



FAQ's

FAQ's

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Billing Specific



Q: How do I add modifiers to the existing modifiers list?

A: Users do not have the ability to add to the existing modifier list. This list is defined by CMS and is not editable.



Q: What is a Related Dx SMARText item?





A: The Related Dx SMARText item is used to indicate the diagnosis code(s) that relate to the particular CPT code in the SOAP encounter note.

Explanation of Related Dx SMARText item

Plan

CHEST X-RAY. #71010 Related Dx- [] Modifiers-
Date of Service From: 12/30/2010 Date of Service To:
12/30/2010



SMARText Quick Access			
   			
S	C	ICD	Description
<input type="checkbox"/>	0	466.0	Acute bronchitis
<input type="checkbox"/>	0	281.2	Anemia, folate deficiency
<input type="checkbox"/>	0	493.9	Asthma
<input type="checkbox"/>	0	491.21	COPD, Bronchitic with acute exac...
<input type="checkbox"/>	0	250.13	Diabetes - Type 1 - with ketoacida...

The diagnosis codes that are entered into the **Assessment field** within the SOAPnote, or in the **patient's Summary Active Problems field**, will display in the SMARText Quick Access when the Related Dx header is left-clicked over within the **Plan field**.



Database



Q: What is the PostgreSQL database top capacity?

A: PostgreSQL is the database included with SOAPware. Postgre SQL is capable of handling the medical records for millions of patients and thousands of clinicians.

Actually, the largest and busiest database in the world is PostgreSQL. See the link below for more information on PostgreSQL.

[Computer World](#)



Q: How do I backup my database?

A: Please see the following links for information on backing up your SOAPware database:

- [Backing Up SOAPware Data](#)

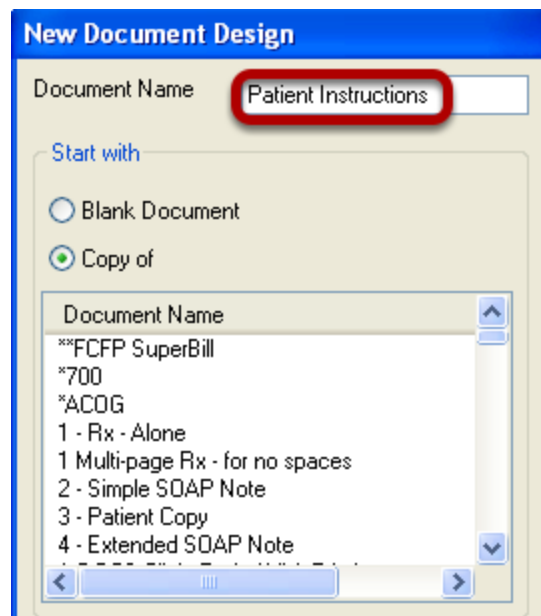


Document Designer

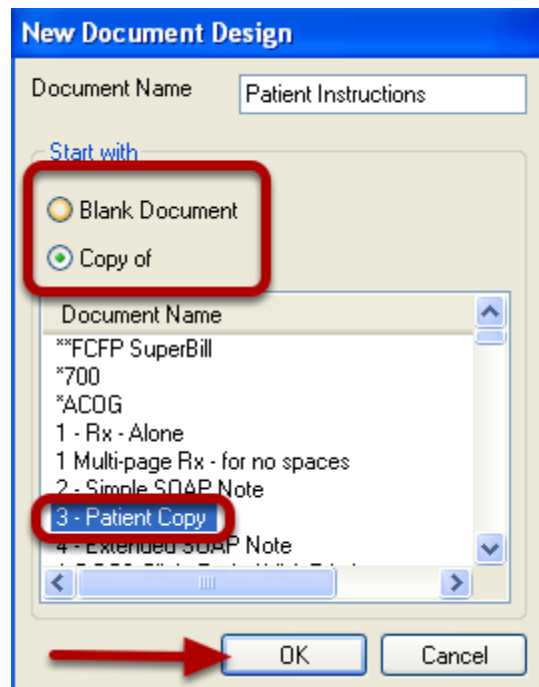


Q: How do I create a new Document Design in Document Designer?

A: To begin creating a new Document Design, the Document Designer window will need to be opened (Tools > Document Designer).



Click on File > Create New Design. Give the new Document Design a Document Name.



To use an existing Document Design to modify, Click the selection, Copy of . To create a Document Design using a blank document, Click to select, Blank Document. Click OK.

The new Document Design will display. Auser can then edit/create the document by using data command items , entering text, macros , or images for clinic logos .



Q: How do I designate a document design as an Order?

A: A user is able to designate a document design as an Order through Document Designer.

Orders - Lab Request

File Edit View Insert Data Items Font Paragraph Table Other

Normal Arial 14 B I U

1 2 3 4 5 6

Current Provider Full Name

Clinic Info Address

Clinic Info Phone Number

Clinical Order Request

General Demographics Field Address

Patient's Name	General Demographics Field First Name	Date	Ins
	General Demographics Field Last Name		M/d/d
Date of Birth	General Demographics Field Birthdate		
Address & Telephone Number	General Demographics Field Home Phone		

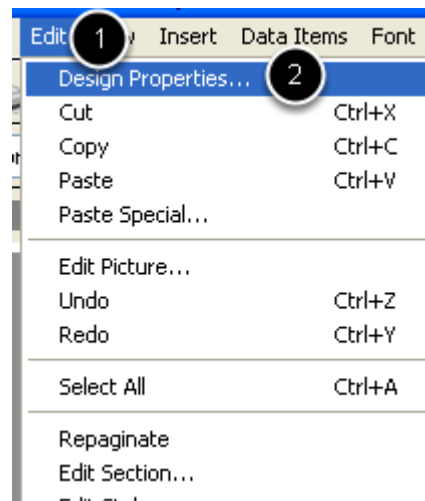
Diagnosis For Lab Request:

Encounter Field Assessment

Labs Requested:

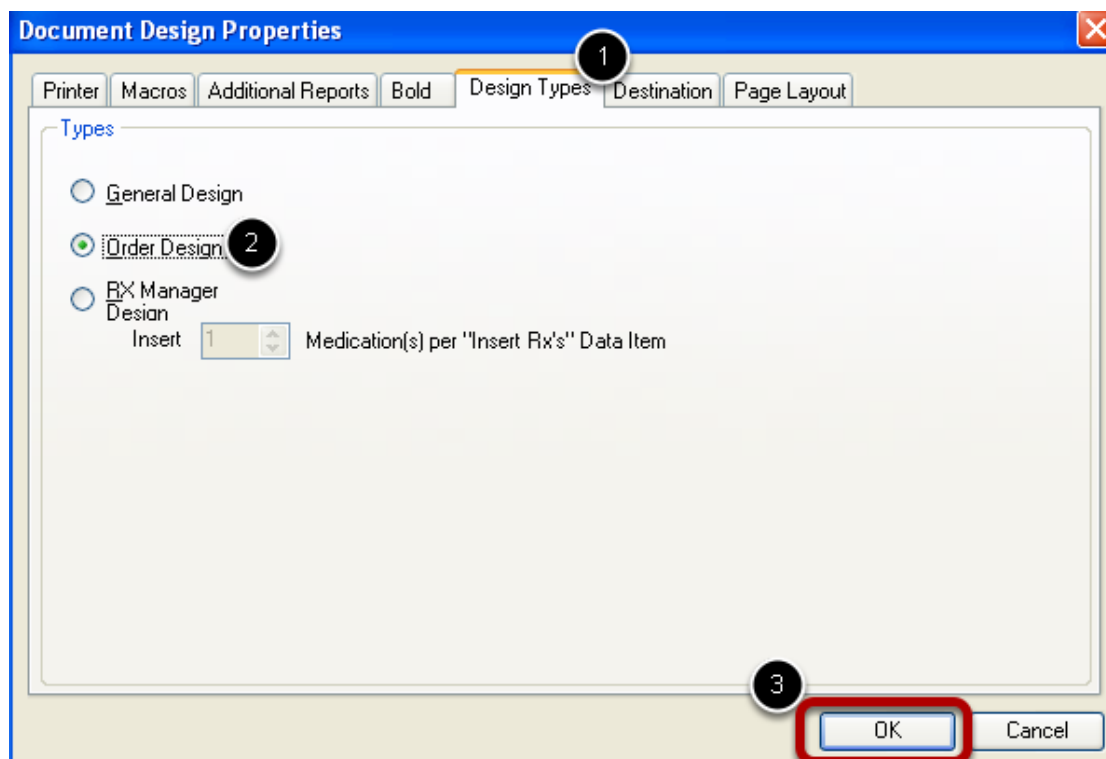
INS Page: 1 Line: 1 Col: 1

Open the Document Design that needs to be designated as an Order.



With the Design open:

1. Click Edit.
2. Click Design Properties.



1. Click on the Design Types tab.
2. Select Order Design.
3. Click OK.

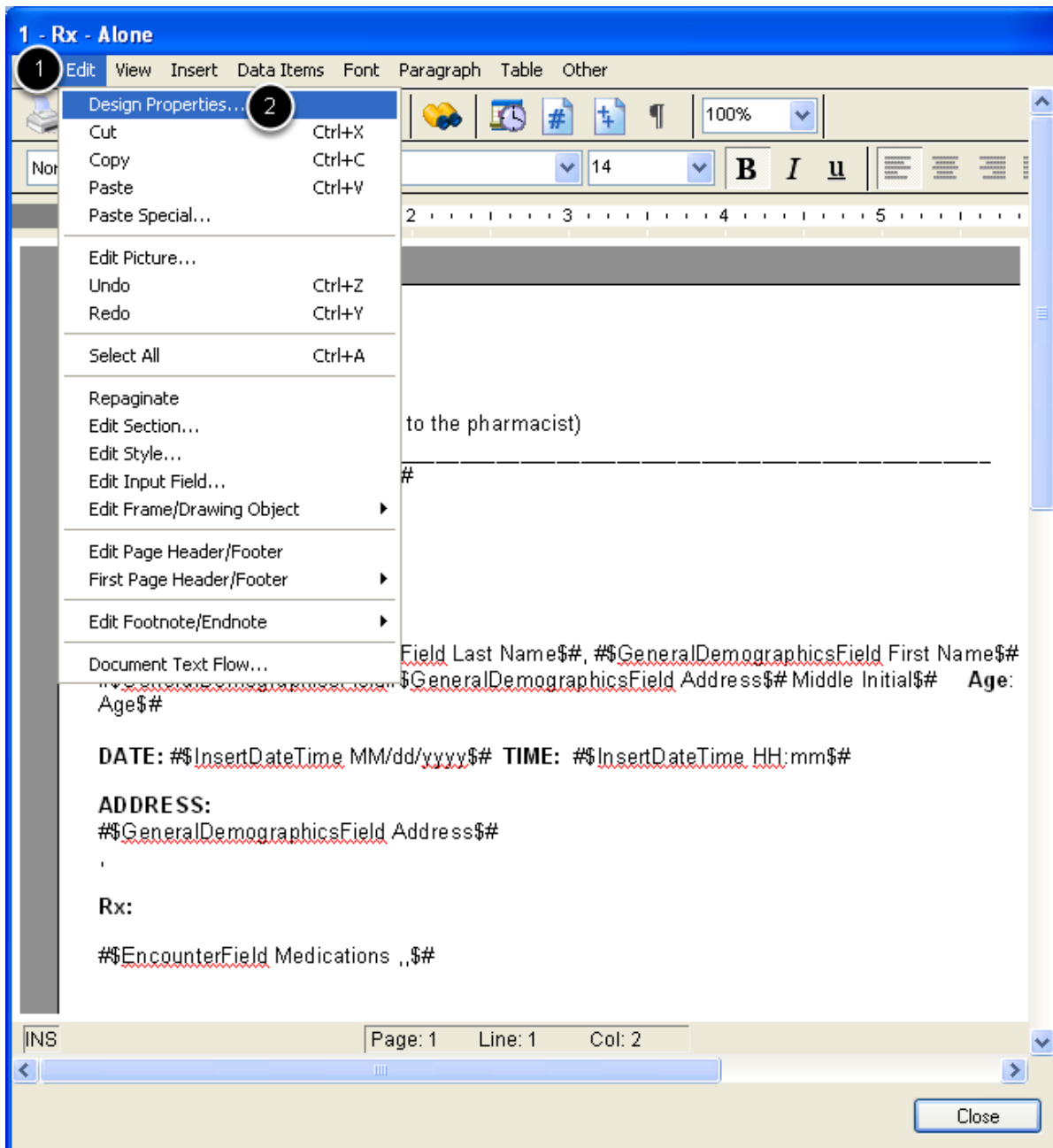


Upon closing the design, there will be a prompt to save any changes.

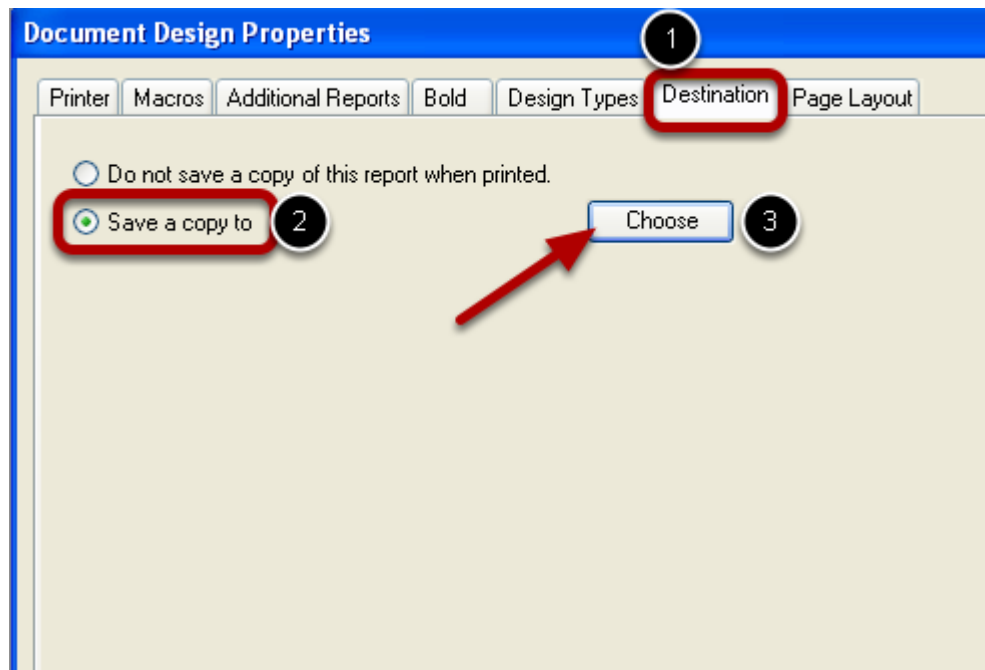


Q: Where are the "Save To" or "Insert" data commands in Document Designer?

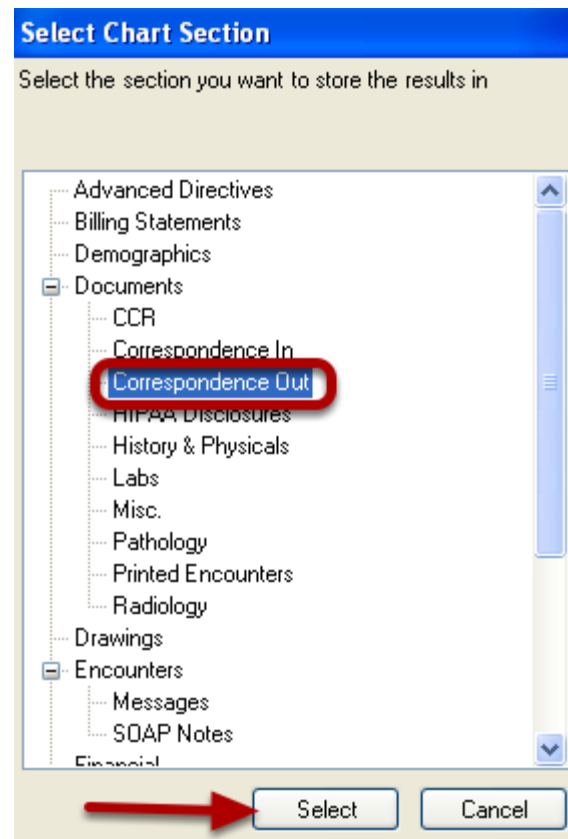
A: These commands are found within Design Properties in Document Designer. (Tools > Document Designer)



1. Click Edit.
2. Click Design Properties.



1. Click the Destination tab.
2. Select "Save a copy to."
3. Click the "Choose" button to select a chart section.



Click to highlight the chart section of choice, then Click Select.

Date	<input type="text"/>
Name	<input type="text"/>
Author	<input type="text"/>
Source	<input type="text"/>
Condition	<input type="text"/>
Status	<input type="text"/>

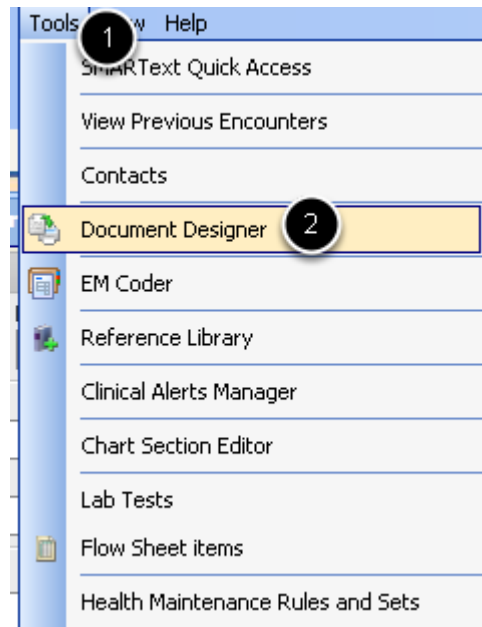
OKCancel

The option to give the Document Design demographic information is available. If no information is entered, Click OK. A window will prompt the user to save the changes to this design upon closing the design.

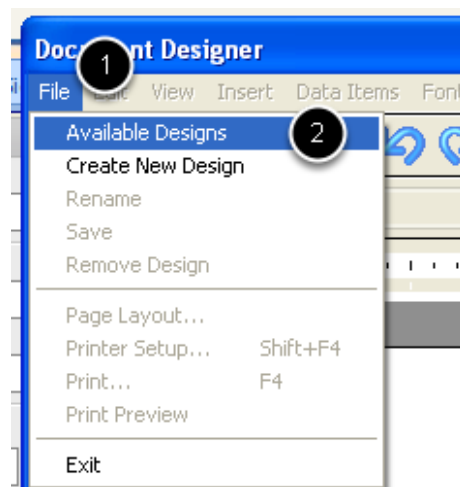


Q: How do you put a signature on a Print Report?

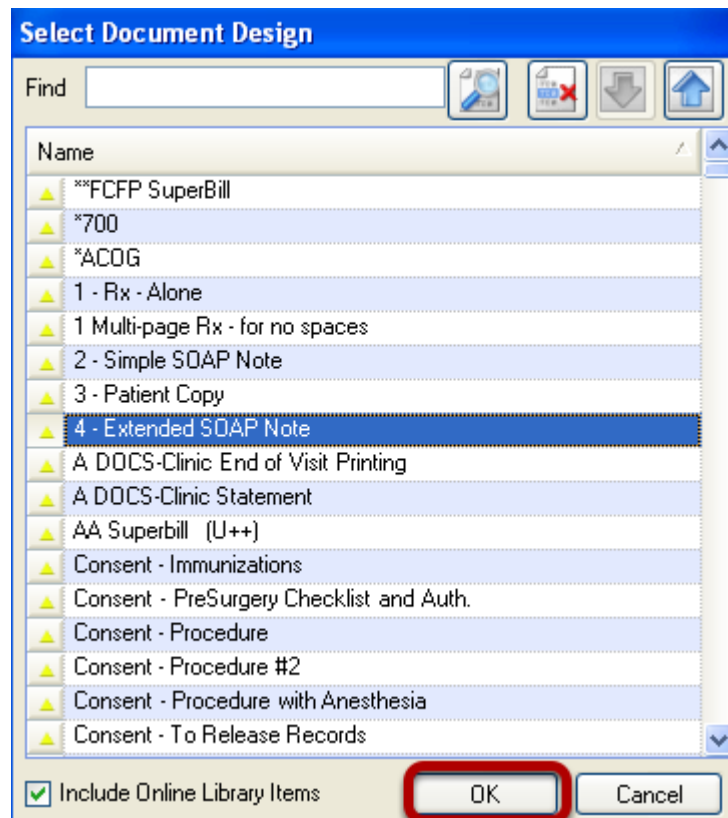
A: To place a signature on a print report or Document Design, use Document Designer, if there is a signature imported previously, into Provider Manager.



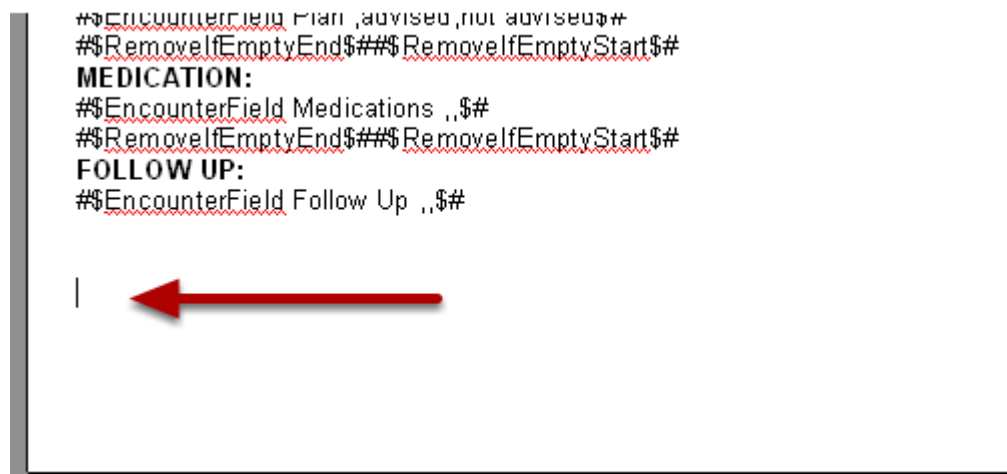
1. Click on Tools.
2. Click Document Designer.



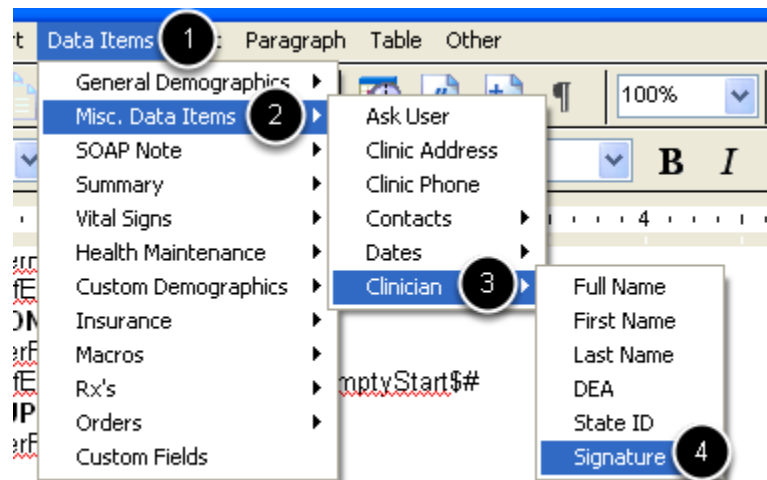
1. Click on File.
2. Click Available Designs.



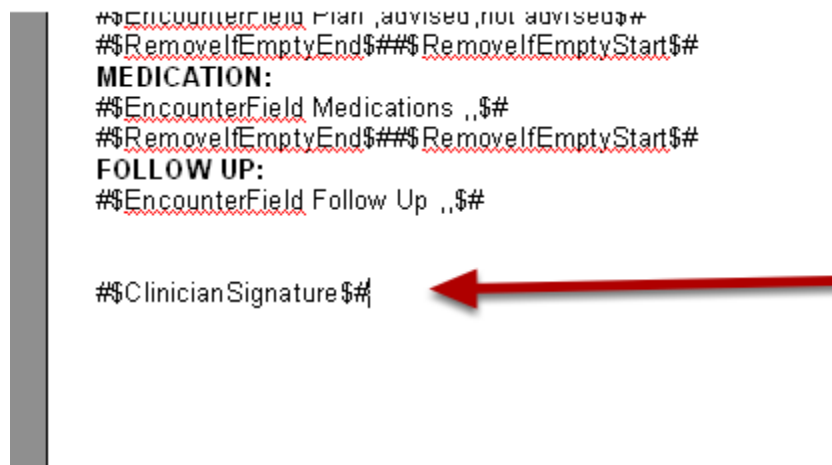
Click to highlight the Document Design to add signature, and Click Ok.



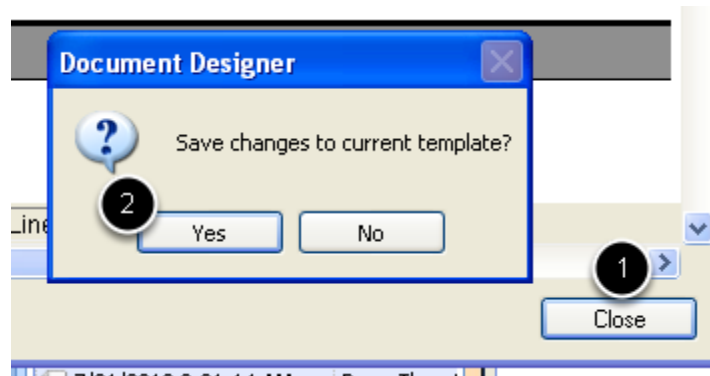
Place cursor at location of choice for signature insertion.



1. Click on Data Items.
2. Click Misc. Data Items.
3. Click Clinician.
4. Click Signature.



The Data Command is placed in the Document Design where the cursor was last placed. This will pull the Clinician Signature image that is in Provider Manager, onto the design.



1. Click Close.
2. Click Yes to save changes to the Document Design.



Document Review



Q: I am unable to access the Document Review workspace. The menu item is grayed out. Why?

A: When a menu item is grayed out, the user has not been given security access for this function. A SOAPware user with Administrator rights has the ability to give security access within SOAPware, to other users.

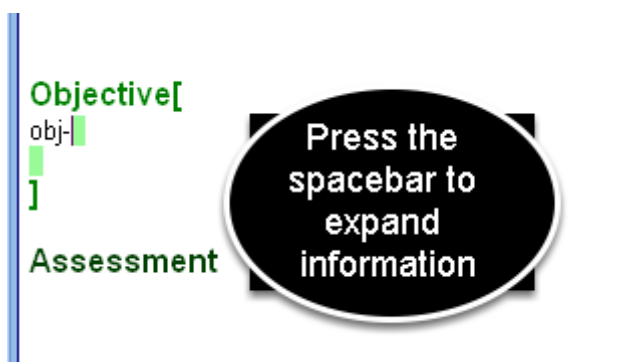


Docuplates



Q: How do I create a Normal Exam docuplate?

A: To set normal findings for a Normal Exam docuplate, a user would need to create this docuplate from a test patient's chart.



In the Objective field, use the shortcut code "obj-", then press the spacebar to expand information. If this SMARText item has never been used, it will need to be searched by pressing the Shift + F11 keys, to be inserted into the SOAPnote.



Objective[

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

LYMPHATIC:

HEAD/EARS/NOSE/THROAT: no lesions of oral or
nasal mucosa, tympanic membranes are intact

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 no wheezing, rhonchi, rales or rubs and with
equal breath sounds.

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.

Mood and affect are described as normal mood and
full affect.

SKIN: Skin Inspection: No rashes or lesions.

+++++

The SMARText body system pick lists for the exam will display. By default, this will enter a "normal exam".



Objective
Exam: GENERAL: Appearance: General appearance can be described as well-nourished, well-developed, and in no acute distress.
LYMPHATIC:
HEAD/EARS/NOSE/THROAT: no lesions of oral or nasal mucosa, tympanic membranes are intact
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 [no wheezing, rhonchi, rales or rubs and w equal breath sounds.]
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

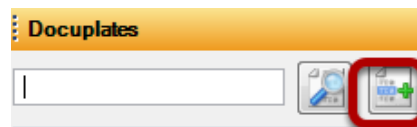
SMART Text Quick Access

Active Item: auscultation elicits" (G)(C)(E)(F)(M)(H)(R)

Selected	Description	h	Ty	Us
<input type="checkbox"/>	"wheezing"		E...	1
<input type="checkbox"/>	"prolonged expirations"		St...	1
<input type="checkbox"/>	"emphysematous changes"		St...	1
<input type="checkbox"/>	"clicks"		St...	0
<input type="checkbox"/>	"rumbling"		St...	0
<input type="checkbox"/>	"whistling"		St...	0
<input type="checkbox"/>	"clear to auscultation"		St...	0
<input type="checkbox"/>	"crackles (rales)"		E...	0
<input type="checkbox"/>	"decreased breath sounds"		St...	0
<input type="checkbox"/>	"normal breath sounds"		E...	0
<input type="checkbox"/>	"on expiration"		E...	0
<input type="checkbox"/>	"on inspiration"		E...	0
<input type="checkbox"/>	"pleural friction rub"		E...	0
<input type="checkbox"/>	"prolonged inspirations"		St...	0
<input type="checkbox"/>	"respirations-shallow"		St...	0
<input type="checkbox"/>	"respiratory"		St...	0
<input type="checkbox"/>	"respiratory click"		E...	0
<input type="checkbox"/>	"rhonchi"		E...	0
<input type="checkbox"/>	"tachypnea"		St...	0
<input type="checkbox"/>	"blowing"		St...	0
<input type="checkbox"/>	"bruit"		St...	0
<input type="checkbox"/>	"barely audible"		St...	0
<input type="checkbox"/>	"snapping"		St...	0
<input checked="" type="checkbox"/>	@'no wheezing, rhonchi, ral...		E...	-1

Left- click on a body system sub-header, to change the findings from normal to another identified finding.

When a user is finished with the creation of a Normal Exam docuplate, Click F6 on the keyboard, to bring up the Docuplates dialog.



Click on the create button, and then give the new Normal Exam docuplate a shortcut, description, and keywords.
Lastly, Click on OK.



The Normal Exam docuplate is now available for use for all users on a local network.



Q: How do I create a docuplate?

A: Click on the link below to learn how to create a docuplate.

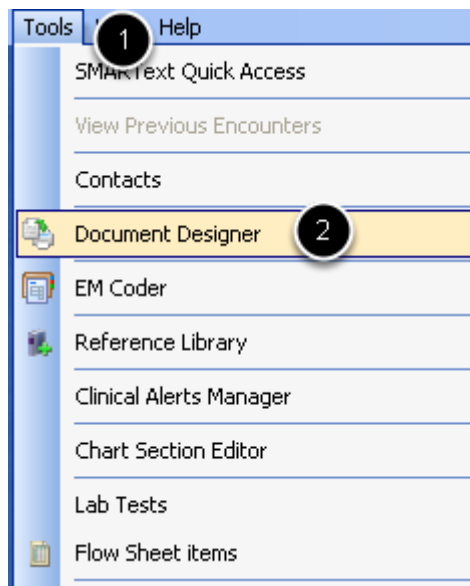
[Create a Docuplate](#)



Q: Can I use Document Designer commands in my docuplates?

A: Yes, Document Designer commands can be place in a temporary Document Design, and then copied and pasted into the docuplate.

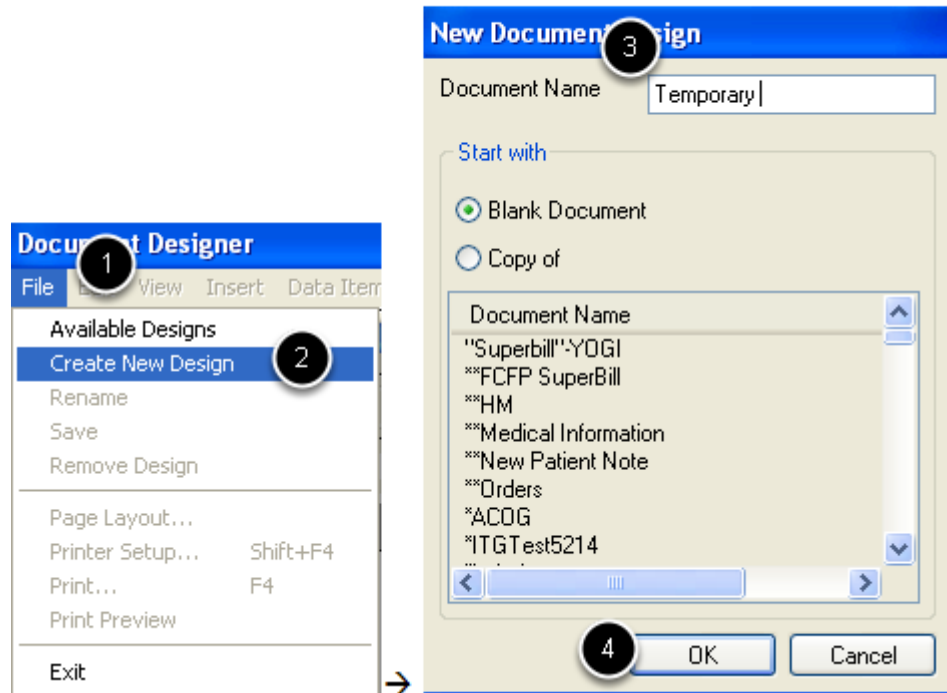
Access Document Designer



1. Click on Tools.
2. Click on Document Designer.



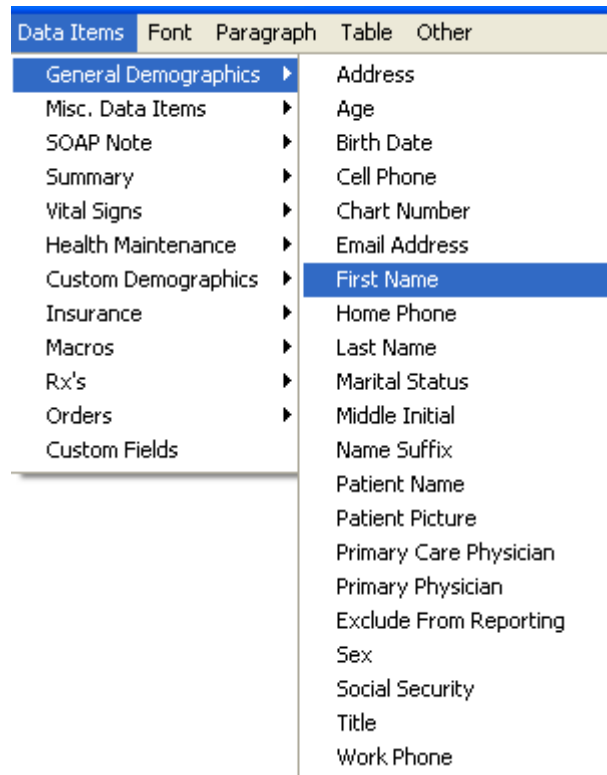
Create the Temporary Design



1. Click on File.
2. Click on "Create New Design."
3. Name the Design.
4. Click OK.



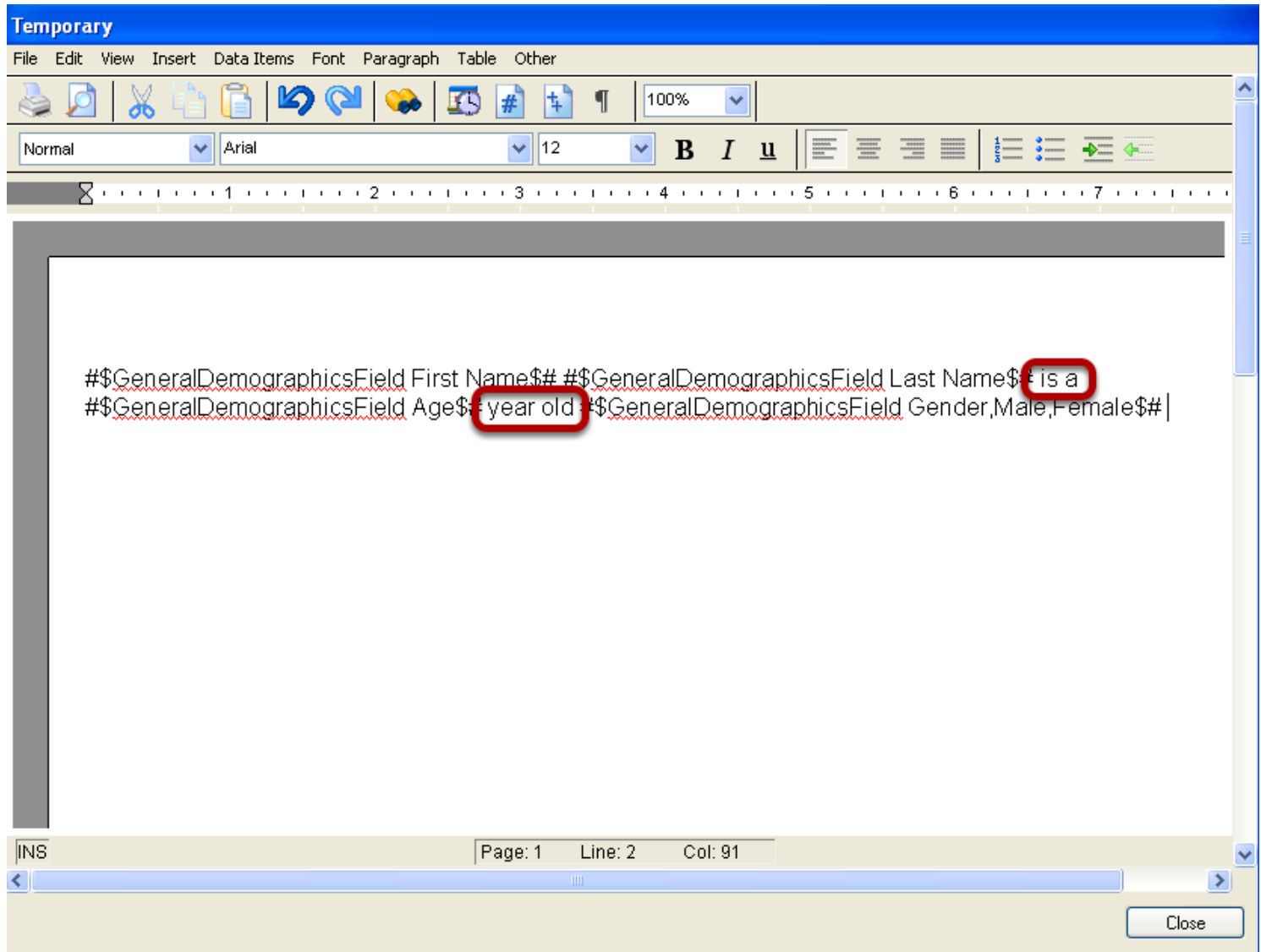
Access the Desired Commands



1. Click on Data Items.
2. Click on the desired commands, one at a time, to insert into the temporary design.



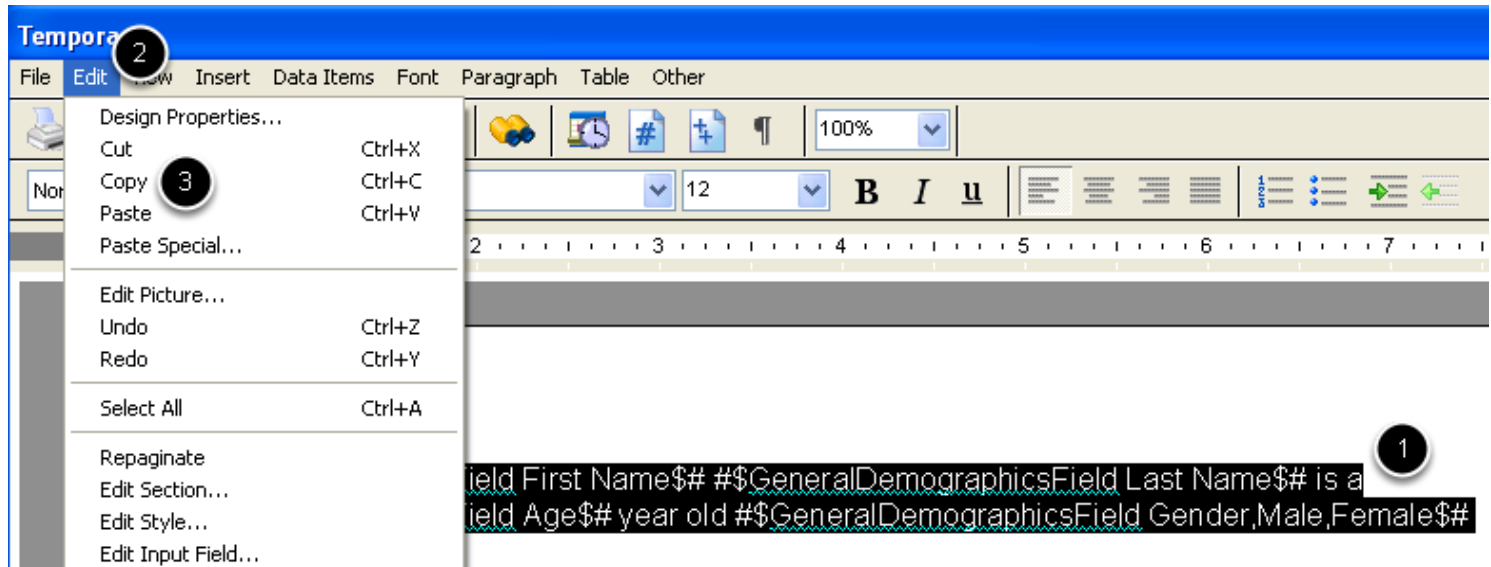
Incorporate Free Text



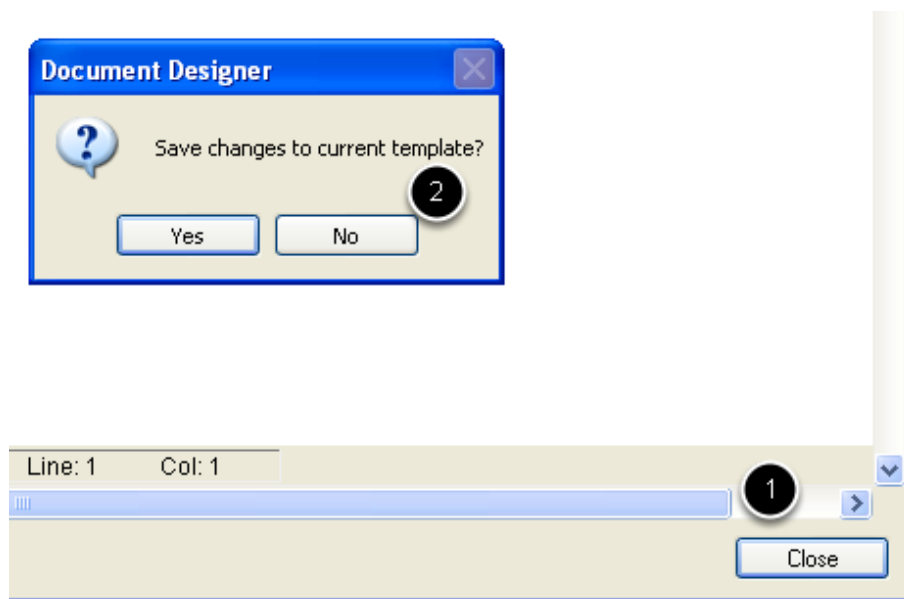
Free Text can be incorporated between the data commands.



Copy and Paste the Commands



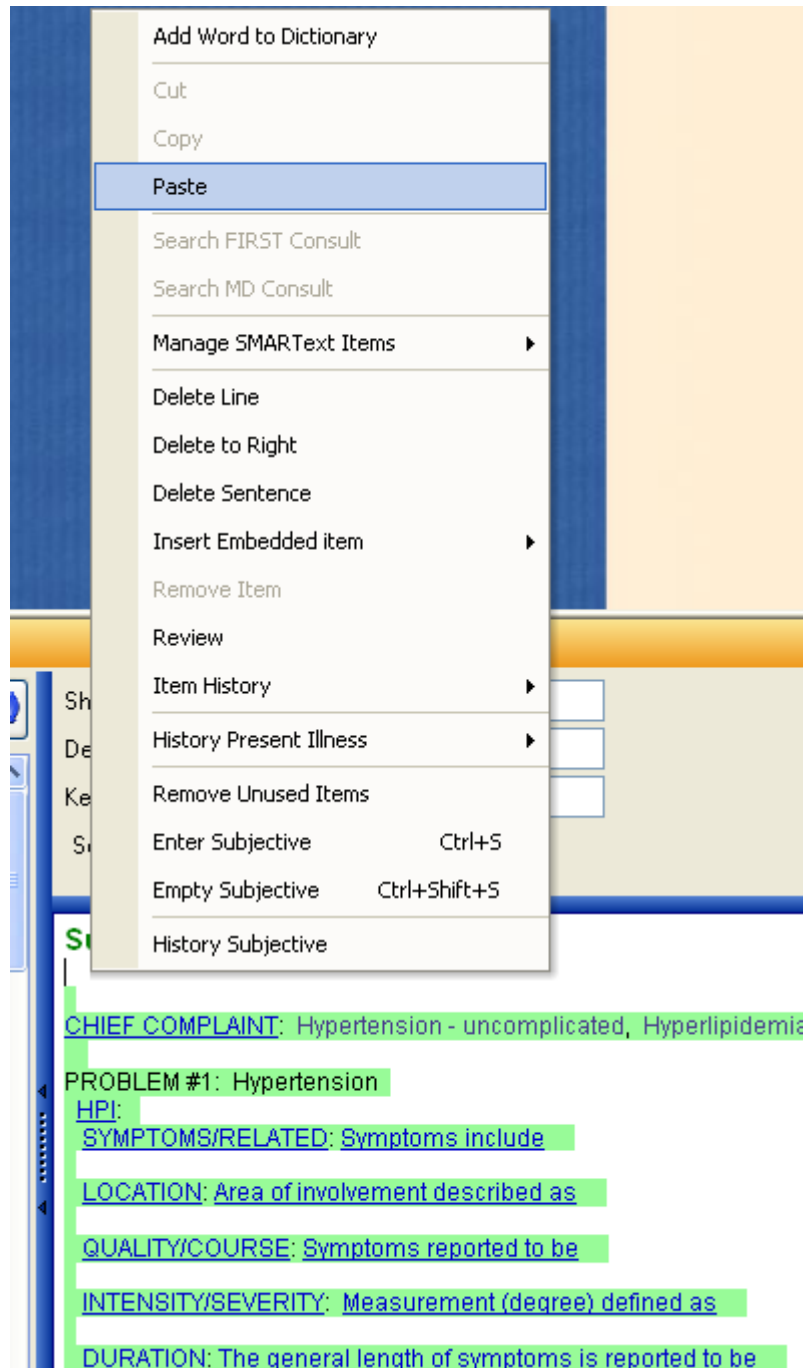
1. Click and drag the cursor over the text-to highlight the text.
2. Click on Edit.
3. Click on Copy.



