu item. Click on Design Properties.



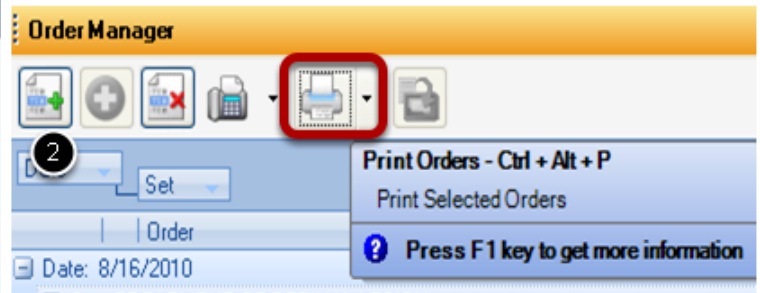
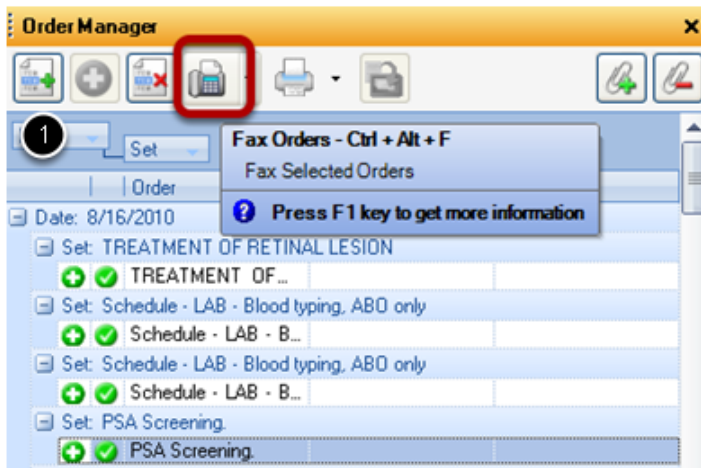
In the Document Design Properties window, Click on the Design Types Tab and Click the bubble next to Order Design and Click Ok. This will save the selected Order Design to the Order Manager.



If more than one Design has been chosen to use for faxing or printing, they will be listed when clicking on the drop down arrow on the faxing and printing button to select. The same list will populate for both faxing and printing.

- 1) Faxing drop down menu
- 2) Printing drop down menu

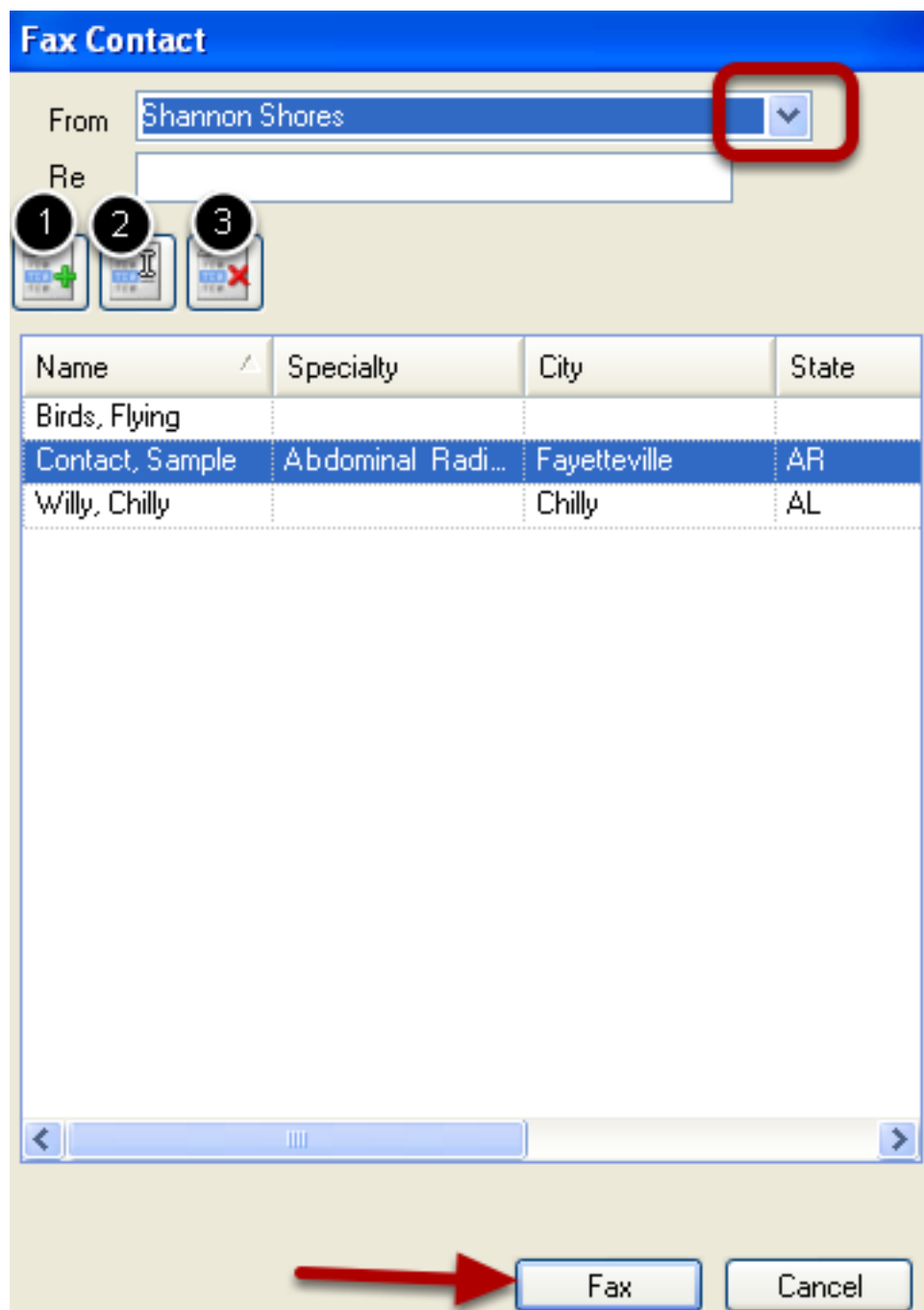
## Faxing and Printing an Order



Click on test or procedure to be faxed to highlight your selection. *Only one selection can be faxed or printed. Multiple selection is not available at this time.*