1. Click on Close.
2. Click on "No" since this is a temporary Document Design.



Place the Commands in the Docuplate



Access the docuplate the commands are to go in. (**NOTE:** You will want to access the desired docuplate from the Docuplates tab-or press F6 on the keyboard--and insert the commands in the preview pane-to the right of the docuplate name. This will ensure that your changes/additions will



be saved for good.)

Click the cursor where the commands are to reside. Right-click and select Paste.

Results

Subjective

Runny Babbit is a 9m 4w year old Female

When the Docuplate is inserted into a SOAPnote, for example, the information will be pulled from the patient's demographics.



Drug Interaction Notifications



Q: Why am I receiving an interaction notice?

A: When opening the Rx Manager, drug interactions are checked. If there are any drug interactions for this patient, an interaction notice will be displayed. Many times, a notice will occur due to unstructured text being entered in the Summary Medications field, Allergy field, or possibly the SOAPnote Medications field.

If there is unstructured text in any of these areas that should be retained, it is best to enter "ID-ignore" at the end of the free text, to be excluded from drug interaction checks. The shortcut code for "ID-ignore" is: id-, then press the spacebar to expand.

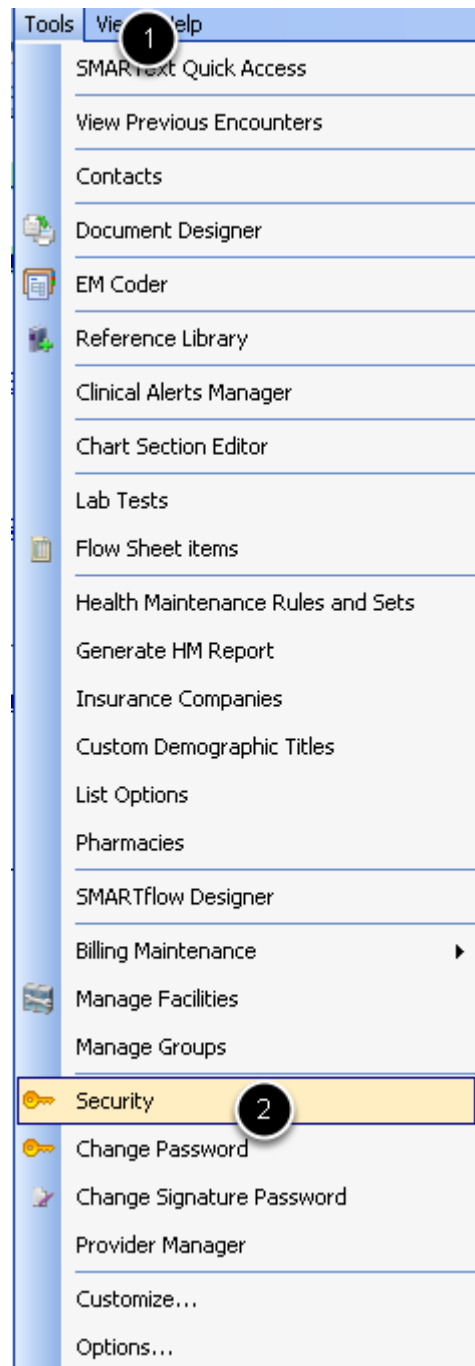


Q: How do I change the severity level of Drug Interaction Notifications?

A: Designating or editing the Drug Interaction Notification is a user-specific setting, that can be defined in Security.



Tools > Security



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



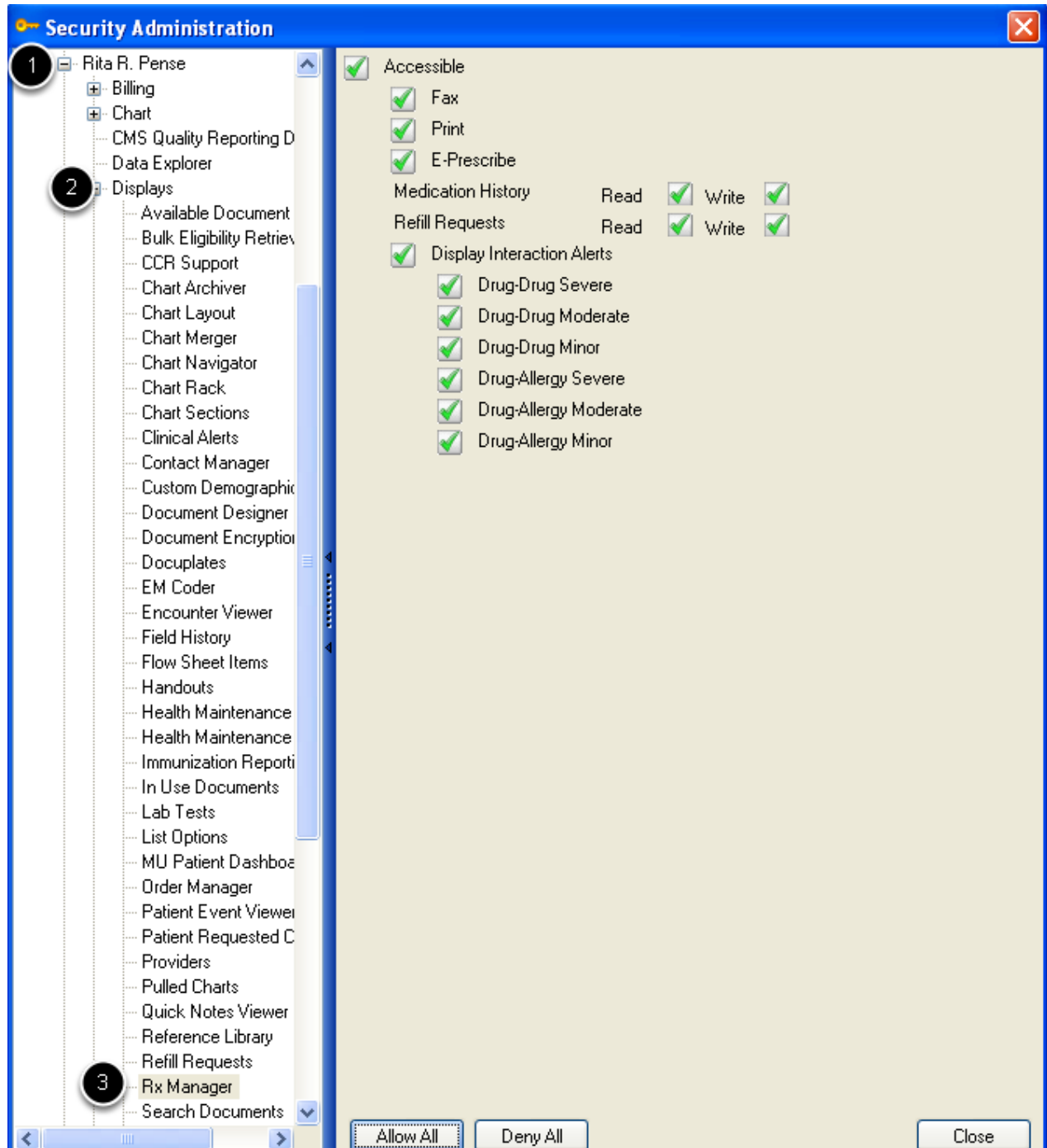
Selecting the User

The screenshot shows the 'Security Administration' window. On the left, a tree view under 'Users' lists several users. 'Rita Pense' is highlighted with a blue selection bar, and a red arrow points to it. Another red arrow points to the plus sign next to the 'Users' folder. On the right, the 'General' tab is active, showing the 'Login ID' as 'ripense'. The 'Name' section has fields for Title, First, M, Last, and Suffix, with 'Rita' in the First field and 'Pense' in the Last field. The 'Set Password' section has fields for Password and Confirm Password, both containing dots, and an 'Update' button. At the bottom, there is a checkbox for 'Account is locked out'.

1. Click on the plus sign (expander node) next to Users.
2. Click to highlight the users name.



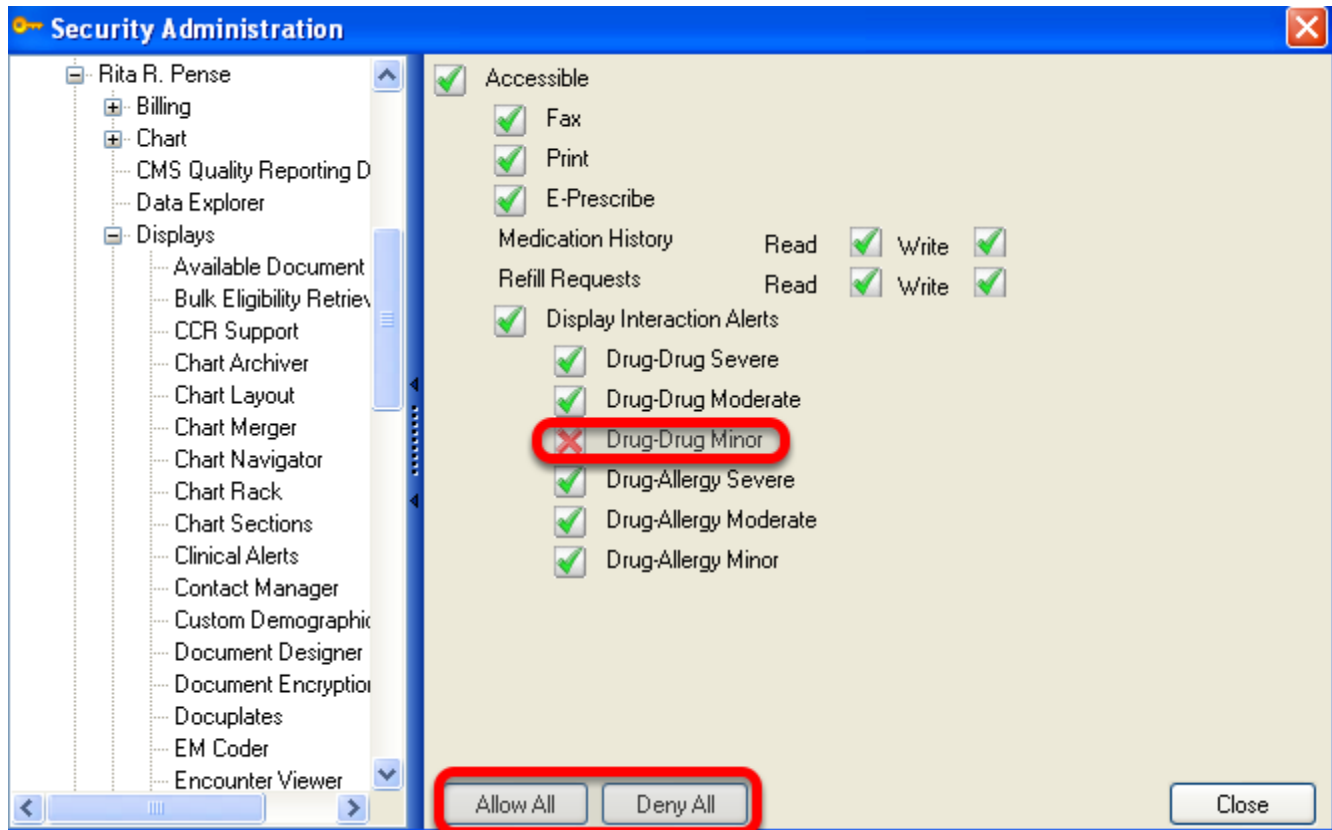
Rx Manager



1. Click on the expander node next to the users name.
2. Click on the expander node next to Displays.
3. Click to highlight Rx Manager.



Defining Alerts

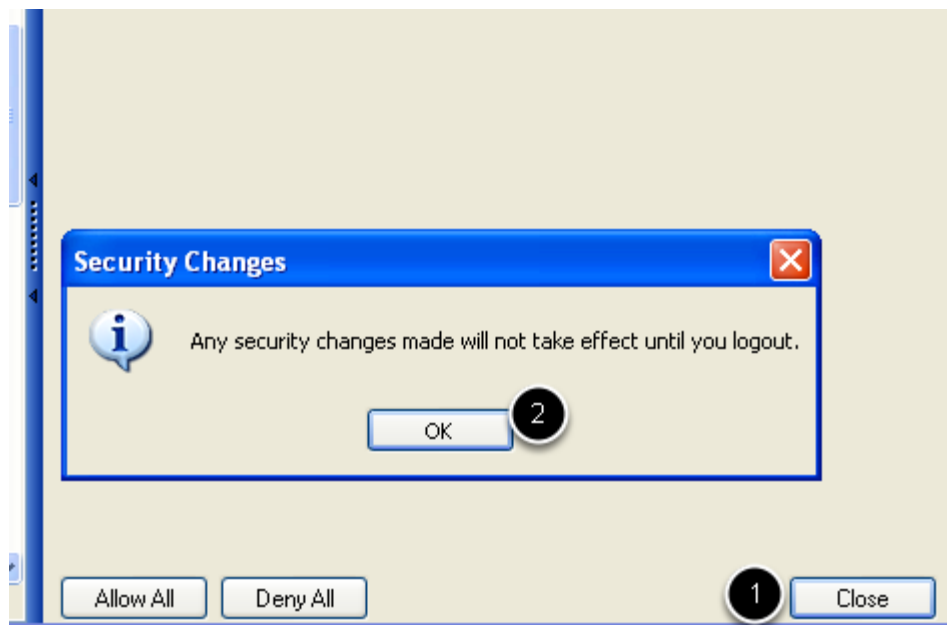


At this point, the user can select "Allow All" or "Deny All."

By clicking directly in the check boxes next to the severity alert, the user can place a red X (to deny access) or green check (to allow access).



Save the Selections



1. Click Close.

2. Click OK.

Logout of SOAPware, and back in for these changes to make effect.



EM Coder



Q: Why is the Level of Risk the color red in EM Coder?

A: The level of risk is automatically calculated for the user based on information found in the SOAPnote. The color red indicates to the user that the level was calculated by SOAPware and that the user should review the SOAPnote to ensure that the value is correct. If the user changes the level of risk manually, the color will change to black.

Note: It is very important for the user to always review the level of risk finding, as there are many rules and conditions that SOAPware cannot account for.

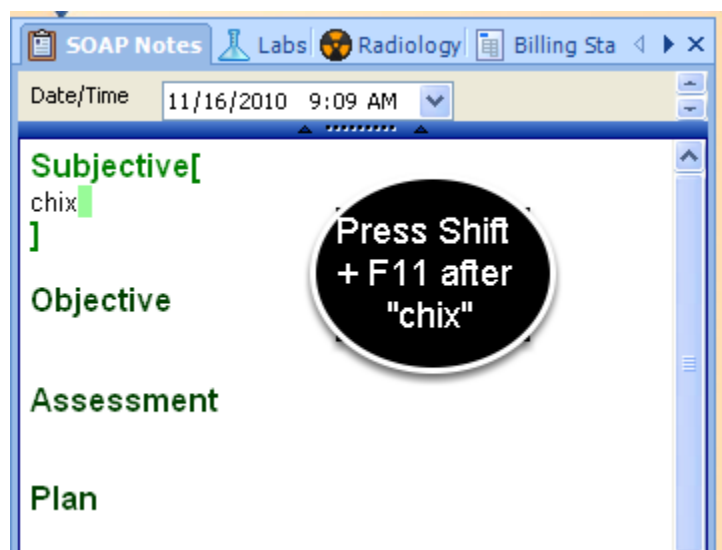


Q: How do I enter a Chief Complaint that will register in the EM Coder?

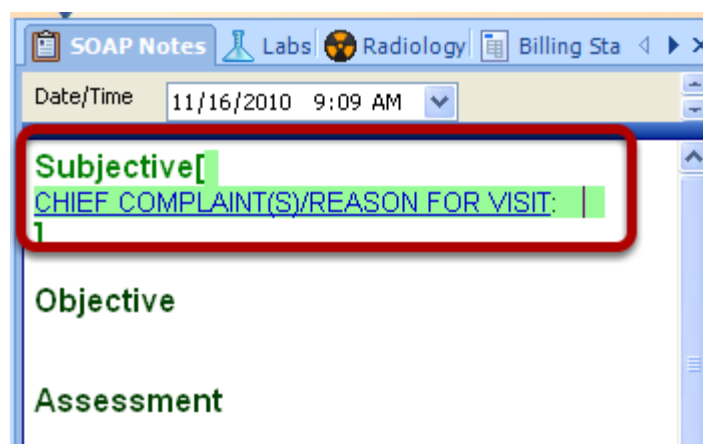
A: It is important to understand that the EM Coder mostly uses SMARText for all of its scoring, and the Chief Complaint is no exception. To enter a Chief Complaint a user must use a SMARText item of the Chief Complaint type.

A screenshot of the SOAP Notes form in the SOAPware application. The form has a title bar with tabs for 'SOAP Notes', 'Labs', 'Radiology', and 'Billing Sta'. Below the title bar is a 'Date/Time' field showing '11/16/2010 9:09 AM'. The main content area is a list of SOAP note sections: 'Subjective[', 'Objective', 'Assessment', 'Plan', 'Medications', and 'Follow Up'. A red arrow points to the 'Subjective[' section, which is highlighted with a green background. The 'Subjective[' section is followed by a green bracket ']'.

Open a new SOAPnote and place the cursor in the Subjective field.



Type "chix" into the Subjective field and press the Shift + F11 keyboard command.



The Chief Complaint(s)/Reason For Visit SMARText pick list is now inserted.



SOAP Notes | Labs | Radiology | Bill

Date/Time: 11/16/2010 9:09 AM

Subjective
CHIEF COMPLAINT(S)/REASON FOR VISIT: []

Objective

Assessment

Plan

Medications

Follow Up

SMARTText Quick Access

Active Item: "CHIEF COMPLAINT(S):"

Selected	Description	S	Ty	Us
<input type="checkbox"/>	(A - GENERAL and Unspecified)		Li...	0
<input type="checkbox"/>	(B - BLOOD and IMMUNE)		Li...	0
<input type="checkbox"/>	(D - DIGESTIVE)		Li...	0
<input type="checkbox"/>	(F - EYE)		Li...	0
<input type="checkbox"/>	(H - EAR)		Li...	0
<input type="checkbox"/>	(K - CARDIOVASCULAR)		Li...	0
<input type="checkbox"/>	(N - NEUROLOGICAL)		Li...	0
<input type="checkbox"/>	(P - PSYCHOLOGICAL)		Li...	0
<input type="checkbox"/>	(R - RESPIRATORY)		Li...	0
<input type="checkbox"/>	(S - SKIN)		Li...	0
<input type="checkbox"/>	(T - ENDOCRINE/METABOLIC/NU...		Li...	0
<input type="checkbox"/>	(U - UROLOGICAL)		Li...	0
<input type="checkbox"/>	(W - PREGNANCY/CHILDBIRTH/...		Li...	0
<input type="checkbox"/>	(X - FEMALE GENITAL)		Li...	0
<input type="checkbox"/>	(Y - MALE GENITAL)		Li...	0
<input type="checkbox"/>	(Z - SOCIAL PROBLEMS)		Li...	0
<input type="checkbox"/>	(I - MUSCULOSKELETAL)		Li...	0
<input type="checkbox"/>	(Most Common Chief Complaints)		Li...	0

Left-click on SMARText item

Click to select

Left-click on the Chief Complaint SMARText item and Select a description from the SMARText Quick Access window. Most commonly, the "Most Common Chief Complaints" is chosen.



SOAP Notes Labs Radiology Bill

Date/Time 11/16/2010 9:09 AM

Subjective
CHIEF COMPLAINT(S)/REASON FOR VISIT:
Back pain (lower or lumbar-sacral).

Objective

Assessment

Plan

Medications

SMARText Quick Access

Active Item - (Most Common Chief Complaints)

Selected	Description	S	Ty	Us
<input type="checkbox"/>	-RFE- "Chronic obstructive lung di...	C...	4	
<input type="checkbox"/>	-RFE- "Cough" (06.0.R05.R...	C...	3	
<input type="checkbox"/>	-RFE- "Abdominal pains that are...	C...	2	
<input type="checkbox"/>	-RFE- "Rash-localized" (14...	C...	2	
<input type="checkbox"/>	-RFE- "Abdomen pains (or cramp...	C...	1	
<input type="checkbox"/>	-RFE- "Allergic rhinitis" (06.0...	C...	1	
<input checked="" type="checkbox"/>	-RFE- "Back pain (lower or lumba...	C...	1	
<input type="checkbox"/>	-RFE- "Chronic bronchitis" (...)	C...	1	
<input type="checkbox"/>	-RFE- "Diabetes - Insulin depend...	C...	1	
<input type="checkbox"/>	-RFE- "Diarrhea" (09.0.D11...	C...	1	
<input type="checkbox"/>	-RFE- "Earache or otalgia" (...)	C...	1	
<input type="checkbox"/>	-RFE- "Fever" (01.0.A03...	C...	1	

Click to select "Back Pain" as the Chief Complaint to get started using the EM Coder.



Q: What does the methodology tab display in the EM Coder?

A: The methodology tab gives a detailed list of information on how the EM Coder is scoring the different systems that make up the probable level of service. This tab is intended for read-only and for informational purposes.



Faxing

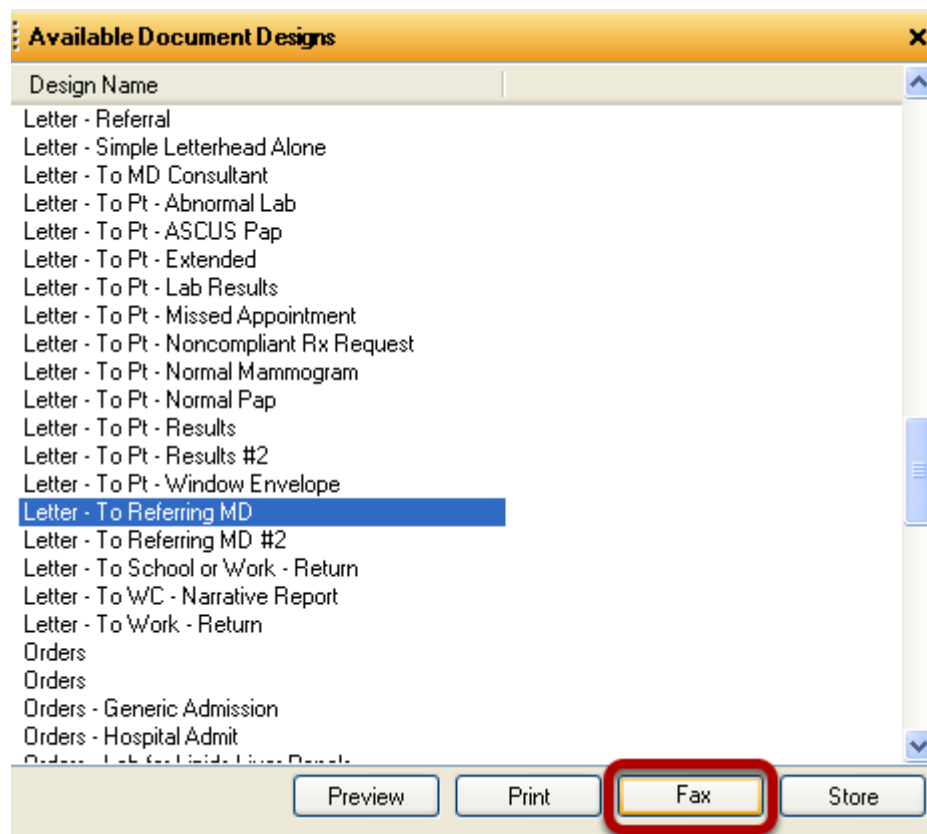


Q: How can I fax directly from SOAPware?

A: Users are able to transmit faxes directly from SOAPware when using the SOAPware Faxing Module and designs from Available Document Designs.

Note: This is a fax- out only ability; faxes cannot be received through SOAPware.

The SOAPware Technical Support Department will receive a message when a fax was not transmitted successfully. They will try to send the fax again manually. If this transmission fails, Support will contact your office.



Click to highlight the Document Design to fax.



Fax Contact

From: Krista L. Laningham

Re: Patient Referral

Drag a column header here to group by that column

	Name	Spe...	City	State	Phone	Fax
🔍						
	Contact, Sample	Abdo...	Faye...	AR		(555) ...
1	Willy, Chilly		Chilly	AL	(123...	
	Birds, Flying					

2

Fax Cancel

The Fax Contact window will display.

1. Select the contact to fax the design to.
2. Click the "Fax" button to send.



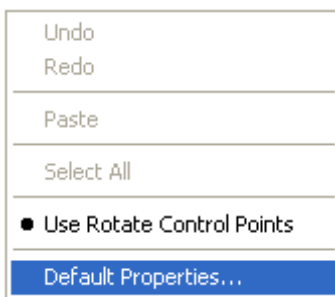
Font



Q: How can we make the font for writing text on scanned or imported documents default to a larger size font?

A: A user can set a default font size for text per document. There is not currently a way to set a default font size that will hold every time you scan or import a new document.

Activate the Document

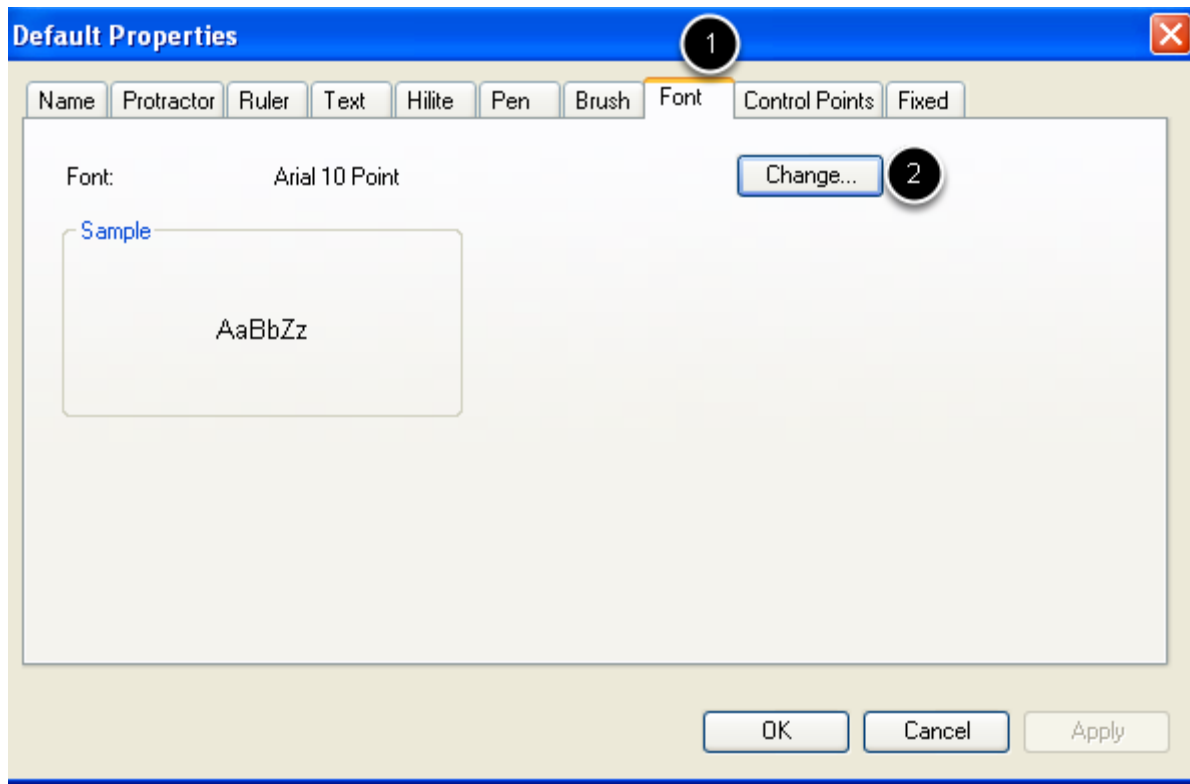


Click on the document to activate the document.

Right-click on the document, then choose Default Properties.



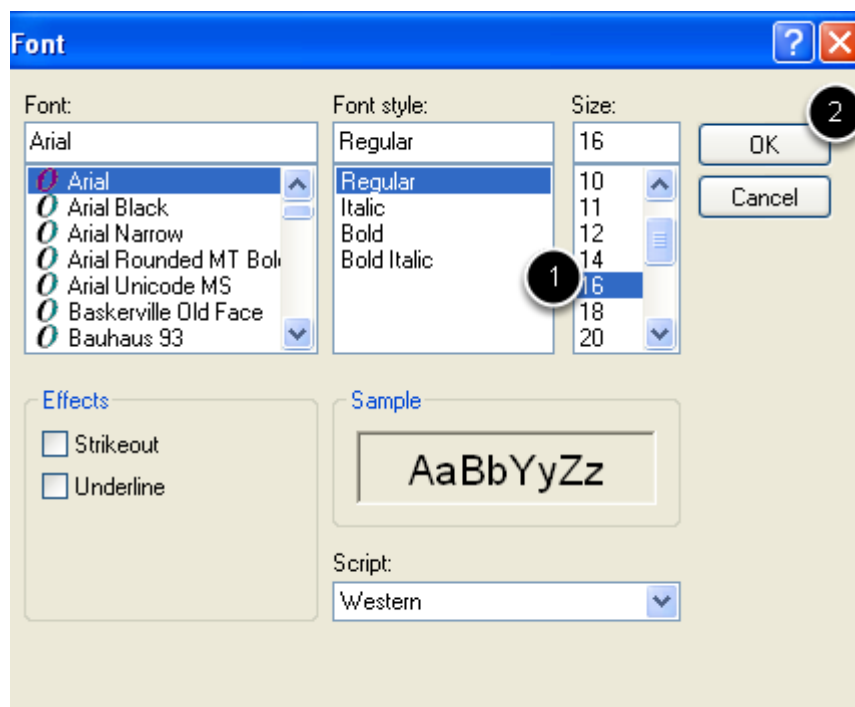
Select the Font Tab



1. Click the Font tab.
2. Click Change.



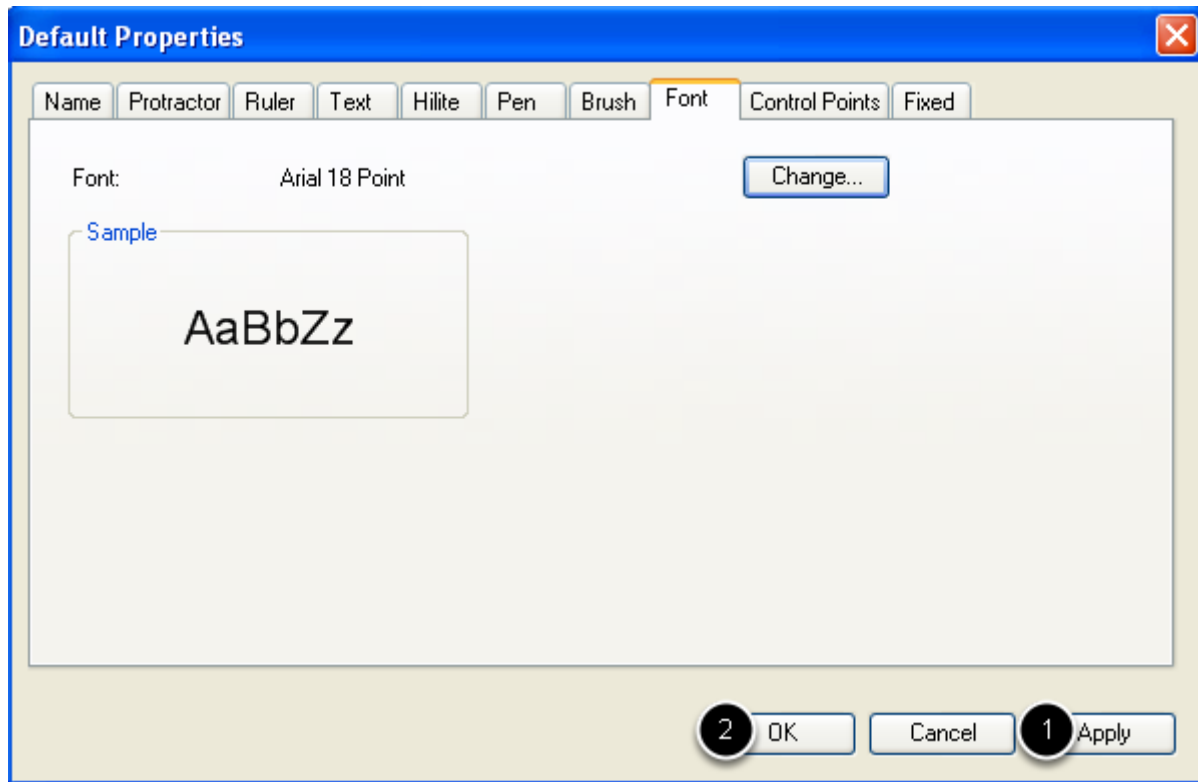
Set the Font Size



1. Choose the font size by selecting the desired size font.
2. Click OK.



Apply the Font Size



1. Click Apply.
2. Click OK.

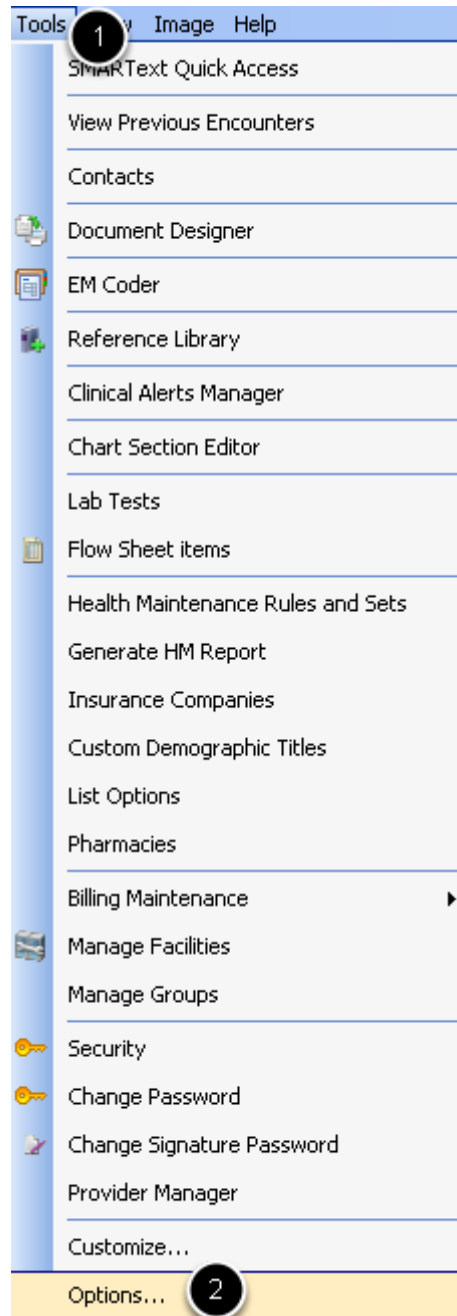


Q: How do I change the font in SOAPware?

A: It is not possible to change the font of a single word or group of words due to the complexity of SMARText within SOAPware. A user can, however, change the overall font in the display. This is a user-specific setting.



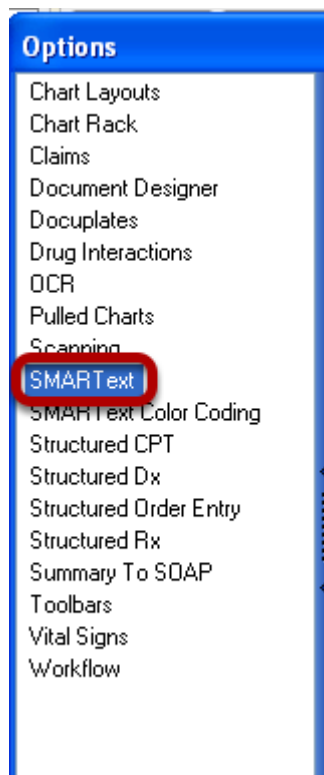
Tools - Options



1. Click on Tools.
2. Click on Options.

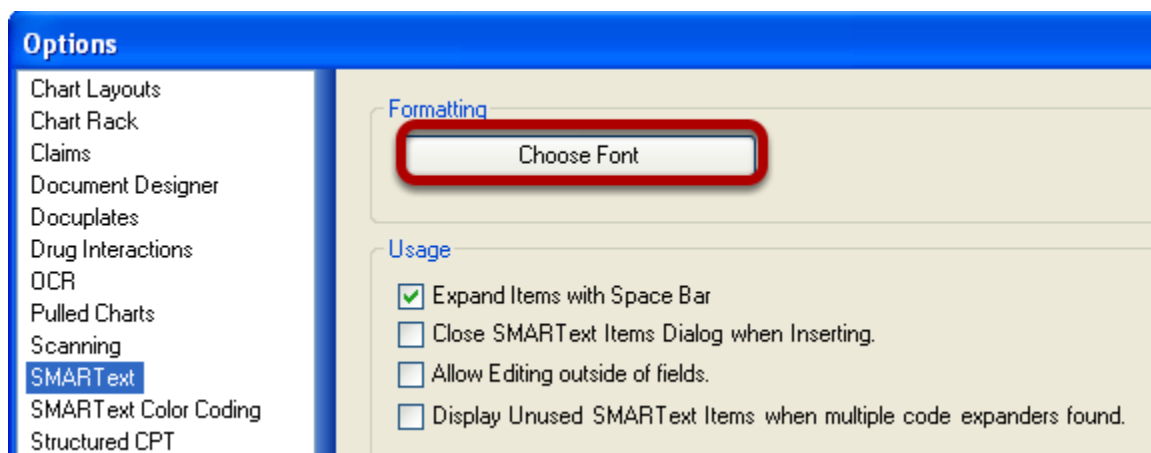


Choose SMARText



Click to highlight SMARText.

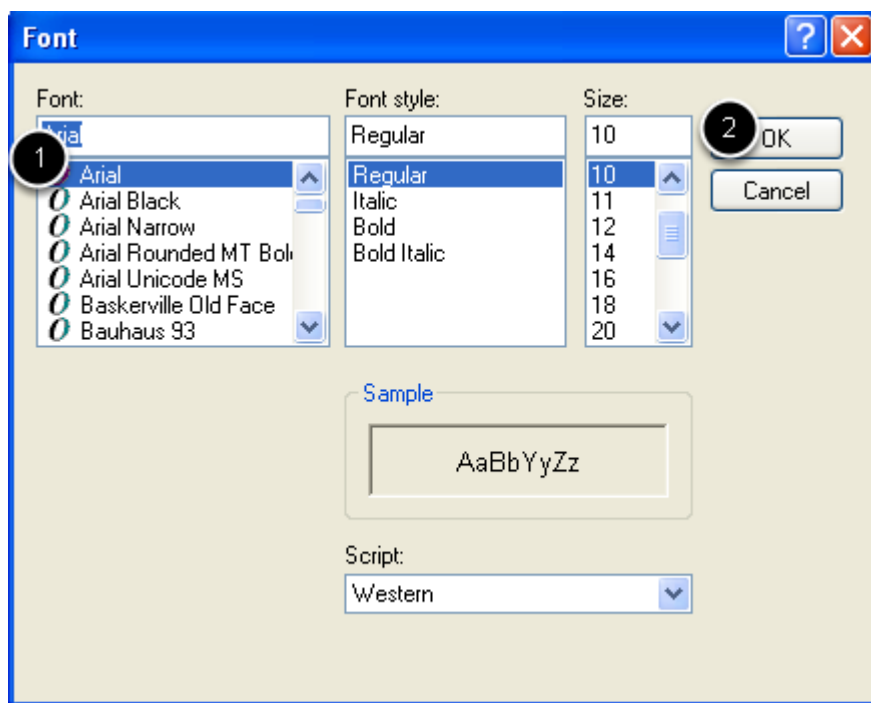
Formatting



Click on the Choose Font bar.



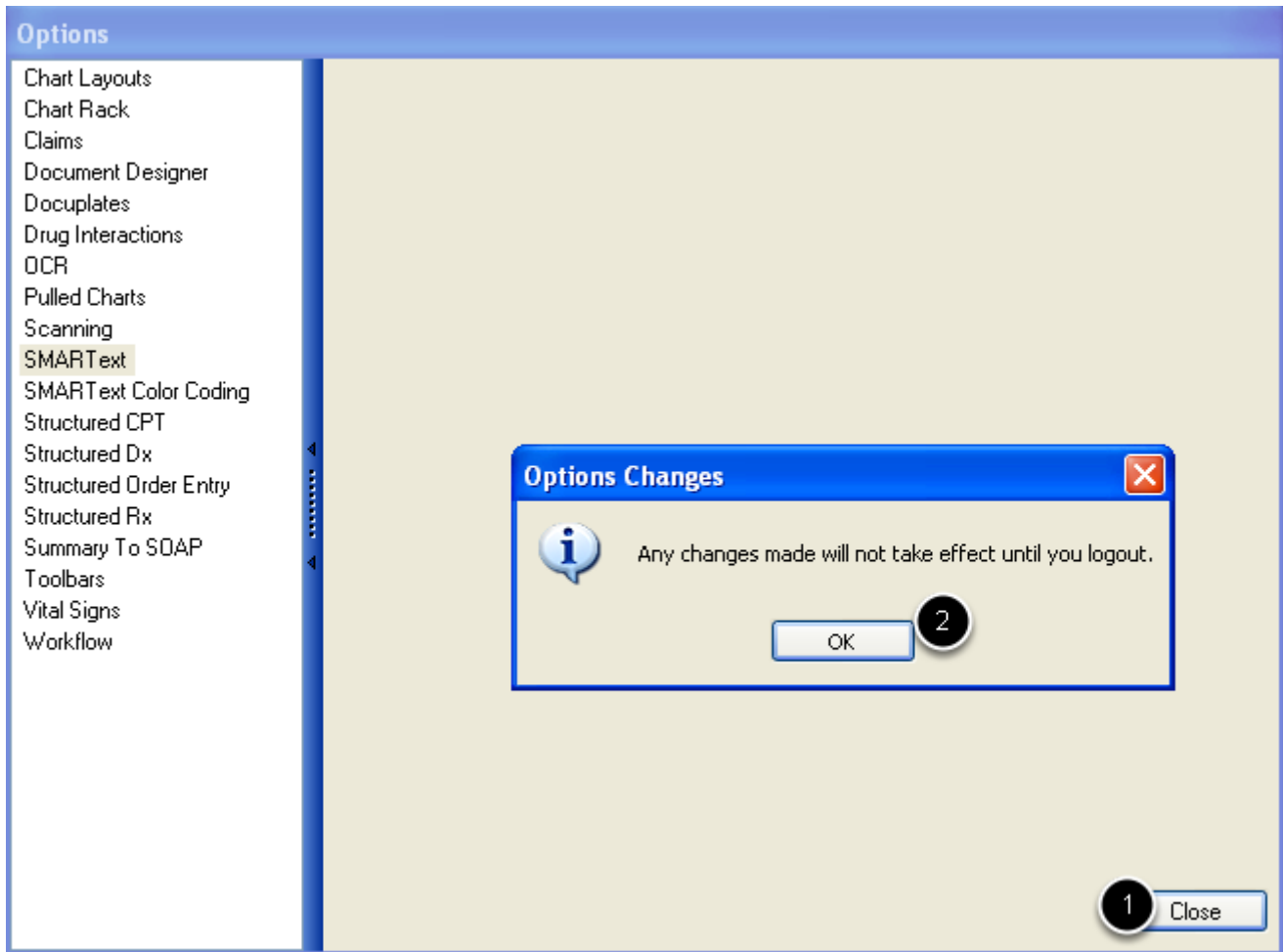
Select the Desired Font



1. Choose the Font, Font Style, and Size by selecting/highlighting the desired items.
2. Click OK.



Finalize Changes



1. Click Close.
2. Click OK.
3. Logout and back into SOAPware for the changes to take effect.



Interface Specific



SOAPware compatible Labs and LIS software/services

Here you will find a list of lab companies and Lab Information Systems (LIS) that currently have interfaces and are compatible with SOAPware?

- 4Medica/CPL
- Accenx
- ACL Laboratory*
- ACM Medical Laboratory
- AEGIS Lab
- AEL Laboratory*
- AIM Laboratories*
- Ameripath
- Ameritox Medication Monitoring Solutions
- Anrtim Labs*
- Atlas Medical Software**
- Aurora Diagnostics
- Avisena Practice Management
- Axolotl-OptumInsight**
- Bon Secours Lab*
- BioReference
- CareEvolve**



- CBLPath
- CDI Radiology*
- Centrex Clinical Laboratories
- Cerner Corporation (Millennium, CoPath)**
- Certify Data Systems**
- Central Coast Pathology*
- Circa Design**
- Comtron**
- Corepoint Health**
- CPSI ChartLinc EMR Portal**
- Cognoscenti Health Institute/CPL*
- CriticalKey**
- Dianon/Labcorp
- Dynacare Laboratories*
- DVALabs - Division of Total Renal Laboratories*
- Ellkay**
- Emdeon**
- Enzo Clinical Labs*
- Foundation Laboratories*



- Halfpenny Technology**
- HCAHealthcare
- McKesson's Horizon Lab LIS
- Healthlab/Central Dupage*
- HEALTHeLINK*
- Healthland
- Health Diagnostic Laboratories
- Health Network Laboratories
- Interbit Data**
- Intermountain Healthcare*
- Labcorp
- LabDAQ**
- LIGOLAB**
- Fletcher Flora Labpak**
- LabTrak LIS**
- Labpak LIS (Merge Healthcare)**
- Legacy Health*
- Lifepoint Informatics**
- Medcom Lab Manager



- Meditech**
- Medical Diagnostics Laboratories
- Medicity**
- MedLink
- Medstar Laboratory Inc.*
- Merge LIS**
- Mesa Lab Equipment (Interpath)
- MobileMD**
- Munson Healthcare Systems*
- North Shore LIJHS*
- Northern Plains Lab*
- Novo Innovations**
- Orchard Software**
- OURLab
- Pacific Physicians Lab*
- Paragon**
- Pathologists Regional Laboratory*
- PathologyAssociates Medical Laboratories
- Pathology Inc.*



- PeaceHealth Laboratories* (formerly Oregon Medical Labs)
- Physicians Medical Laboratories*
- Providence Laboratory Services*
- PROLIS**
- PeaceHealth Laboratories/Oregon Medical Labs*
- Quest Diagnostics
- RADNET Inc.
- Relay Health**
- Rhode Island Medical Imaging*
- SchuyLab LIS**
- Sheil Medical Labortory*
- Solstas Lab Partners (formerly Spectrum/Carilion Labs)
- Steinberg Diagnostic Medical Imaging*
- S.T.A.R. Radiology*
- Steinberg Diagnostics Imaging Centers*
- Sunrise Medical Laboratories*
- TriCore Reference Laboratories*
- United Laboratories Inc.
- UniPath*



- Westcliff Medical Labs*
- West Pacific Medical Laboratories*

**Indicates regional/local lab*

*** Indicates regional/local lab via LIS listed*

Note:

The SOAPwareXchangeHL7 also interfaces with many other local hospital/regional labs. If you do not see your lab listed, contact SOAPware at 800-455-7627.



Q: How does the SOAPware-Phreesia Interface work?

A: This lesson will provide the user with a brief description of the SOAPware-Phreesia interface, and its capabilities.

What is Phreesia?

Phreesia and SOAPware Integrate to Improve Clinical Data and Streamline Workflow at Medical Practices

Phreesia checks in your
patients and gets you paid.

- ✓ Increase cash flow
- ✓ Save staff time
- ✓ No hardware cost

[Learn More](#)



Phreesia, the patient check-in company, helps medical practices increase cash flow and save staff time. The solution, which checks in millions of patients every year, digitizes the check-in process by replacing the traditional patient clipboard and all paper forms with the wireless, touchscreen PhreesiaPad. Phreesia electronically collects and updates critical patient information, verifies insurance, and collects co-payments and balances during check-in. The solution also offers a number of flexible and convenient payment options for patients, including online payments and automated payment plans, further streamlining workflow for practices and helping them get paid in full and on time. Learn more at <http://www.phreesia.com>.



How does the interface work?

How it works



- 1 PhreesiaPads are handed to patients



- 2 Patients complete check-in interviews while waiting to be seen



- 3 Patients pay their copays and balances on the PhreesiaPad



- 4 Patient information and payments is easily managed and accessible via the Phreesia Dashboard or SOAPware

Behind the scenes, Phreesia communicates with SOAPware via the [SOAPwareXchange](#) enhancement.

When the patient enters the office, they are given a PhreesiaPad to enter their data. When finished, the patient will hand the PhreesiaPad back to the front office staff. During this process, a file is also sent to the SOAPwareXchange for importing into SOAPware via the network.



Where will the Patient Information entered on the PhreesiaPad be located in SOAPware?

The screenshot displays the SOAPware interface. On the left, the 'Patient Information' tab is active, showing fields for Name (Joel T. Test), SSN, Birth Date (1/1/1950), Age (62), Gender (Male), Marital Status (Single), Race, Ethnicity, Language, Address (123 APPLE DRIVE, New York, NY 10010), and Contact Information. The 'Demographics' tab is highlighted with a red circle. On the right, the 'SOAP Notes' tab is active, showing a 'Subjective' note with the text: 'JOEL TEST is a 60 year old Male presenting today with , as well as ,'. The 'Subjective' field is highlighted with a red circle. Below the notes, there is a 'Tasks' section with a table of tasks.

Patient	Description	Notes	Priority	Action/Status	Due Date	Assigned To	Last Modified	Completed
Test, Joel T.	New Encounter Created via SOAPware/Change		High	Needs Review	06/05/2012	Test Five	06/05/2012 17:18	

Demographics are transferred to their respective chart section in SOAPware. Demographics can also transfer from SOAPware back to Phreesia if enabled.

A new SOAPnote will automatically be created, and the clinical data the patient entered into the PhreesiaPad, will be found in the Subjective field. A task associated with this SOAPnote will also automatically be created and assigned to the appropriate provider.

If the patient does not already exist in SOAPware, his/her chart will automatically be created. If a patient does exist in SOAPware, then any updated information will be imported from the PhreesiaPad.



IT Specific



Q: Do we have to update SOAPware on all computers?

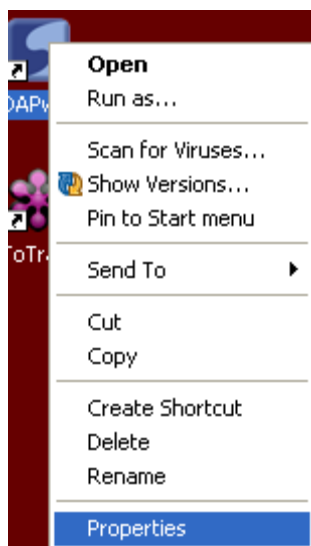
A: The answer is yes; all machines need to be updated. In order for SOAPware to run most efficiently, all computers should be on the same version of SOAPware. Otherwise, with different versions of SOAPware installed, it could cause problems with SOAPware running well.



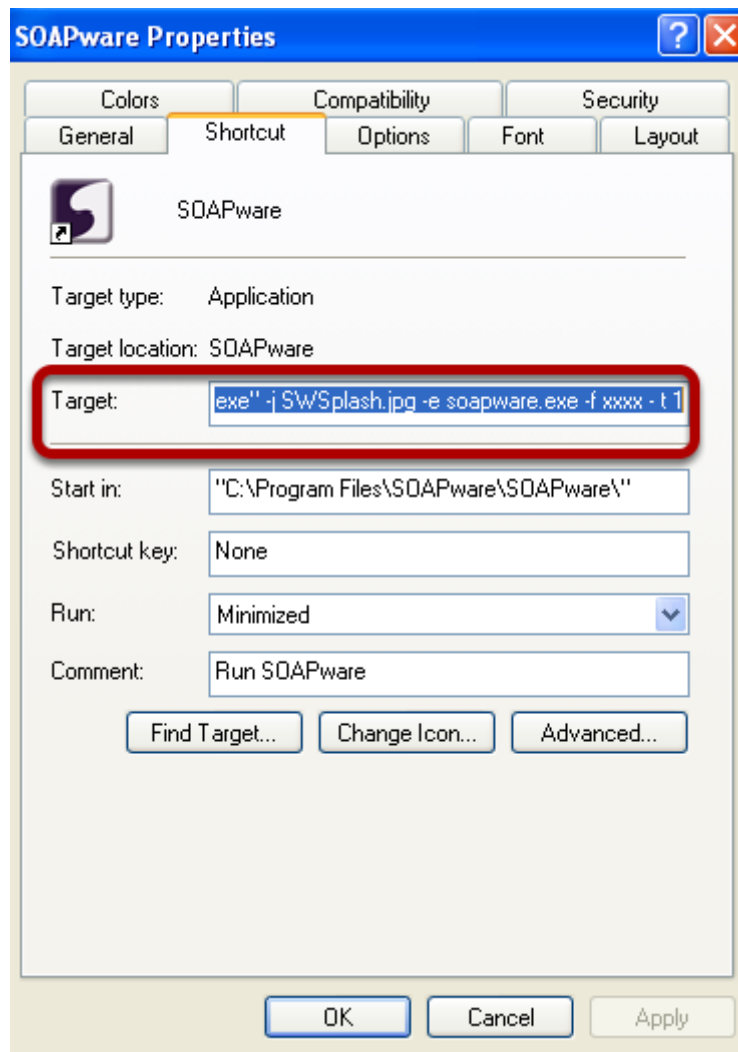
Q: How do I optimize SOAPware over an RDP Connection?

A: To optimize the speed of SOAPware over a RDP connection (i.e. Citrix Metaframe, Microsoft Terminal Service, VPN etc) you can edit the SOAPware shortcut and add an argument for turning off the background image which can render slowly.

Create the Argument



Right-click over the SOAPware shortcut icon, and Select Properties.



In the Target Location box, type:

```
"C:\Program Files\SOAPware\SOAPware\ShowSplash.exe" -j SWSplash.jpg -e "soapware.exe  
-displayimage=n" -f xxxx -t 1
```

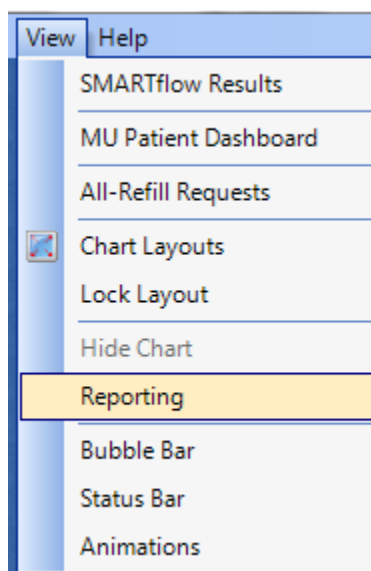


Miscellaneous



Q: How do I create a mailing label?

Custom Patient Demographic Reporting for a Mailing Label



Open the Custom Patient Reporting by clicking on the **View** menu, then select **Reporting**.



Custom Patient Report

Demographic Info

Last Name: A Z

Birth Date: From To

Age: From To

Marital Status:

Gender:

Race:

Ethnicity:

Language:

City:

State:

Zip: From To

Primary Provider: Show All

Referring Provider:

PCP:

Preferred Pharmacy:

Guarantor: ...

Financial Class:

Student Status:

Scheduling Info

Insurance Policy Info

Billing Info

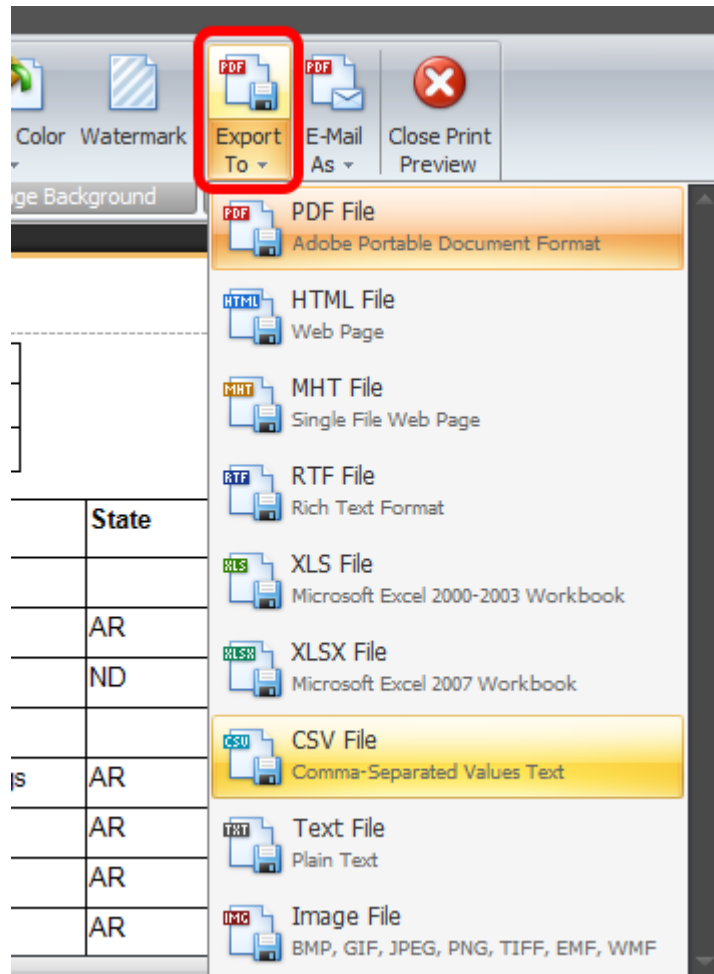
Unique Patients Only

View Report Close

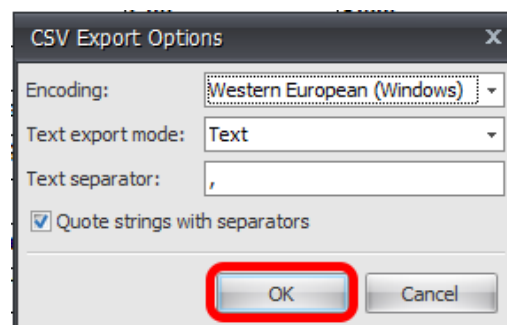
1. In the Demographics section under Last Name, specify the range of patient's that you wish to export for the mailing labels (Ex: if you wish to create mailing labels for all patients, enter A in the first box and Z in the second).
2. Click View Report.



Export the Report



Export the report to a CSV or Excel File by clicking on the **Export To** button, then select either XLS, XLSX or CSV.



If CSV is selected, define the export options and then click OK.



	A	B	C	D	E	F
1	Last Name	First Name	Address	City	State	Zip Code
2	Sweet	Alabama	39298 Alabam Ln	Fayetteville	AR	72703
3	Jane	Andrews	355 1st Street	Fargo	ND	54102
4	Runny	Babbit	23324 Raines Rd	Siloam Springs	AR	00000-0000
5	Honey	Badger	5984 W. 1st St.	Rogers	AR	72756-4598
6	Darlin	Bailey	16548 Bailey Circle	Fayetteville	AR	72703-1924
7	Meat	Ball	2365 Runny St	Springdale	AR	48999
8	Jonas	Barnaby	478 Charles Street	Williamsport	PA	17701
9	Pork	Beans	22365 Pug Gayer	Siloam Springs	AR	45666
10	Oscar	Betta	7899 Aquarium Tank	Fayetteville	AR	78979
11	Sunny	Blossom	23365 Mum St	Sensation	AR	78999-9879

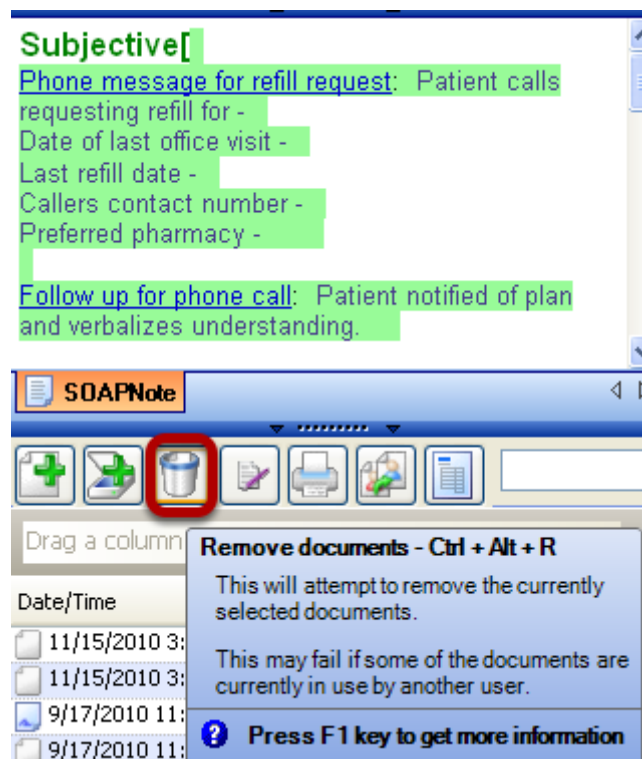
This will export the file to an Excel/CSV file. From here the columns/rows can be edited so that they only include the data that is needed to create mailing labels. This file should be saved as an Excel file and then imported into Microsoft Word when the Mail Merge to create the Labels is created.



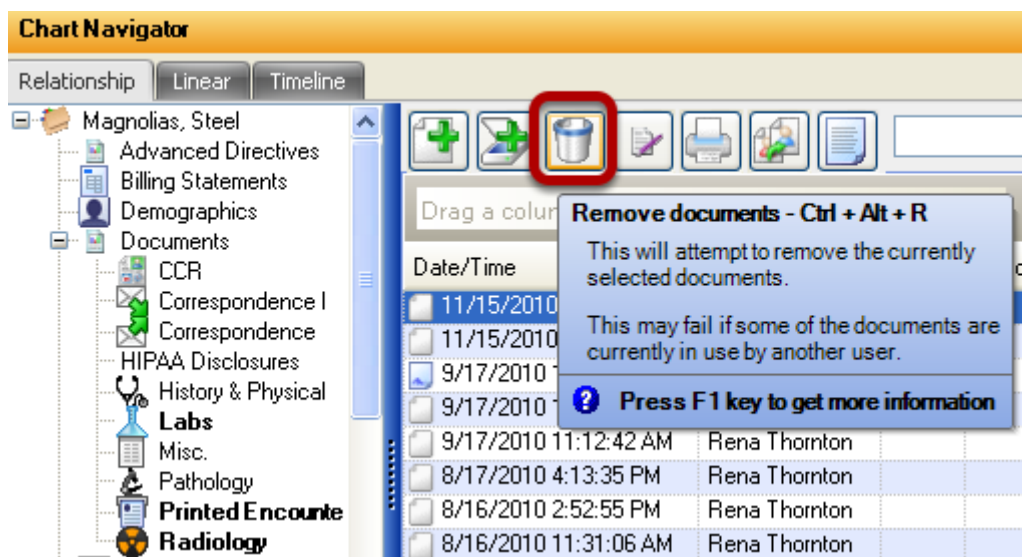
Q: How do I remove a document?

A: Unsigned documents can be easily removed from the chart. Removing Signed off documents must be performed with caution. Once a document has been removed from SOAPware, it can no longer be retrieved. Clicking the "Remove Documents" button, or using the keyboard command Control + ALT + R, will remove the documents. The user will be prompted to verify this action before completion.

The user must have the appropriate security permissions to use this feature.



The above image demonstrates how to remove a document, while viewing the document.

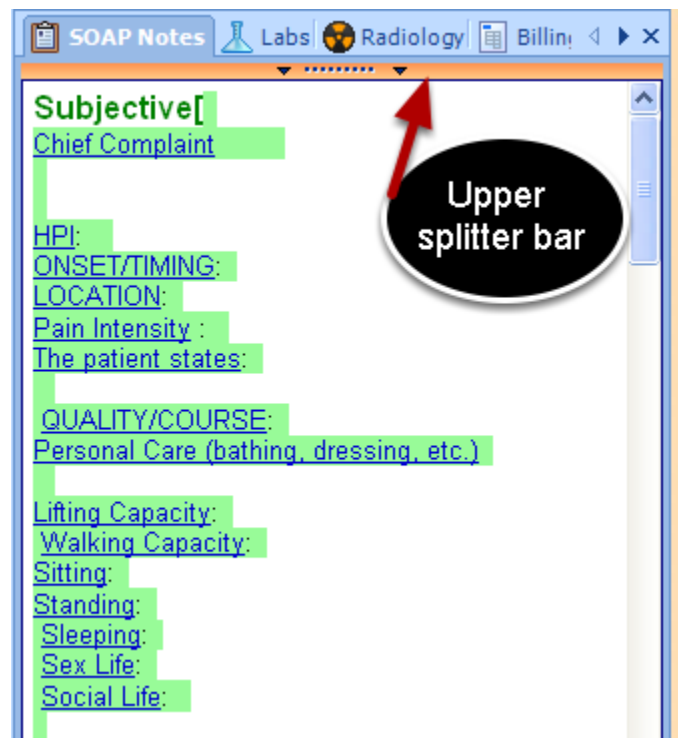


This image demonstrates how to remove a document from within Chart Navigator.

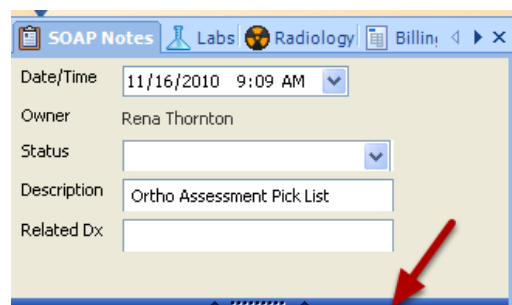


Q: What are document demographics?

A: The document demographics section is located in most chart sections, separated from the document by the upper splitter bar. The upper splitter bar may be expanded or collapsed, to view the document demographics. Demographic information can vary from one chart section to another.



Click the upper splitter bar to view document demographic information for the SOAPnote chart section.



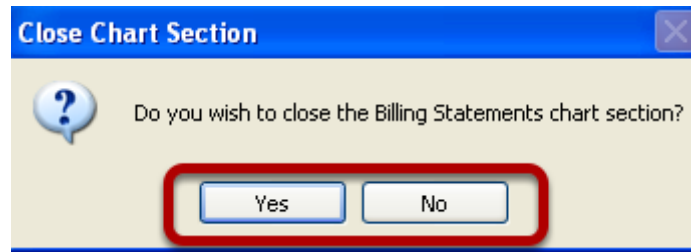
The image above displays document demographic information for the SOAPnote chart section. To close/hide the document demographics, Click the upper splitter bar.



Q: Why is my patient's chart empty?

A: A chart will appear empty if all of the chart sections have been closed.

Clicking on the "X" located next to the chart section tabs, will close the active chart section.



Click Yes or No to the prompt shown in this screenshot.



Q: How do my nurses let me know when a patient is ready to be seen?

A: The information can be entered into the Add Document Task dialog. Room numbers can be created in the Action/Status column to reflect the exam room the patient is in, and the time the patient was checked in can be typed in the description line.

Add Document Task Screen Dialog

Add Document Task

Task Info

Description: Ready to be seen 12:15

Owner: Rita Pense

Assigned To: Rita Pense

Due: 11/ 5/2010

Reminder: / / : :

Priority: Normal

Type: SOAP Note

Notes:

Action/Status: In Exam Room #2

Docutainer Info

Date/Time: 11/05/2010 10:04 AM

Owner: Rita Pense

Status:

Description: soapnote

Related Dx:

☐ Apply To All

Add Cancel

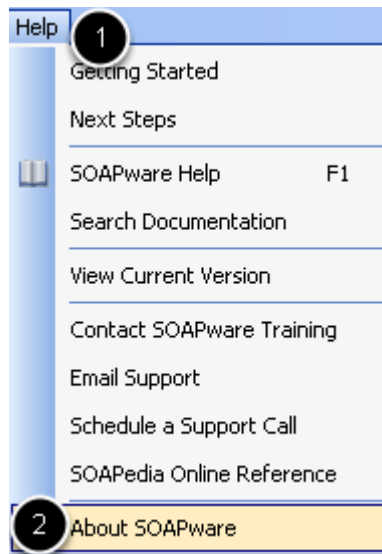
**Remember, this dialog is derived from clicking the Add New Docutainer button.



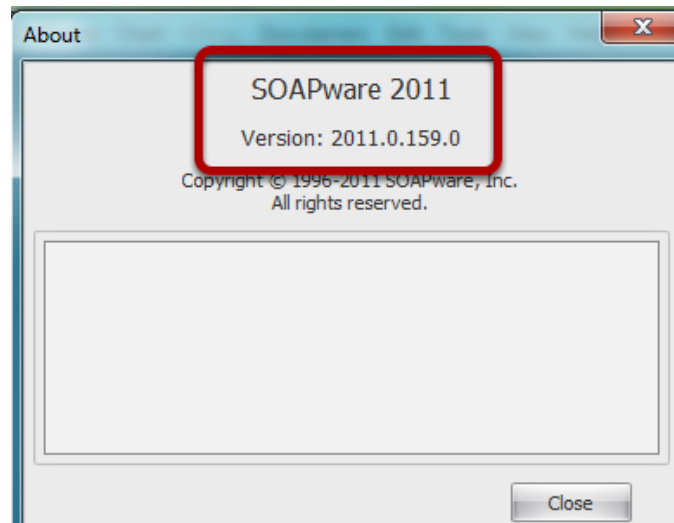
Q: How can I tell what version of SOAPware I am running?

A: SOAPware currently has different versions, and within those versions are different builds of SOAPware.

Check the Current Version of SOAPware



1. Click on Help on the menu bar.
2. Click on "About SOAPware."



A dialog box will appear with the current version and build of SOAPware.



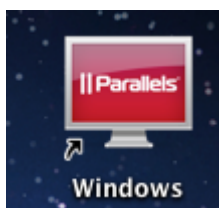
Q: Can I run SOAPware on a Mac computer?

A: Yes, a windows-based application like SOAPware can be run locally on a Mac computer with the aid of a tool like [Parallels Desktop](#), or [VMware](#).

***Note:** If you should need any type of technical assistance regarding the use of Parallels Desktop or VMware products, please seek out support from the respective companies.

For this article, we will refer to using Parallels Desktop.

Parallels Desktop



Double-click on the Parallels Desktop icon.

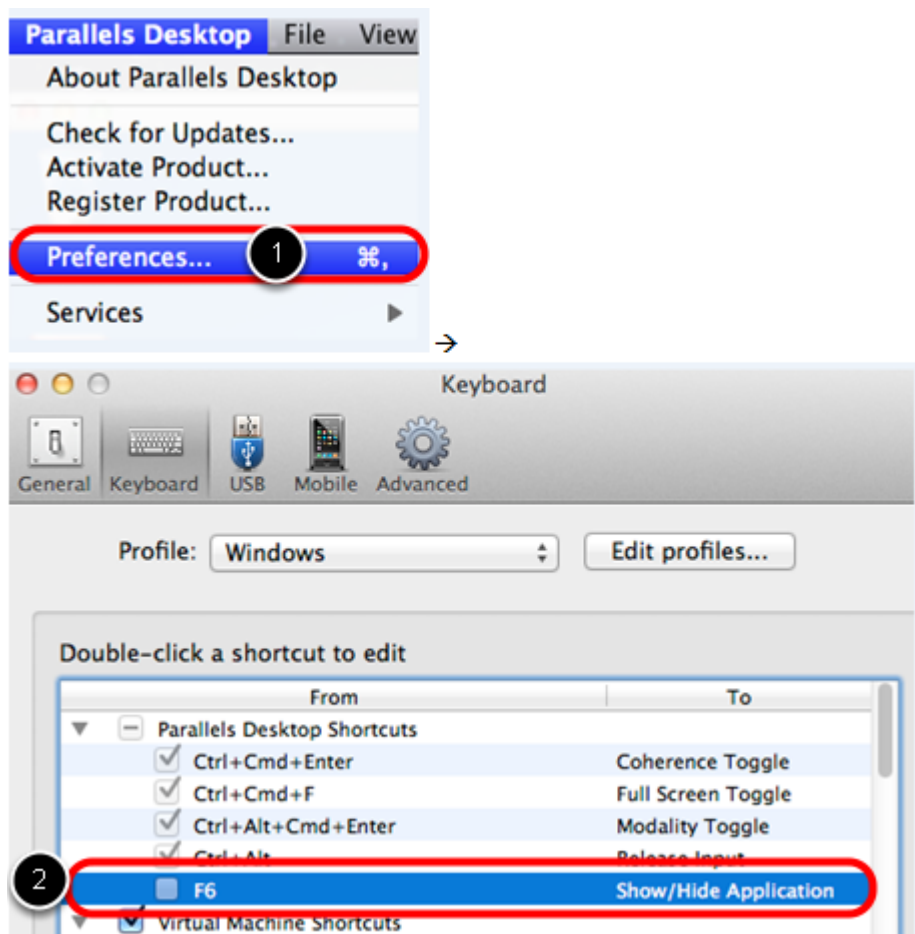
Launch Windows



Insert your log in and password for windows.



Parallels Desktop Preferences



1. In the top toolbar, Click Parallels Desktop > Preferences.
2. Uncheck the box next to "F6" since that is a function key used in SOAPware.

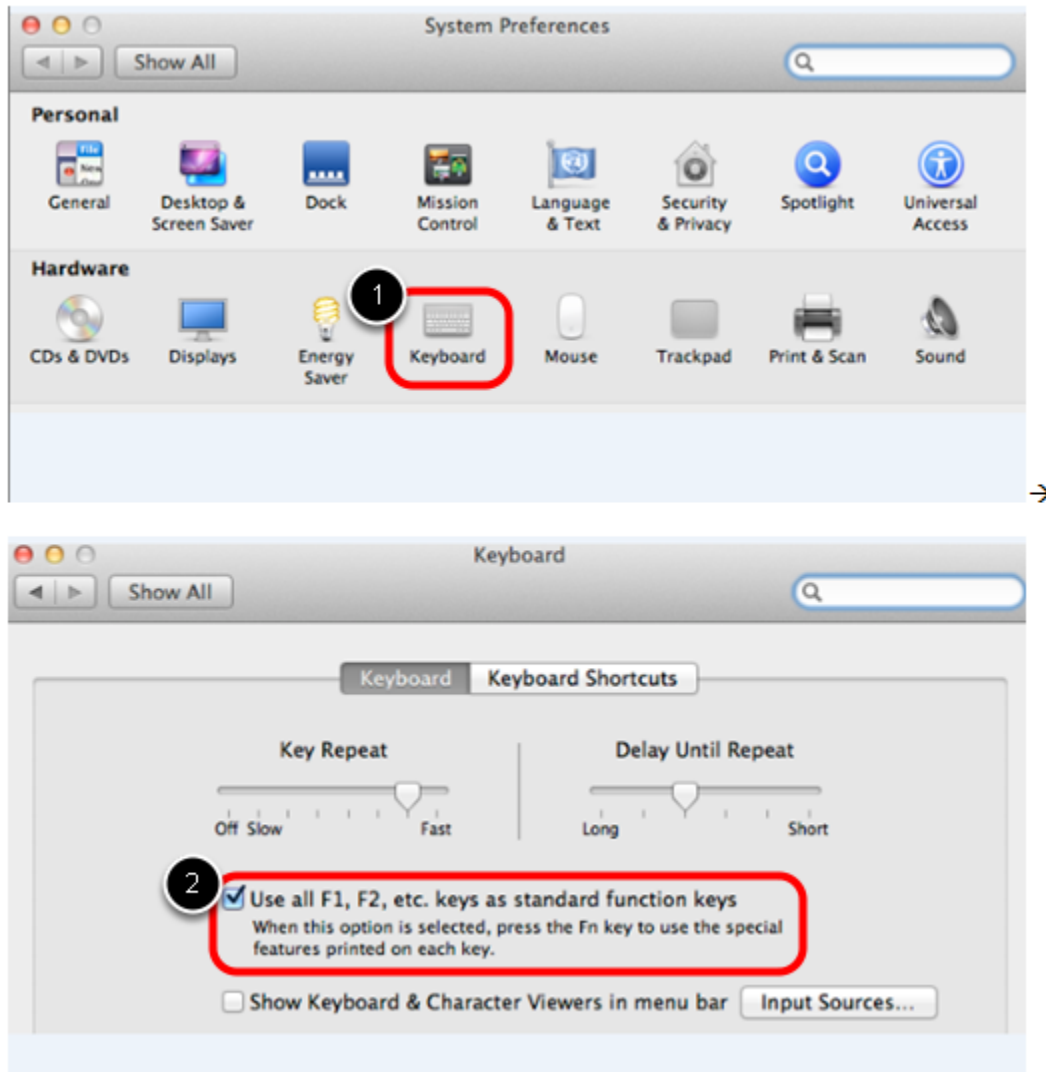
System Preferences



Double-click on the System Preferences icon at the bottom of the screen.



System Preferences- Keyboard

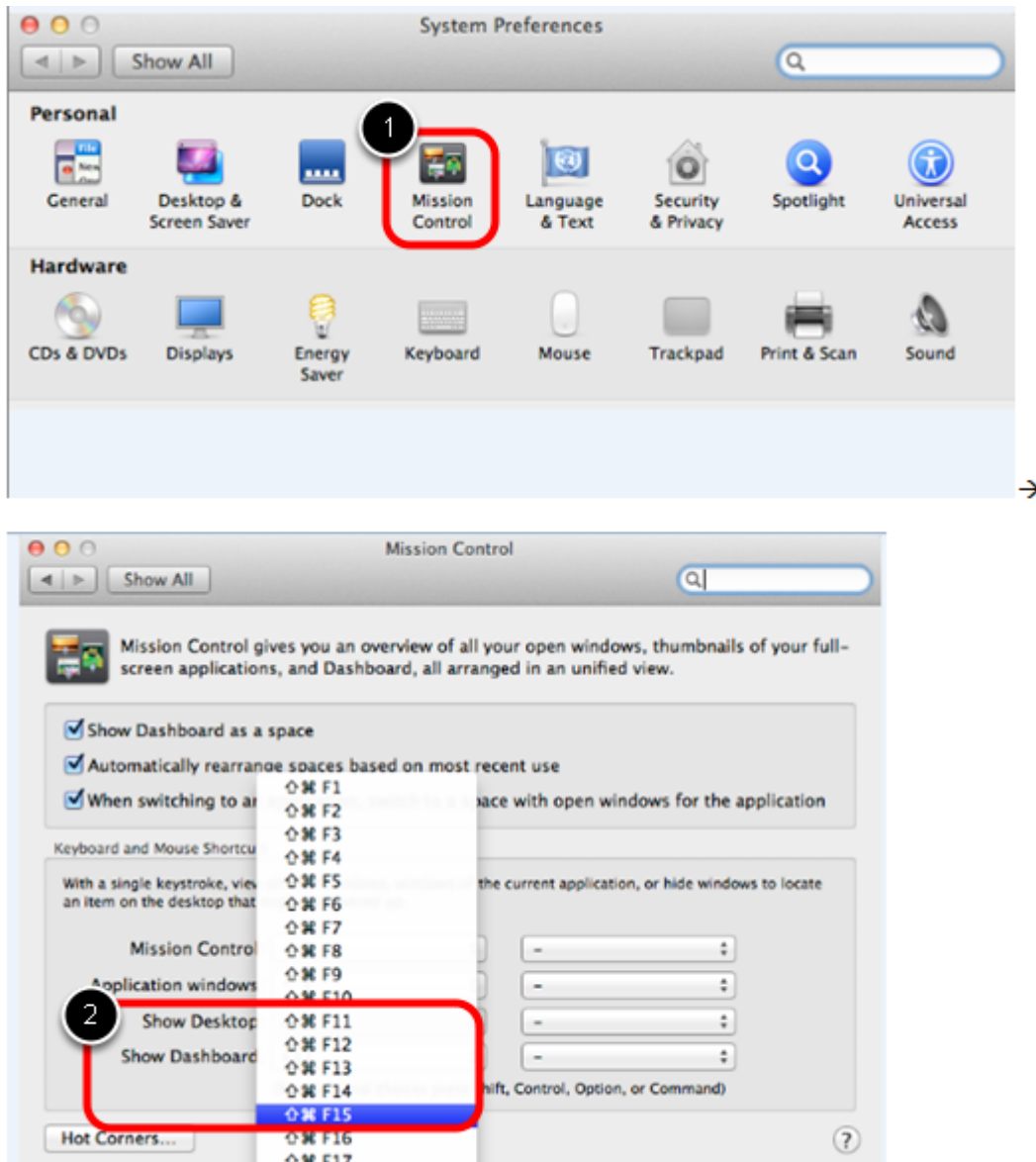


1. Click on "Keyboard."
2. Check the first box that refers to the standard function keys.

Checking this box will allow the Mac user to still use the function keys for their intended function, however the Fn key must be pressed first on the keyboard, and then select a function key at the top of the keyboard.



System Preferences- Mission Control



1. Click on "Mission Control."
2. Reset the "Show Desktop" option (which will be set to F11) to a function key that is not already used in SOAPware, such as F15.



Launch SOAPware



Double-click on the SOAPware icon. You may then log in and proceed to use the function keys on your keyboard, to bring up the intended actions in SOAPware.

***Note:** Should a user need to install SOAPware on either the Parallels Desktop or VMware, please refer to our [downloads](#) article.



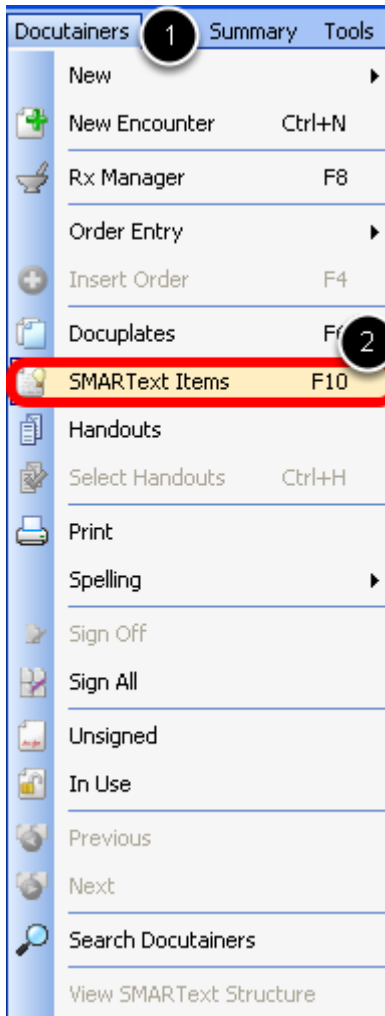
Orders



Q: Are there examples of orders available on the SOAPware Cloud Library?

A: Yes, there are several SMARText Order Items available to download.

Accessing the SMARText Items Manager

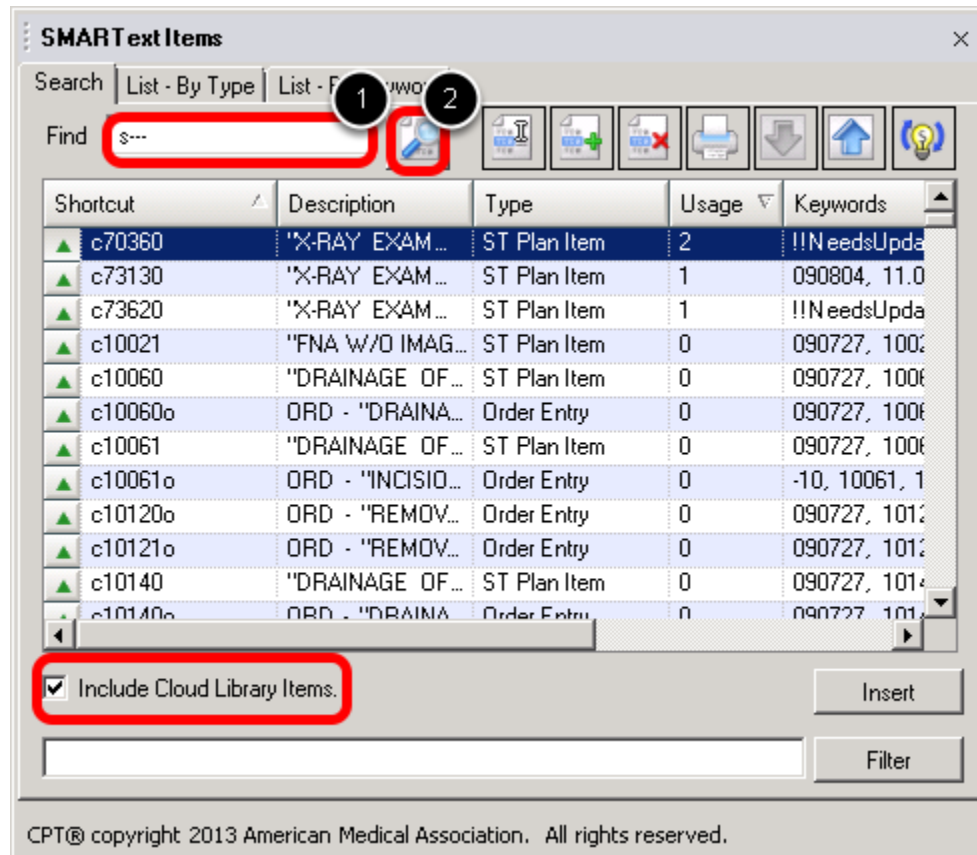


1. Click on **Docutainers**.
2. Click on **SMARText Items**.

A user can also press F10 on the keyboard, to pull up the SMARText Items Manager.



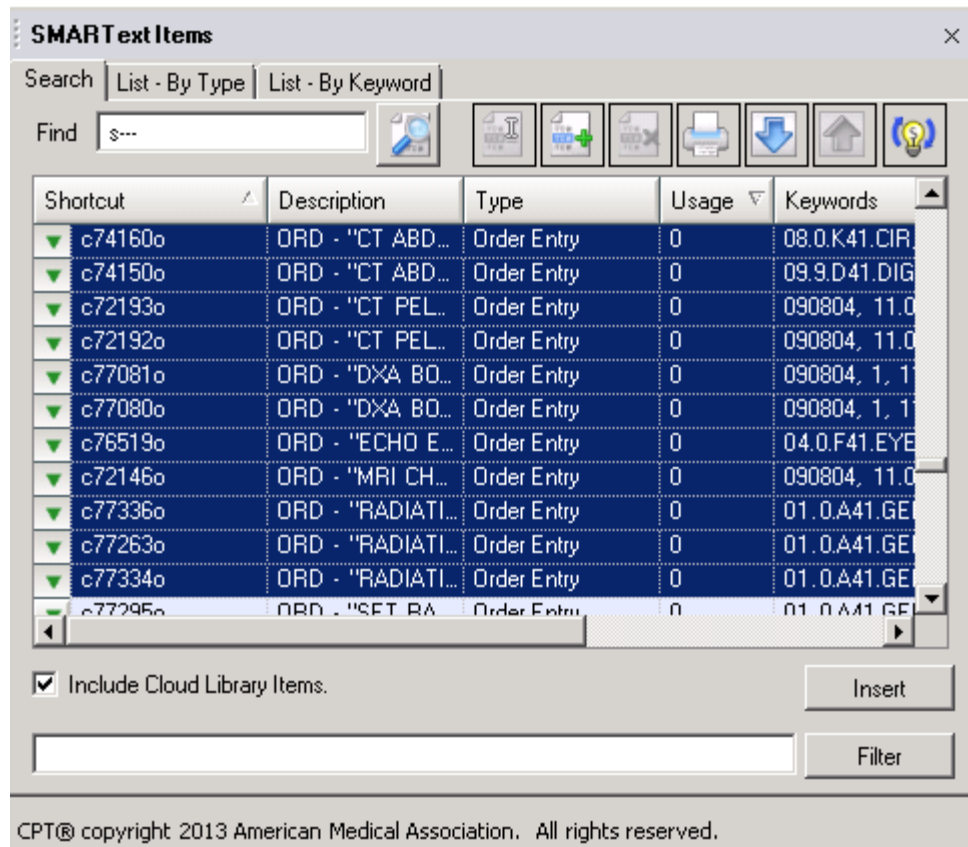
Searching for SMARText Orders



1. In the Find box, type in the shortcut code "S---" (S and 3 dashes).
2. Click on the **Find** (magnifying glass) button. Make sure "Include Cloud Library Items" is checked at the bottom right of the SMARText Items Manager.



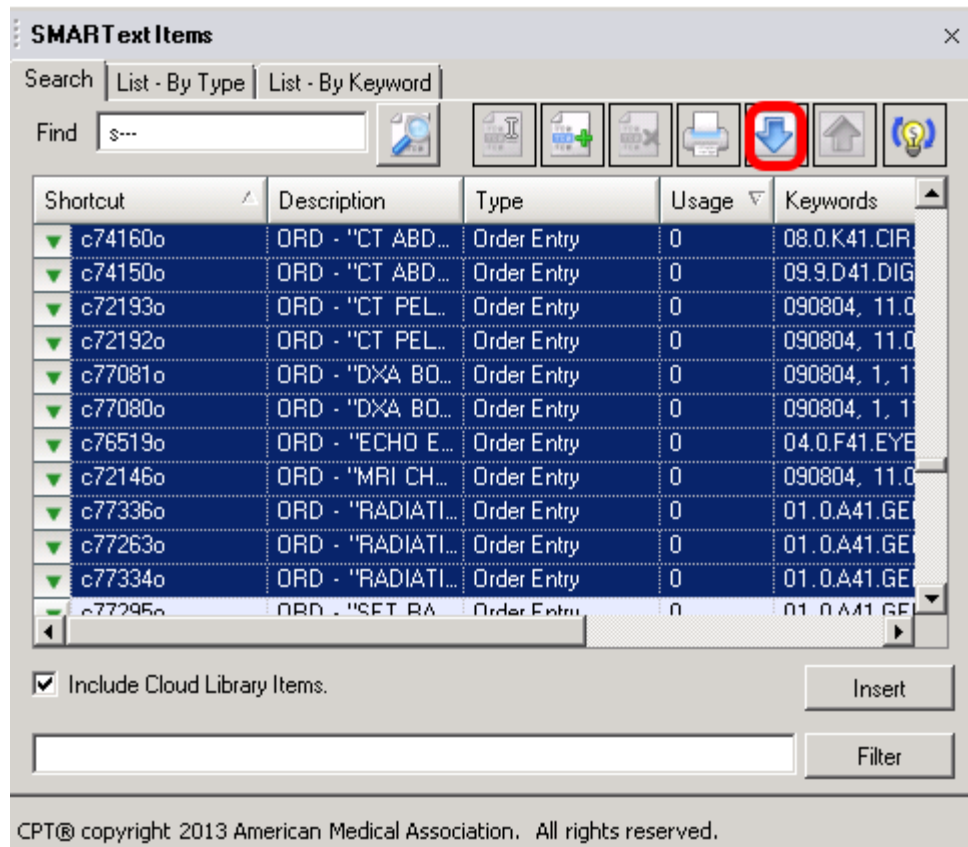
Selecting the Items



Click to highlight the first order Item with a downward facing triangle and, holding down the Shift key on the keyboard, click to highlight the last order Item with a downward facing arrow, to be downloaded. This will highlight all the SMARText Order Items in between.