- 1) Fax Order
- 2) Print Order

## Fax Contact Window



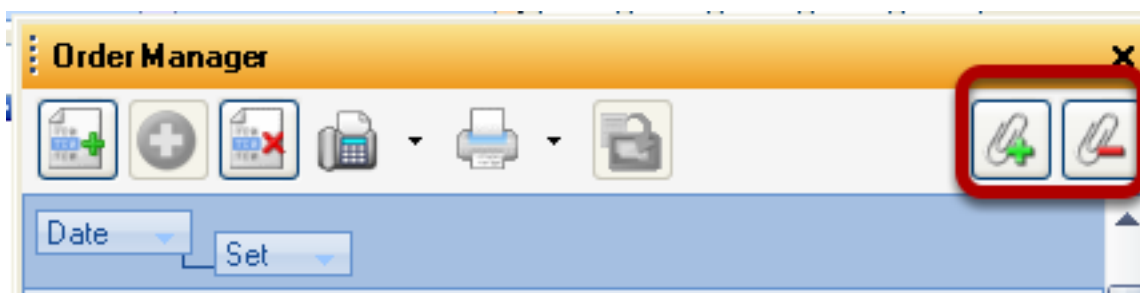
The screenshot shows the 'Fax Contact' window. At the top, there's a blue header bar with the title 'Fax Contact'. Below it, the 'From' field is set to 'Shannon Shores' and is highlighted with a red rectangle. The 'Re' field is empty. Below the 'Re' field are three numbered icons: 1) Add new Fax Contact (green plus), 2) Edit Fax Contact (pencil), and 3) Remove Fax Contact (red X). Below these icons is a table with four columns: Name, Specialty, City, and State. The table contains three rows: 'Birds, Flying', 'Contact, Sample' (highlighted in blue), and 'Willy, Chilly'. Below the table is a large empty text area. At the bottom, there are 'Fax' and 'Cancel' buttons, with a red arrow pointing to the 'Fax' button.

Name	Specialty	City	State
Birds, Flying			
Contact, Sample	Abdominal Radi...	Fayetteville	AR
Willy, Chilly		Chilly	AL

In this window the provider that is sending the order can be chosen by using the drop-down arrow. Faxing contacts may also be added, edited or removed by clicking on the appropriate button. To fax, Click the Fax button.

- 1) Add new Fax Contact
- 2) Edit Fax Contact
- 3) Remove Fax Contact

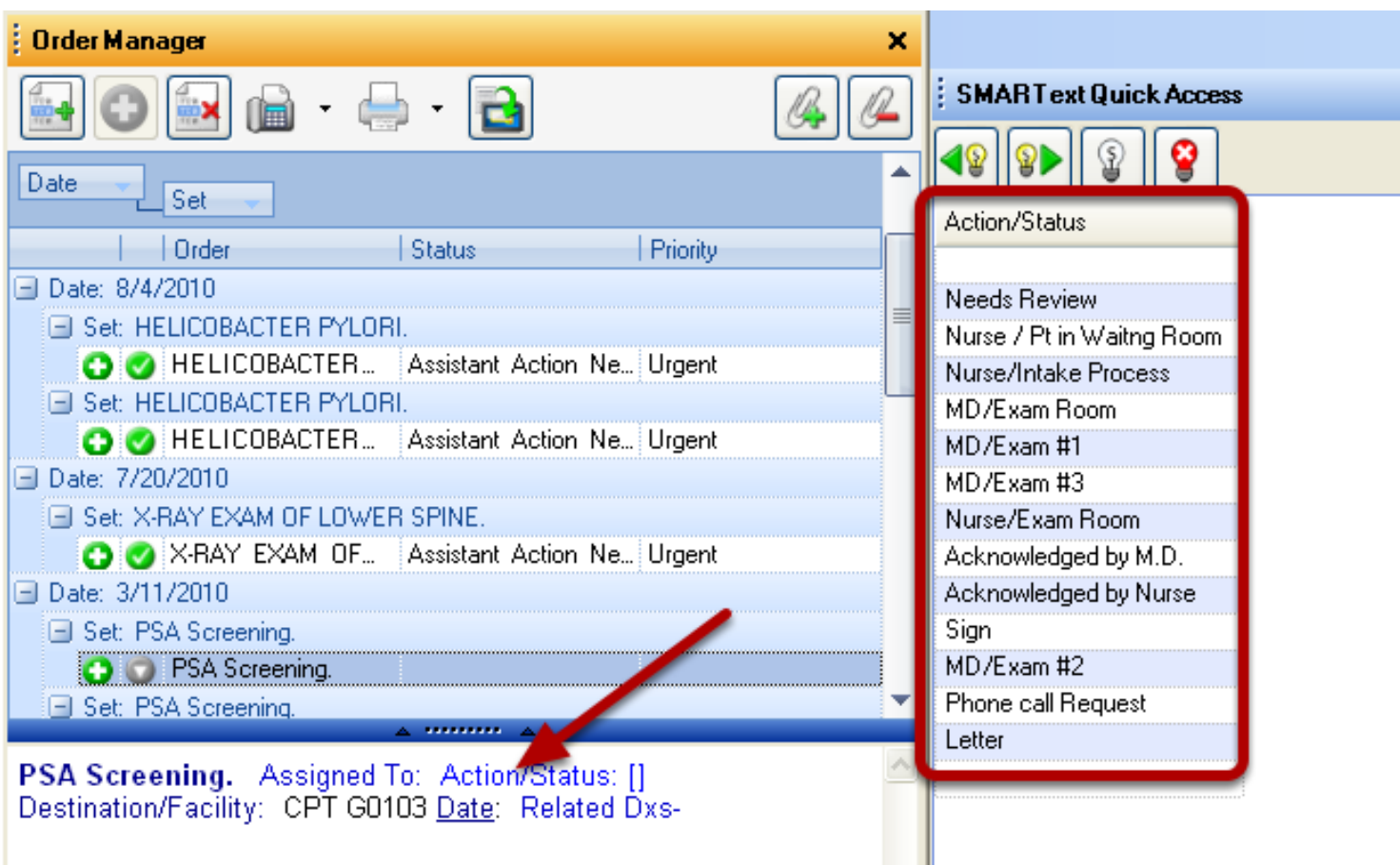
## Adding Order to Billing Statement



Adding orders to the Billing Statement is performed from Order Manager. Click on the green plus " + " to add or the red minus sign " - " to remove from from the Billing Statement. Only add orders or procedures to the Billing Statement that have been performed in-house for billing purposes.

## Editing an Order

Before placing or performing an order, the user has the option of editing that order. Some order sub-items may be set to default when originally designed. Any of the sub-item default values can be changed within Order Manager prior to placing or performing the order.



Left Click on an order sub-item (i.e. the blue, underlines SMARText Item) in the lower pane of the Order Manager window. This will display the pick list options for the order item in SMARText Quick Access. Click to highlight an Action/Status to be displayed for the order.

This displays a pick list for Action/Status in SMARText Quick Access.

After completing the edits for the sub-items in the order, Click the Order Selected Item button to place or perform the order.