Downloading the SMARText Items



With the desired items highlighted, click on the **blue download arrow** button.
This will download the items into the local database for use by all users on the local database.



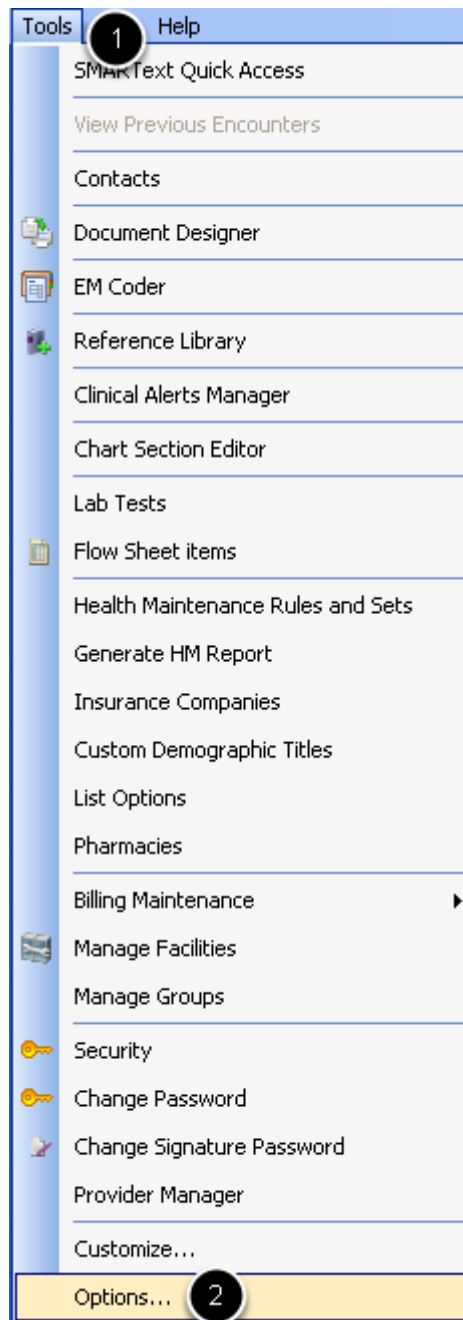
Q: How do I remove or add Order Entry sub-items that display in the Plan field?

A: Adding and removing Order Entry sub-items that are displayed in the Plan field is accomplished under the Tools > Options menu, and is a user-specific setting.

When a user changes a sub-item to either display or not display in the field, those changes will only be reflected with new orders that are inserted into the Plan field. Orders that are already in the Plan field, prior to these changes, will not be effected.



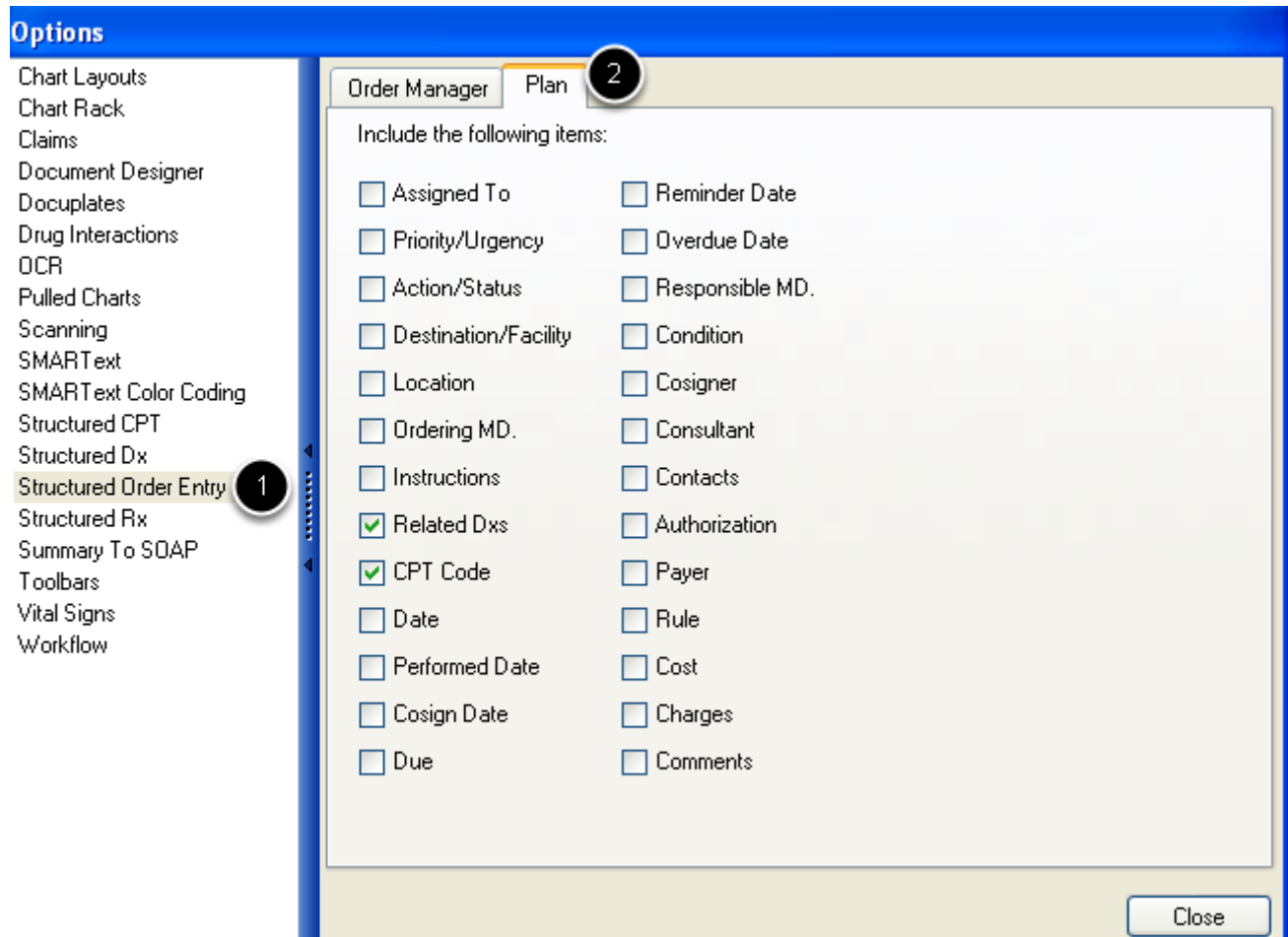
Tools - Options



1. Click Tools.
2. Click Options.



Structured Order Entry



1. Click on Structured Order Entry.
2. Select the Plan tab.



Selecting the Sub-Items

Options

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

Order Manager **Plan**

Include the following items:

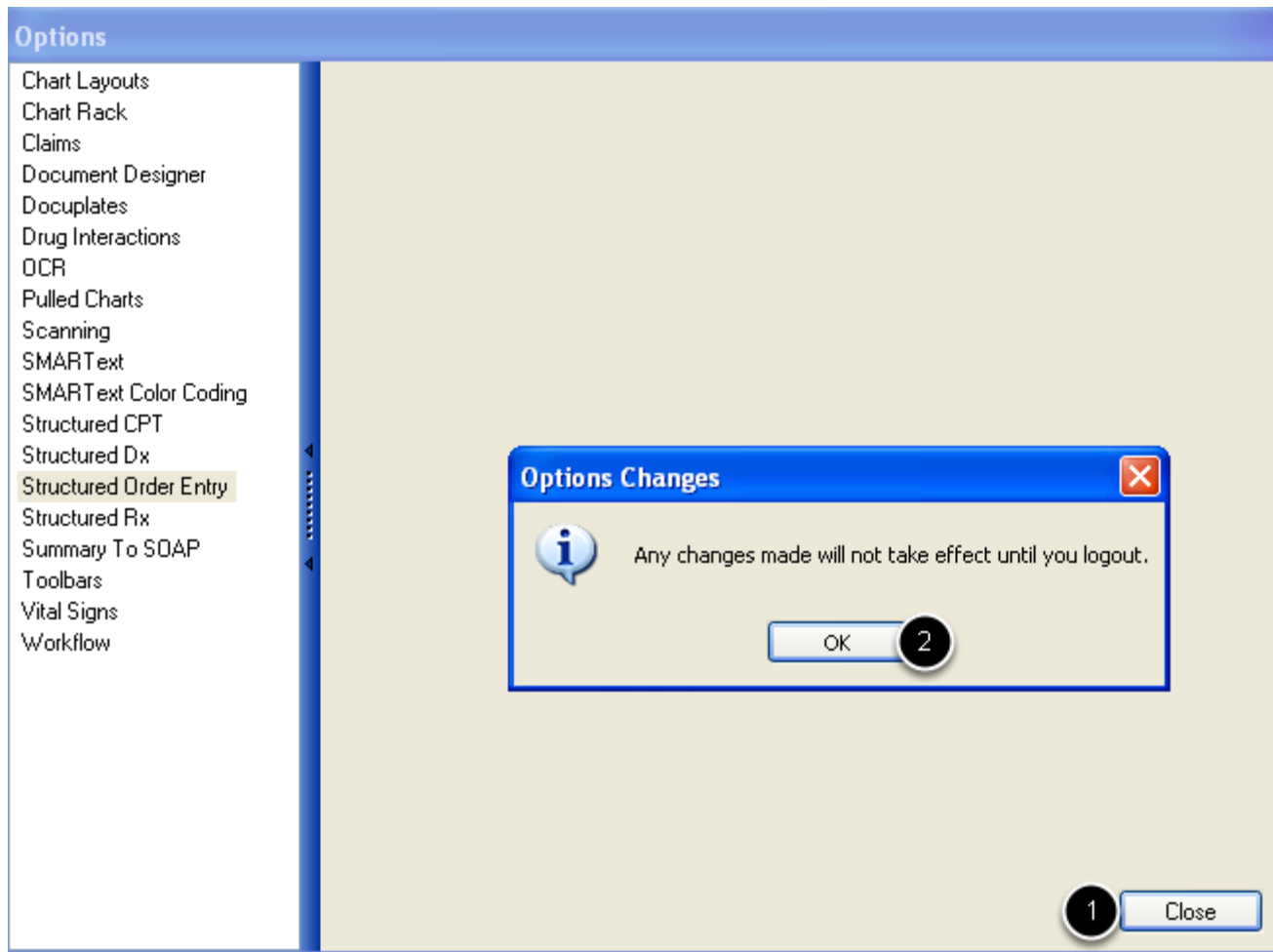
<input checked="" type="checkbox"/> Assigned To	<input type="checkbox"/> Reminder Date
<input type="checkbox"/> Priority/Urgency	<input type="checkbox"/> Overdue Date
<input type="checkbox"/> Action/Status	<input type="checkbox"/> Responsible MD.
<input type="checkbox"/> Destination/Facility	<input type="checkbox"/> Condition
<input type="checkbox"/> Location	<input type="checkbox"/> Cosigner
<input checked="" type="checkbox"/> Ordering MD.	<input type="checkbox"/> Consultant
<input type="checkbox"/> Instructions	<input type="checkbox"/> Contacts
<input checked="" type="checkbox"/> Related Dxs	<input type="checkbox"/> Authorization
<input checked="" type="checkbox"/> CPT Code	<input type="checkbox"/> Payer
<input type="checkbox"/> Date	<input type="checkbox"/> Rule
<input type="checkbox"/> Performed Date	<input type="checkbox"/> Cost
<input type="checkbox"/> Cosign Date	<input type="checkbox"/> Charges
<input type="checkbox"/> Due	<input type="checkbox"/> Comments

Close

Click to place a check mark in the box next to each sub-item that will appear in the Plan field.



Saving the settings



1. Click Close.
2. Click OK and logout of SOAPware for these changes to take effect.



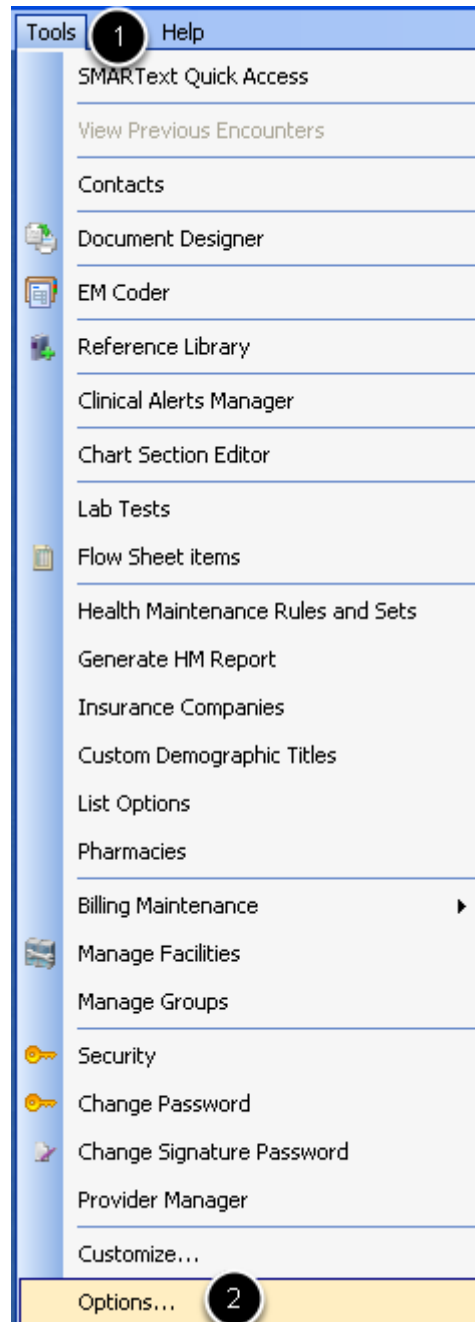
Q: How do I remove the sub-items shown in Order Manager?

A: Adding and removing Order Entry sub-items that are displayed in Order Manager, is accomplished under the Tools > Options menu, and is a user-specific setting.

When you change a sub-item to either display or not display, those changes will only take effect on new orders that insert into Order Manager. Orders that were already in Order Manager, prior to these changes, will not be effected by the new settings.



Tools - Options



1. Click on Tools on the menu bar.
2. Click on Options.



Structured Order Entry

Options

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

2 Order Manager Plan

Include the following items:

<input type="checkbox"/> Assigned To	<input type="checkbox"/> Reminder Date
<input type="checkbox"/> Priority/Urgency	<input type="checkbox"/> Overdue Date
<input type="checkbox"/> Action/Status	<input type="checkbox"/> Responsible MD.
<input type="checkbox"/> Destination/Facility	<input type="checkbox"/> Condition
<input type="checkbox"/> Location	<input type="checkbox"/> Cosigner
<input type="checkbox"/> Ordering MD.	<input type="checkbox"/> Consultant
<input type="checkbox"/> Instructions	<input type="checkbox"/> Contacts
<input checked="" type="checkbox"/> Related Dxs	<input type="checkbox"/> Authorization
<input checked="" type="checkbox"/> CPT Code	<input type="checkbox"/> Payer
<input type="checkbox"/> Date	<input type="checkbox"/> Rule
<input type="checkbox"/> Performed Date	<input type="checkbox"/> Cost
<input type="checkbox"/> Cosign Date	<input type="checkbox"/> Charges
<input type="checkbox"/> Due	<input type="checkbox"/> Comments

Close

1. Click on Structured Order Entry.
2. Select the Order Manager tab.



Selecting Sub-Items

Options

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

Order Manager Plan

Include the following items:

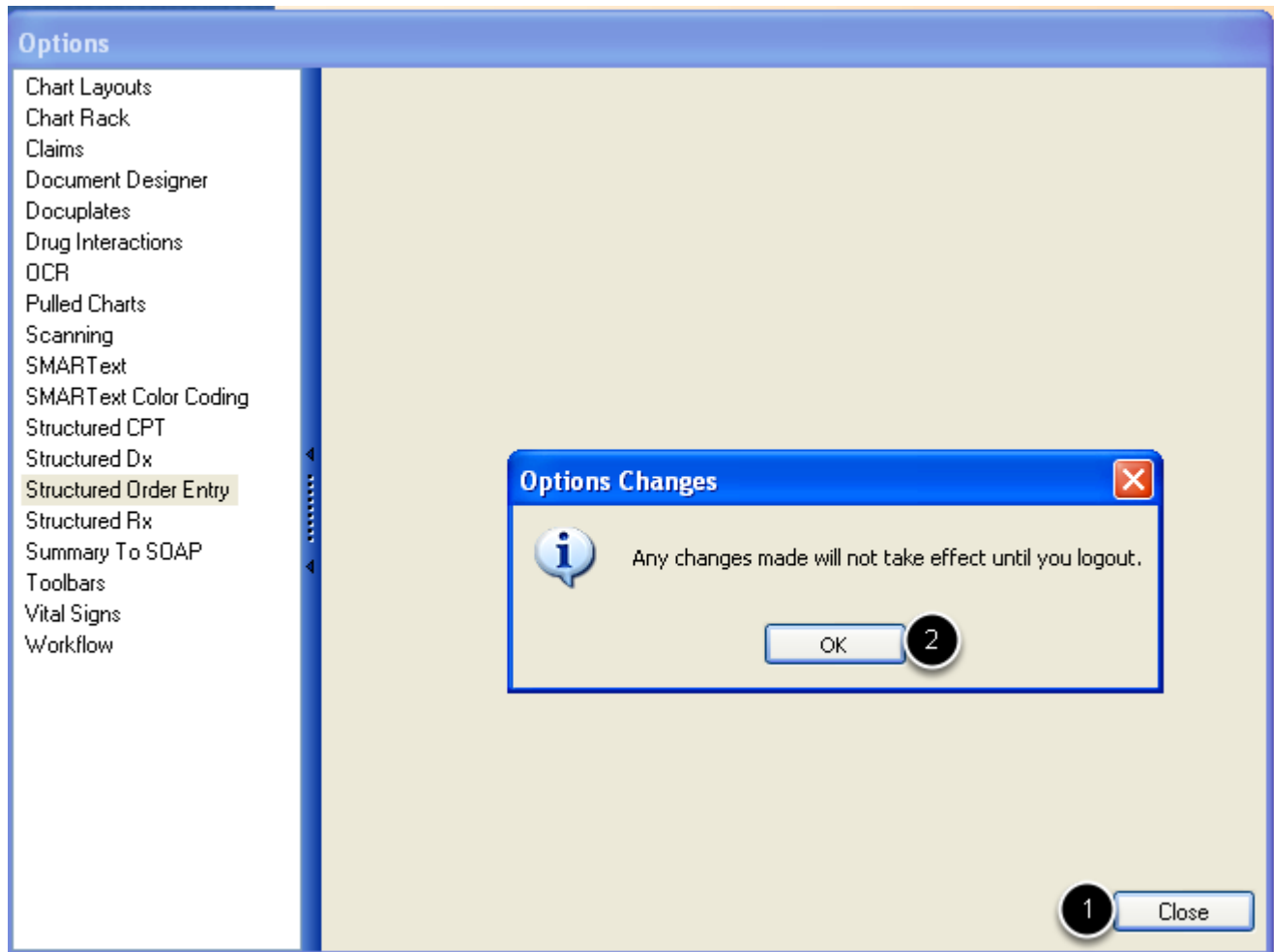
<input checked="" type="checkbox"/> Assigned To	<input type="checkbox"/> Reminder Date
<input checked="" type="checkbox"/> Priority/Urgency	<input type="checkbox"/> Overdue Date
<input checked="" type="checkbox"/> Action/Status	<input type="checkbox"/> Responsible MD.
<input checked="" type="checkbox"/> Destination/Facility	<input type="checkbox"/> Condition
<input type="checkbox"/> Location	<input type="checkbox"/> Cosigner
<input checked="" type="checkbox"/> Ordering MD.	<input type="checkbox"/> Consultant
<input type="checkbox"/> Instructions	<input type="checkbox"/> Contacts
<input checked="" type="checkbox"/> Related Dxs	<input type="checkbox"/> Authorization
<input checked="" type="checkbox"/> CPT Code	<input type="checkbox"/> Payer
<input checked="" type="checkbox"/> Date	<input type="checkbox"/> Rule
<input type="checkbox"/> Performed Date	<input type="checkbox"/> Cost
<input type="checkbox"/> Cosign Date	<input type="checkbox"/> Charges
<input type="checkbox"/> Due	<input type="checkbox"/> Comments

Close

Click to place a check mark in the box next to each sub-item that will appear in the Order Manager.



Saving the Settings



1. Click Close.
2. Click OK and logout of SOAPware to save the settings.



Pick Lists



Q: When I make a change to a pick list within a docuplate, why does this change not reflect when I insert the docuplate again into the SOAPnote?

A: In order for changes to a pick list in a docuplate to become permanent, edits will need to be made in the Docuplate display window.

The screenshot displays three windows from the SOAPware application:

- 1. Docuplates window:** A list of docuplates with columns for Shortcut, Description, and Location. The 'PhaC' docuplate is selected.
- 2. Docuplate view window:** A window showing the 'Subjective' section of a docuplate. It contains a text area with the following text:
COMPLAINT or ISSUE: [Sore throat (Pharyngitis), Chronic bronchitis, ...]
HPI: SYMPTOMS/RELATED: Reports symptoms of dysphagia or swallowing problems.
LOCATION: Reports area of involvement as bilateral.
DURATION: Reports the general length of symptoms to be days.
ONSET/TIMING: Reports occurrence as 3 to 5 days ago.
CONTEXT/WHEN: Reports usually associated with swallowing.
ROS: SKIN/Integumentary: Denies symptoms such as rash-generalized.
Objective
Exam: GENERAL: Appearance: General
- 3. SMARTText Quick Access window:** A window showing a list of pick list items for 'Active Item'. The list includes items like 'Chronic obstructive lung disease', 'Cough', 'Abdominal pains that are epig...', 'Rash-localized', 'Abdomen pains (or cramps) t...', 'Allergic rhinitis', 'Back pain (lower or lumbar-s...', 'Diabetes - Insulin dependent', 'Diarrhea', 'Earache or otalgia', 'Fever', 'Knee pain/symptom/complain...', 'Headache', 'Nausea', 'Immunizations or boosters', 'Vision Screening', 'Acute bronchitis, or bronchioli...', 'Chronic bronchitis', 'Asthma', 'Hypertension, uncomplicated', 'Hypertension, complicated', 'Chest Pain, nonspecific', and 'Congestive Heart Failure'.

1. Docuplates window
2. Docuplate view window
3. SMARTText Pick List Items



Q: Why can I not deselect a pick list item after inserting it?

A: Pick lists should **only** be used with structured items. When free text or unstructured items are used to make a pick list, SOAPware cannot tell one item from another. Thus, when the unstructured item or free text item is inserted into a field, the pick list can't find it to remove it.



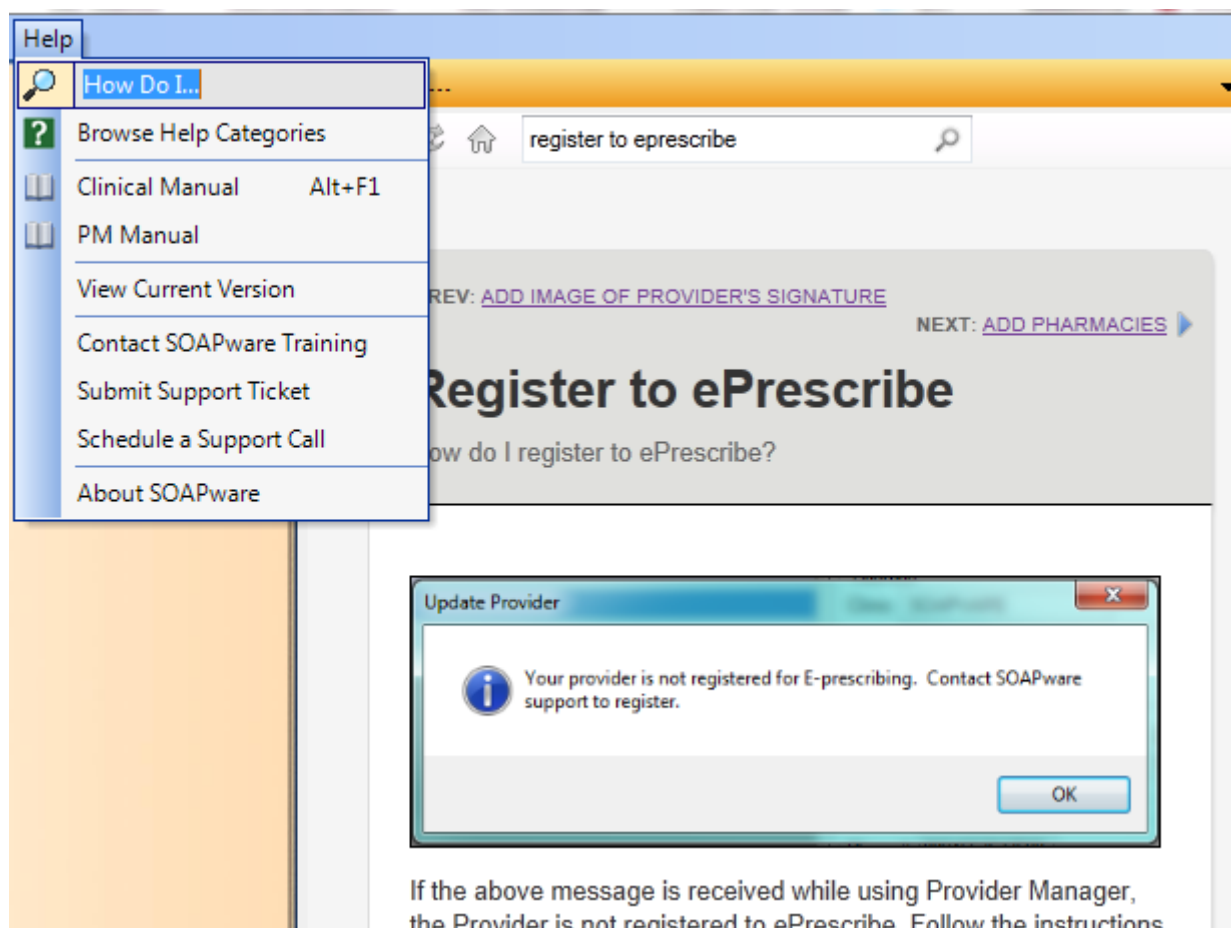
Prescriptions



Q: How do I set up ePrescribing?

A: In order to set up ePrescribing correctly, look to the five steps outlined below.

Step 1: Register to ePrescribe



Within our new Help Manual training resource within SOAPware, you will want to access the Register to ePrescribe lesson by going to **Help > How do I** and type in "**Register to ePrescribe**" and click the magnifying glass. Click [here](#) to learn more about our Help Manual.



Step 2: Access Provider Manager

Providers

Providers

- Jane R. Doe, M.D.
- Jonny Bravo, M.D.
- Kaye L. Williamson
- Krista Nicewarner
- Randall Oates
- Rita Pense
- Sample A. Provider, M.D.

General Misc Codes Signature

Name

Title First M Last Suffix

[] Jane R Doe M.D.

Address

Clinic SOAPWARE

Street 4220 N Crossover RD

City Fayetteville State AR Zip Code 72703-

Contact Information

Phone # (800) 455-7627

Fax # (866) 237-9073

Email []

Physician Numbers

DEA # 123456789 State ID []

NPI# 123456789 UPIN# []

Taxonomy []

☒ Is Supervisor

Update

You will want to access Provider Manager (Tools > Provider Manager) to fill in the provider's DEA number among other fields for ePrescribing purposes. Please see: [Provider Manager](#).



Step 3: Pharmacy Setup

Pharmacy Manager

Quick Access Directory

Find By Zip Code 72701 Find

D..	Name	Street	Street 2	City	S...	Zipcode	Office Phone	Fax Number
	COLLIER DRUG - DICKSON	100 W. DICKS...		FAYET...	AR	72701	(479) 442-6262	(479) 587-0889
	MEDICAL ARTS PHARMA...	2515 E HUNT...		FAYET...	AR	72701	(479) 443-3411	(479) 443-3412
	USA Drug Express	2111 W. Martin...		Fayette...	AR	72701	(479) 442-5240	(479) 582-2408
	Southgate Pharmacy	1620 S School ...		Fayette...	AR	72701	(479) 443-4747	(479) 443-2824
	wal-mart pharmacy 2997	616 N GARLA...		Fayette...	AR	72701	(479) 443-1658	(479) 443-8038
	Tammy B's Health Mart Ph...	2131 North Ce...		Fayette...	AR	72701	(479) 643-3303	(479) 643-2226
	Walgreens Drug Store 07847	524 S. School ...		Fayette...	AR	727015957	(479) 251-7685	(479) 251-1034

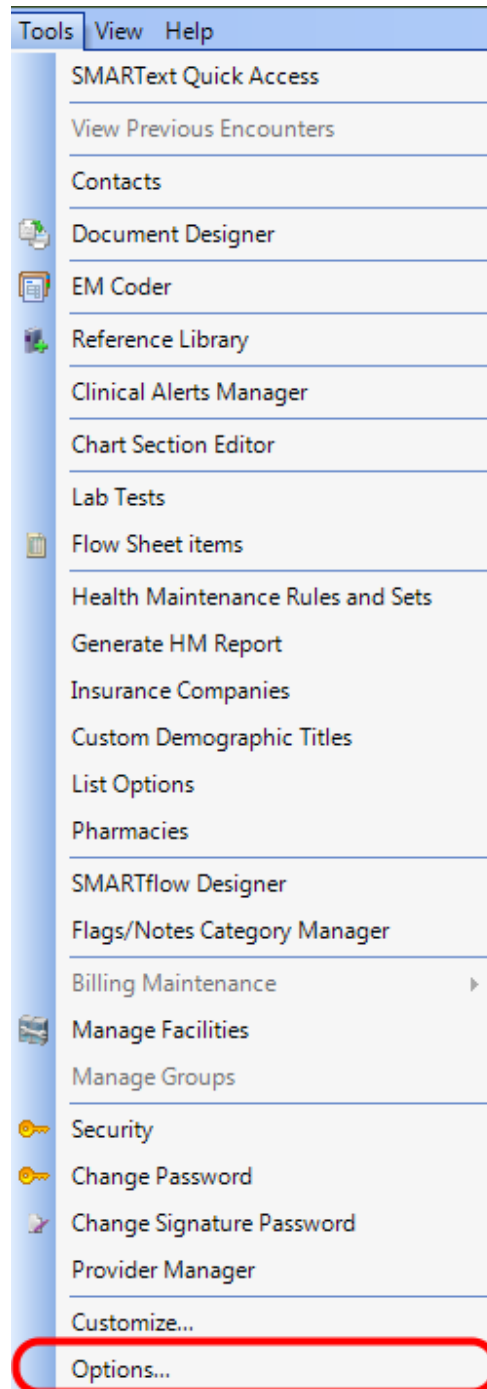
Add to Quick Access

Close

Prior to sending prescriptions electronically or faxing to a participating pharmacy, Pharmacies must be set up in the Pharmacy Manager (Tools > Pharmacies). Please see: [Pharmacy Setup](#).



Step 4: Set Up Structured Rx Options



You will need to access the Options menu which can be found by going to **Tools > Options**. Out of the Options list, you will click on the **Structured Rx** option. Please now refer to the [Tools-Options](#) lesson, and scroll down to the Structured Rx- Printing- Faxing and Structured Rx- Rx



Transmission sections, for further guidance.

Step 5: Use Structured Medications

```
Medications[
Diovan (Valsartan): 160 mg (tablet) SIG- 1 tab(s) once a day orally #30
Substitutions Not Allowed Refills- 12 Notes- |
]
```

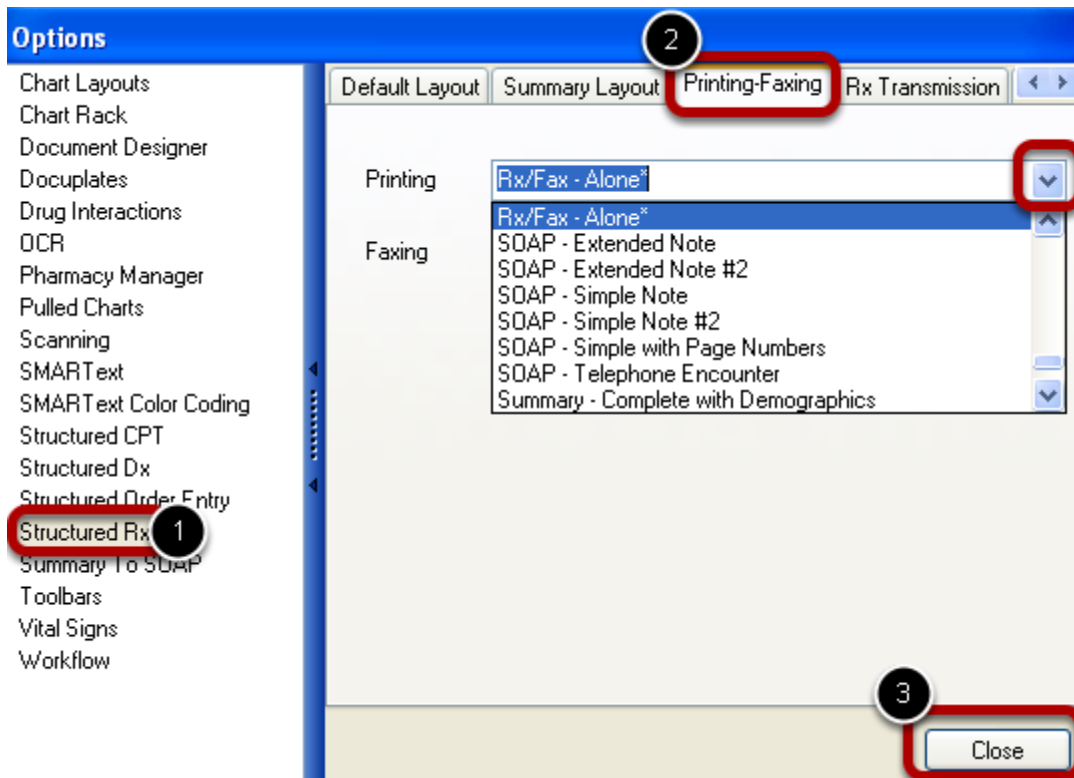
Structured medications will need to be inserted into the SOAPnote Medications field for ePrescribing purposes. For more information, see: [Medication Entry](#).



Q: How do I change the prescription report printed from Rx Manager?

A: 1. Select the Design from Tools > Options > Structured Rx.

In this dialog, the default design can be changed. This setting is user- specific only.



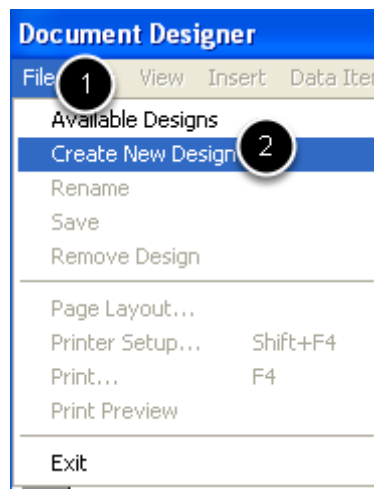
2. Click on the Printing-Faxing tab, and then the drop down option, to change the report that will be used when printing prescriptions.

3. Click Close and logout out of SOAPware to save changes.

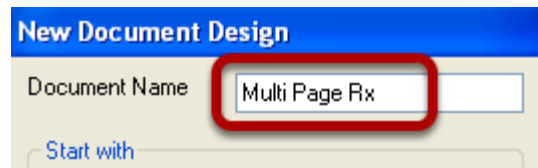


Q: How do I build a multi-page prescription?

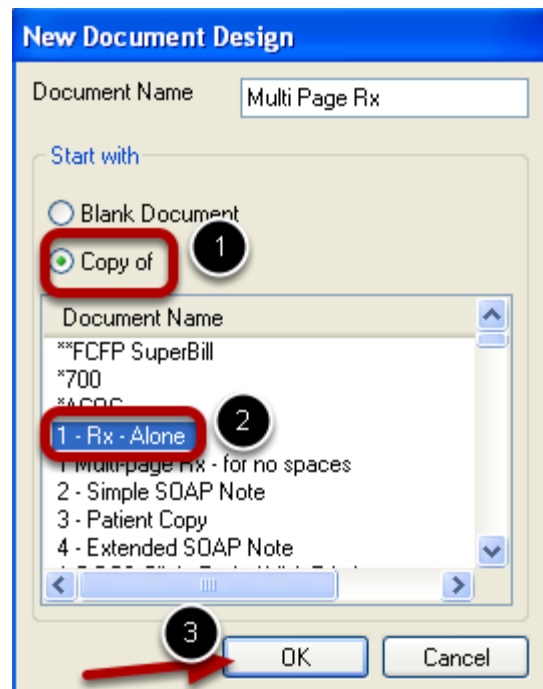
A: To build a multi page prescription, open Document Designer (Tools > Document Designer) to begin creation.



1. Click File.
2. Click Create New Design.



Enter a Document Name.



1. Select Copy of .
2. Click to highlight the Rx- Alone Document Design.
3. Click OK to open design.

Rx:

~~##EncounterField Medications ,##~~

Dr: _____ ##ClinicianSignature##

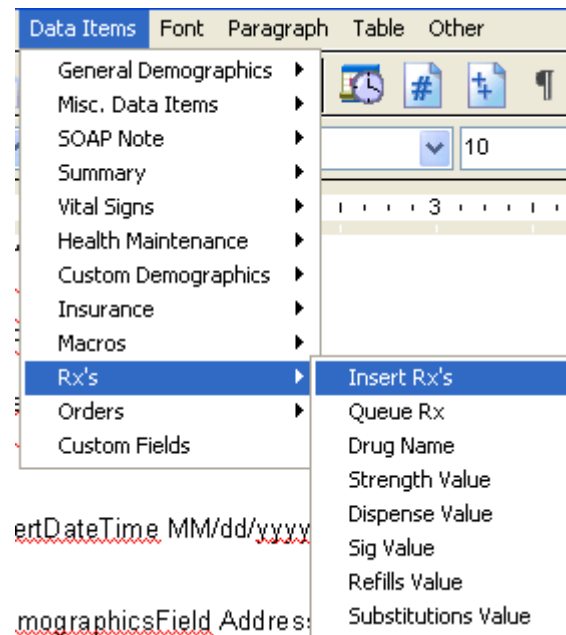
##CurrentProvider Full Name##

##CurrentProvider Full Name##

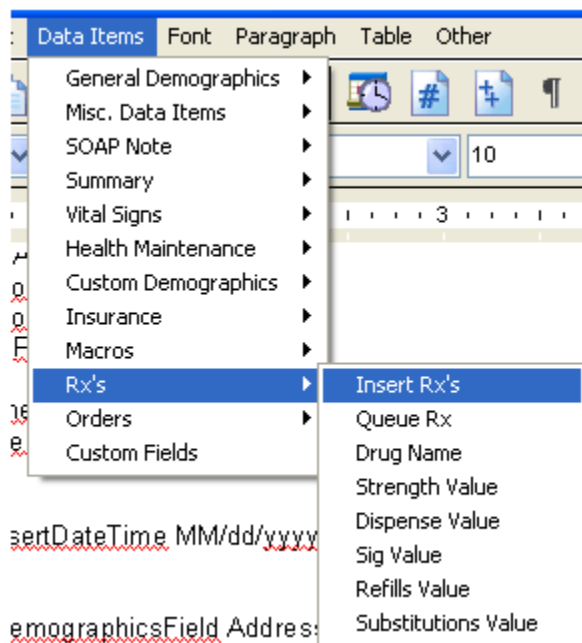
Substitution permitted

Dispense as written

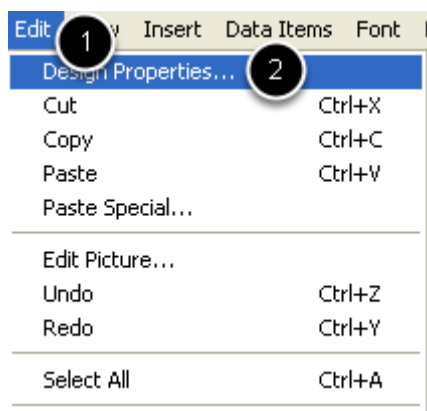
Remove the data command to enter medications from the SOAPnote medication field, by highlighting the command, and hitting backspace on the keyboard.



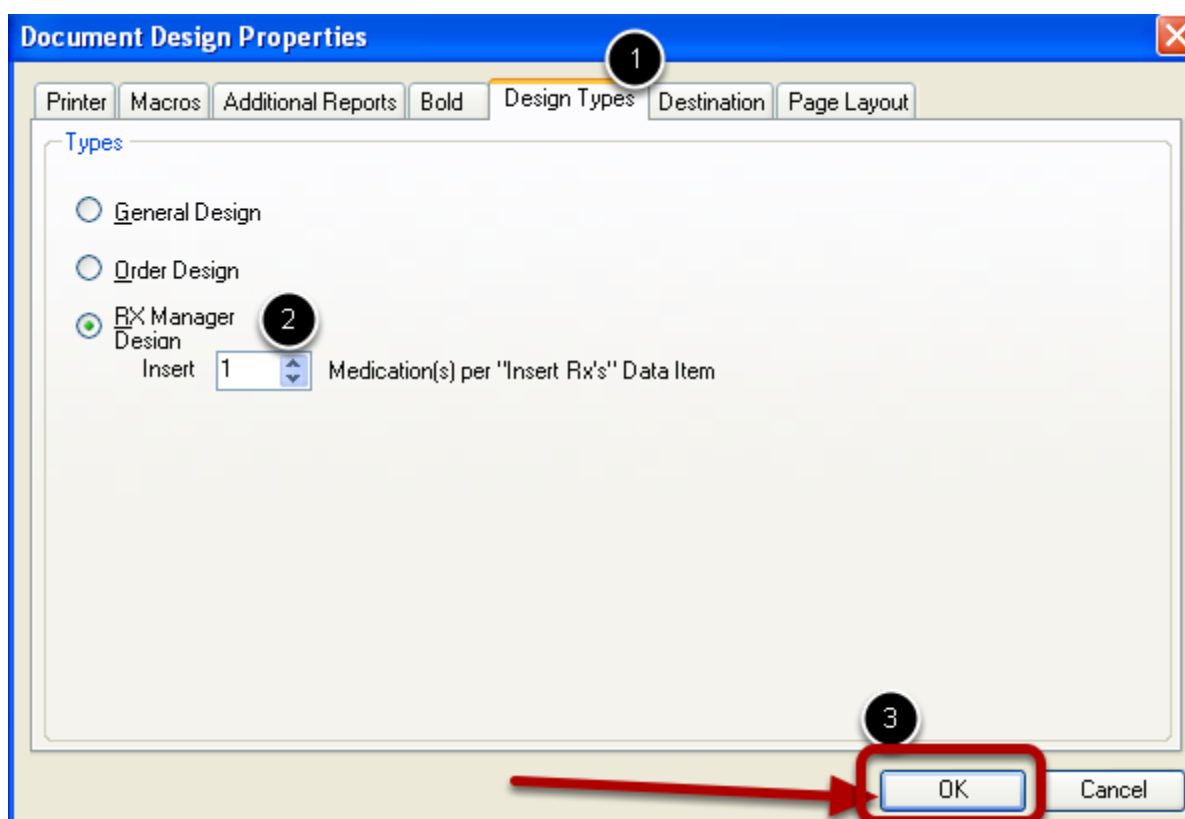
Insert the data command, Insert Rx's (Found from Data Items > Rx's > Insert Rx's).



The new data command has been placed onto to document design.



1. Click Edit.
2. Select Design Properties.



1. Click the Design Types tab.
2. Select Rx Manager Design if not already selected. Select "1" for the number of medications inserted.



3. Click OK.

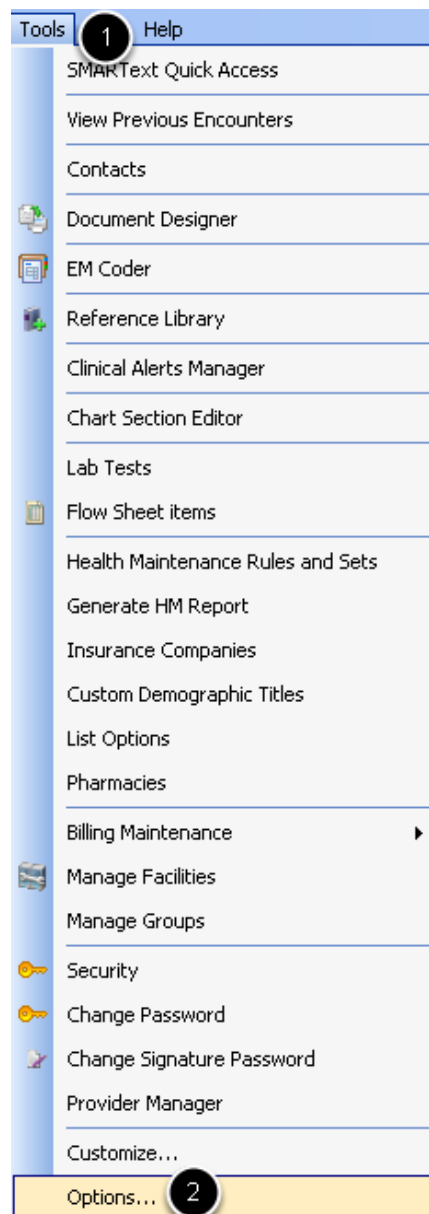
Click Save when closing the design, to save all changes.



Q: When a prescription is faxed through the Rx Manager, what format is it in?

A: The prescriptions faxed through Rx Manager are in the format of the Document Design that is chosen from the Tools > Options menu.

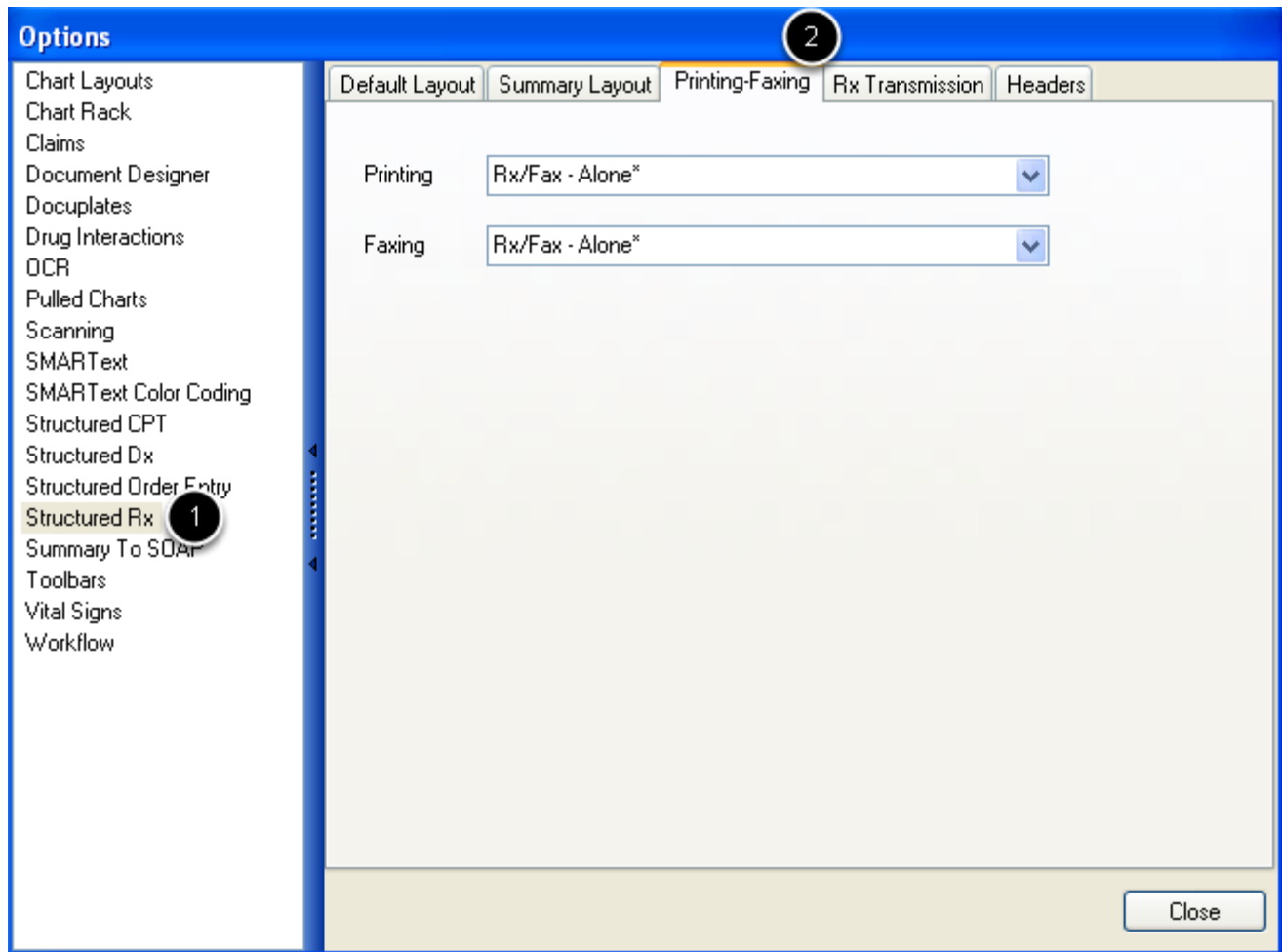
Tools - Options



1. Click on Tools.
2. Click on Options .



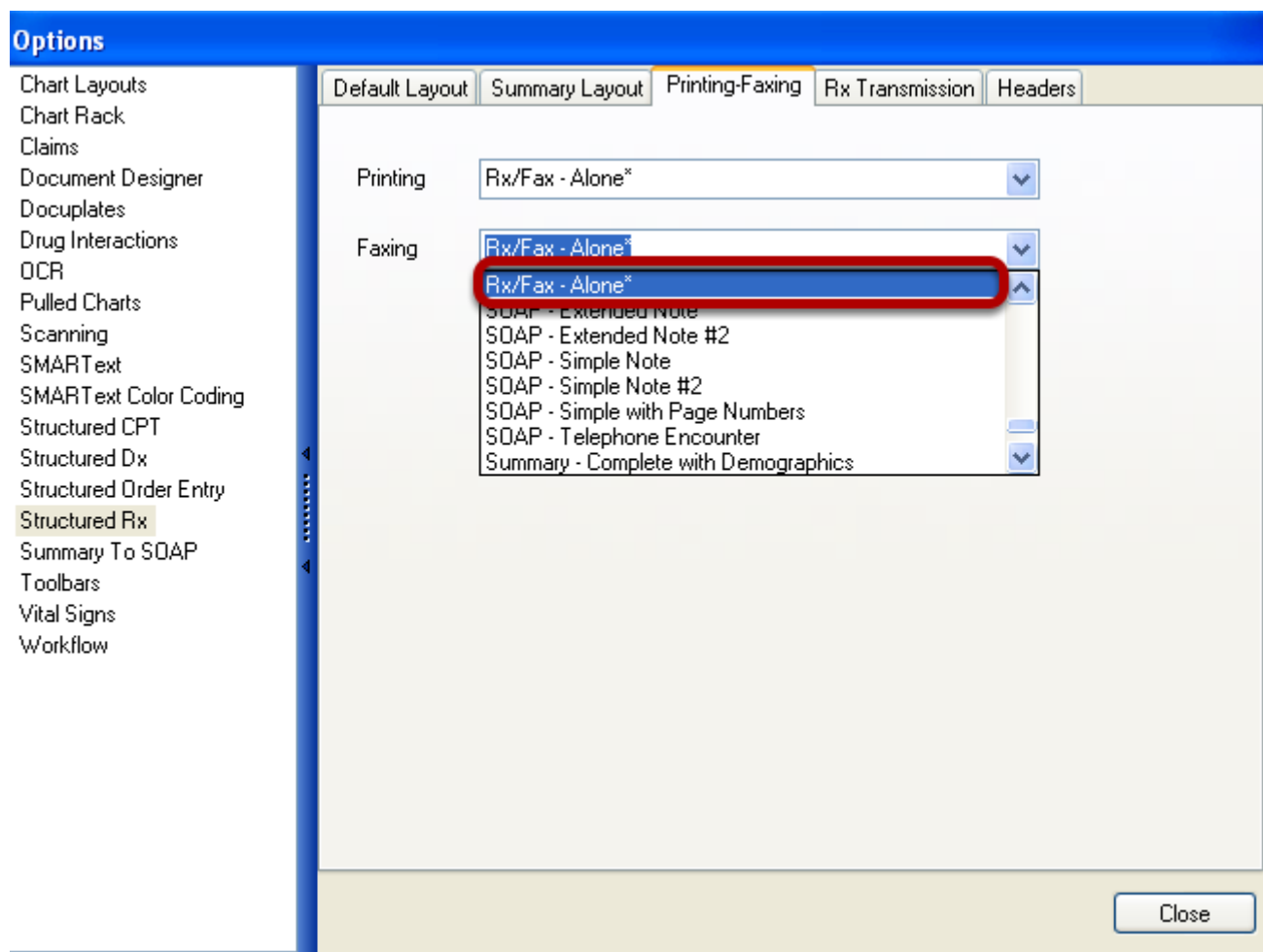
Structured Rx



1. Click to highlight Structured Rx.
2. Click on the Printing-Faxing tab.



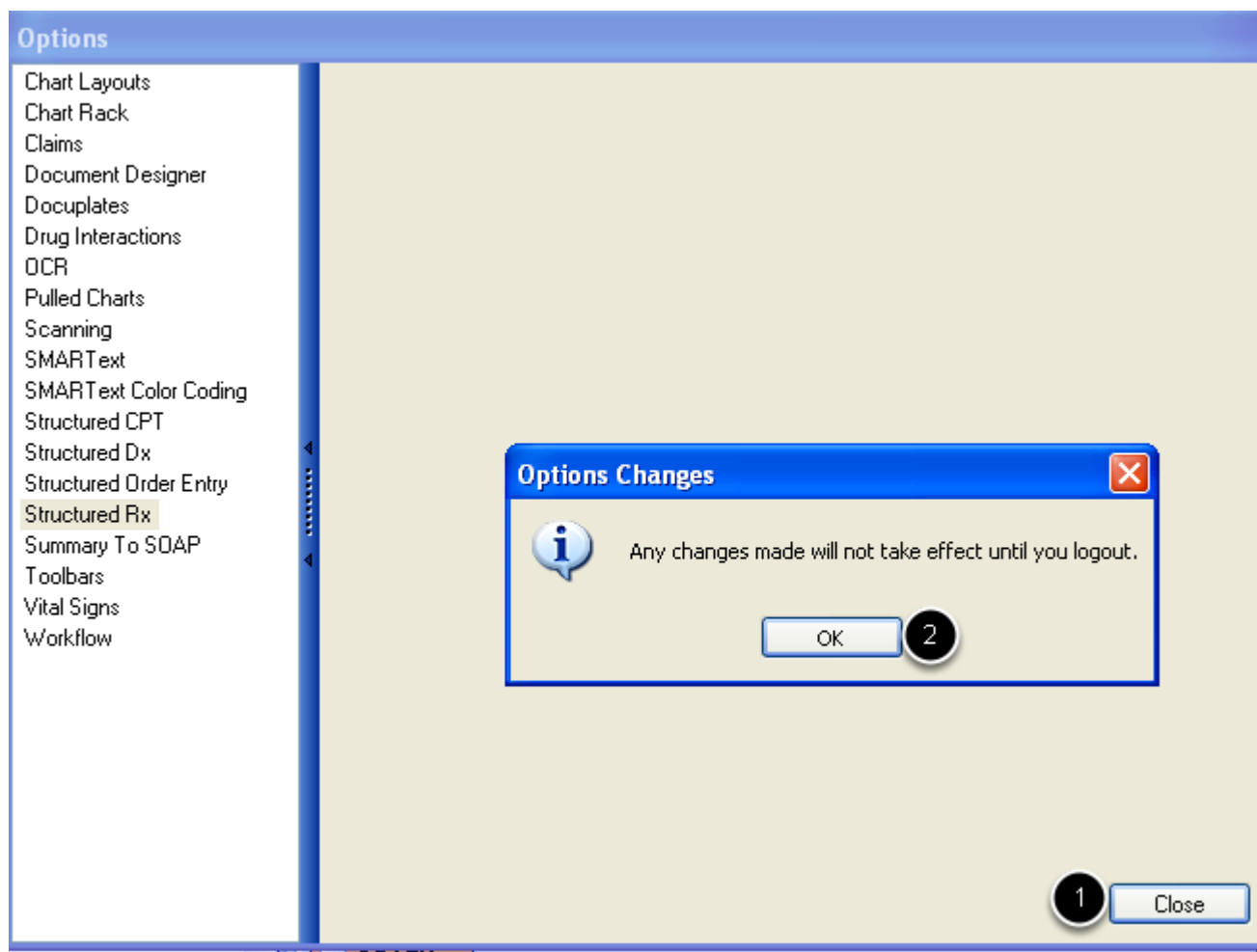
Choosing the Document Design



Using the drop down arrow menu, choose the desired Document Design for printing prescriptions and faxing prescriptions.



Save the Settings

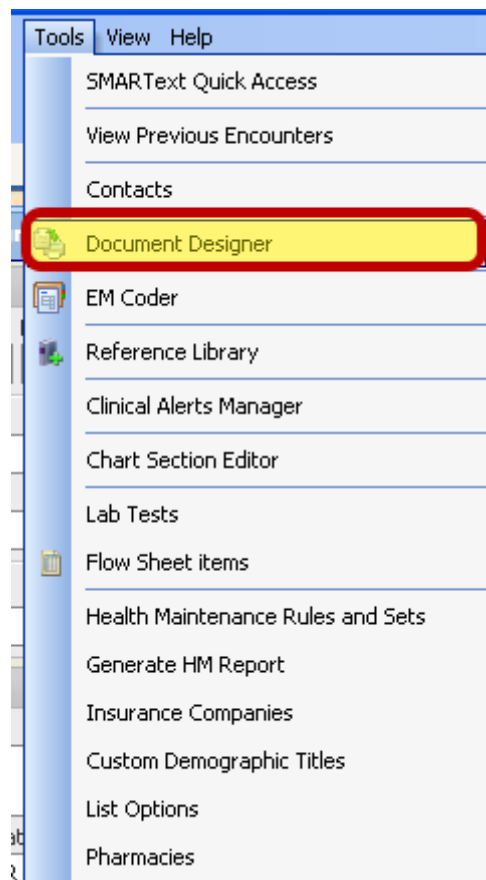


1. Click Close.
2. Click OK, then logout of SOAPware and log back in.

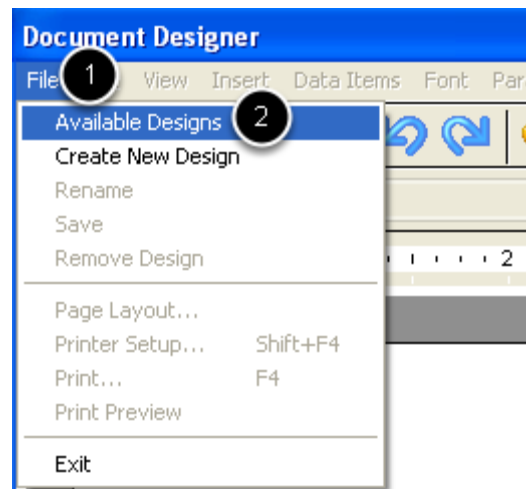


Q: How do I add the office fax number to printed prescriptions?

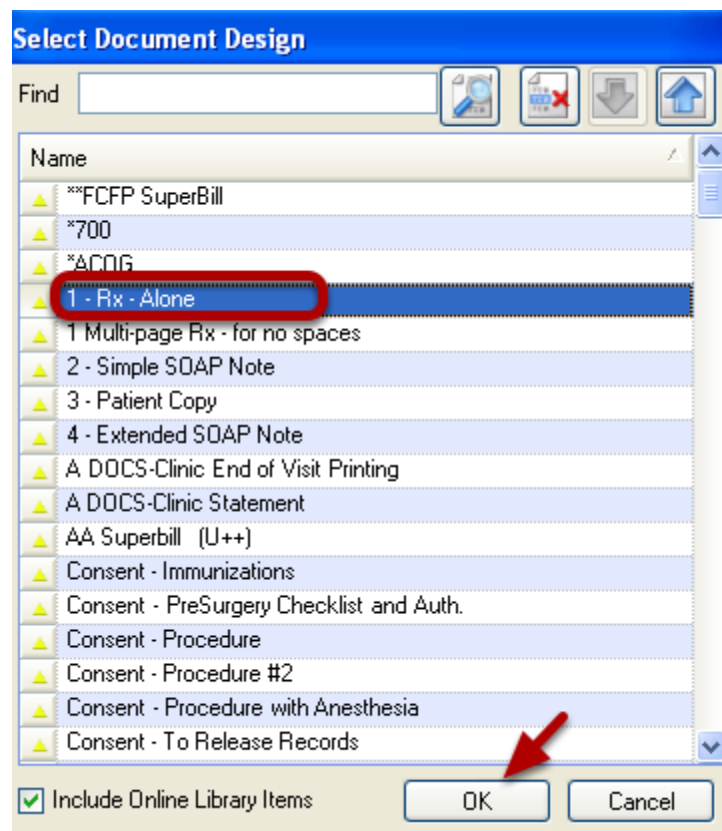
A: Adding an office fax number to a printed prescription can manually be done in Document Designer.



Access Document Designer by going to Tools > Document Designer.



1. Click on File.
2. Click on Available Designs, to bring up designs to choose from.



Click to highlight the document design of choice, then Click OK to open the design.



PRESCRIPTION: (Give to the pharmacist)

##CurrentProvider Full Name##

##ClinicInfo Address##

##CurrentProvider DEA##

##CurrentProvider StateID##

##ClinicInfo PhoneNumber##

FOR: ##GeneralDemographicsField Last Name##, ##GeneralDemographicsField First Name##
##GeneralDemographicsField##GeneralDemographicsField Address## Middle Initial## Age:
Age##

DATE: ##InsertDateTime MM/dd/yyyy## TIME: ##InsertDateTime HH:mm##

ADDRESS:

##GeneralDemographicsField Address##

,

Rx:

##EncounterField Medications ,,\$##

Place the cursor in the desired location to enter the office fax number.



PRESCRIPTION: (Give to the pharmacist)

##CurrentProvider Full Name##

##ClinicInfo Address##

Fax: (479)555-5555

##CurrentProvider DEA##

##CurrentProvider StateID##

##ClinicInfo PhoneNumber##

FOR: ##GeneralDemographicsField Last Name##, ##GeneralDemographicsField First Name##
##GeneralDemographicsField##GeneralDemographicsField Address## Middle Initial## **Age:**
Age##

DATE: ##InsertDateTime MM/dd/yyyy## **TIME:** ##InsertDateTime HH:mm##

ADDRESS:

##GeneralDemographicsField Address##

,

Rx:

##EncounterField Medications ,##

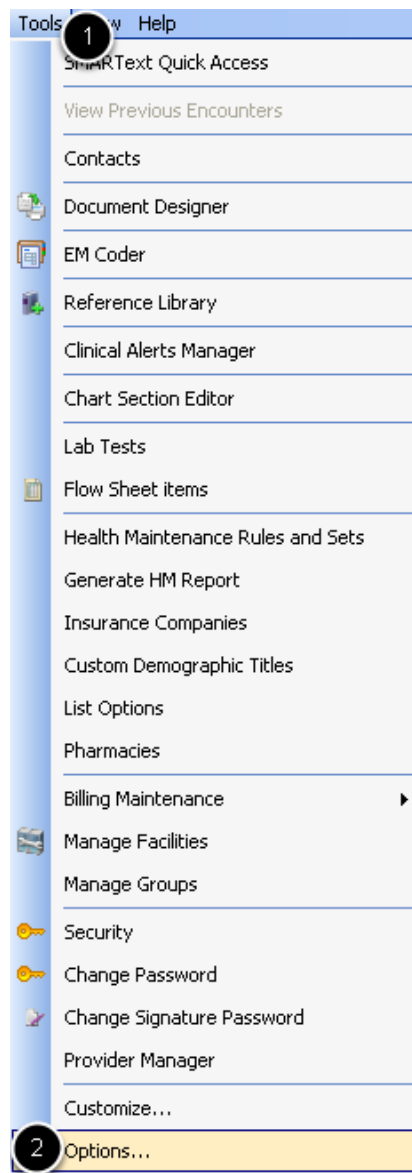
Manually type the office fax number into the desired location on the document design.
Remember to always save changes when closing the design.



Q: How do you put a prescription on hold?

A: The "Notes" sub-item of a medication is the area in which notes to the pharmacist can be documented.

Tools - Options

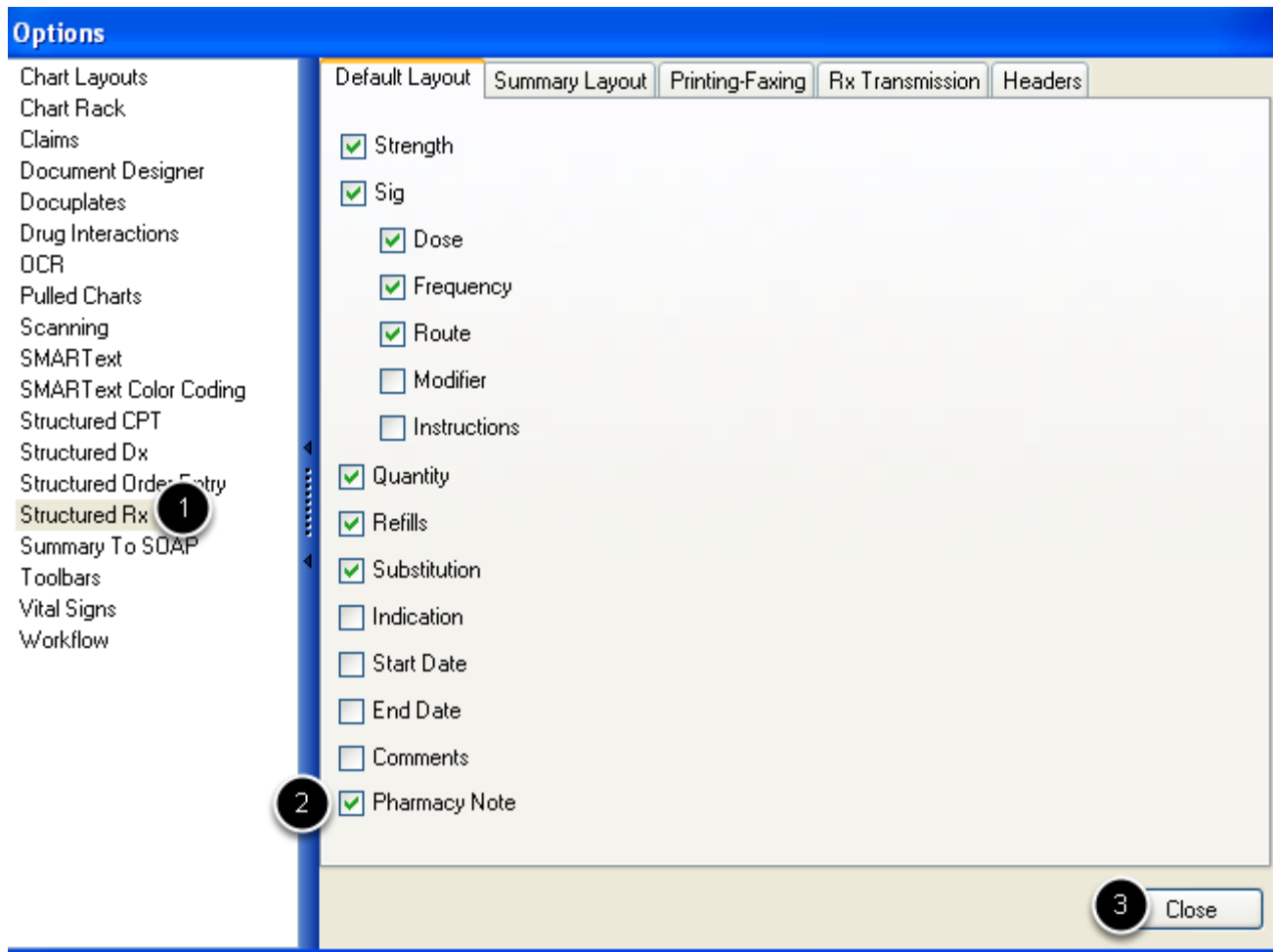


To ensure that the "Notes" sub-item is present in all medications entered into the SOAPnote, a user will need to select it as an option. This setting is user-specific.



1. Click on Tools on the menu bar.
2. Click on Options.

Setting the Default Sub-item



1. Click to highlight Structured Rx.
2. On the Default Layout tab, Click to place a check in the box next to Pharmacy Note.
3. Click Close.



Using the Notes Sub-item

Medications

Diovan HCT(Valsartan/HCTZ): 12.5 mg-80 mg (tablet)
SIG- 1 each once a day orally #30 Substitutions
Allowed Refills- 12 Comment- Notes- [Please hold
until 4/10/2001]

When the SMARText medication is inserted into a SOAPnote, the "Notes" sub-item will be visible.

1. Click next to "Notes" (the item will turn green and small green brackets will appear).
2. Type the note to the pharmacist between the brackets. This information will be sent to the pharmacist via the Rx Manager.



Q: How do you add a provider's signature to an electronically prescribed prescription?

A: It is not necessary to place a provider's signature onto the electronically prescribed prescription. The signature is in the background of this transmission.



Q: Can you generate a prescription without having to create a new SOAPnote?

A: A SOAPnote will always need to be created when generating a prescription. Rx Manager (where prescriptions are derived from), reads the the Medication field in a SOAPnote. This workflow also keeps all prescriptions and medication history in one area.

For refills from the pharmacy that are handled from the All Refill Request Manager, a SOAPnote will be auto-created when the refill is replied to, and the information will be documented in the Medication field for you. That SOAPnote will then need to be signed off.



Printing



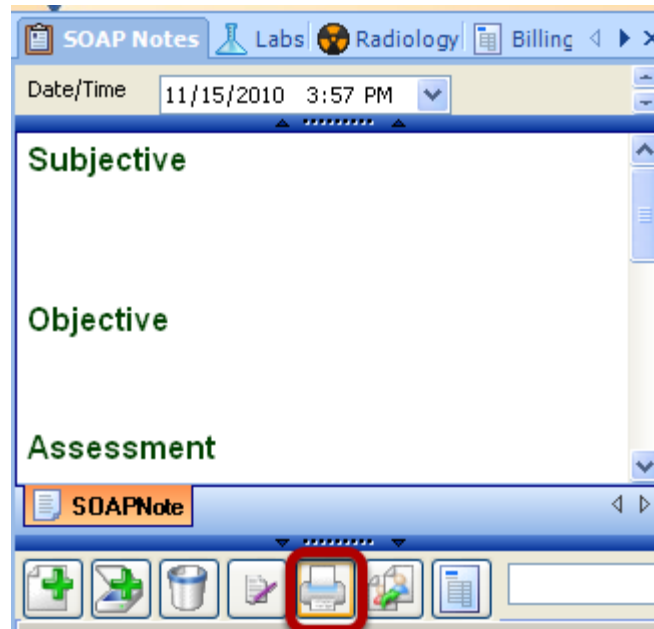
Q: How do I print notes for a Medicare Audit?

A: SOAPware 2010 is the first version (subsequent versions included) to support the functionality necessary when an audit, such as a Medicare RAC Audit, is requested.

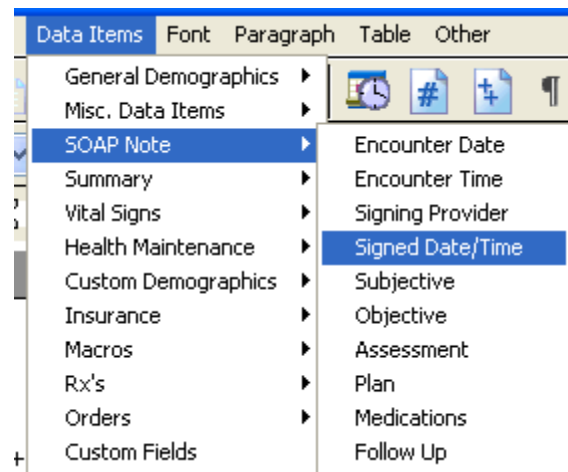
Entering "Electronically Signed by" into the SOAPnote is required. This can be achieved in SOAPware by using a shortcut code to be part of a default docuplate that is used in the SOAPnotes chart section, or by entering the shortcut code in Provider Manager, under the Codes tab as the default follow up code.

There are multiple ways to print out what you need depending upon the situation.

1. When printing the current docutainer with the print button located in the mini-toolbar, the sign off date and time will automatically be inserted.
2. Data commands for the sign off date and time may be inserted onto a document design when printing an Available Document Design.
3. The Share Charts workspace within SOAPware allows the printing of all or selective chart section docutainers to be exported. It is necessary to insert the date and time on all docutainers by using the keyboard command: Control + D.



When printing the current docutainer with the print button located in the mini-toolbar, the sign off date and time will automatically be inserted.



Data commands for the sign off date and time may be inserted onto a document design when printing an Available Document Design.



The keyboard command, Control + D, will enter the date and time into the SOAPnote.



Active Provider: All Providers

Type of Export:
☒ Individual (Select: Pancakes, Banana)
☐ Pulled Charts
☐ All Charts

Search Dates:
Start Date: / / : : End Date: / / : :

Select Items:

- ☒ Advanced Directives
- ☒ Billing Statement
- ☒ Demographics
- ☒ Documents
 - ☒ CCR
 - ☒ Correspondence In
 - ☒ Correspondence Out
 - ☒ Demographics
 - ☒ Drawings
 - ☒ Financial
 - ☒ Flow Sheets
 - ☒ Growth Charts
 - ☒ Health Maintenance
 - ☒ HIPAA Disclosures
 - ☒ History & Physicals
 - ☒ Labs
 - ☒ Misc.
 - ☒ Pathology
 - ☒ Printed Encounters
 - ☒ Radiology
- ☒ Drawings
- ☒ Encounters
- ☒ Messages

Sections to Export:

- Advanced Directives
- Billing Statements
- CCR
- Correspondence In
- Correspondence Out
- Demographics
- Drawings
- Financial
- Flow Sheets
- Growth Charts
- Health Maintenance
- HIPAA Disclosures
- History & Physicals
- Labs
- Messages
- Misc.
- Pathology
- Printed Encounters
- Radiology

Location:
C:\Documents and Settings\rodell\My Documents\ScreenSteps Library\Lessons

Browse

Copy

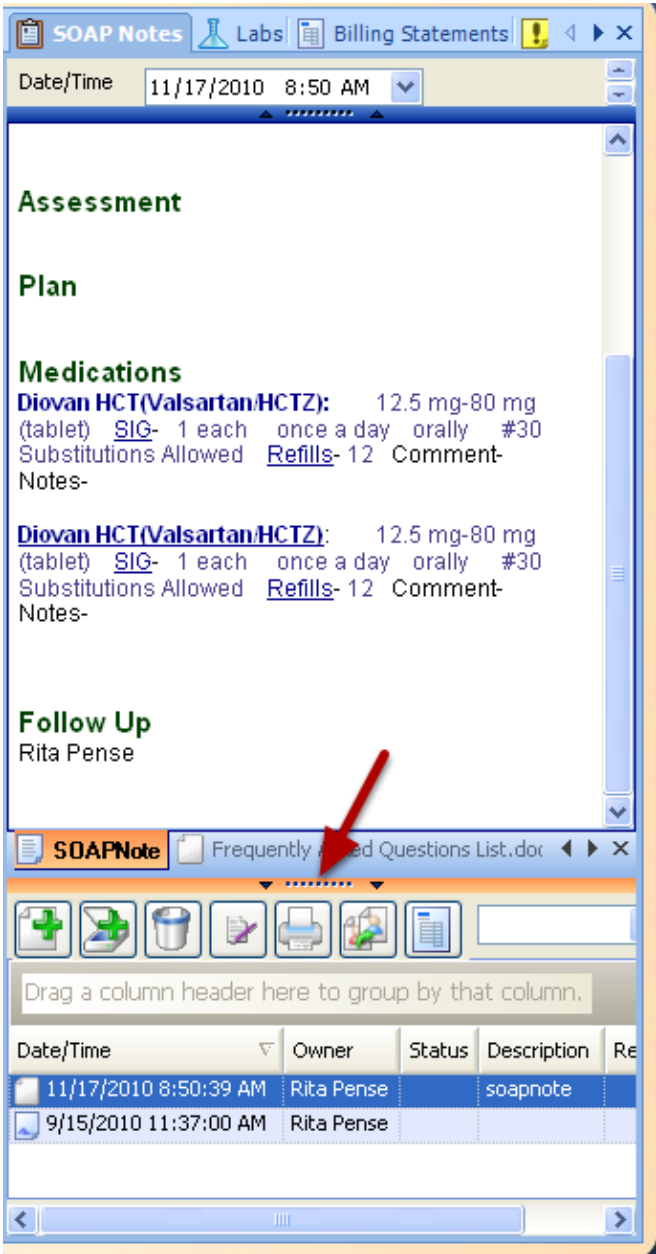
The Share Charts workspace within SOAPware, allows the printing of all chart section. or selective chart section docutainers to be exported.



How do I include all documents in a docutainer when I use the quick print method?

A: When using the print button, located under the lower splitter bar in a chart section, menu options are available.

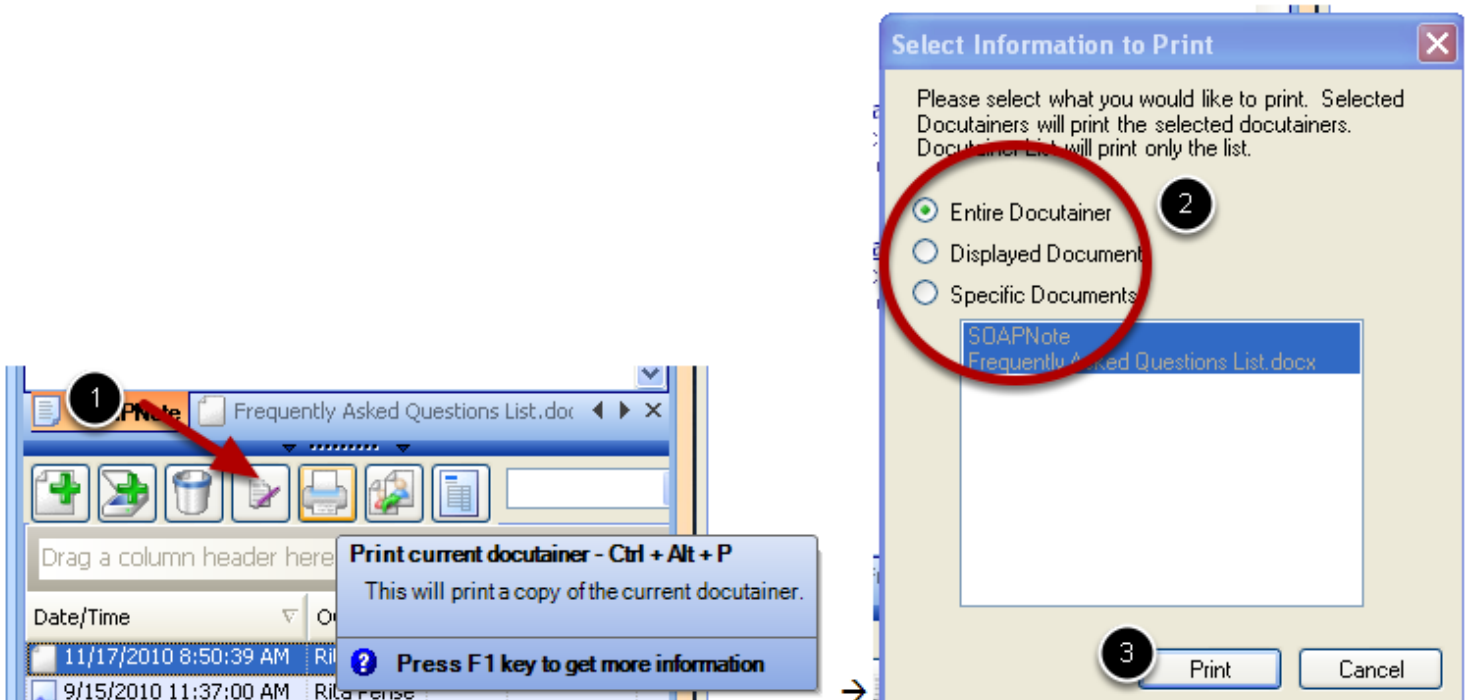
Accessing the Print Button



If the bottom splitter bar is closed, left- click to expand.



Selecting the Documents to Print



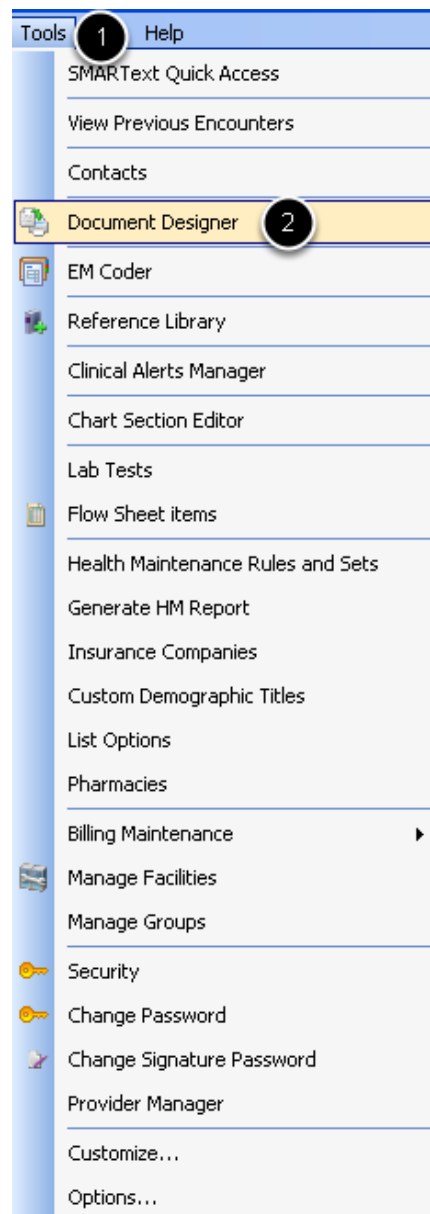
1. Click on the Print Current Docutainer button.
2. Choose the option desired:
 - *Entire Docutainer- prints all documents in the docutainer
 - *Displayed Document- prints the document in view
 - *Specific Documents- Click to highlight the document to be printed
3. Click Print.



Q: How can handouts print automatically with other Document Designs?

A: A command, called Print Selected Handouts, can be placed on a Document Design. If handouts are selected, they will automatically print with the Document Design.

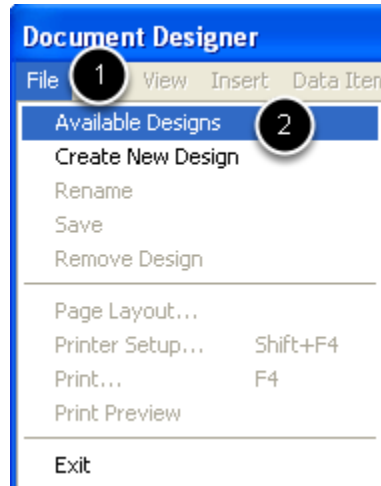
Tools - Document Designer



1. Click on Tools on the menu bar.
2. Click on Document Designer.



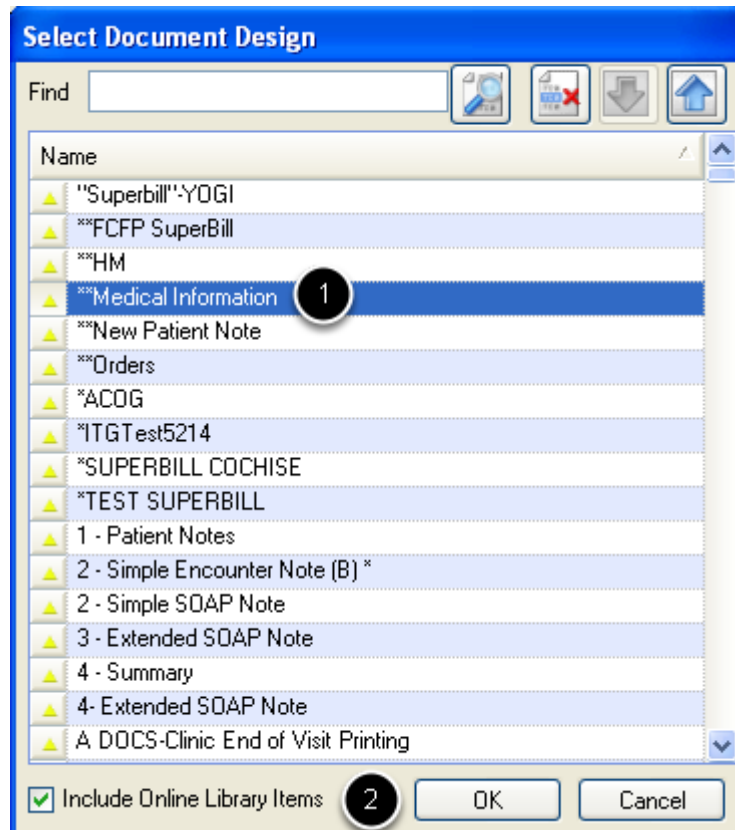
File - Available Designs



1. Click on File.
2. Click on Available Designs.



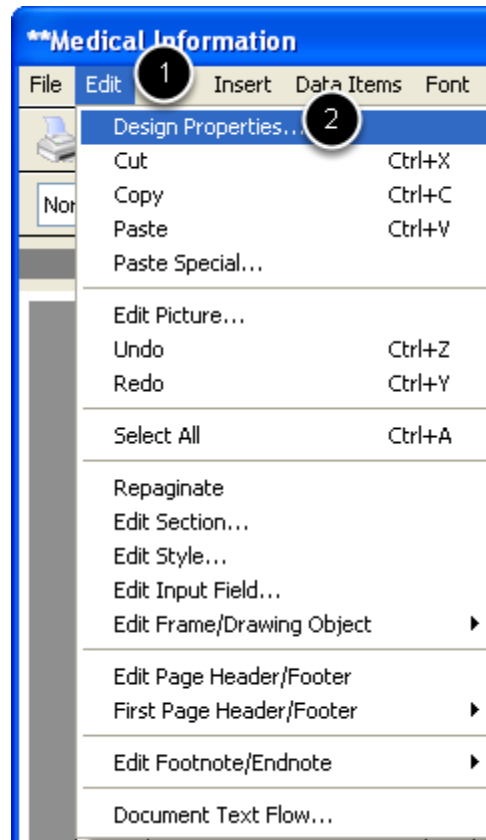
Selecting the Document Design



1. Click to highlight the design to place the print command.
2. Click OK.



Edit - Design Properties



1. Click on Edit.
2. Click on Design Properties.

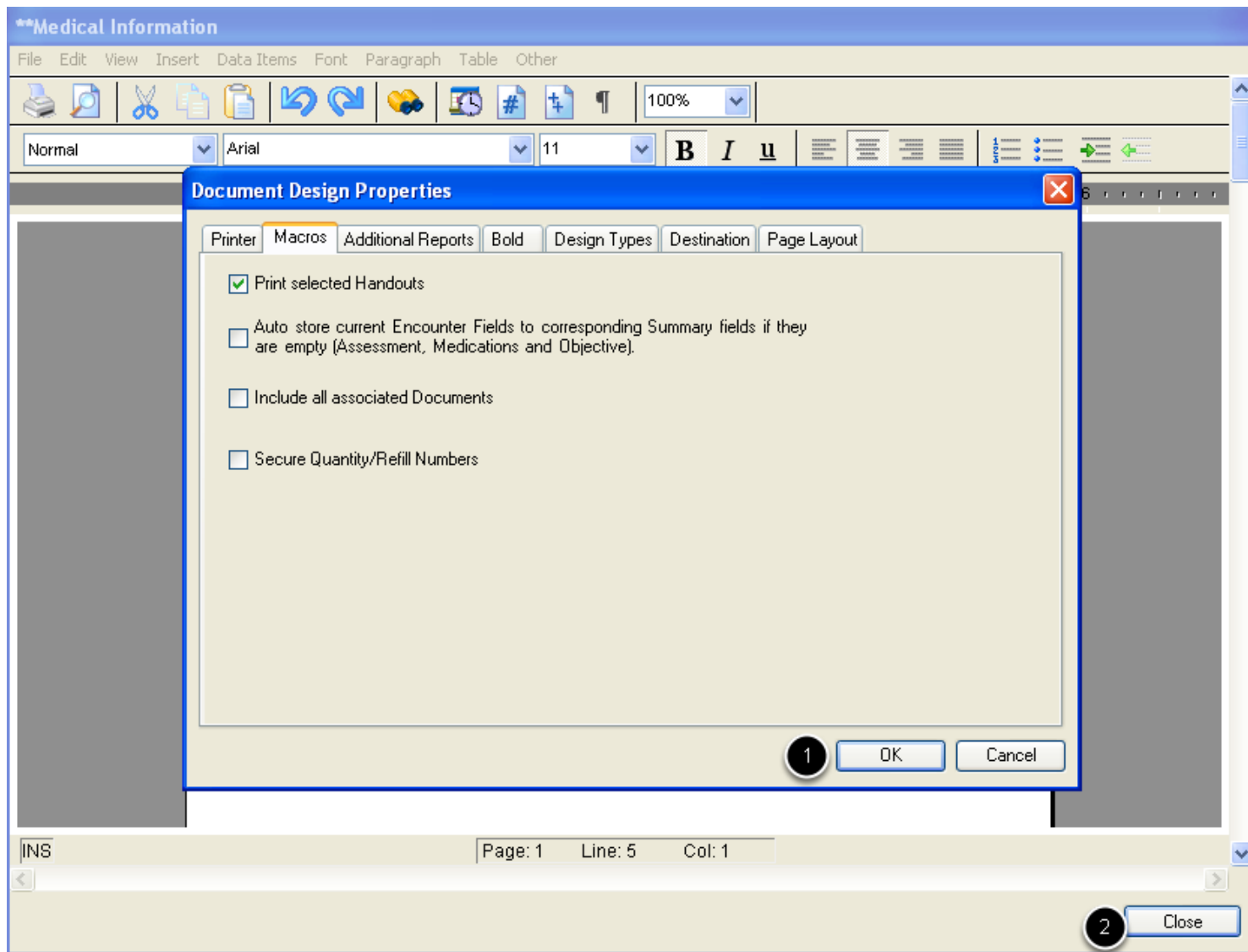
Placing the Print Handouts Command on the Document Design



1. Click on the Macros tab.
2. Click to place a check in the box next to Print Selected Handouts.



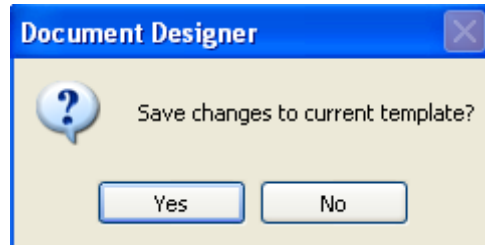
Saving the Settings



1. Click OK.
2. Click Close.



Saving the Changes to the Document Design



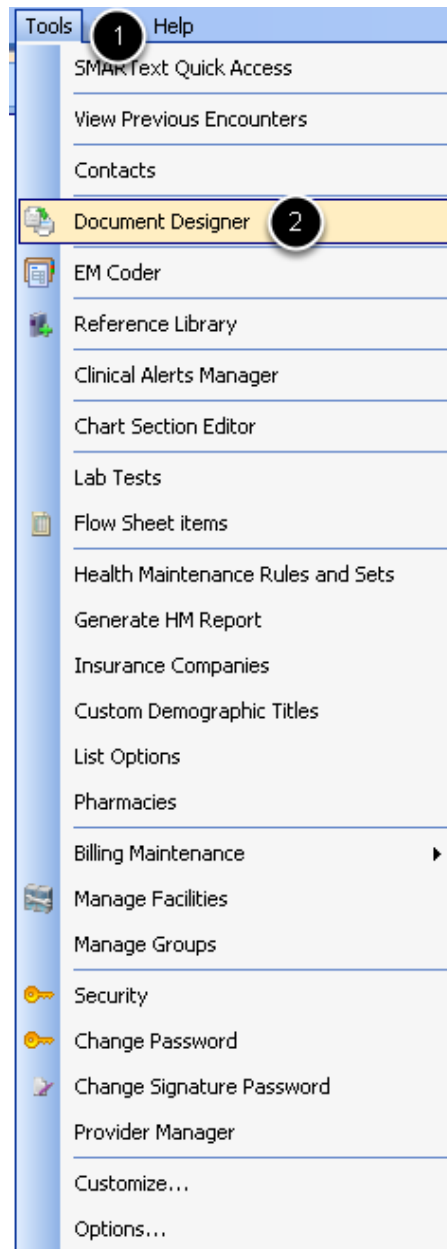
Click Yes.