### Order Entry Important Notes

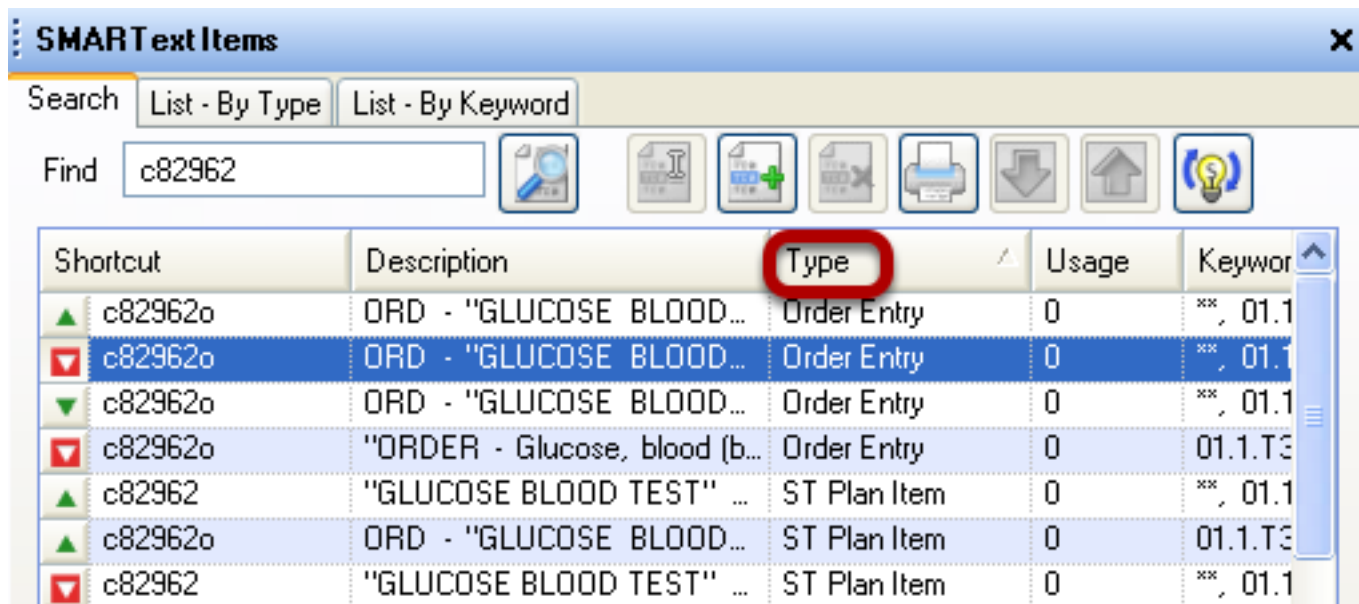
- 1) Order Entry Items can only be entered into charts via the Order Manager or the Quick Insert (F4). They will **NOT** function properly if entered with shortcut codes directly into the SOAPnote Plan field.
- 2) Searching for Order Entry Items that are in the online library is not yet possible from within the Order Manager. Only the items that are in the local database are available. This makes downloading of needed orders necessary from within SMARText Items Manager before searching for them in Orders Manager.
- 3) Order Entry is currently a first phase implementation. Some functions have yet to be implemented.

## Order Entry Set Up and Quick Entry

Order Entry allows the user to place, manage, and track orders and results from within the patient chart. These orders are used in the Plan field. This SMARText Item type will display as Order Entry in the SMARText Manager window when searching. This item type is the base of all Orders in the SOAPware system. It is **IMPORTANT** to understand that the Order Entry item type is different from other SMARText Items.

*In the Security settings, there is an option to cancel the creation of a Task Item. It is generally **Not** a good idea to allow Task Item creation to be canceled. If this option is activated, it is possible to skip creating a Task Item by clicking Cancel. The order will be placed for the patient, but without an associated Task Item.*

### Order Entry SMARText Item Type



The screenshot shows the SMARText Manager window with a search for 'c82962'. The table below represents the data shown in the window:

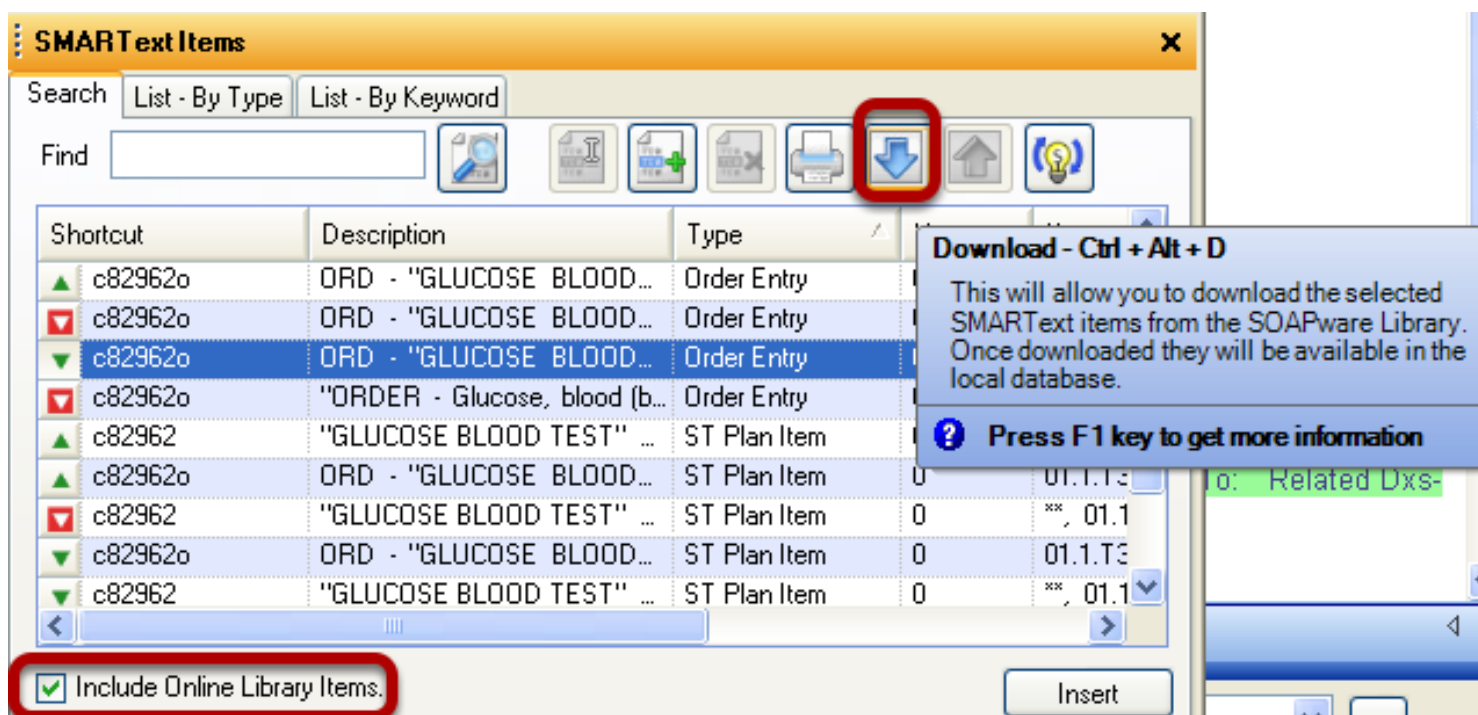
Shortcut	Description	Type	Usage	Keyword
▲ c82962o	ORD - "GLUCOSE BLOOD..."	Order Entry	0	**, 01.1
▼ c82962o	ORD - "GLUCOSE BLOOD..."	Order Entry	0	**, 01.1
▼ c82962o	ORD - "GLUCOSE BLOOD..."	Order Entry	0	**, 01.1
▼ c82962o	"ORDER - Glucose, blood (b..."	Order Entry	0	01.1.T3
▲ c82962	"GLUCOSE BLOOD TEST" ...	ST Plan Item	0	**, 01.1
▲ c82962o	ORD - "GLUCOSE BLOOD..."	ST Plan Item	0	01.1.T3
▼ c82962	"GLUCOSE BLOOD TEST" ...	ST Plan Item	0	**, 01.1