Q: How do you make a Document Design print at a specific printer?

A: A print command will be placed on the Document Design.

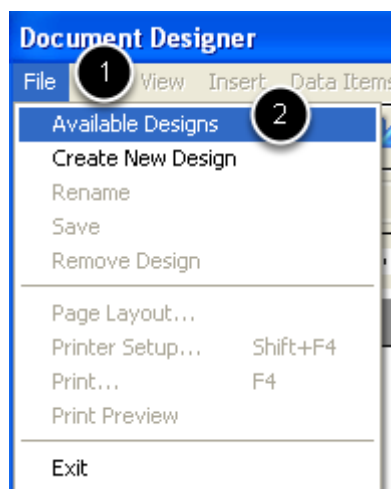
Tools - Document Designer



1. Click on Tools.
2. Click on Document Designer.



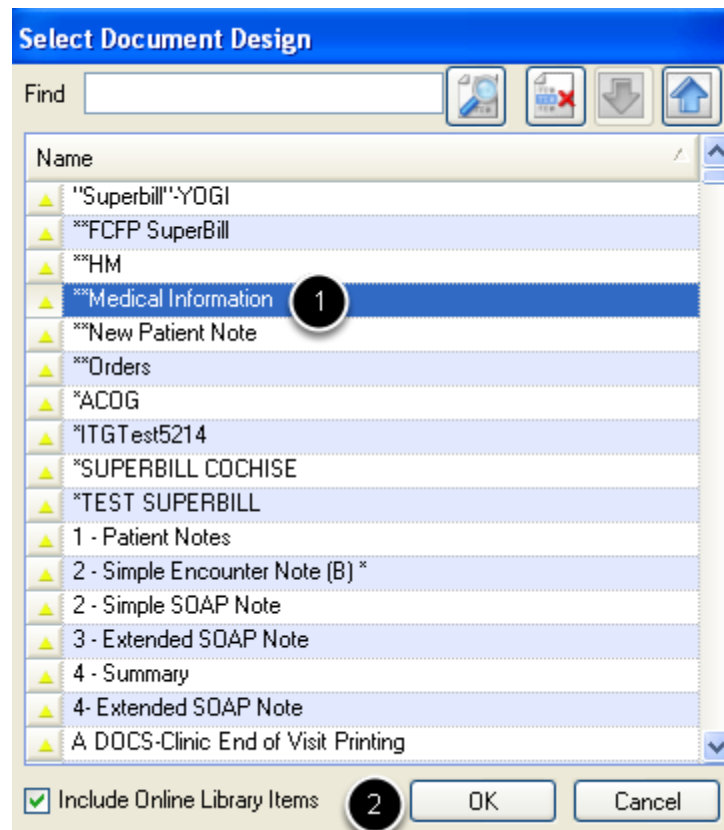
File - Available Designs



1. Click on File.
2. Click on Available Designs.



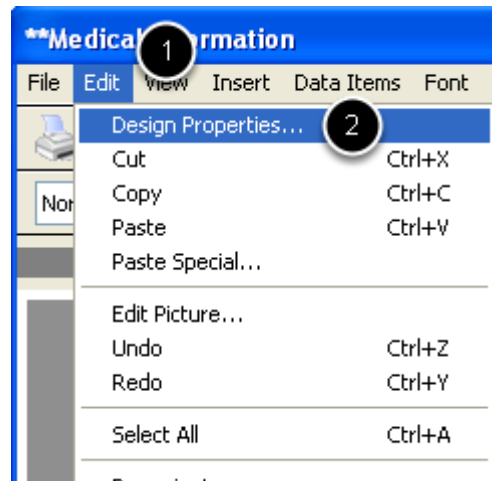
Selecting the Document Design



1. Click to highlight the design to place the print command.
2. Click OK.



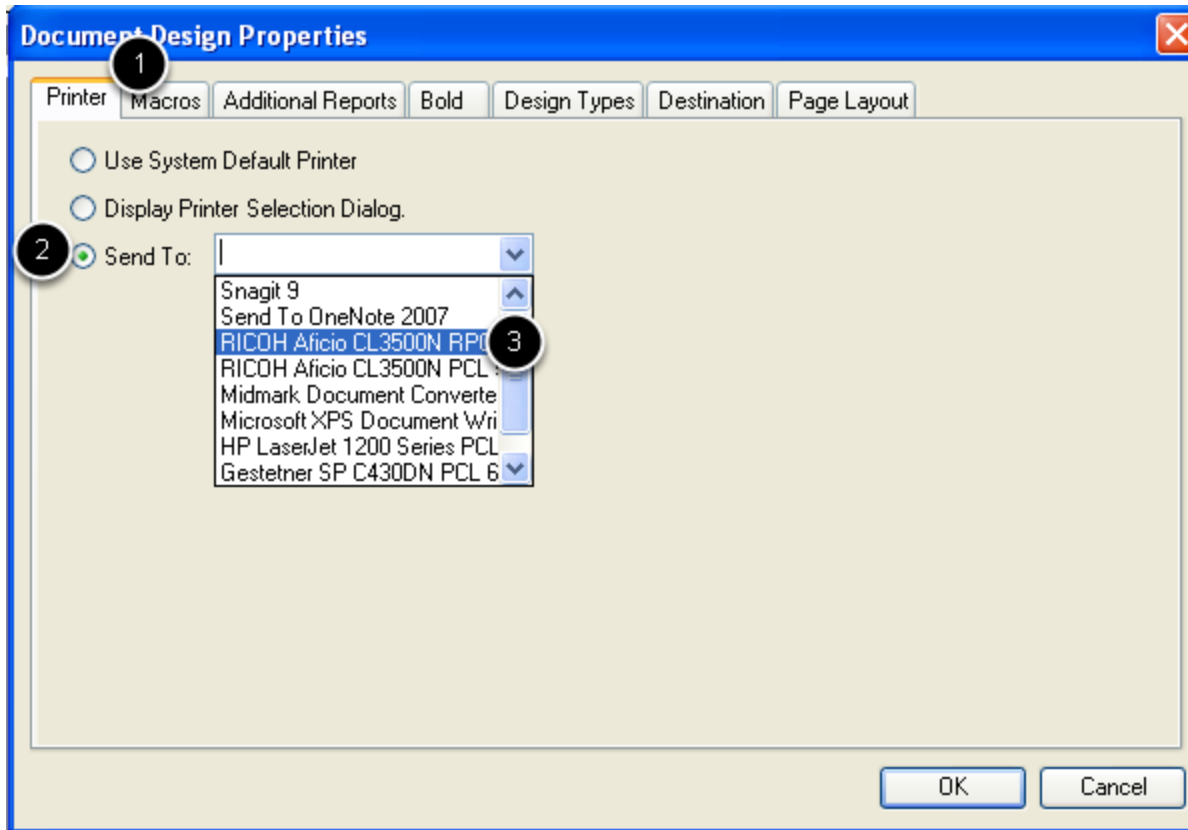
Edit - Design Properties



1. Click on Edit.
2. Click on Design Properties .



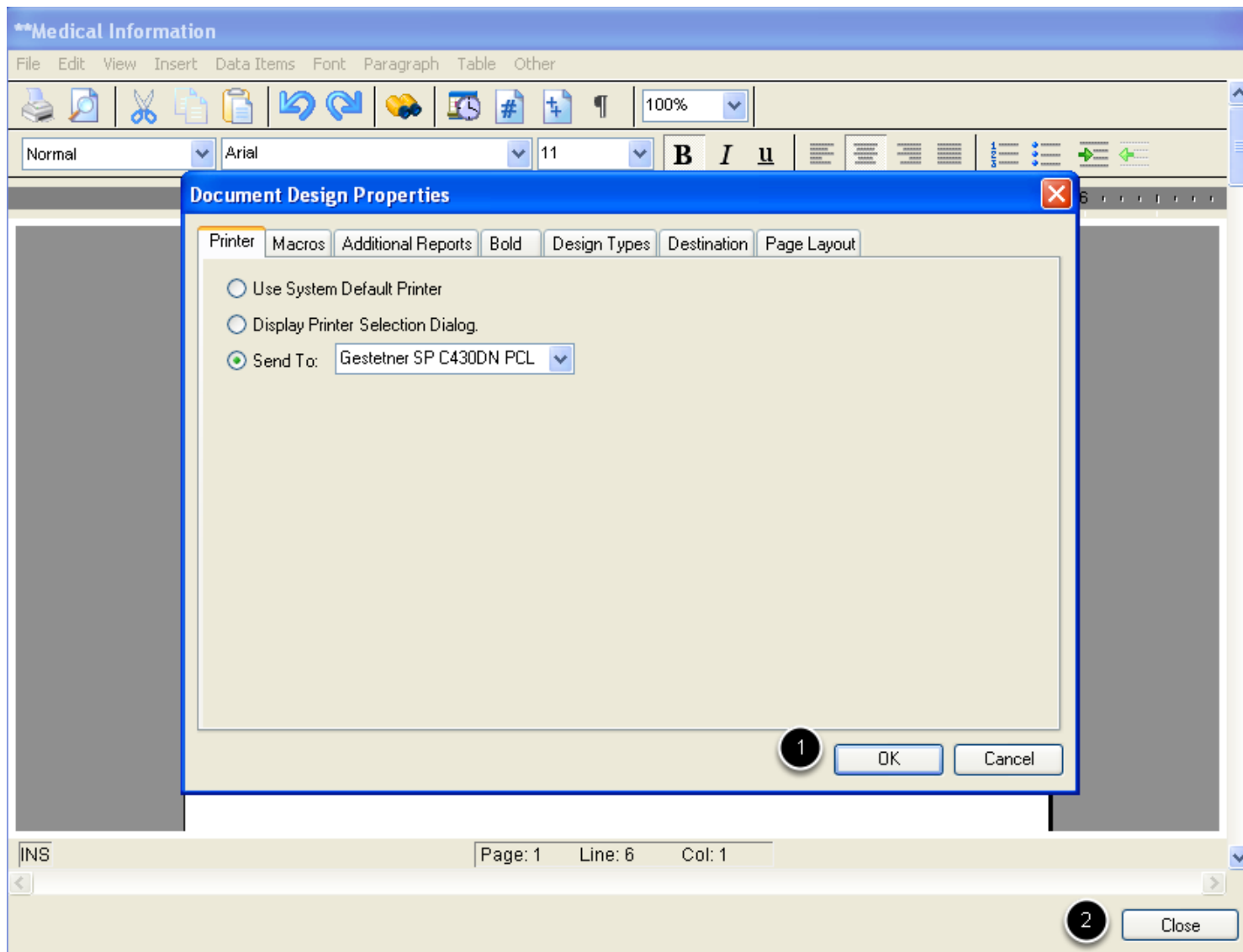
Placing the Print Command on the Document Design



1. Click on the Printer tab.
2. Click on the radio button next to "Send To:"
3. Using the drop down menu, choose the desired printer.



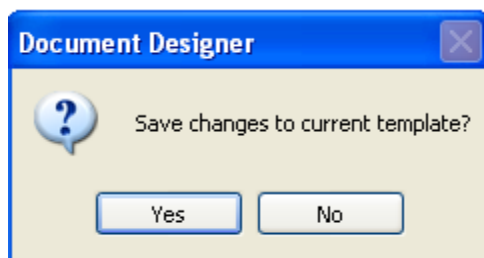
Saving the Setting



1. Click OK.
2. Click Close.



Save the Changes to the Document Design



Click Yes.



Refill Requests



Q: How should I respond to a controlled substance refill request?

A: Approving refill requests for a controlled substance violates ePrescribing laws. When responding to the pharmacy, choose the response labeled "Deny/New Rx to follow," as this is the ideal response to these requests.



Q: How do I remove a refill request?

A: It is not recommended to remove a refill request. Denying a refill request would be the appropriate response. If multiple refill requests are received for one patient and one medication, the pharmacy should be notified. A note to the pharmacist may be entered when this refill is denied, notifying them of this issue.



Q: Why do pharmacies send refill requests for scheduled medications if they cannot be refilled electronically?

A: Pharmacies are using the electronic messaging option to notify the prescriber of the need for a refill for a patient, rather than reverting to faxing or calling the clinician.



Q: Why am I not receiving electronic refills from the pharmacies that automatically match with the patients in SOAPware?

A: Electronic refill requests are an evolving phenomenon which involves work flow and software changes from both the pharmacy and the clinic. Due to limitations of technology linking clinics to pharmacies, the pharmacy has to send refill requests in a fashion that is different from past methods. Specifically, for automatic matching of the request to a patient, the request has to be directly derived from the original prescription that was sent electronically to the pharmacy.

Many pharmacies do not yet have the software that can store the original prescription electronically. In fact, more often than not, the pharmacy is actually working with a fax machine, rather than an electronic transfer of information. In time, the software that pharmacists use and the standard for sharing prescription information, will allow for increased direct electronic transfer of prescription information, so that fewer steps are necessary from both the pharmacy and the clinic.

A major limitation to efficiency, at present, is the lack of any unique identifiers for patients. It is now illegal to use Social Security numbers. Currently, the only means to uniquely identify (match) patients with prescriptions, is to use the original identifier associated with the initial prescription sent from the clinician to the pharmacy.

****If a clinician is receiving no refill requests that automatically match to patient charts, there may be a discrepancy between the prescriber information sent from SOAPware, and what Surescripts has on file for a clinician.****



Sales Specific



Q: Does SOAPware offer a return period?

A: SOAPware does have a return policy.

Return Policy

As long as you are within 30 days from the **date of purchase** you can return SOAPware for a full refund of the purchase price.

Sales Contact Information

Phone: 800-455-7627, ext. 200

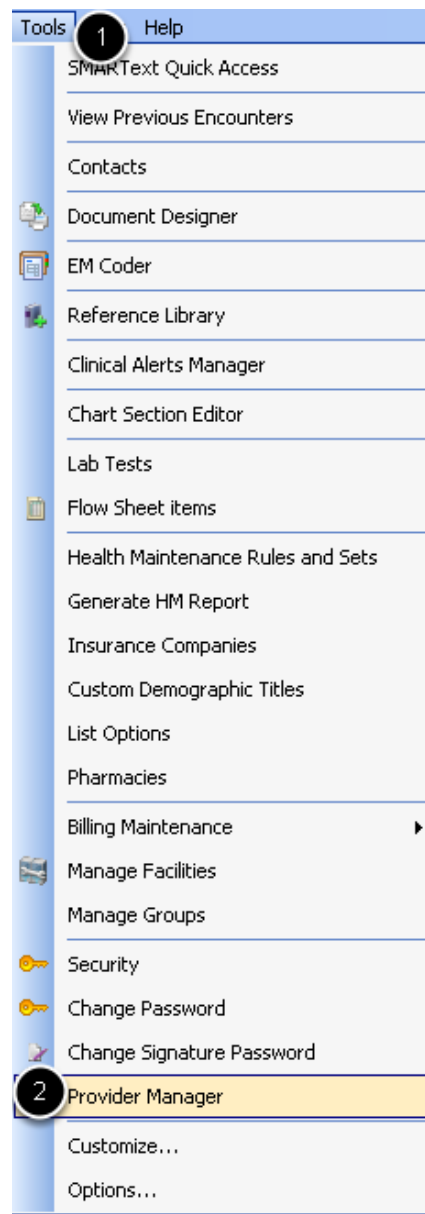
E-mail: sales@soapware.com



Q: How do I see my SOAPware license?

A: The SOAPware Site Administration page will display what enhancements or package you have with SOAPware, as well as check the renewal dates for the SOAPware license.

Tools - Provider Manager



1. Click on Tools on the menu bar.
2. Click on Provider Manager.



Provider Manager

Providers

Providers

- Jonny Bravo, M.D.
- Krista Laningham
- Randall Oates
- Rita Pense

General Misc Codes Signature

Name

Title	First	M	Last	Suffix
	Jonny		Bravo	M.D.

Address

Clinic SOAPWARE

Street 4220 N Crossover RD

City	State	Zip Code
Fayetteville	AR	72703-

Contact Information

Phone # 8004557627500

Fax # (866) 267-9073

Email

Physician Numbers

DEA #	State ID	NPI#	UPIN#
AJ 3274658		1203265987	

☒ Is Supervisor

Update

Within the Provider Manager, Click on the button with the green plus.



Site Administration Page

Provider Administration

Deactivate Save & Close Close

Step 1: Demographics

Title:	<input type="text"/>
First Name:	<input type="text" value="Randall"/> <input type="text" value="Oates"/>
Suffix:	<input type="text"/>
Dea Number:	<input type="text"/>
<input checked="" type="checkbox"/> I would like to save this provider without a DEA number. This will disable E-Prescribing.	
SPI Number:	<input type="text"/>
NPI Number:	<input type="text"/>
Email:	<input type="text"/>
Clinic Name:	<input type="text" value="SOAPWARE"/>
Phone Number:	<input type="text" value="800"/> - <input type="text" value="455"/> - <input type="text" value="7627"/> ext: <input type="text" value="500"/>
Fax Number:	<input type="text" value="866"/> - <input type="text" value="267"/> - <input type="text" value="9073"/>
Address:	<input type="text" value="4220 N Crossover RD"/>
City:	<input type="text" value="Fayetteville"/> State: <input type="text" value="AR"/> Zip: <input type="text" value="72703"/>

Custom Fields

Custom 1:	<input type="text"/>
Custom 2:	<input type="text"/>
Custom 3:	<input type="text"/>
Custom 4:	<input type="text"/>
Custom 5:	<input type="text"/>
Custom 6:	<input type="text"/>

☒ SOAPware Professional Edition

Licenses

- ☒ ALL
- ☒ SOAPware Billing Standard ☒ SOAPware Billing Professional

Current Site Licenses

License	Used	Expires
SOAPware Billing Standard	3 of 22	12/30/2099
SOAPware Billing Professional	2 of 22	1/12/2099
SOAPware Professional Edition	4 of 22	1/12/2099

Licensing information will be displayed.

**Q: How many office staff can use each SOAPware license?**

A: For local installs of SOAPware, SOAPware is licensed by provider. This allows as many office staff, not including providers, to be using SOAPware at the same time.

For the SOAPware Hosting Service: SOAPware Clinical Suite includes 5 connections for the first provider, and 3 connections for each additional provider. With SOAPware Professional, each provider license comes with 3 connections per provider.



Q: How many computers can I install SOAPware on?

A: SOAPware is licensed per provider. This allows installation of SOAPware on all computers in the office, as well as on home computers if needed; without increasing the price of the SOAPware.



Security



Q: Is there a way to lock users out of the ability to customize or reset toolbars?

A: This setting is user **and** computer specific, and therefore cannot be limited within security.



Q: Why does my newly created chart section not show up in Chart Navigator?

A: When a new chart section is created, all users will need to be given access to view it within Security.

For information on Security, [click here](#).



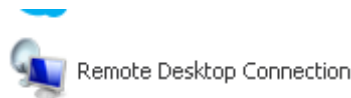
SOAPware Cloud Solution



Q: On the SOAPware Cloud Solution, how do I control the size of my screen?

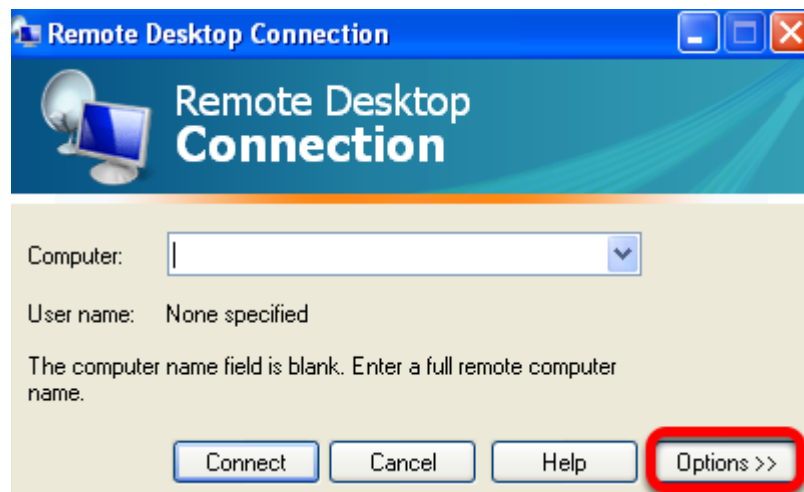
A: Auser is able to control the size of their screen on the SOAPware Cloud Solution by accessing the display tab, where resolution settings can be chosen.

Access the Remote Desktop Connection



Click on Remote Desktop.

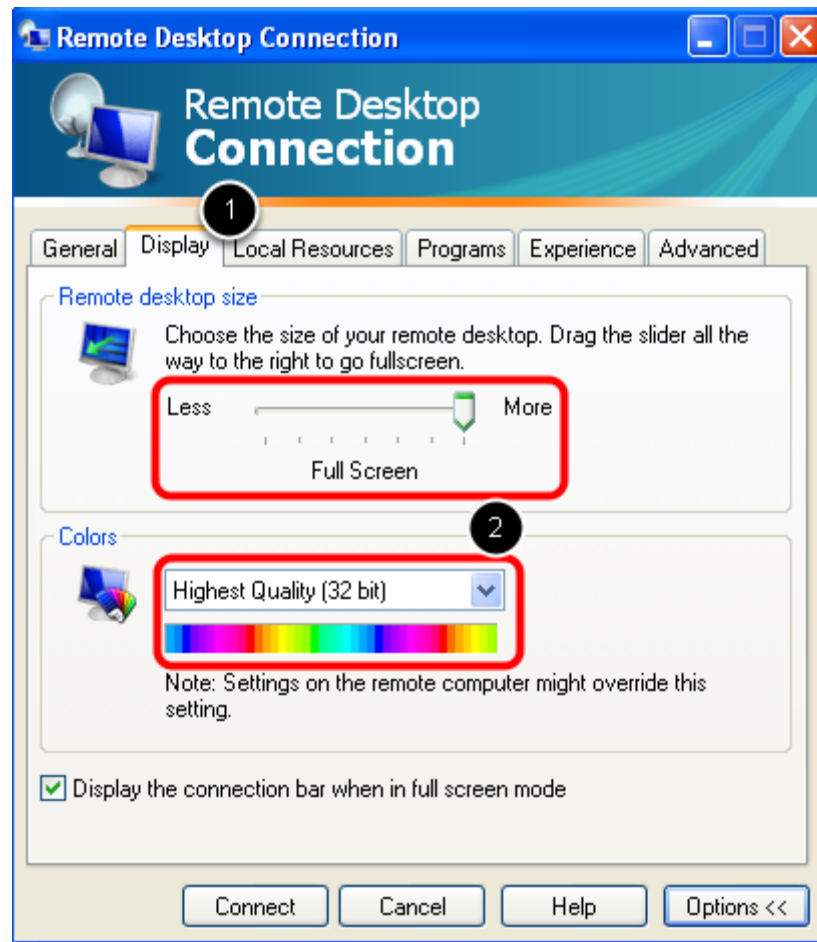
Options



Click on Options.



Display Tab



1. Click on the Display tab.
2. Set the absolute size **or** choose Full Screen, and the Colors depth.



Some Considerations

1. The fewer the colors, the faster your connection will respond. The greater the number of colors, the more attractive your screen will appear.

2. Below are some guidelines for using SOAPware at reasonable combinations. We will start with 19" monitors, running a minimum of 1024x768, as this would be a minimum size for the SOAPware application. These figures are approximations, but give you a very good idea of where to start.

Make sure your Video Card can support these resolutions before purchasing.					
Size	1024x768	1280x1024	1600x1200	1680x1050	1980x1200
19"	OK	Good	Small but usable	-	-
21"	OK	OK	Good	Small but usable	-
22"	OK	OK	Good	Good but small	Small but usable
23" to 24"	Very Large	OK	Good	Good but small	Small but usable
30"	See notes below				

30" at this point you have to make very sure that your video card can support these resolutions, but Dell has a 30" monitor that will support 2560 x 1600 (digital only).



Q: How do I logout/disconnect from my SOAPware ASP Server?

A: There are different ways to logout/disconnect from your SOAPware ASP Server, and not all have the same effect.

Below discusses the methods for logging out or disconnecting, and the effects of each on your session and data.

NOTE: Logging out of SOAPware and disconnecting from the ASP Server are two distinct actions. It is possible to logout of SOAPware while remaining connected to your ASP Server.

To logout of the SOAPware application, choose the menu option SOAPware > Logout or Exit SOAPware.

This method:

- * **only closes SOAPware** and has no effect on your ASP Server connection or any other application on your ASP Server.
- * will save all data you have entered into SOAPware.
- * is the recommended way to close SOAPware before ending your SOAPware ASP session in order to minimize the risk of data loss.

To Disconnect from your SOAPware ASP server:

This allows you to leave SOAPware and other applications running on your ASP Server when you disconnect. SOAPware will continue to run on your server so that when you reconnect you can pick up your work in the same place.

If you plan to be away from the computer for a short time (such as when changing rooms), this is a simple way to make a new connection from another computer without having to shutdown all your open applications.

If you plan to be away from the computer for an extended period, it is highly recommended that



you Log-Off from your server rather than disconnect, due to potential data loss. (See the Logging-Off section below.)

While you are disconnected, scheduled events (scheduled backups, maintenance, server updates, etc) or unscheduled events (hardware failure, emergencies, disasters) at the SOAPware data center could cause your ASP Server to reboot or close SOAPware, which will cause any unsaved data or documents to be lost.

There are four ways to **Disconnect** from your server:

- * Clicking the Close Button in the upper right-hand corner of the Remote Desktop window.
- * Right-clicking the Remote Desktop window title bar and choosing Close.
- * Click the Start button on your ASP Server and choose Shutdown. Select Disconnect from the drop down box and click OK.

If you plan to be away from the computer for an extended period, it is highly recommended that you Log-Off from your server rather than disconnect, due to potential data loss.

Logging-Off is the recommended method to end your SOAPware ASP Server connection. Your connection is closed properly and all changes made to your SOAPware ASP Server Desktop will be saved.

Closing SOAPware (and any other open applications) before Logging-Off your ASP Server using this method is the surest and safest way to minimize the possibility of data loss.

There are 2 ways to **Log-Off** from your server:

- * Click the Start button on your ASP Server and choose Log Off.
- * Click the Start button on your ASP Server and choose Shut Down, then select Log Off from the drop down box and click OK.



Q: How do I import images into a chart via the Remote Desktop?

A: The concept of importing images is very simple. This process is documented for end-users who wish to transfer files from their local computer (client) to the SCS server (server), to import into SOAPware, or to utilize their virtual server as an cloud repository for documents. In response to this need, we have responded with a utility called “DocTrans”. This small utility transfers files from the client’s computer to the server. The files can then be transferred into SOAPware using SOAPware’s “Document Importer” or transferred to a folder of the end-users choice.

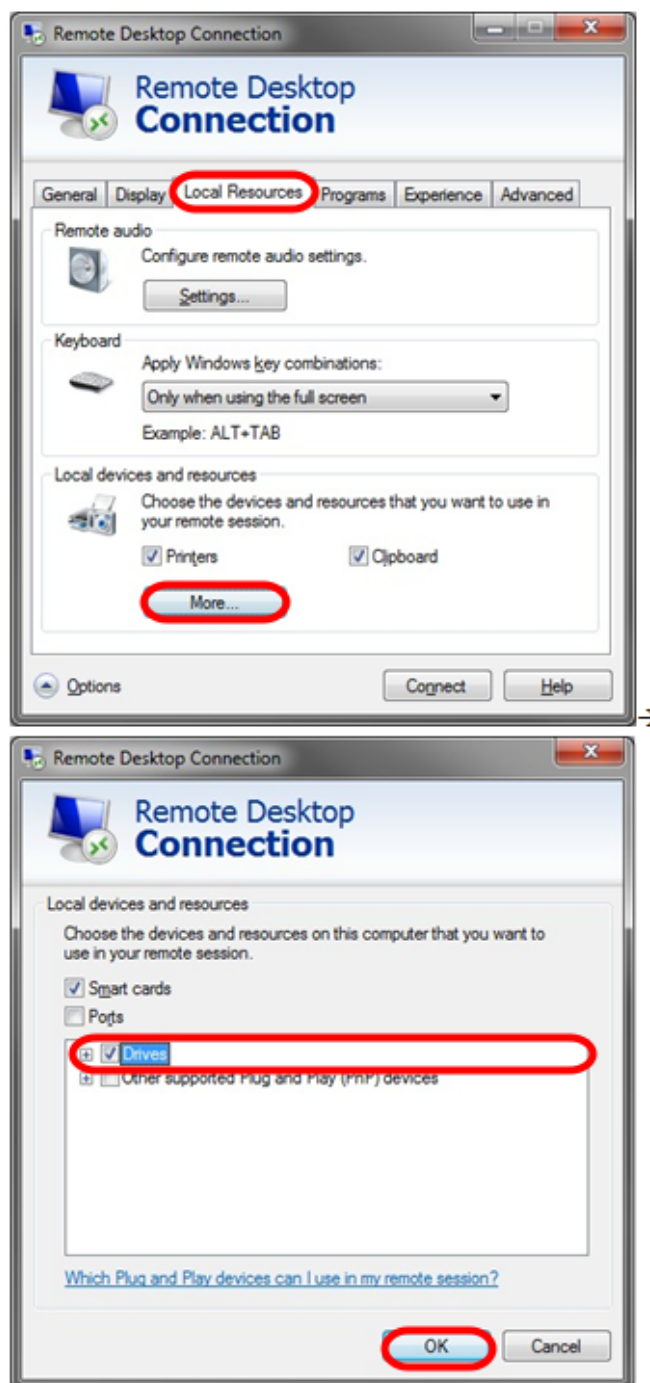
Configurations

Two quick configurations are needed to allow DocTrans.exe to work properly:

- Your local C:\ drive must have a folder with the exact name of “shstrans” (C:\shstrans). If you don’t have the knowledge or authority to make this folder, please see your system administrator. The folder on the server should already exist, if not please call support at 800-455-7627.
- Configuration of the “Remote Desktop Connection” application is required for the DocTrans.exe to work.



Local Resources- Windows 7



- Open the **Remote Desktop Connection** application on your computer (client).
- Choose the **Local Resources** tab.
- In the Local devices and resources section, click the **More** button.



- The second RDP dialog box will be displayed. Check the box next to **Drives**.
- Click **OK**.

Connect as you normally would, however, at this point you may receive a security notice that you are going to be connecting your drives to the Remote Desktop Computer. This is expected, and is the function we want. At this point, the configuration steps are finished on this PC & only need to be completed once on each of the client computers you use.

Local Resources- Windows XP



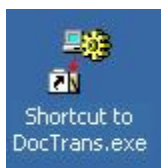
- Open the **Remote Desktop Connection** application on your computer (client).
- Make sure the **Options** button is clicked to display the Option tabs.
- Choose the **Local Resources** tab.



- Under the section Local devices and resources click the **More** button.
- Make sure your **C:** drive is selected.
- Click **OK** and then back to the General tab.

Connect as you normally would, however, at this point you may receive a security notice that you are going to be connecting your drives to the Remote Desktop Computer. This is expected, and is the function we want. At this point, the configuration steps are finished on this PC & only need to be completed once on each of the client computers you use.

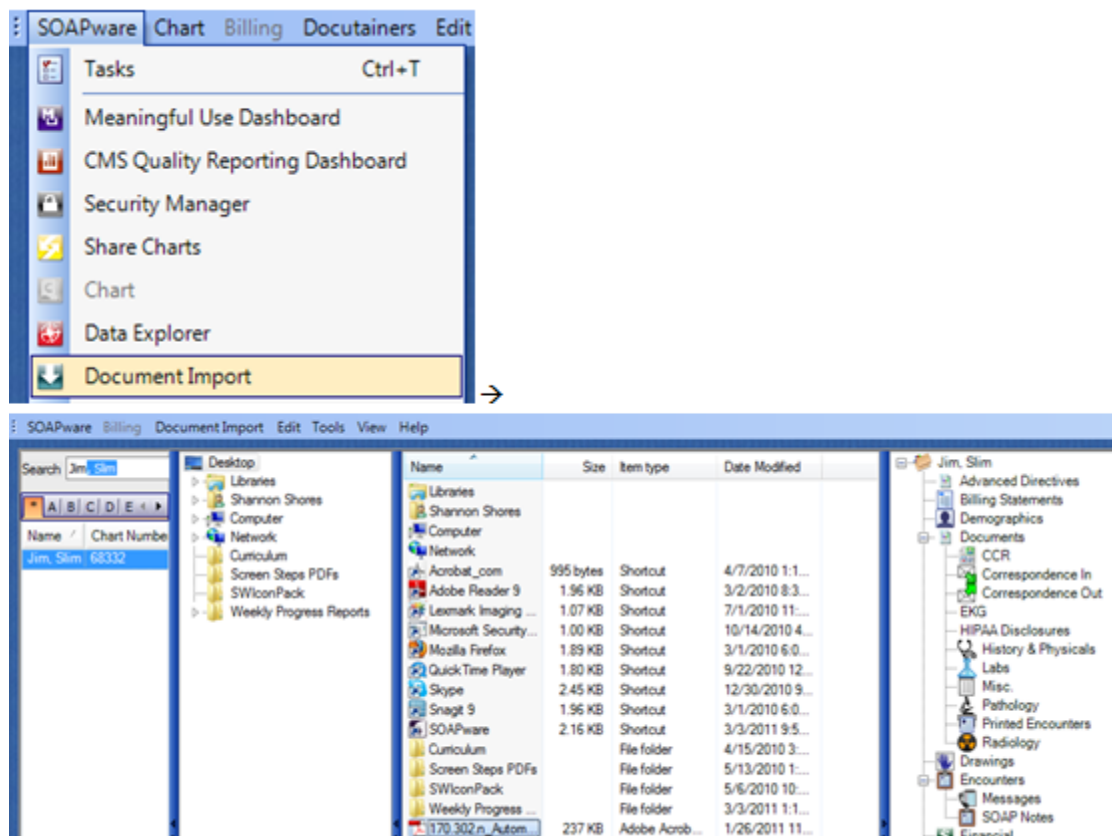
Transfer Image/Document(s) to the VPS



- At this point, you have the folder created and the Remote Desktop Connection application configured to connect your C:\ drive to the server.
- You can now save/drop any Image/Document(s) into the C:\shstrans folder on your local computer.
- Double-click the DocTrans application on the server desktop, and the contents of the SCS trans folder will be uploaded to the server.
- You will see a DOS window appear showing you that status of the image/document(s) transfer, once complete a window will appear displaying the contents of the C:\shstrans folder.



Importing the Image/Documents(s) into SOAPware



- Double-click the SOAPware Icon & login to SOAPware as you normally do.
- Once SOAPware is open, click **SOAPware > Document Import** > the Document Importer Workspace will appear, which contains 4-panes to operate in: Chart Rack, Drive/Folder Selection, File Selection, & Chart Section.
- In the Chart Rack Pane, pick a patient > in the Drive/Folder Selection Pane, pick a location to browse for your files; in this example it would be C:\shstrans > in the File Selection Pane, select the file(s) you want & drag them to the Chart Section you would like them saved in.
- You have successfully imported your Image/Document(s) into SOAPware.

Things to Remember

- The DocTrans will only transfer 10MB or less at a time. This protects you from using all your bandwidth for long periods of time.
- The DocTrans will overwrite existing files with the same name. For example if you have a scan called MRI.jpg in the server's C:\shstrans folder and you upload another file called



MRI.jpg, it will overwrite the first.

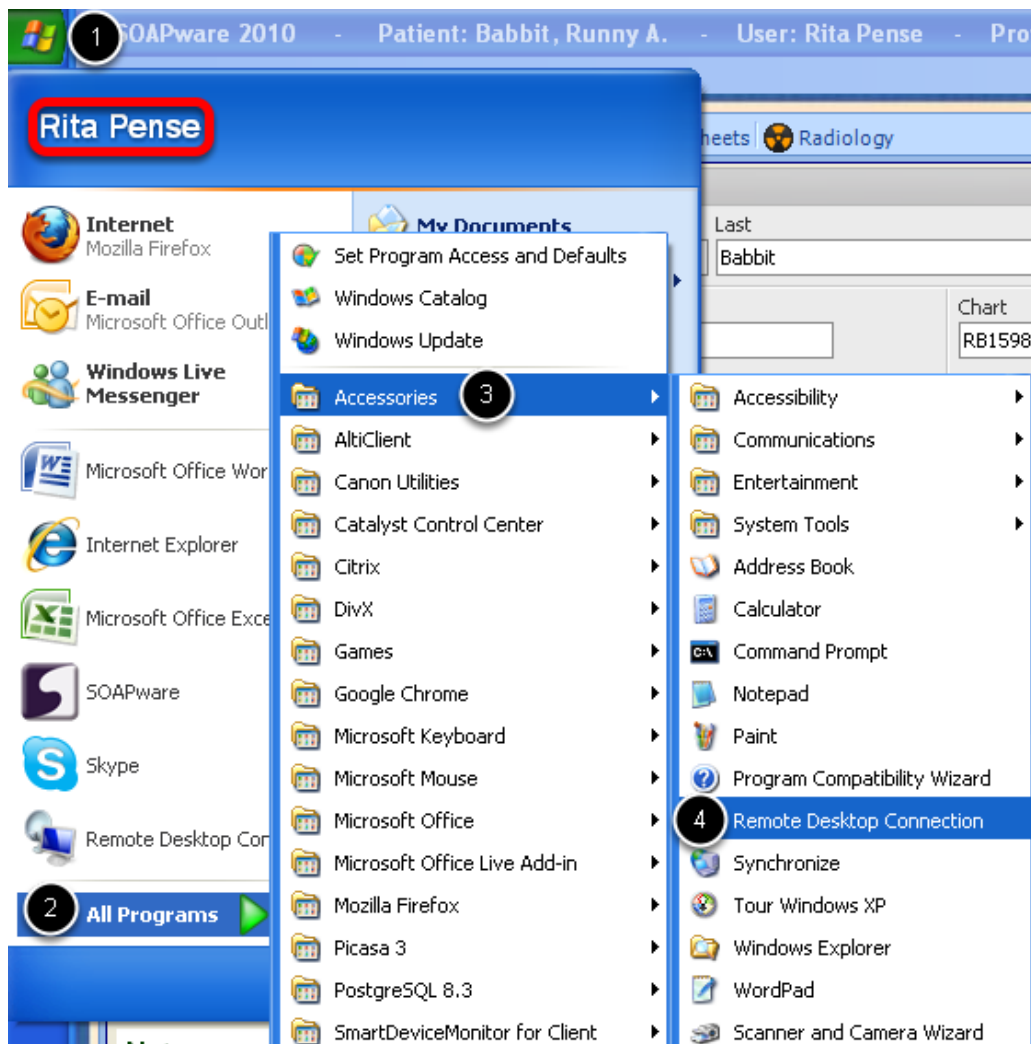
- The DocTrans only moves files from the clients C:\shstrans to the servers C:\shstrans, it doesn't move them the reverse direction.
- The DocTrans places the documents on the server for easy import into SOAPware, it does not move them into SOAPware.
- Once a document has been moved into SOAPware with the "Document Importer" it can then be deleted from the server's C:\shstrans folder. This is actually encouraged as you don't want to use all your free space on the C:\ drive with documents.



Q: How do I connect to the SOAPware Cloud server?

A: The SOAPware ASP program allows for users to connect to the SOAPware application from anywhere in the world using Microsoft's Remote Desktop Connection Application. RDC, as we will call it from here forward, is a tool for running a computer remotely. With RDC you can utilize our remote servers just as if you were sitting in front of it. There are RDC applications for almost every operating system, including Macintosh.

Connect to the ASP server



1. Click on Start.
2. Click on All Programs.
3. Click on Accessories.



4. Click on Remote Desktop Connection.

Enter the DNS (Domain Server Name)



1. Enter the DNS (this will be supplied to the clinic contact person).
2. Click Connect.

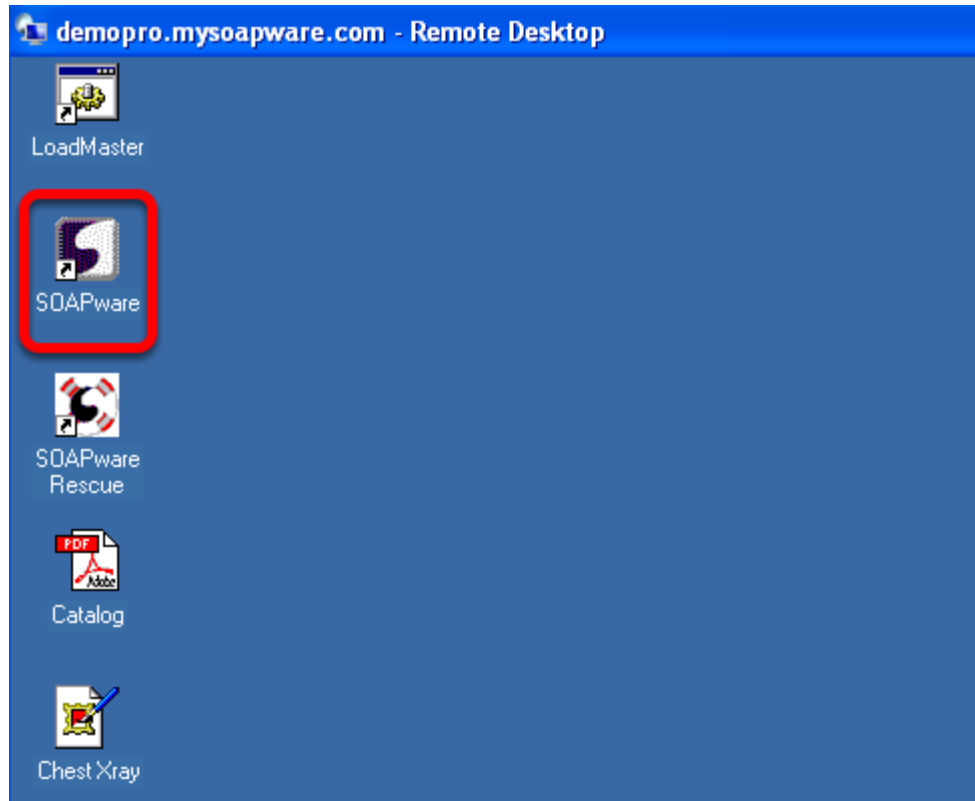
Login Screen



The next screen you will see is your log on screen. Here you will enter your user name and password to the VPS server. Each user name and password is unique for each server and each clinic has it's own server.



Remote Desktop View



Once logged in, you will see a desktop much like your local desktop. From here you can launch the SOAPware application or any other application you have purchased.



Q: How do I print from a Remote Desktop Connection (RDC)?

A: Give a list of the printers in the clinic, to the Support Team at SOAPware. The Support team will then install the print drivers on the ASP server to make the printers available from the server. You may submit this information in a Support ticket at www.soapware.com/ticket.