Because of the way Order Entry SMARText Items are designed:

- 1) They **cannot** be searched and inserted into the plan field by using F11 or Shift F11
- 2) They **cannot** be part of a SMARText Pick List
- 3) They **cannot** be selected from SMARText Quick Access
- 4) They **cannot** be inserted into the Plan field by using a shortcut macro



## Order Entry Set Up

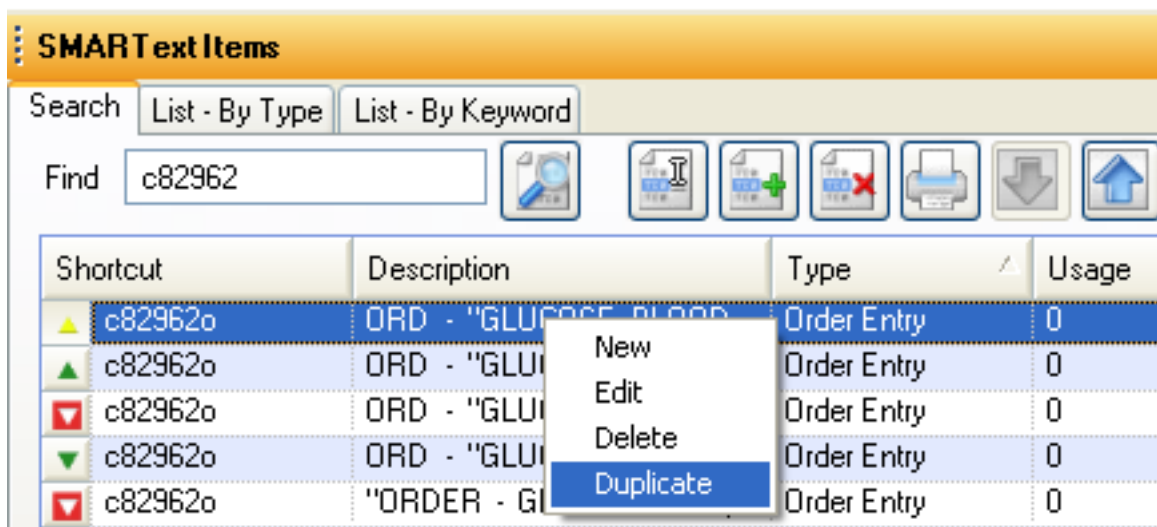


It is necessary to first go to the SMARText Items Manager and download the Order Entry items that will be used in the clinical practice. This can be accessed from Docutainers menu item or pressing your F10 key. Verify the checkbox for Include Online Library Items is checked.

To do this:

- 1) Make a list of the most frequently used Orders in the practice (Orders are any diagnostic test or procedure that needs to be performed outside the practice).
- 2) Search in SMARText Items Manager for the Order Entry items and download them.
  - In the Type column, the Order Entry item can be identified. Clicking on the Type column header will group the SMARText Items together by Type.
- 3) After items have been downloaded, customization of the Order Entry sub-items can be made if needed. Rarely should new items be created.

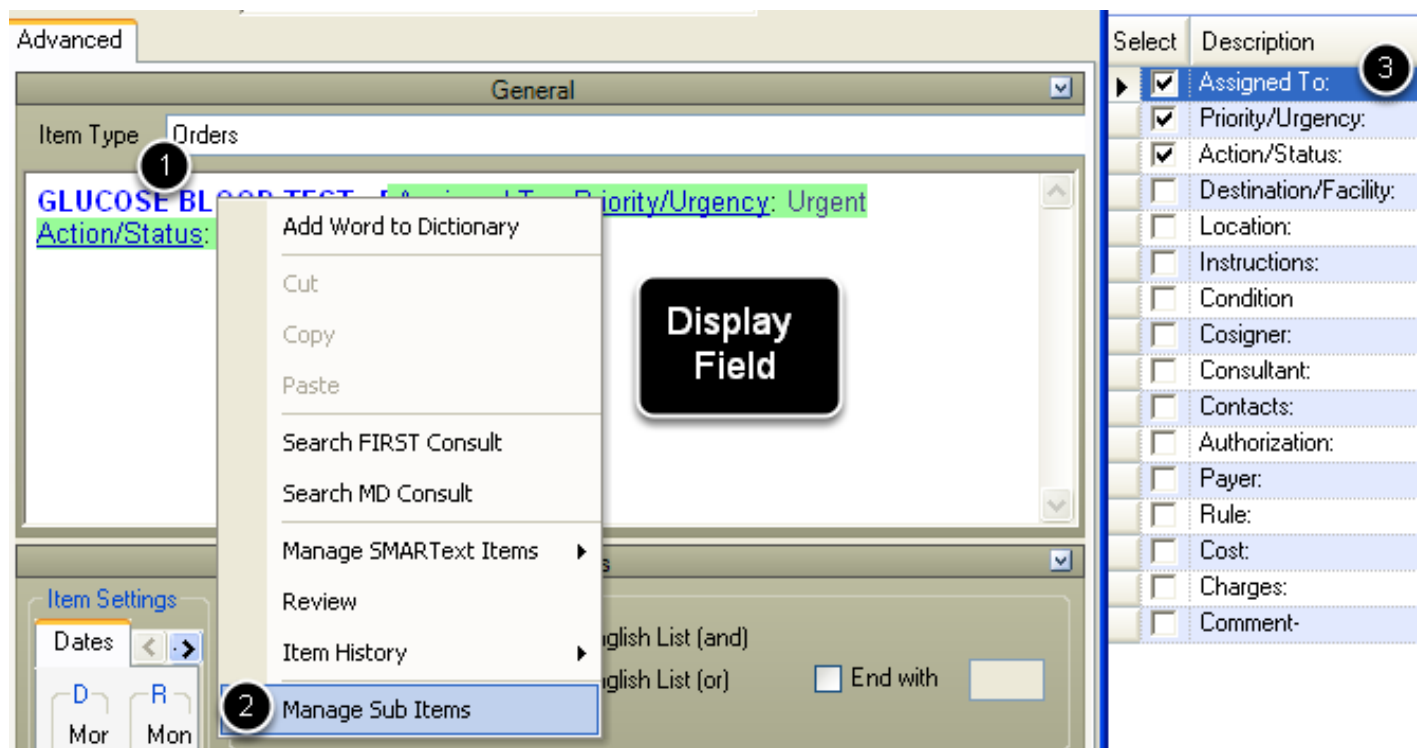
## Customization Order Entry Sub-Items



To display customized Order Entry sub-items in the SMARText Quick Access window follow these steps:

- 1) Duplicate the item to be customized by right clicking over the Order Entry Item and click on Duplicate
- 2) Click on the edit button to begin the customization
- 3) Drag the SMARText Designer so that it is next to SMARText Quick Access

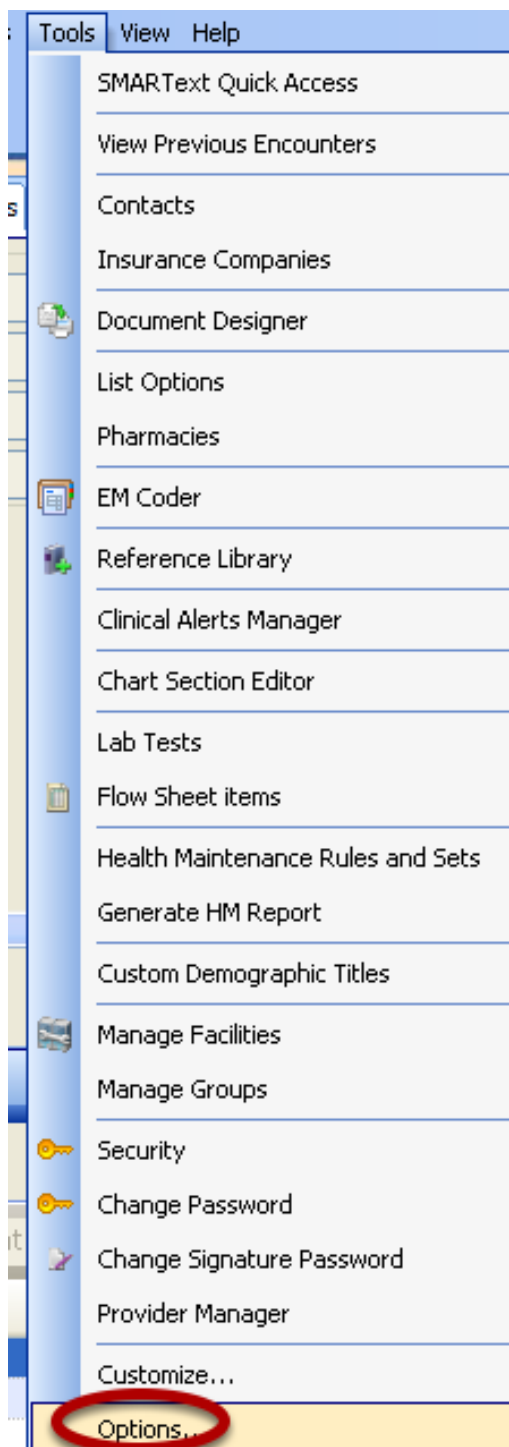
## Selecting Sub-Items To Be Displayed In Order Entry SMARText Items



- 1) Right click anywhere on the blue/bold words of the Display Header that is shown in the Display field of the SMARText Designer
- 2) Click Manage Sub-Items

3) Select Sub-Items to be used in SMARText Quick Access; For example: Click Assigned To to display a list of users set up for your practice

### Customize Order Manager and Plan Field Sub-Items



Order Entry sub-items that are displayed in Order Manager can be customized under the Tools menu item.

- 1) Click Tools menu item
- 2) Click Option

### 3) Click Structured Order Entry

## Structured Order Entry

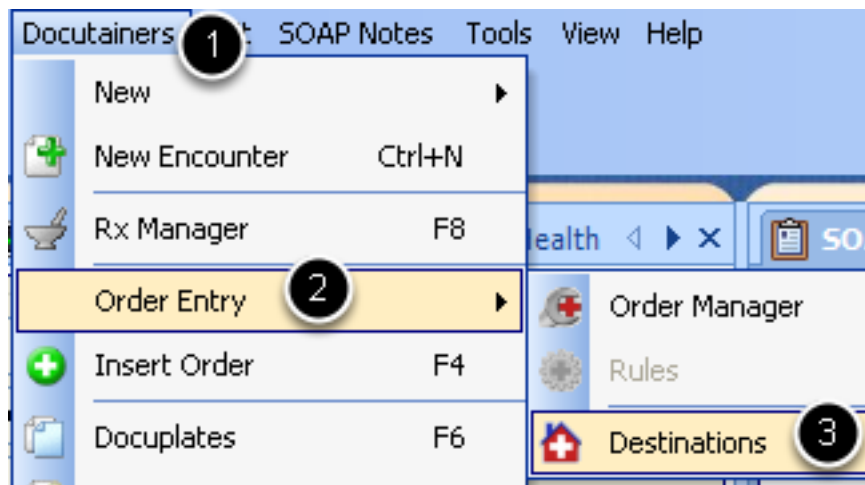
There are two tabs for Structured Order Entry sub-items:

- 1) Order Manager
- 2) Plan

Sub-items may be customized for both Order Manager and the Plan field (i.e. after an order is entered into a SOAPnote). Rarely, if ever, would most users want more than 2-4 sub-items displayed.

Unchecking a sub-item box in SMARText Quick Access is recommended instead of deleting the sub-item.

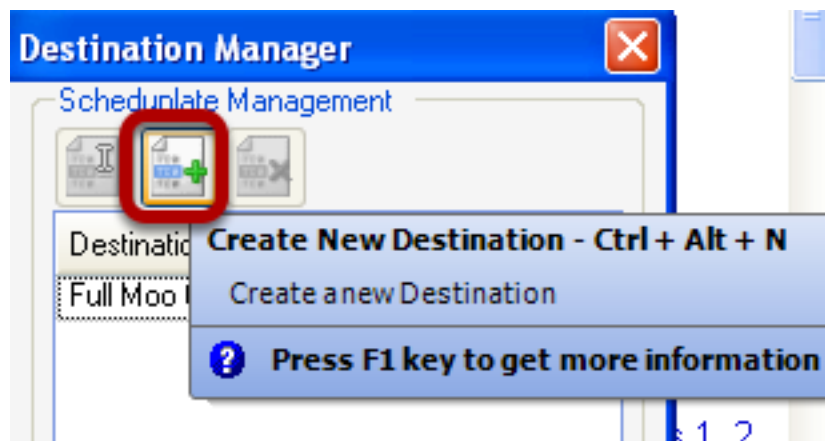
## Order Entry Destination Set Up



Order Entry Destinations are facilities that are user defined where orders can be submitted. For example, Memorial Hospital Lab might be a destination. It is a place to send orders (i.e. tests, labs, studies, procedures, equipment, etc.) to be processed.

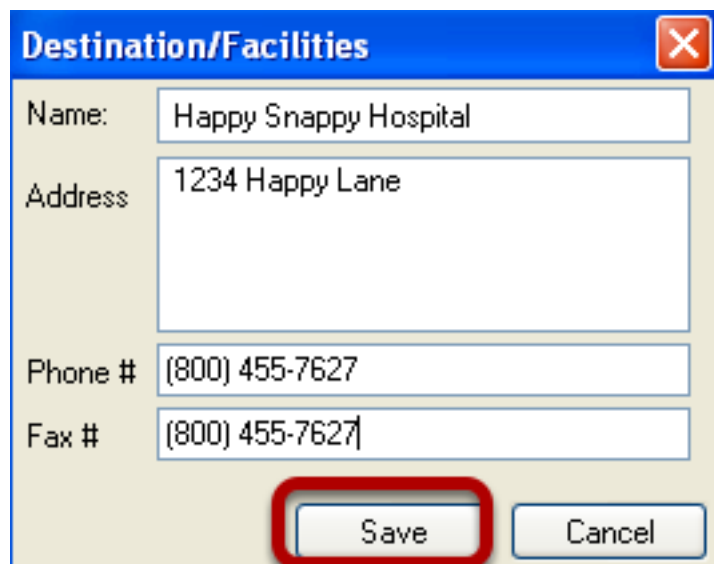
- 1) Click Docutainers
- 2) Click Order Entry
- 3) Click Destinations

## Destination Manager



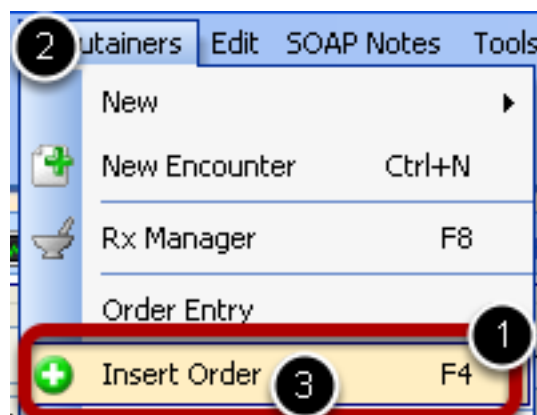
Click the **Green +** to enter information for a new Destination. Click the edit button to edit the information for a Destination or the remove button to remove the Destination from list.

## Destination Demographics

A screenshot of a software dialog box titled "Destination/Facilities". It contains four text input fields: "Name:" with "Happy Snappy Hospital", "Address" with "1234 Happy Lane", "Phone #" with "(800) 455-7627", and "Fax #" with "(800) 455-7627". At the bottom, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular box.

Enter the demographic information for the new Destination and Click Save.

## Quick Entry for Orders (Insert Order or F4)

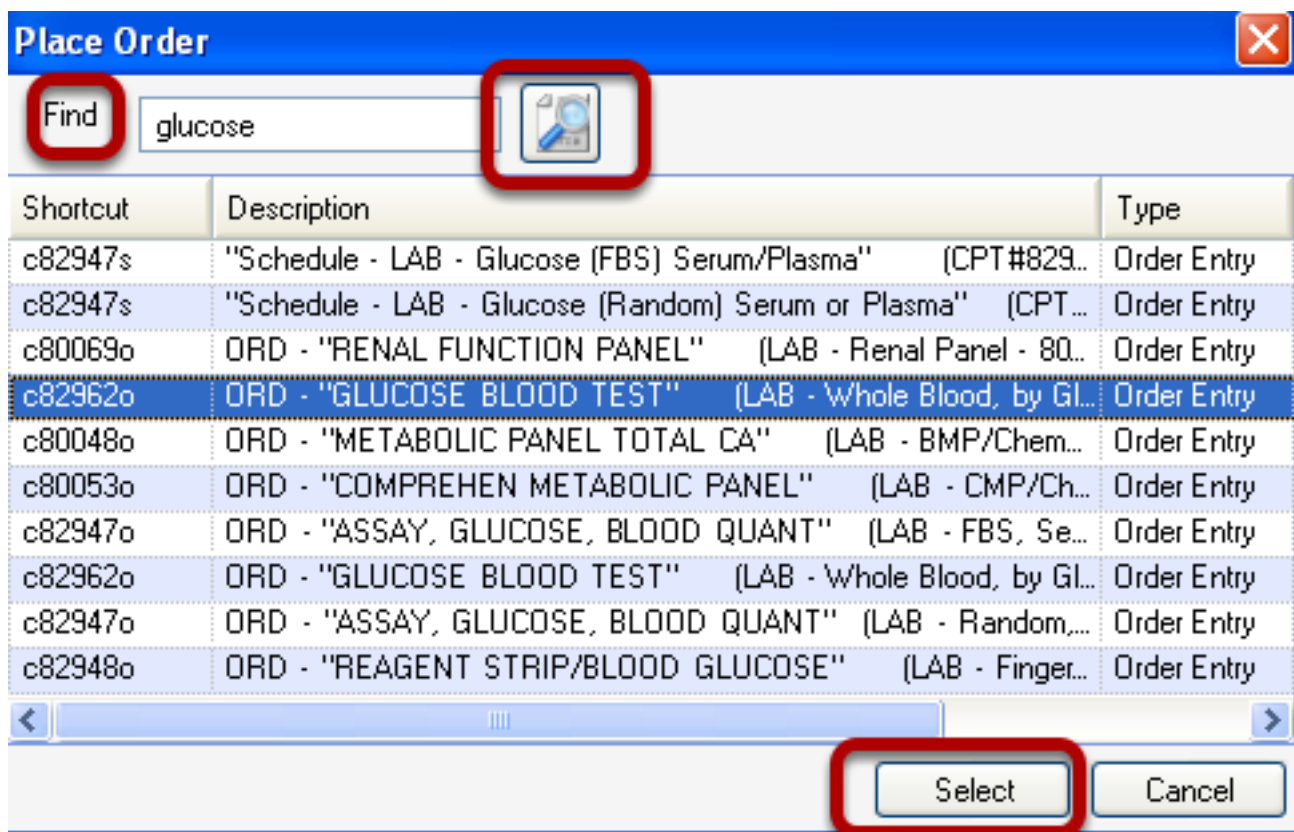


There are 2 methods for inserting orders into SOAPnotes. One way is via the Order Manager, and the second is via Quick Entry (Insert Order or F4).