After this step is completed, the option of "printers" must be selected on the Remote Desktop Connection.

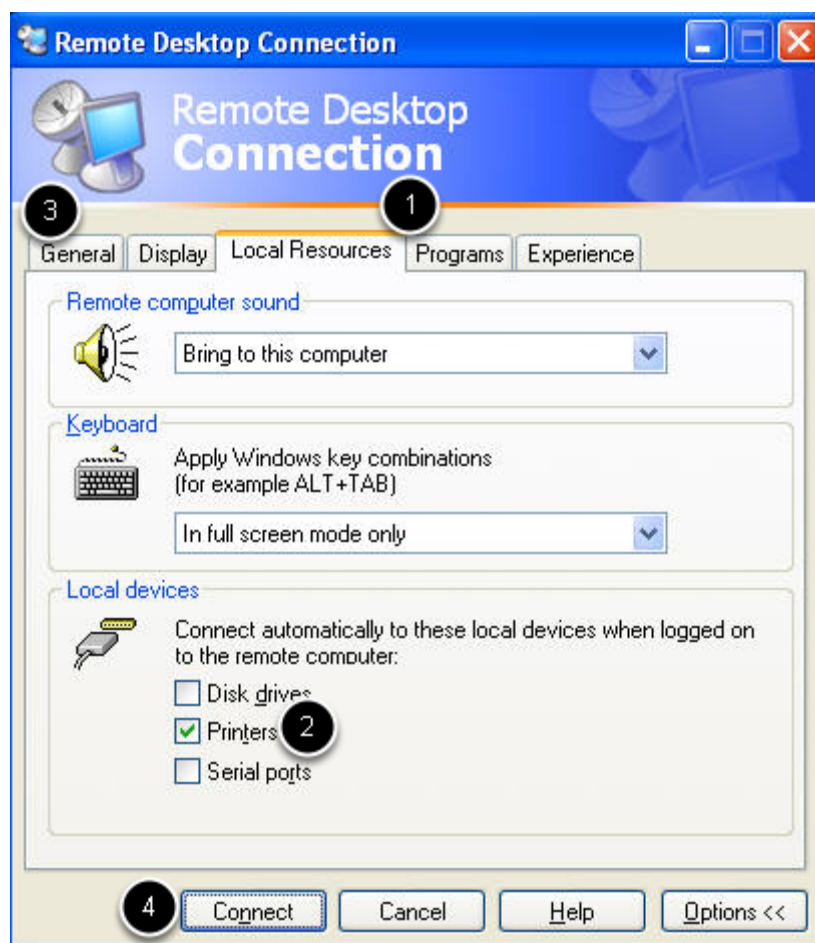
Q: Access the Remote Desktop Connection



1. Click on the computers Start menu.
2. Click on Remote Desktop Connection.



Local Resource/Printers



1. Click on the Local Resources tab.
2. Click to place a check in the box next to printers.
3. Click on the General tab.
4. Click on Connect to connect to the Remote Desktop.



Q: How does a Remote Desktop Connection "Session" work?

A: Terminology for understanding "Session" concepts:

Session - An independent desktop environment capable of running a set of programs on a server with set permissions based on user name and passwords which persists regardless of outside connectivity.

Remote Desktop Connection - A Microsoft program that allows you to start, connect to or stop a "session".

Terminal Session - implies connectivity from the client (Remote Desktop Connection) to the server.

If a user logs onto the server and simply clicks the X to close the Remote Desktop Connection program, they have only disconnected from the server. In other words, they have stopped the Terminal Session. The environment or what is called a "session" is still open and running on the server. All the programs that have been opened are still running back at the server and as far as the server is concerned, connectivity has been lost and it's patiently waiting for to reconnection.

The upside of leaving a session open is:

- The user can close this connection at the current computer, go to another computer and log back in with the same user name and password, and be right back in the "session" where they left it when they disconnected.
- The user doesn't have to wait for SOAPware to load, they simply log in.

The downside of leaving a session open is:

- That session uses up a terminal licenses, and the clinic only has a set number of them.
- If for some reason the user has an unsaved encounter information or other unsaved data and the session is reset by another user whom logs in and unknowingly closes programs without saving, the server is rebooted or in the event of a server crash, that data will be lost.
- If a user is logged into SOAPware with high permissions, and someone with lower permissions logs into the session, they can see what the first user was working on. It's



important that session accounts and SOAPware accounts match in permissions. For example, if the front desk staff only has the ability to pull a chart or create a new chart in SOAPware, they do not need the user name and password to the doctor or nurses Remote Desktop Connection Session.

Note: It is our recommendation, when a user is finished working in a session, at the very least, close the patient's chart (that saves the data) then log out of SOAPware (this keeps any of the staff without permission from seeing patient data).

To log out of SOAPware click the menu item File > Logout.

Leaving a session open is not in itself bad, as long as you have logged out of SOAPware by Clicking the menu item, File > Logout. The absolute safest measure is to Click the Task Bar's, Start > Log off buttons. Logging off the session closes all programs and releases the Terminal Session licenses.



Q: How do I scan into SOAPware on the SOAPware Cloud Solution?

A: Due to limitations with Windows, document scanners cannot directly scan into the SOAPware Cloud Solution. However, there are some options:

Option #1

Scanners from Ambir Technology (an approved SOAPware Partner) are specifically designed to work with the SOAPware Cloud Solution. These scanners have been tested and verified to work in the SOAPware Cloud Solution environment. For more information, visit <http://www.ambir.com/SOAPware>.

Option#2

[Click here](#) for a lesson that goes over how to scan locally & import your Document(s) over to your SCS server for importing into SOAPware.

Option #3

There is third party software available that gives Windows Remote Desktop the ability to access a scanner from your local computer. The software programs listed below are currently being used by a number of SCS Users and SOAPware, Inc. has no complaints concerning their usage.

- [TSScan](#) - Remote Desktop Scanning by Terminal Works.



Q: What controls the speed of my ASP server?

A:

The first, and most influential, factor is bandwidth. Bandwidth is the potential amount of data that can move across the Internet connection. Internet connections can be purchased from ISPs for amounts from 28.8 Kbps to 10Mbps. As with RAM or CPU speed, more is always better.

Remote Desktop Connection (RDC) has the ability to fine tune the servers to accommodate a lack or abundance of bandwidth. In the RDC application under the "Experience" tab, are settings from the most limited connections (Modem 28.8Kbps) to the highest available (LAN 10Mbps or higher).

In our tests we have found that most connections operate optimally at the Modem 56Kbps setting. Choosing a lower setting doesn't limit the connection speed, only the Experience. In fact, the lower the Experience setting, the faster the ASP server will seem to react and run, as it has to move less data over the Internet connection for any given task.

While it is possible to connect to the server via a 28.8 or 56 Kbps Modem, we have found that at least a 128 Kbps connection is needed for real-time interaction.

To optimize the connection, start off with the most basic settings possible, and gradually increase them until the server's reaction seems to slow down, then move back down to the previous setting. A good starting point is to set the connection speed to Modem 28.8 Kbps, the display to 640x480, and the display colors to 256.

The optimal configuration is a trade-off between perceived reaction times and display quality. Users may prefer different settings depending on their needs.



Q: Why won't printers load into a Remote Desktop Session?

A: When you connect to your SCS Server, and go to Start > Control Panel, > Printers and Faxes--and nothing displays, this is a known Microsoft Windows XP issue and Microsoft has addressed it in a support article.

The reason for this behavior is that by default, Terminal Services only supports printer's that begin with COM, LPT, or USB.

The fix for this is fairly simple, as you will need to follow the following 6 steps:

1. Click Start > Click Run> type "regedit" > and then Click OK.
2. Locate and then Click the following key in the registry:
HKEY_CURRENT_USER\Software\Microsoft\Terminal Server Client\Default\AddIns\RDPPDR
3. On the Edit menu > point to New > then Click DWORD Value.
4. Type "FilterQueueType", and then press ENTER.
5. On the Edit menu, Click Modify.
6. Type "FFFFFFFF", and then Click OK.

These steps allow all printer ports to be redirected inside Terminal Services/Remote Desktop.

To see the actual Microsoft Support document, Click [here](#).

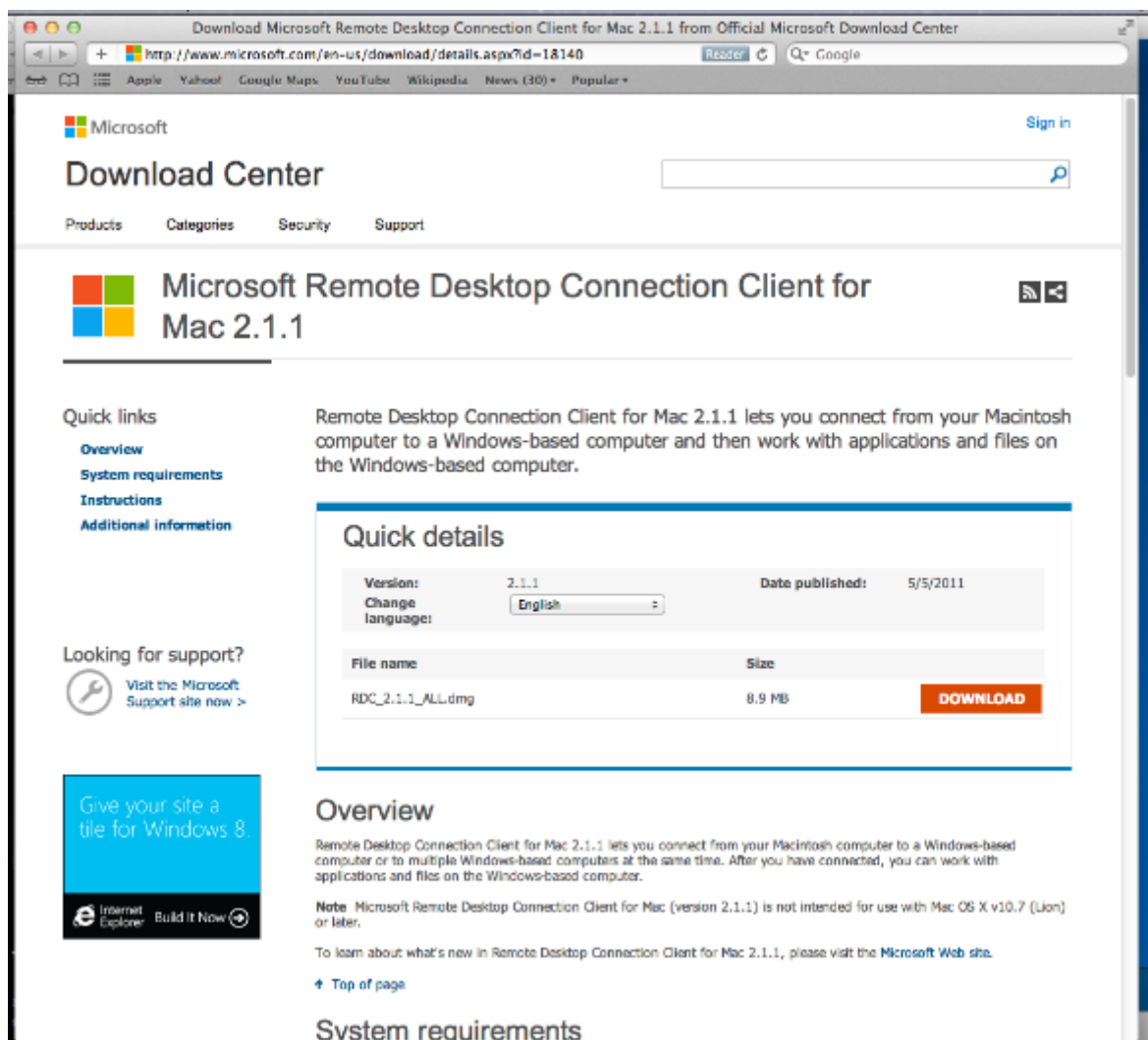


Q: Can I run SOAPware on a Mac computer through SCS?

A: Yes, a user can run SOAPware on a Mac computer through SOAPware Cloud Solution.

For more information on SOAPware Cloud Solution, Click [here](#).

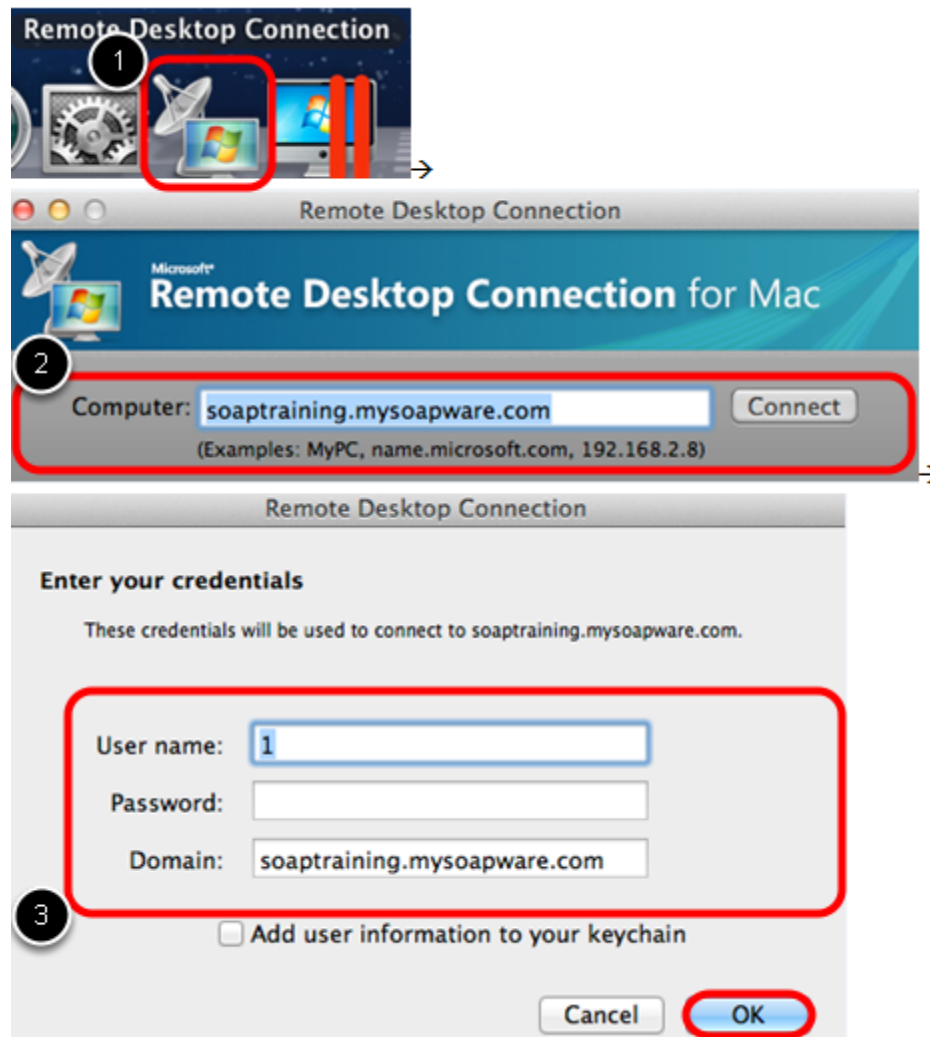
Download Remote Desktop Client



For a free version of Remote Desktop Client for Mac 2.1.1, Click [here](#).



Launch Remote Desktop Connection for Mac



1. Double-click on the "Remote Desktop Connection" icon at the bottom of the screen.
2. Type in *your* computer name and Press "Connect."
3. Type in your credentials and Press "OK."

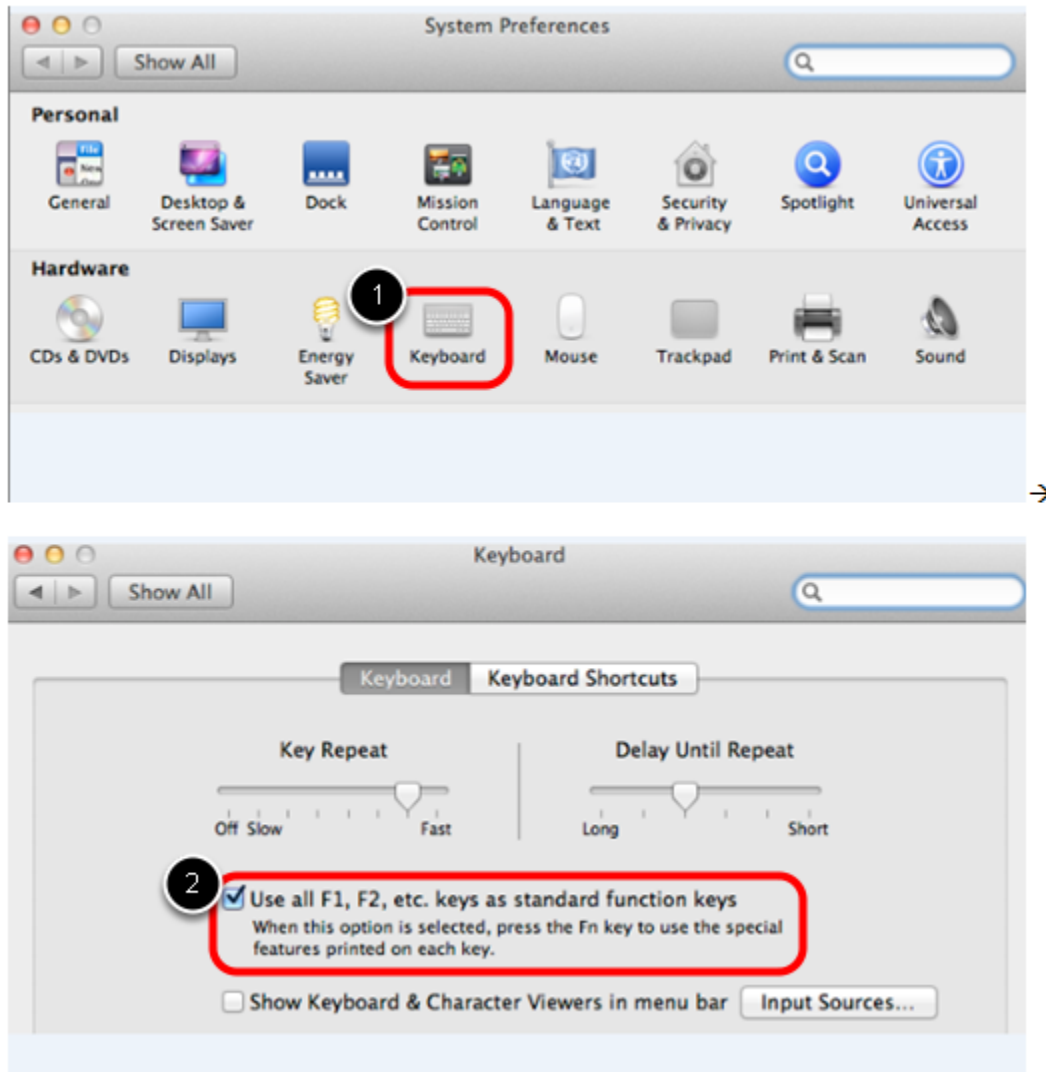
System Preferences



Double-click on the System Preferences icon at the bottom of the screen.



System Preferences- Keyboard

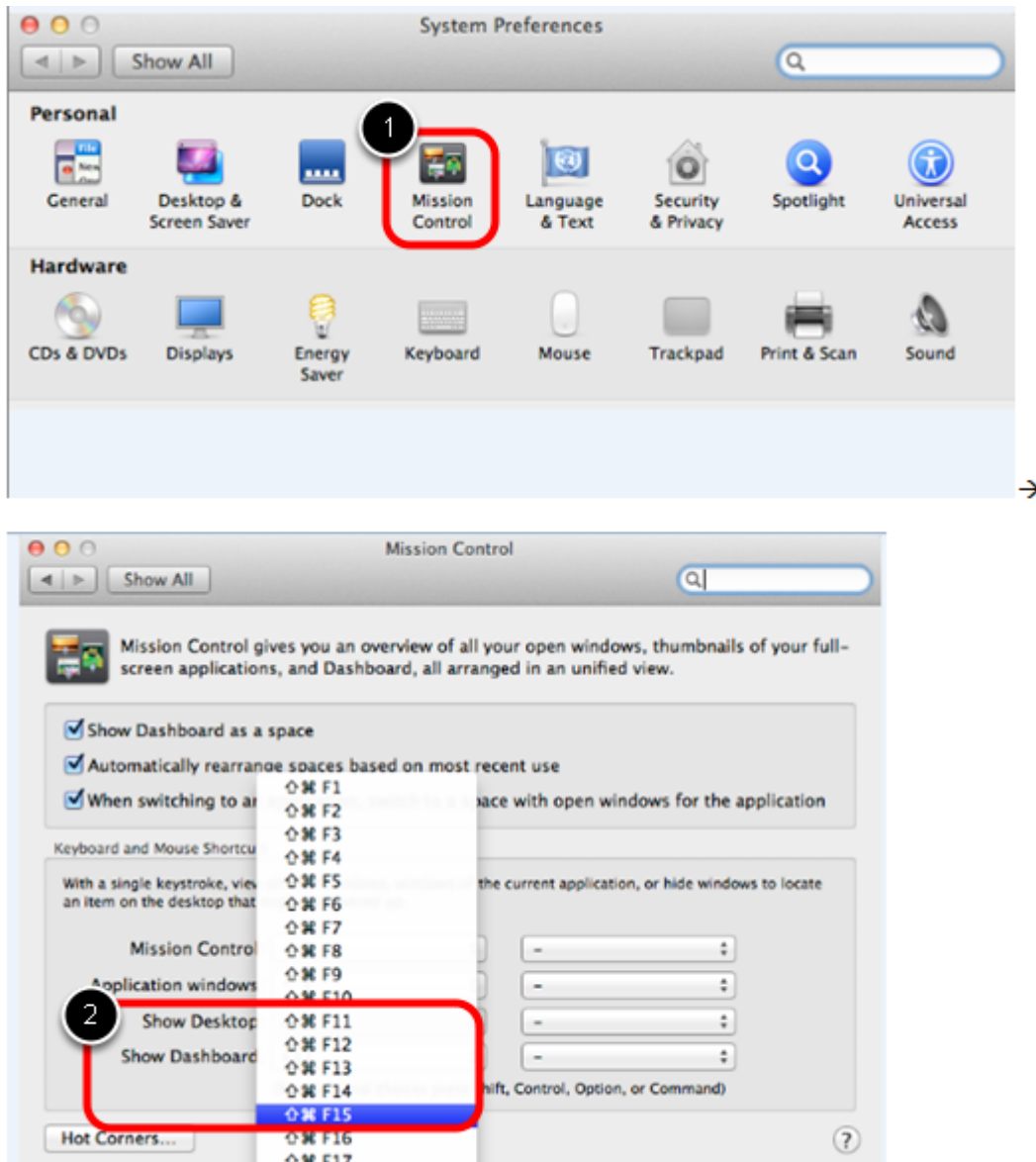


1. Click on "Keyboard."
2. Check the first box that refers to the standard function keys.

Checking this box will allow the Mac user to still use the function keys for their intended function, however the Fn key must be pressed first on the keyboard, and then select a function key at the top of the keyboard.



System Preferences- Mission Control



1. Click on "Mission Control."
2. Reset the "Show Desktop" option (which will be set to F11) to a function key that is not already used in SOAPware, such as F15.



Launch SOAPware



Double-click on the SOAPware icon. You may then log in and proceed to use the function keys on your keyboard, to bring up the intended actions in SOAPware.



SMARText



Q: What do the triangle colors next the SMARText Items mean?

A: SMARText Items will have a green, red, or yellow triangle next to them in the SMARText Items Manager, as well as when results from a Shift F11 or F11 search is displayed.

Explanation of Triangle Colors

▼		- "E/M - OFFL	ST Plan Item	0	080218, 99214,...
▼	cptsw	Office/outpatient...	ST Plan Item	0	2, 3, 40, 99215,...
▼		Heat exhaustion,...	Dx	0	992.5, exhaustio...
▼	cptsw	Initial hospital ca...	ST Plan Item	0	3, 50, 99222, a,...
▼	cptsw	Inpatient consult...	ST Plan Item	0	3, 55, 99253, a,...
▼	cpt	New Pt Eval/Ma...	ST Plan Item	0	99204, cpt, Eval/...
▼	212demo	- "OFFICE/OU...	ST Plan Item	0	080212, 99212,...
▼	cptsw	Observation car...	ST Plan Item	0	3, 99220, a, adm...
▼	cptsw	Office consultati...	ST Plan Item	0	3, 40, 99243, a,...
▼	cptsw	Inpatient consult...	ST Plan Item	0	3, 80, 99254, a,...
▼		- "Confirmator...	ST Plan Item	0	080214, 99272,...

* **Red** - These denote CPT items that have been edited by users and uploaded to the Cloud Library. Due to the AMA's copyright on CPT items, they can be edited by users, but not shared. Meaning, these items cannot be downloaded.

* **Green** - These are trusted items. This means that the items were created by SOAPware, Inc. staff.

* **Yellow** - These are items that were created or edited by users. These items can certainly be used by other users, but it is simply unknown if the item will work correctly or not.

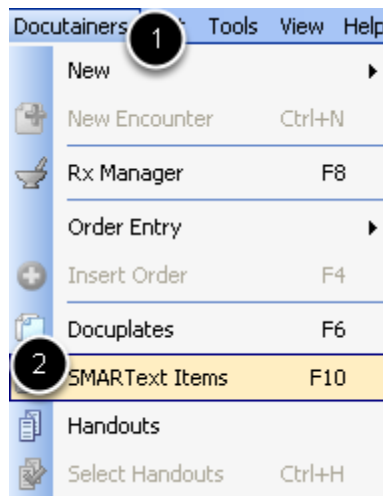


Q: How do I change a SOAPware created shortcut code to my own shortcut code?

A: Users can change the shortcut code to any SOAPware created structured SMARText item. However, in any release **prior to SOAPware 2010.2**, when all local SMARText items are updated, the edited SMARText item **will not** update.

If any section of the SMARText item, other than the shortcut code for users with SOAPware 2010.2 and subsequent versions, is edited (i.e. Description, Display Header etc), the item will not be updated.

Accessing the SMARText Manager



1. Click on Docutainers on the menu bar.
2. Click on SMARText Items.



Select the Item to Edit

SMART Text Items

Search List - By Type List - By Keyword

Find

Shortcut	Description	Type	Usage	Keywords
AugmPL	Augmentin (Amoxicillin/Clavulanate) P...	Rx	0	01.0.A00
▲ Amo	"Amoxicillin (Amoxil) 250mg #30 tid R...	Rx	0	01.0.A.GE
▲ AmoC	"Amoxicillin Chewables 250mg #30 1 ti...	Rx	0	01.0.A.GE
▲ AmoS11	"Amoxicillin (Amoxil) 125/5 Susp #100...	Rx	0	01.0.A.GE
▲ AmoS18	"Amoxicillin (Amoxil) 125/5 Susp #80m...	Rx	0	01.0.A.GE
▲ AmoS22	"Amoxicillin (Amoxil) 200/5 Susp #225...	Rx	0	01.0.A.GE
▲ AmoS23	"Amoxicillin (Amoxil) 250/5 Susp #300...	Rx	0	01.0.A.GE
▲ AmoS4	"Amoxicillin (Amoxil) 400/5 Susp #150...	Rx	0	01.0.A.GE
▲ Amo5	"Amoxicillin (Amoxil) 500mg cap #30 1...	Rx	0	01.0.A.GE
▲ AmoS24	"Amoxicillin (Amoxil) 250/5 Susp #450...	Rx	0	01.0.A.GE
▲ AmoS23	"Amoxicillin (Amoxil) 200/5 Susp #300...	Rx	0	01.0.A.GE
▲ AmoS21	"Amoxicillin (Amoxil) 200/5 Susp #100...	Rx	0	01.0.A.GE

☒ Include Online Library Items.

CPT copyright 2008 American Medical Association. All rights reserved.

1. Type the keyword of the item to edited in the Find box.
2. Click on the find button.
3. When the item is displayed, Click to highlight the item.
4. Click on the edit button.



Change the Shortcut Code

SMARText Designer

Shortcut: aug875

Description: Augmentin (Amoxicillin/Clavulanate)

Keywords: AugmPL, 01.0.A00.GEN, A00, AmoCla, amoxicillin, antibiotic, Aug5, Aug500, augementin, Augm

☒ Display Header Augmentin (Amoxicillin/Clavulanate): ☐ only when item is empty.

Advanced

General

Item Type: [v]

Augmentin (Amoxicillin/Clavulanate): 875 mg-125 mg (tablet) SIG- 1 tab(s) 2 times a day for 10 days orally #20 Tablet(s) [Substitutions Allowed] Refills- 0 Take with food.

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ End with [v]

☒ Separate with [v] ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - Never [v]

Coding / Notes

Structure Viewer

Save **Cancel**

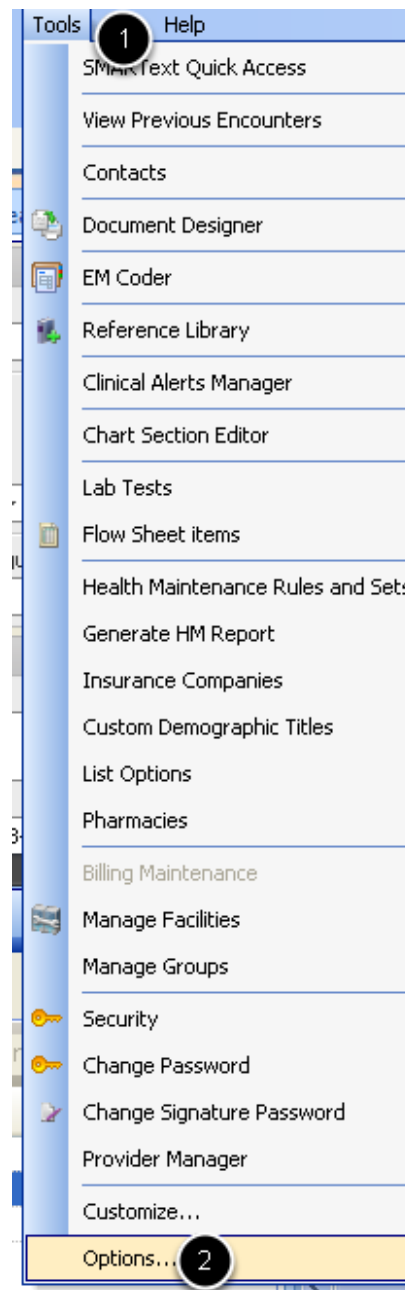
Replace the existing shortcut code with a more personal shortcut code

1. Remove the existing shortcut code.
2. Type in the desired code.
3. Click Save.

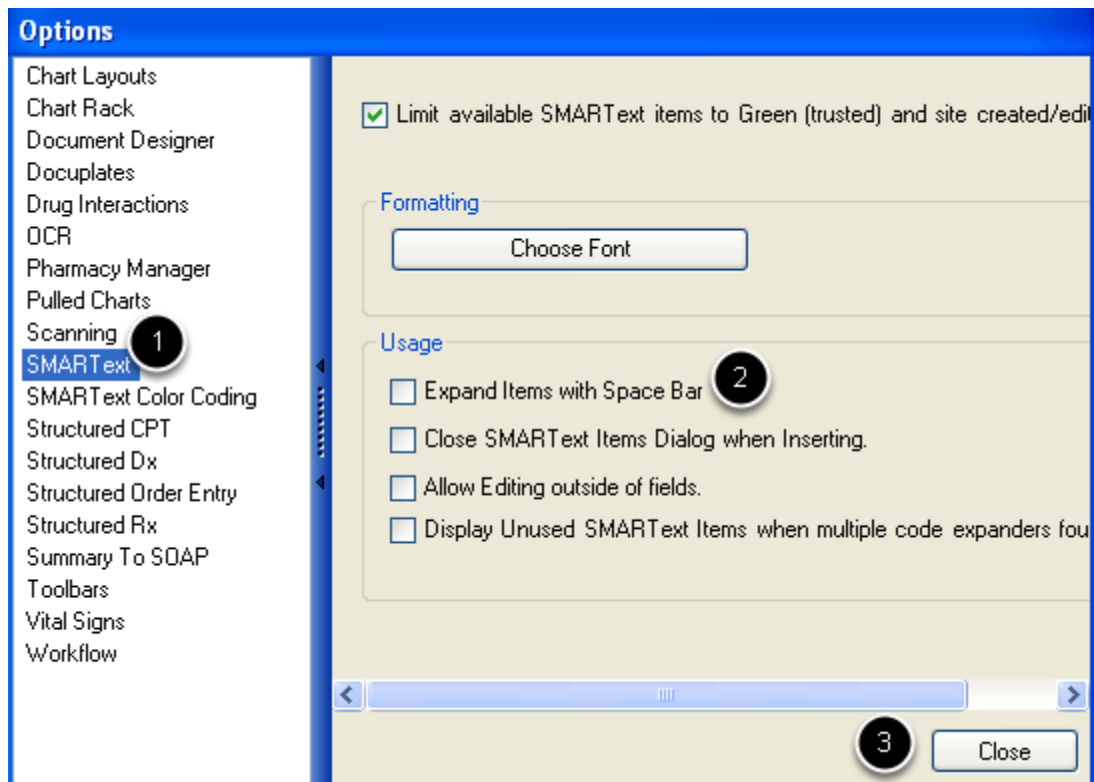


Q: Why do some words expand into text when I don't want them to, and how do I resolve this issue?

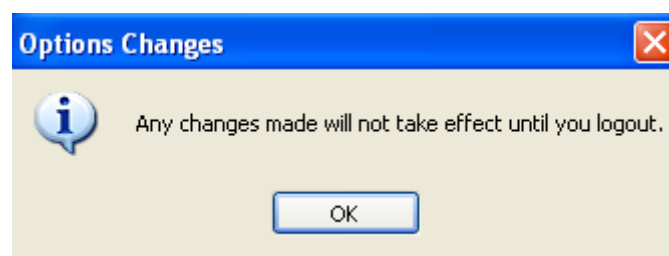
A: The option to turn off "Expand Items with Space bar," can be done from the Tools menu item.



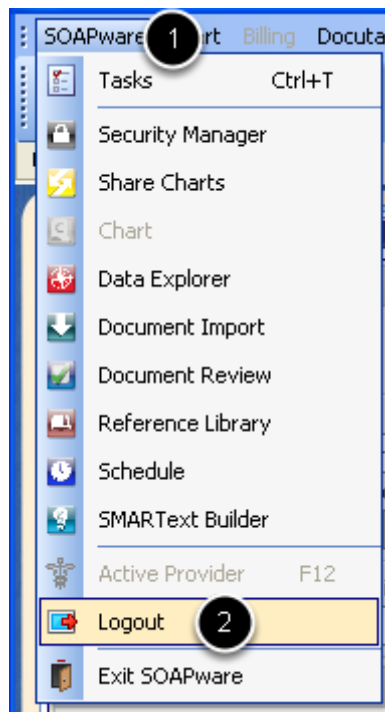
1. Click on Tools.
2. Click on Options.



1. Click on SMARText in the Options list.
2. Uncheck the box next to "Expand Items with Space Bar."
3. Click Close.



It is very important to Logout of SOAPware to save the changes.



- To Logout out of SOAPware:
1. Click on the SOAPware menu item.
 2. Click Logout.



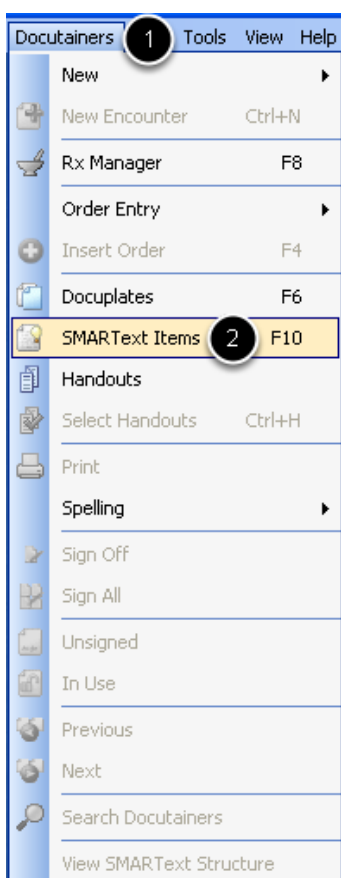
Q: How do I use existing SMARText items as the basis for new ones?

A: Existing SMARText items can be duplicated and modified by the user.

Note: It's very important **not to change the fundamental meaning of duplicated items**. For example, if you duplicate Tylenol, do not change the name to Amoxicillin. The coding system (in the background) for the item will still identify it as Tylenol in the computer and in the database.

It is also very important to **make edits to the duplicated item and not the original**. The duplicated item can be determined by checking the values in the Last Modified column in the SMARText Items Manager.

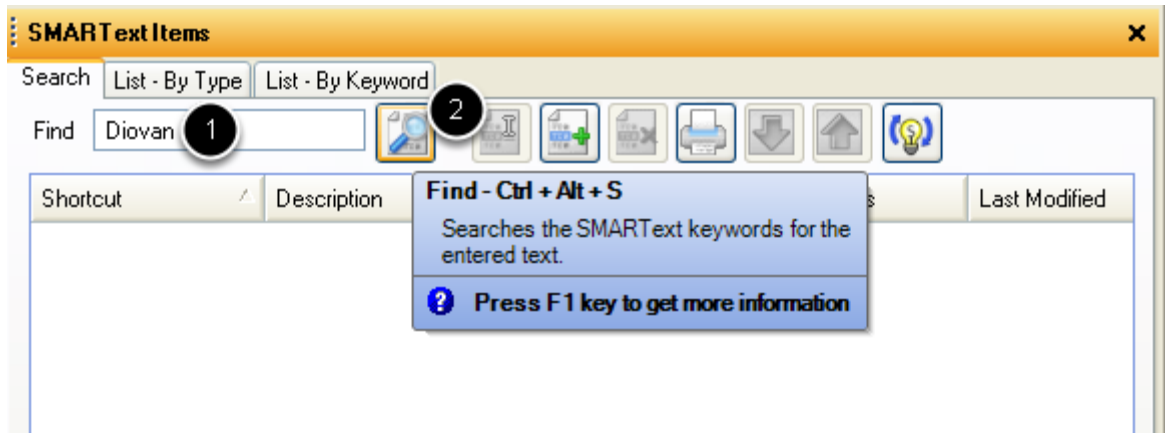
Access the SMARText Items Manager



1. Click on Docutainers.
 2. Click on SMARText Items to access the SMARText Items Manager.
- Or, press F10 on the keyboard.

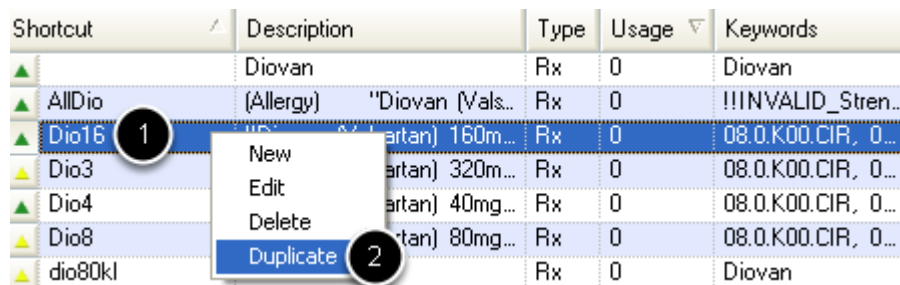


Search for the SMARText Item



1. In the SMARText Items Manager, type a keyword in the Find box.
2. Click on the Find button.

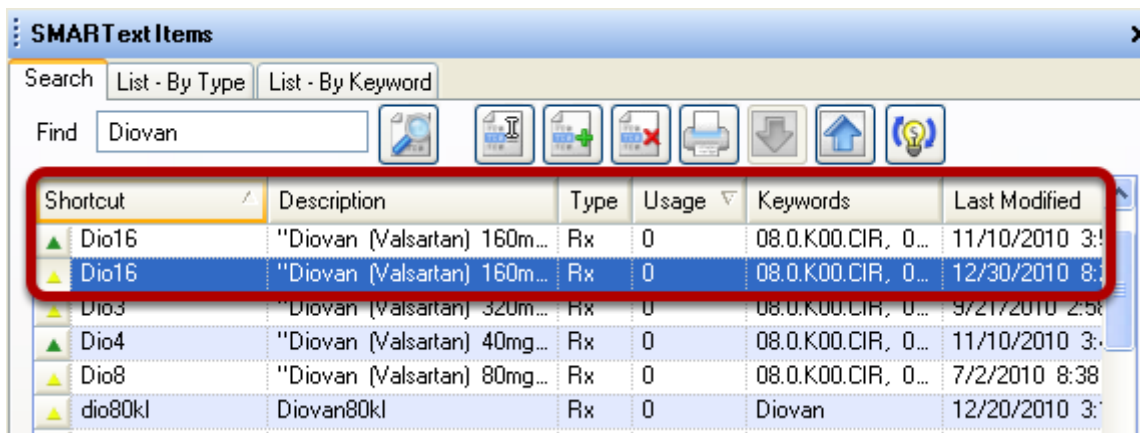
Duplicate the SMARText Item



1. Click to highlight the desired SMARText item.
2. Right-click on the item and choose "duplicate."

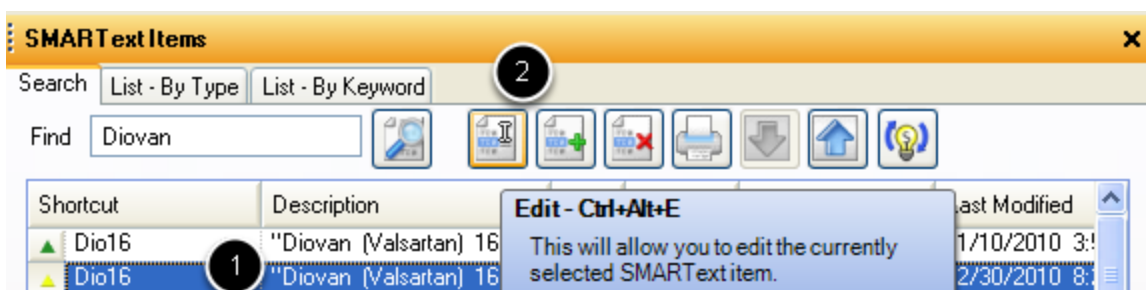


Access the Duplicated Item



Now there will be two of the items in the list. The duplicated item will appear with a yellow triangle and the "Last Modified" date will display the date of the duplication.

Open the SMARTText Designer



1. Click to highlight the duplicated item.
2. Click on the Edit button.



Make the Desired Changes

SMARText Designer

Shortcut: Dio16

Description: "Diovan (Valsartan) 160mg, #30, 1qd, R-12"

Keywords: Dio16, Valsartan, Dio, diovan16, HTN, Hbp, hypertension, Diovan, 08.0.K00.CIR, K00, r---, 0811

☒ Display Header: Diovan (Valsartan) ☐ only when item is empty.

Advanced

General

Item Type: [Dropdown]

Diovan (Valsartan): [160 mg (tablet) SIG- 1 tab(s) once a day orally #30 Substitutions Not Allowed Refills- 12]

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and) ☒ Separate with ☐ English List (or) ☐ End with ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - Never [Dropdown]

Coding / Notes

Structure Viewer

Save Cancel

SMARText Designer

Shortcut: dio160

Description: "(Valsartan) 160mg, #30, 1qd, R-12"

Keywords: Dio16, Valsartan, Dio, diovan, htn, rip.

☒ Display Header: Valsartan ☐ only when item is empty.

Advanced

General

Item Type: [Dropdown]

Diovan (Valsartan): [160 mg (tablet) SIG- 1 tab(s) once a day orally #30 Substitutions Not Allowed Refills- 12]

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and) ☒ Separate with ☐ English List (or) ☐ End with ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - Never [Dropdown]

Coding / Notes

Structure Viewer

Save Cancel

1. Within the SMARText Designer, make the changes to the Shortcut, Description, Keywords and Display Header as needed.
2. Click Save.



Q: How do I add a comment or free text to a structured item?

A: To add a comment to a structured SMARText item is referred to as "the click and type method".

The click and type method **does not work with medications**.

Activate the Structured Item

Family History

[Positive family history for](#) -

[Negative family history for](#)

PARENTS: **Diabetes - Type 2: []**

CHILDREN:

GRANDPARENTS:

SIBLINGS:

UNCLES/AUNTS:

OTHERS/DISTANT:

Left-click directly on top of the SMARText item the comment will be attached to. (meaning, place your cursor within the SMARText item)

Add a Comment

1. After left-clicking on the SMARText Item, start typing the desired comment.

The comment box will not appear until you start typing.

2. Click Save or press the Enter key on the keyboard.



The Result

Family History

[Positive family history for](#) -

[Negative family history for](#)

PARENTS: [Diabetes - Type 2: \[Father age 52\]](#)

CHILDREN:

GRANDPARENTS:

SIBLINGS:

UNCLES/AUNTS:

OTHERS/DISTANT:

The free-text comment will now be "attached" to the SMARTText item.

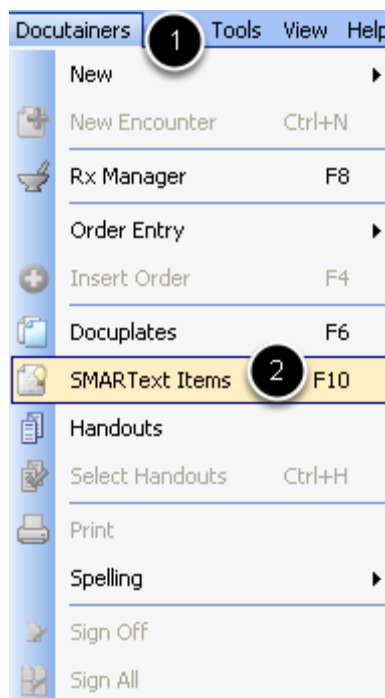
To edit the comment, simply left-click on top of the comment, and press the spacebar on the keyboard. The Item Comment box will display, so that the comment can be edited.