With a patient chart and SOAPnote open:

- 1) Press your F4 key or
- 2) Click on Docutainers menu item
- 3) Click Insert Order

## Place Order Dialog



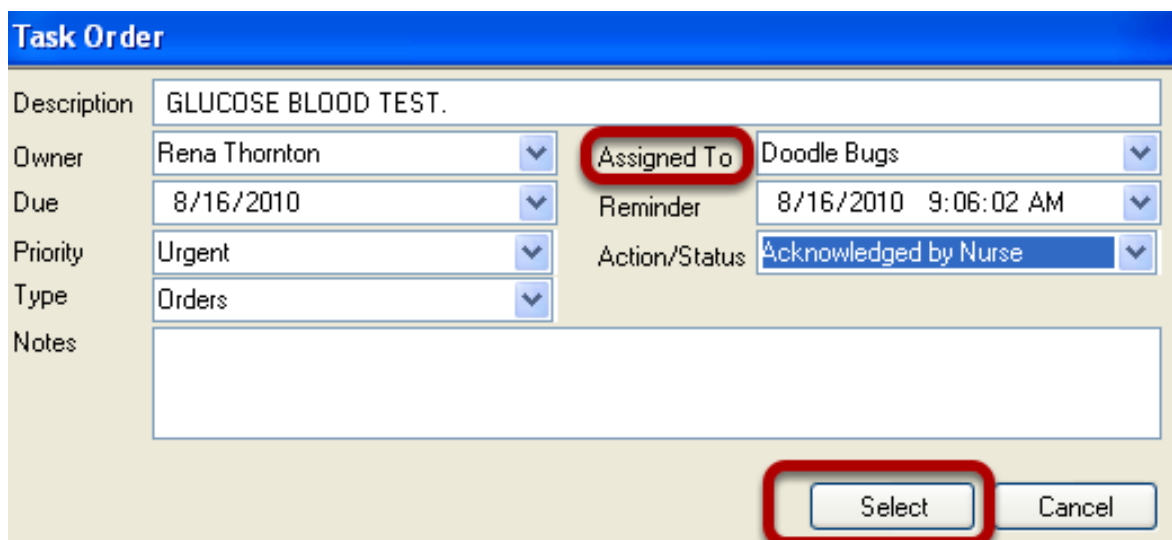
**Place Order**

Find  

Shortcut	Description	Type
c82947s	"Schedule - LAB - Glucose (FBS) Serum/Plasma" (CPT#829...	Order Entry
c82947s	"Schedule - LAB - Glucose (Random) Serum or Plasma" (CPT...	Order Entry
c80069o	ORD - "RENAL FUNCTION PANEL" (LAB - Renal Panel - 80...	Order Entry
c82962o	ORD - "GLUCOSE BLOOD TEST" (LAB - Whole Blood, by Gl...	Order Entry
c80048o	ORD - "METABOLIC PANEL TOTAL CA" (LAB - BMP/Chem...	Order Entry
c80053o	ORD - "COMPREHEN METABOLIC PANEL" (LAB - CMP/Ch...	Order Entry
c82947o	ORD - "ASSAY, GLUCOSE, BLOOD QUANT" (LAB - FBS, Se...	Order Entry
c82962o	ORD - "GLUCOSE BLOOD TEST" (LAB - Whole Blood, by Gl...	Order Entry
c82947o	ORD - "ASSAY, GLUCOSE, BLOOD QUANT" (LAB - Random,...	Order Entry
c82948o	ORD - "REAGENT STRIP/BLOOD GLUCOSE" (LAB - Finger...	Order Entry

The desired orders can be found either by searching in the Find field/box or by scrolling through the Place Order list. To use the Find/Search method, type the **shortcut of keyword** in the Find field, and Click the Search button. *This only searches the local database and does not search the online library.*

## Task Order



**Task Order**

Description:

Owner:

Assigned To:

Due:

Reminder:

Priority:

Action/Status:

Type:

Notes:

Click to select the user the task needs to be assigned to from the Assigned To drop-down menu, and then Press the Select Button.

For Quick Entry to most efficient, it is advised that the clinicians pre-define and store the Assigned To and other values. If this is done, entering an order can be done in three easy steps:

- 1) Press F4
- 2) Type the order's shortcut
- 3) Press Enter

The order has been placed into the SOAPnote Plan field, and an associated Task Item has been created to track the order.



# Clinical Alerts

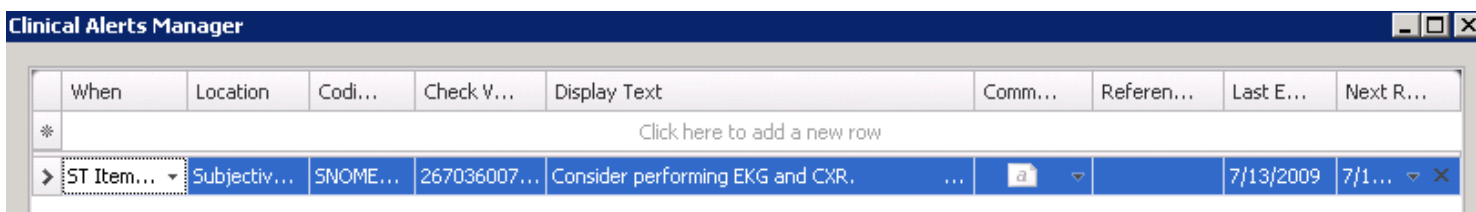
## Clinical Alerts

Clinical Alerts are a simple way to have SOAPware display text based prompts/reminders when a defined value is found in a specific location within the chart. Clinical Alerts are automatic. When one is triggered, a small pop-up will display, and then slowly fade out after a few moments. The basics of an alert are defined by When, Location, Coding Type, Check Value, and Display Text.

### \*REQUIRED FOR MEANINGFUL USE CORE REQUIREMENT - ONE CLINICAL DECISION SUPPORT RULE

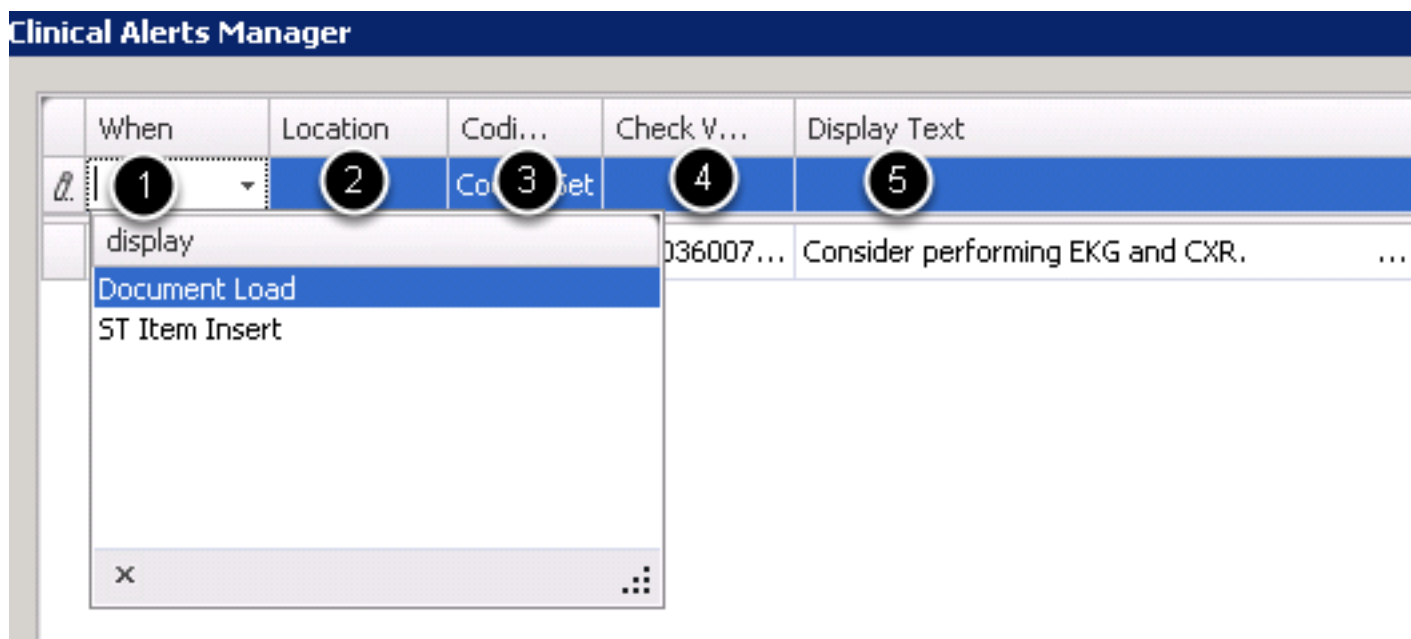
[Click here to view Meaningful Use criteria](#)

#### How To Access Clinical Alerts



Click Tools in the menu bar, and click Clinical Alerts Manager to display the Clinical Alerts Manager.

#### How To Create a Clinical Alert



To add a new rule, click in the top row of the display. The next step will be to define the basics of the alert:

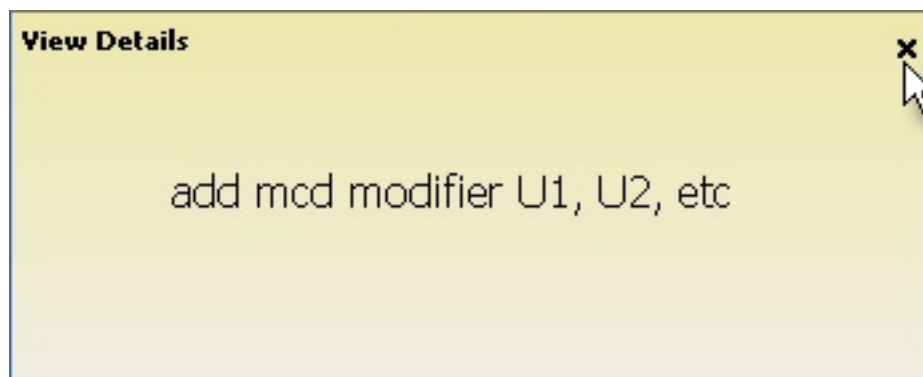
**1. When-** Defines when (i.e. the trigger) the alert is presented (e.g. when opening a document or when inserting a SMARText Item).

- 2. Location-** The name of the SOAPnote or Summary field in which to watch for entry of the code/word/trigger (Assessment, Plan, Inactive Problems, etc.). Select the drop down list of standard fields, or type in the name of a custom field.
- 3. Coding Type-** The match can be to text or to any of the coding systems (e.g. ICD-9, CPT, SNOMED-CT, LOINC, SWICPC, etc.) SOAPware supports the Codes/Notes sections of the SMARText Item Editor.
- 4. Check Value-** This is the value SOAPware looks for to match. In the case of text, it is case insensitive.
- 5. Display Text-** This is the text that will be displayed to alert users when a positive match is found.

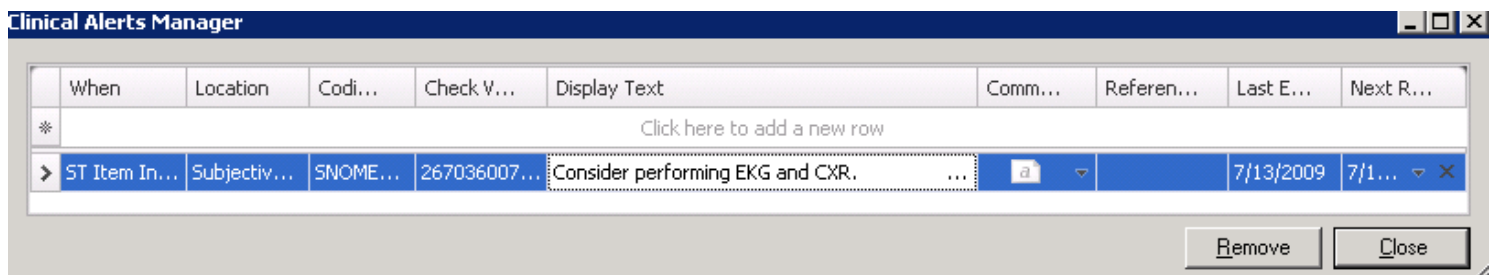
Complete each field and Click the Close button to save.

Any pending alerts can be displayed, on demand, for the current chart by clicking View in the main menu, and selecting Clinical Alerts.

## Clinical Alerts Display



## Removing a Clinical Alert



Click to highlight the line item and then click on the Remove button.

# Reference

## Meaningful Use

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To learn more about Meaningful Use and SOAPware, see: [Meaningful Use Overview](#).

## Upgrades and Updates

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### Updates

Drug DB Updates are handled with the same update from Multum/Cerner. The updates are applied to the central, SOAPware drug information server on a monthly basis. SOAPware Drug Interaction checking takes place at our data center and is accessed automatically from the SOAPware client via secure web services. A history of Drug Data updates is made available on our publically available web site.

Drug DB Updates come in two forms - the first is making new "structured" drugs available for download by our users and the second is ensuring that the drug interaction engine has the latest data. In both cases, this is handled with the same update from Multum/Cerner.

<http://www.multum.com/>

The updates are applied to the central, SOAPware drug information server on a monthly basis. To make sure that items on your local database are up to date, it is recommended that you update SMARText once a month.

SOAPware Drug Interaction checking takes place at our data center and is accessed automatically from the SOAPware client via secure web services. Thus, users have no need to apply drug updates nor do they have to be concerned they are out of date.

### Upgrades

To keep up with the latest SOAPware version, see: [Intro to Updating](#).