Q: How can I change the wording and appearance of SMARText in my documentation?

A: The appearance, or text , of a SMARText Item , can be changed. For example, the "Chief Complaint" SMARText item can be changed to display "Reason for Visit" or "Patient complains of."

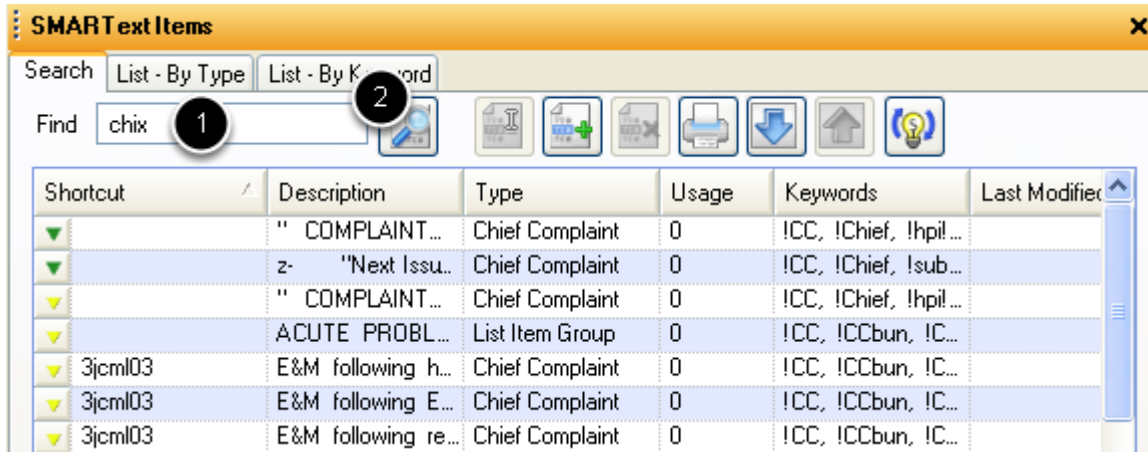
Access the SMARText Items Manager



1. Click on Docutainers.
 2. Click on SMARText Items.
- Or, press F10 on the keyboard

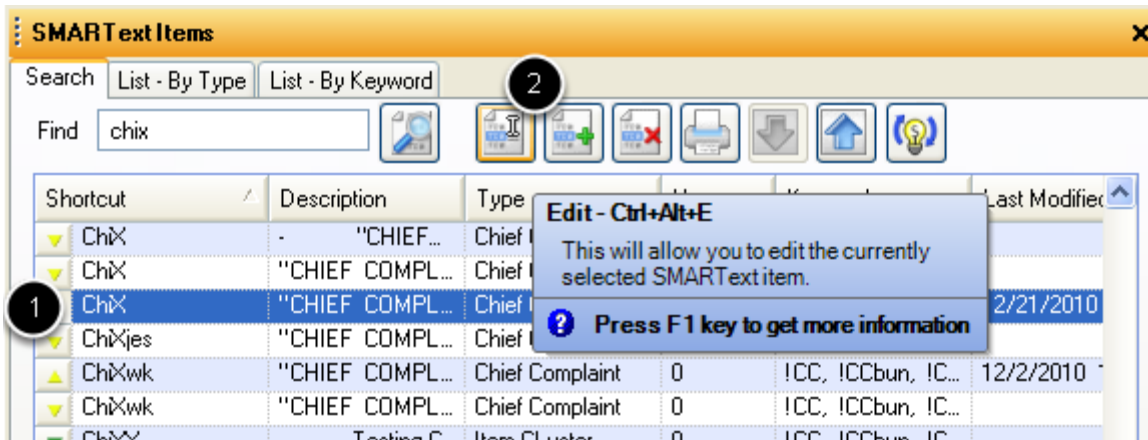


Locate the SMARText Item



1. Type the shortcut code or keyword of the SMARText item to be edited into the Find box.
2. Click on the Find button.

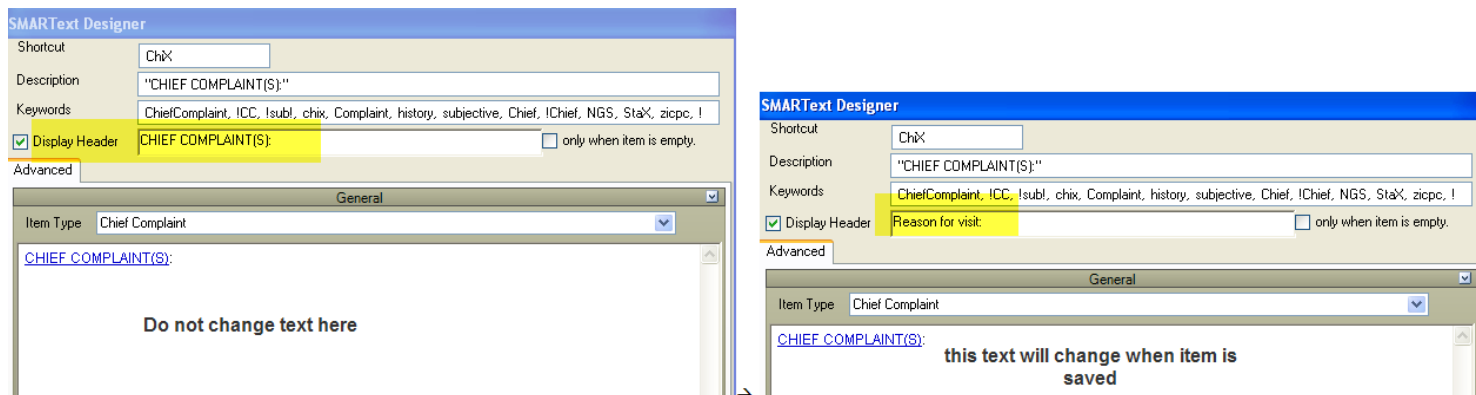
Highlight the Desired Item



1. Click to highlight the item to be edited.
2. Click on the Edit button.

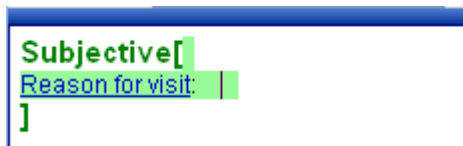


Edit the Item



In the Display Header box, **not the blue text in the large text box for it will change automatically**, change the text to appear as desired. Click Save.

Use the Edited Item



When the shortcut code is inserted into the Subjective field, and the spacebar is pressed, the SMARText item reads "Reason for Visit" rather than "CHIEF COMPLAINT (S)."



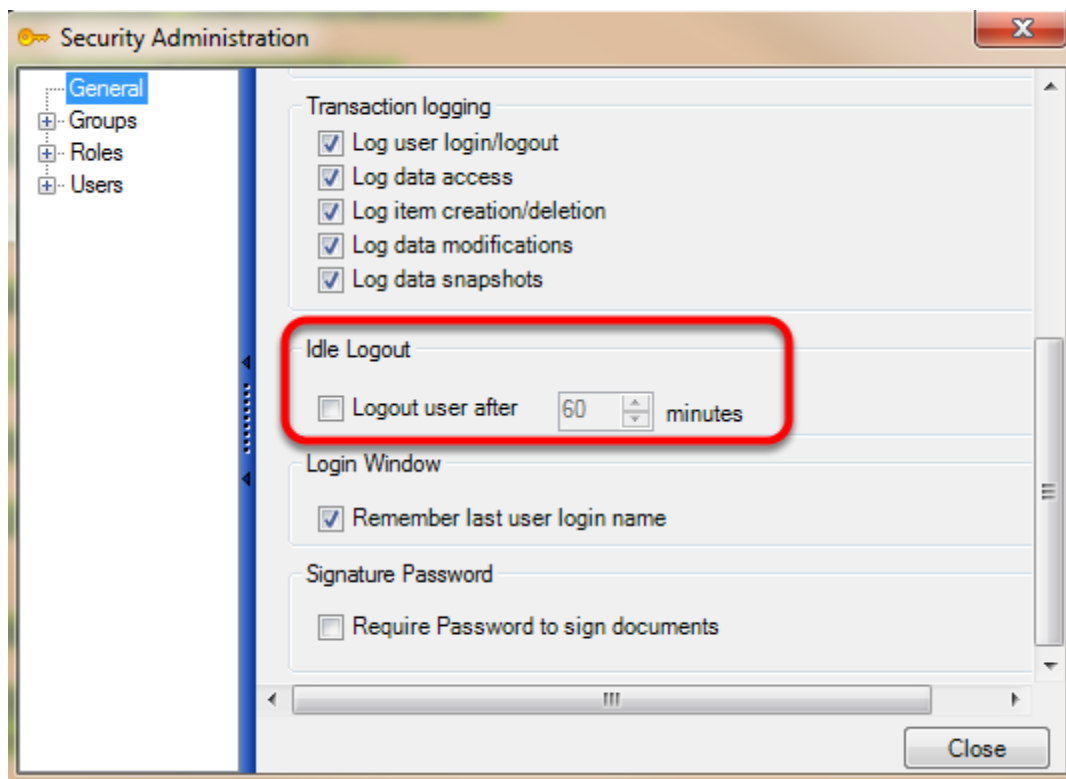
Q: How do I update SMARText items?

A: Updating local SMARText items is an easy process. We, however, recommend that this is not done during clinic hours as the speed of SOAPware will be compromised.

We recommend this process to be completed every two weeks to once a month, at a minimum. Updating SMARText only needs to be performed on one networked computer.

Prior to updating SMARText items go to Tools > Security and disable the Idle Logout function by unchecking the box next to Logout user.

Disable Idle Logout Before Updating SMARText



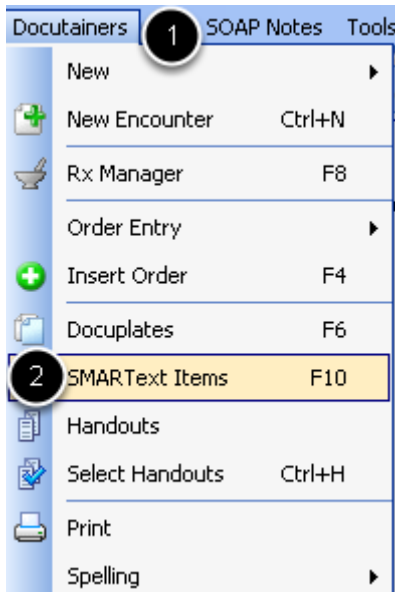
Prior to updating SMARText items go to Tools > Security and disable the Idle Logout function by unchecking the box next to Logout user.

Logout of SOAPware for this change to take effect then log back in and follow the steps below.



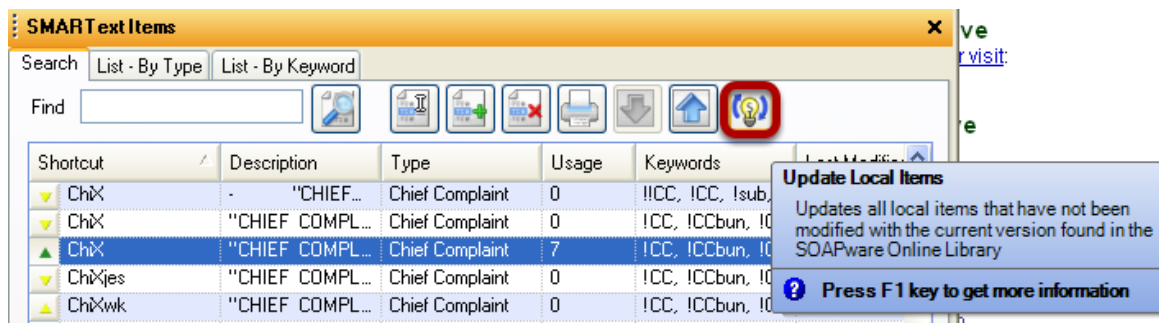
***Note:** To protect electronic health information go back into security and enable idle logout after the SMARTtext update is complete.

Access the SMARTText Items Manager



1. Click on Docutainers.
 2. Click on SMARTText items
- Or, press F10 on the keyboard

Update SMARTText Items



1. Click on the Update Local Items button with the light bulb image.

Note: We do not recommend updating SMARTText for the clinic during clinic hours, as this process



will slow down the speed of SOAPware for everyone on the network, and can take anywhere from 20 minutes to 2 hours to complete.



Q: Why do I get a "Connection Failed" error when attempting to update SMARText?

A: Downloading and updating SMARText Items depends on establishing and maintaining a consistent connection to the SOAPware Cloud Library servers. Normally this is handled by your computer and network equipment and requires no additional effort on your part.

In some cases, though, there may be problems in the chain of communication that can adversely impact the connection.

If you receive "time out" errors when connecting to the Cloud Library, there are several possible causes: The first thing to do is to re-try the update later in the day or at a time that Internet or your network traffic is likely to be lower. Other considerations...

1. A problem with that computer's network connection. Test the connection by trying to access resources (files, printers, etc) that are stored on another computer on the local network.
2. A problem in your local network. There could be wires, hubs, or routers in your local network that are damaged or failing. This would be indicated by widespread connectivity problems in your office, from multiple computers and in multiple applications.
3. A problem with your internet service provider. If your ISP's network is having trouble, you will have slow or reduced speed connections to the Internet. Test this by trying to reach large, reliable sites (such as www.google.com) or by running speed tests (such as those at www.speakeasy.net).



4. A problem with SOAPware's servers. If you have verified that your computer, local network, and internet connect are all functioning properly, contact SOAPware to report your problem. We can verify the state of our servers and connections and help you troubleshoot the problem.

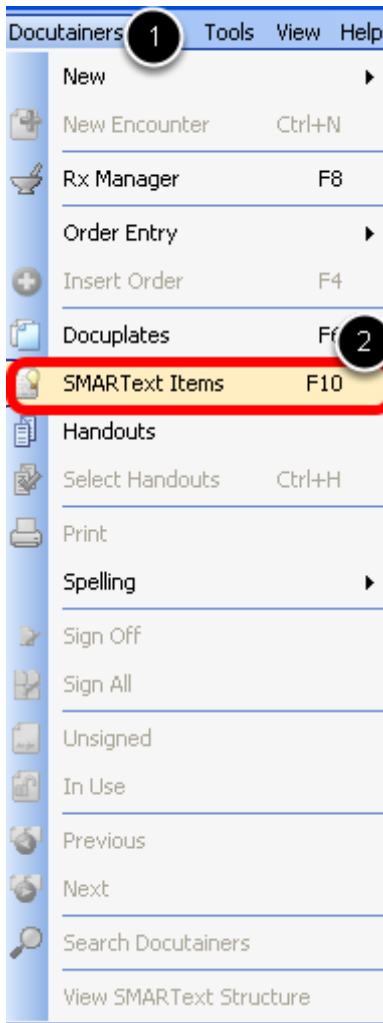
In summary, there are a whole host of issues that can cause the connection to be problematic, resulting in time-outs. In the middle of the day, when Internet traffic is highest, one can expect there to be more problems. In contrast, updating in the middle of the night should result in the fewest problems with time-outs.



Q: Is there a good way to download a large amount of structured medications at once?

A: The user would search in the SMARText Items Manager by type, and bulk-download the commonly used medications.

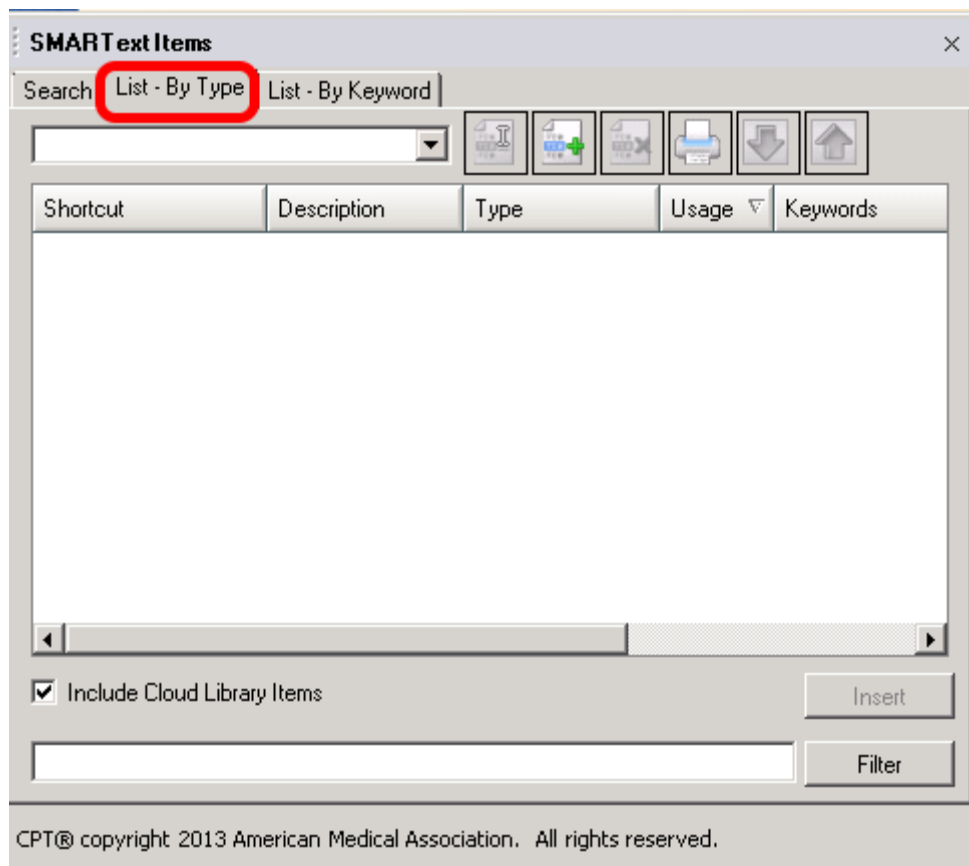
Access the SMARText Items Manager



1. Click on **Docutainers** in the menu bar.
2. Click on **SMARText Items**.
or press F10 on the keyboard



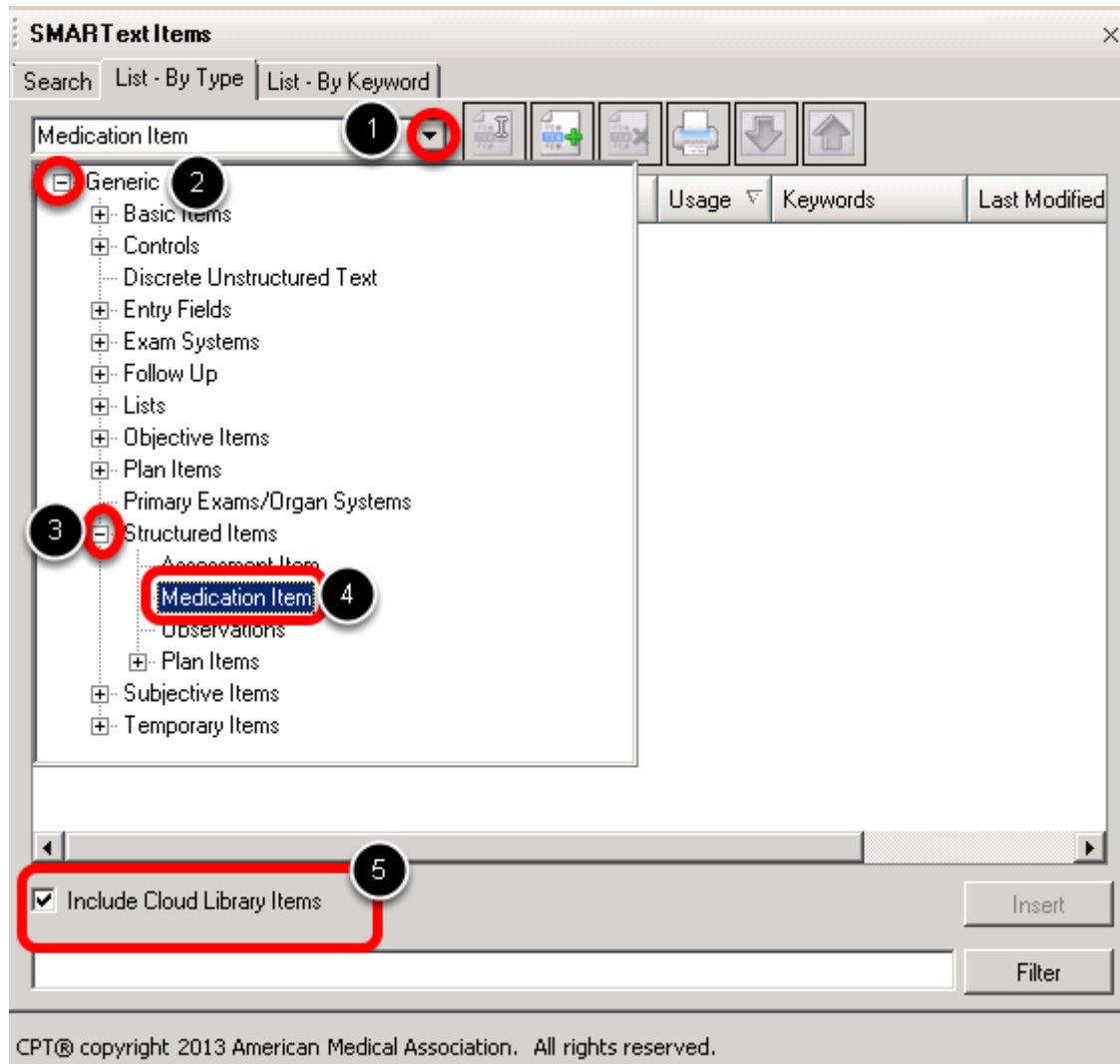
List by Type



Within the SMARText Items Manager, Click on the **List by Type** tab.



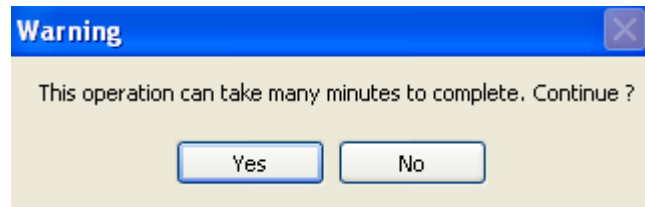
Medication Items



1. Click on the drop down arrow.
2. Click on the + (expander node) next to **Generic**.
3. Click on the expander node next to **Structured Items**.
4. Click on **Medication Item**.
5. Make sure there is a check mark in the box next to **Include Cloud Library Items**.



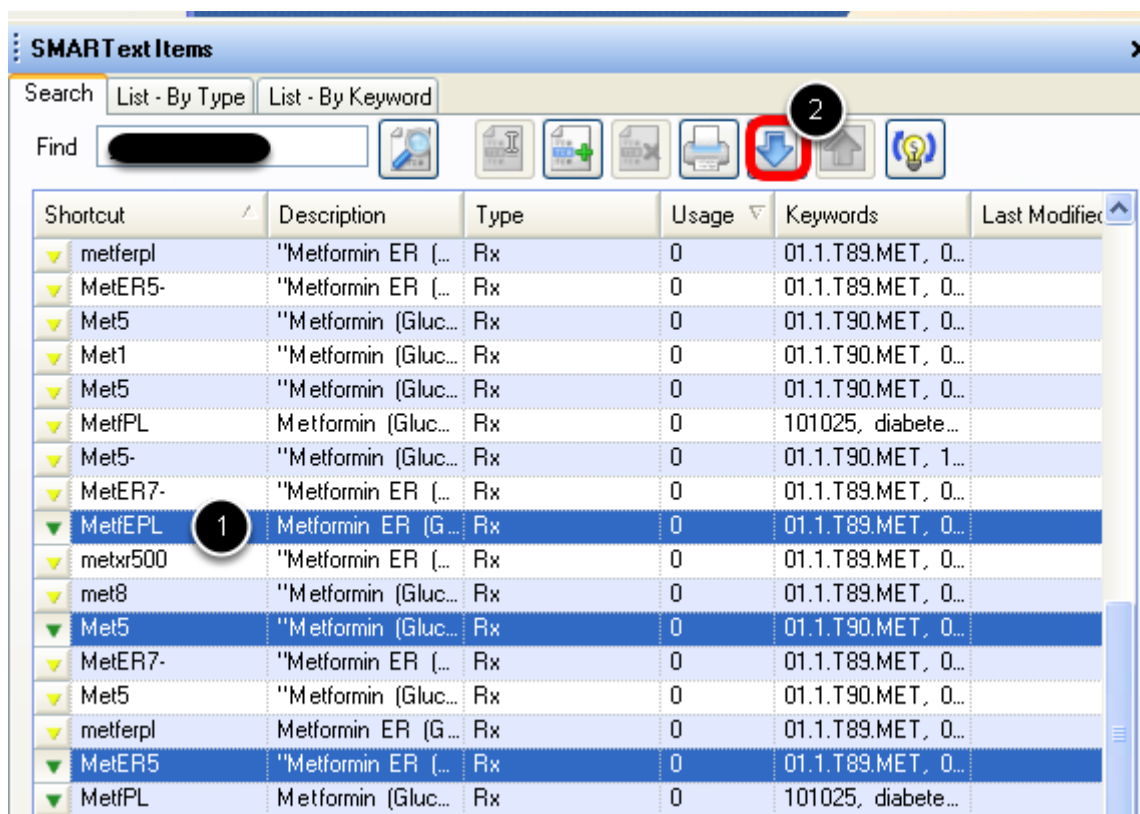
Searching



A dialog will display indicating this action will take "many minutes" (typically 10-15 minutes) to complete.

Click **Yes** if ready to continue.

Download the Medication Items



1. Holding down the Control key on the the keyboard, click to highlight the medication items to be downloaded.

2. Click on the download arrow to download these medications into the local database.



Q: How do I load the SMARText Quick Access with my top SMARText items?

A: The SMARText Quick Access will display the items previously inserted by a user in a particular field when the cursor is placed in that field. For example, when the cursor is placed in the Medications field, all previously used SMARText items will be displayed in the SMARText Quick Access. They can quickly and easily be inserted by double-clicking on the item.

To pre-populate these lists, place your cursor in the Medication field, for example, and insert the top 20-30 SMARText medications that are used. This can also be done in the Assessment field with diagnosis, and the Plan Field with CPT codes.

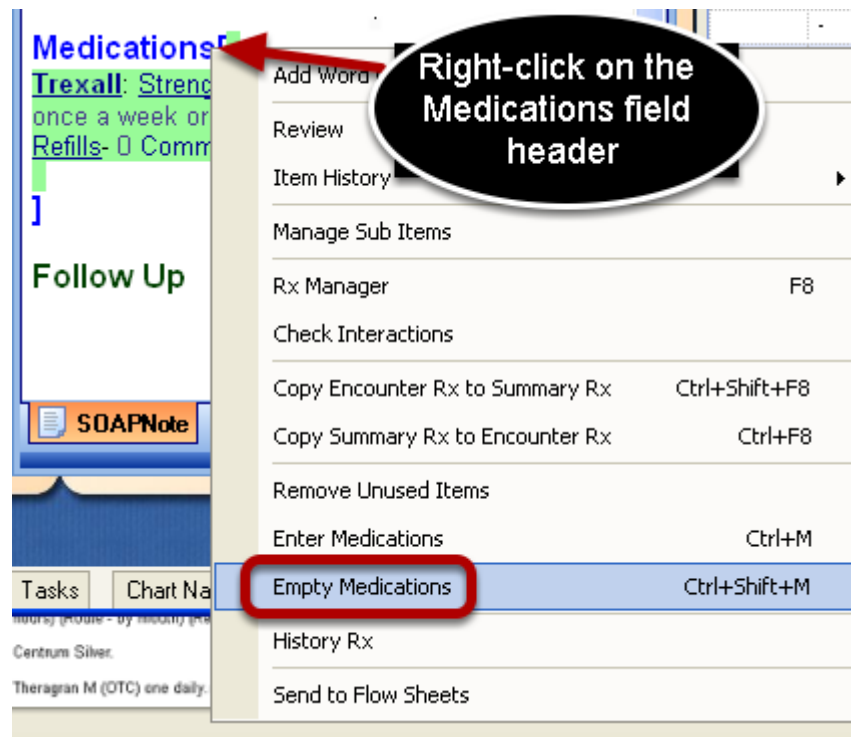


Summary/SOAPnote Specific



Q: How do I clear/empty a field under a field header in the Summary or a SOAPnote?

A: Clearing/emptying fields in the patient's Summary or SOAPnote chart section, only requires a few steps. See below for an example of how to empty/clear the contents within the Medication field.

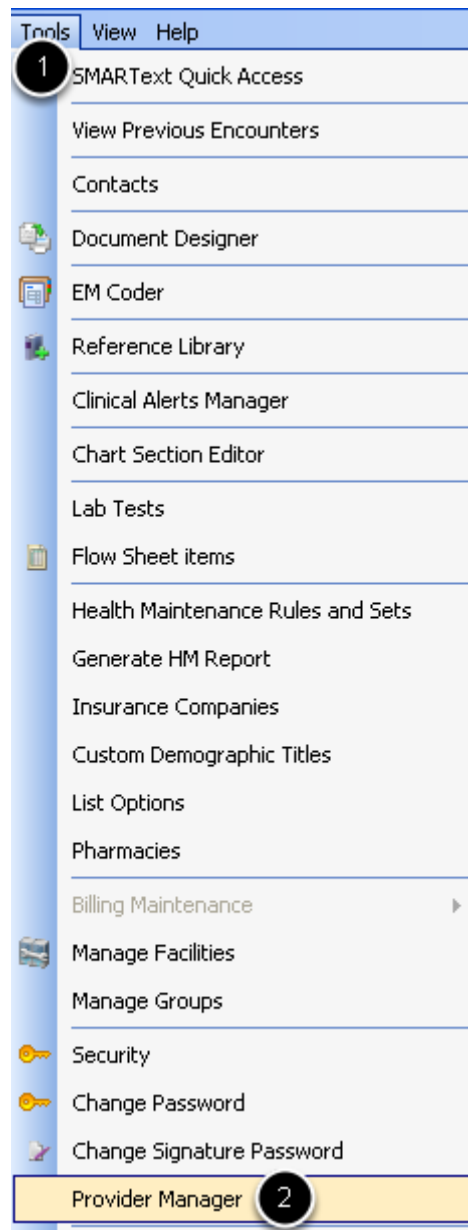


Right- click on the field header (e.g. Medications). Select "Empty Medications" from the list in the display window.

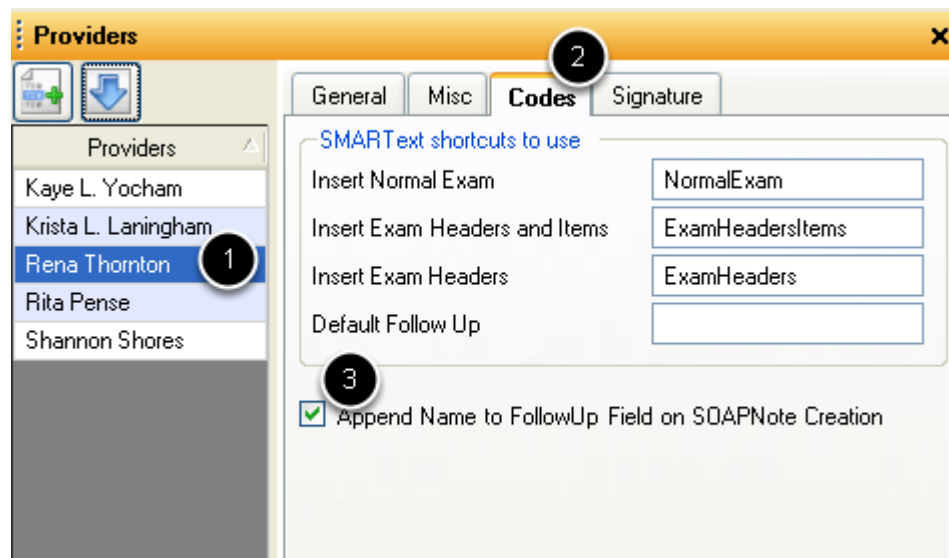


Q: How do I add or remove the Provider name in the Follow Up field?

A: Auser is able to add or remove a Provider's name in the Follow Up field from Provider Manager.



1. Click on Tools.
2. Click on Provider Manager ,to display the provider's information.



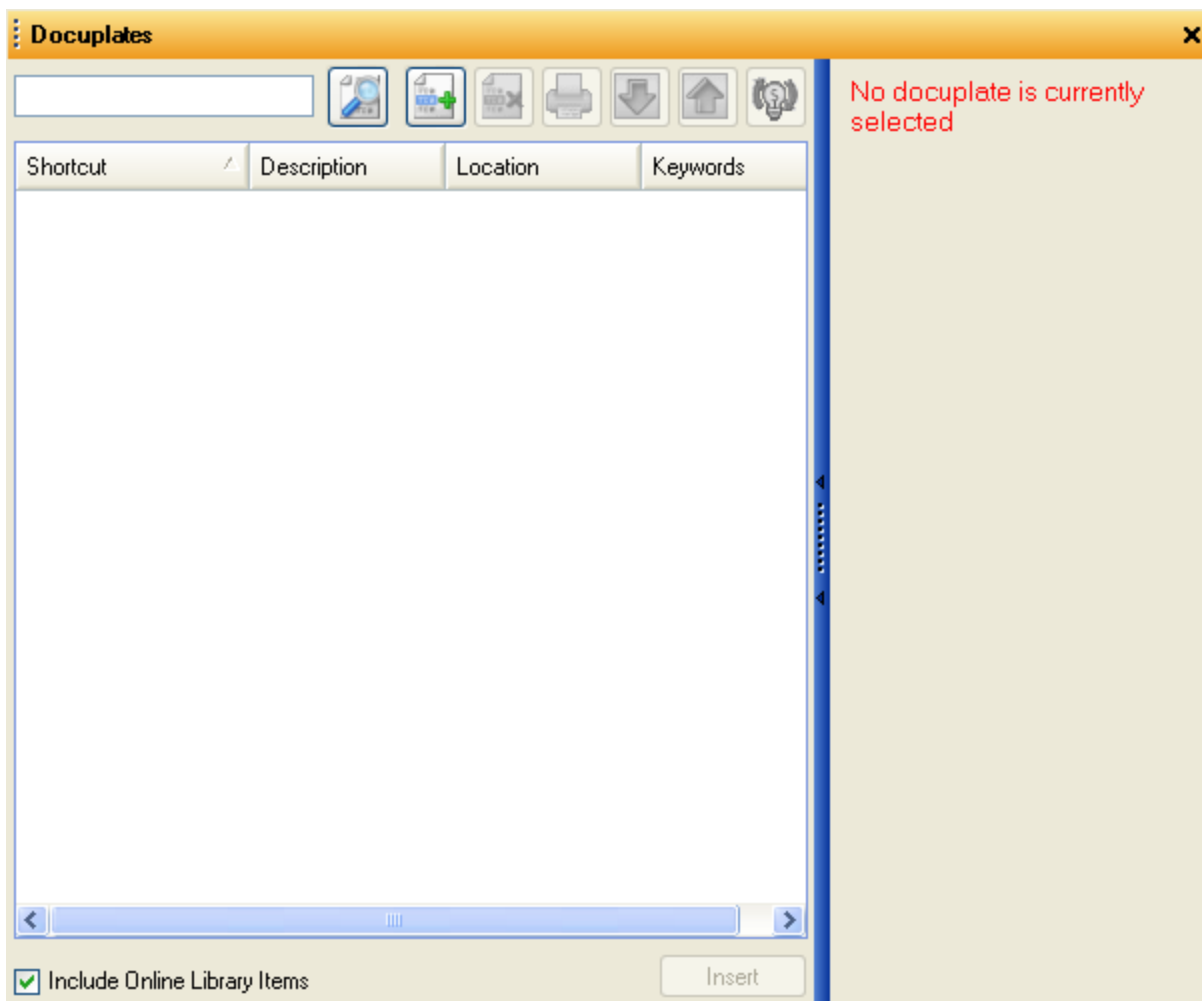
1. Click to highlight the Provider to add/remove name from the Follow Up field.
2. Click the Codes tab.
3. Select or deselect to Append Name to Follow Up Field on SOAPnote Creation.

To save changes, Click the Update button.

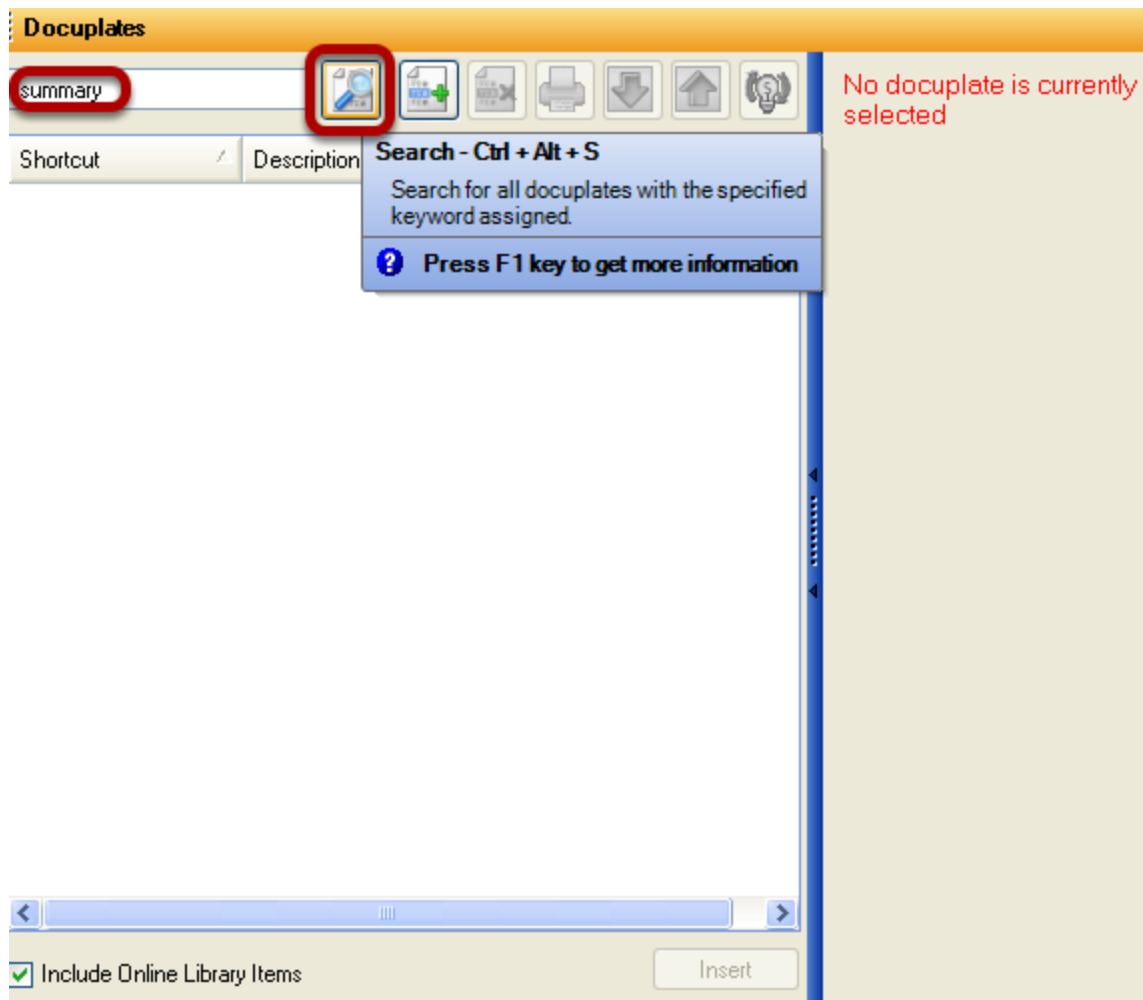


Q: Can I hide or remove certain field headers in the Summary or SOAPnote chart sections?

A: Yes, it is possible to hide/remove a field header from the Summary or SOAPnote chart sections. This change will reflect on newly created patient charts, but not on existing patient charts.



To remove the unwanted field headers, open the Docuplates window. This can be achieved by pressing F6 on the keyboard, or by clicking Docutainers > Docuplates.



To search for a docuplate, enter the name of the docuplate into the search field. Click the Search button.



Docuplates

summary

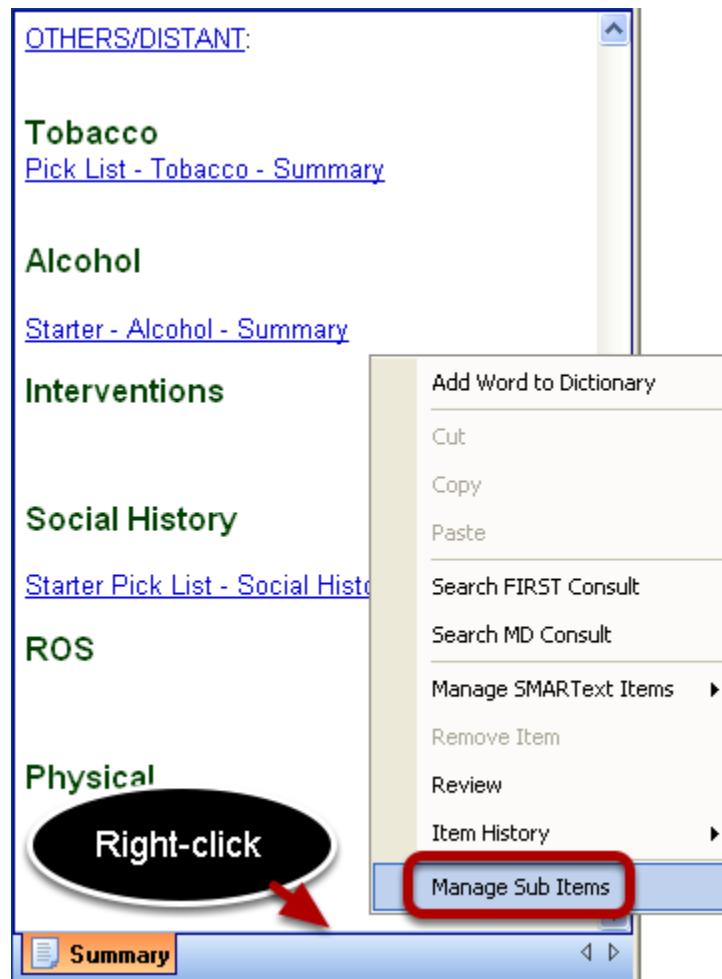
Shortcut	Description	Location	Keywords
Summary-DPL	Summary Defaul...	Summary	080814, Del
SumPL	Summary - with...	Summary	lists, pick, S
tfmpedsum	Pediatric summa...	Summary	01.0.A00.GE
SumPL	Summary - with...	Summary	lists, pick, S
SumPL	Summary - with...	Summary	lists, pick, S
DrugFailSum	Summary Pick-L...	Summary	Allergy, Drug
evertsonsum	Geriatric summa...	Summary	01.0.A00.GE
summary	Empty Summary	Summary	peds
summaryOURS	Custom Summar...	Summary	summary hee
	Summary 2/16/2...	Summary	famdac, sum
summary	DR.J #1	Summary	FEMALE
summary	summary - 9/09	Summary	summary
SummaryPeds	Summary Pediat...	Summary	ali, summary
arp summary	arp summary	Summary	arp, summary
*summaryEAB2	*SUMMARY DE...	Summary	default, eab,
summary2	summary	Summary	summary
tfmpedsum	Pediatric summa...	Summary	01.0.A00.GE
Summary-DPL	Summary Defaul...	Summary	080814, Del
summary	Empty Summary	Summary	
famdacsum	Default Summar...	Summary	Allergy, Drug
*summaryEAB	*SUMMARY DE...	Summary	default, eab,

☒ Include Online Library Items Insert

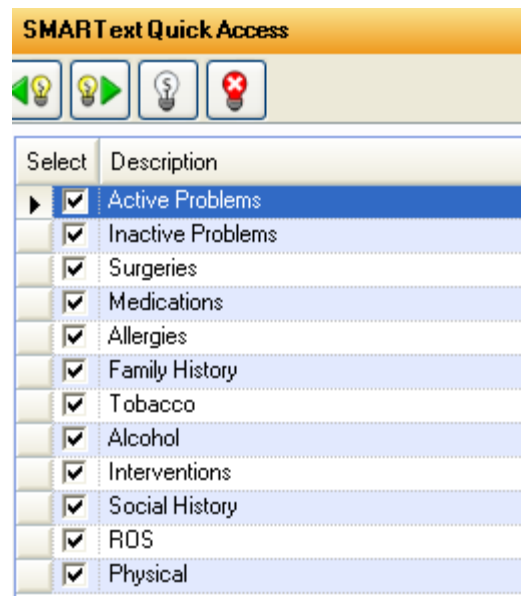
A list of docuplates for the "summary" search will display in the window. The docuplate in need of modifying is usually the default docuplate for a particular chart section.

A screenshot of a medical record interface. The interface has a blue header bar. Below the header, there are several sections, each with a green title and a blue link. The sections are: 'Active Problems' with link 'Starter - Active Problems:', 'Inactive Problems' with link 'Starter - Inactive Problems:', 'Surgeries' with link 'Pick List - Surgeries', 'Medications', 'Allergies' with link 'Starter - Allergies - Summary:', and 'Family History' with links 'Positive family history for -', 'Negative family history for -', 'PARENTS:', 'CHILDREN:', 'GRANDPARENTS:', and 'SIBLINGS:'. At the bottom of the interface, there is a blue bar with a document icon and the word 'Summary' in white. On the right side of the interface, there is a vertical scrollbar.

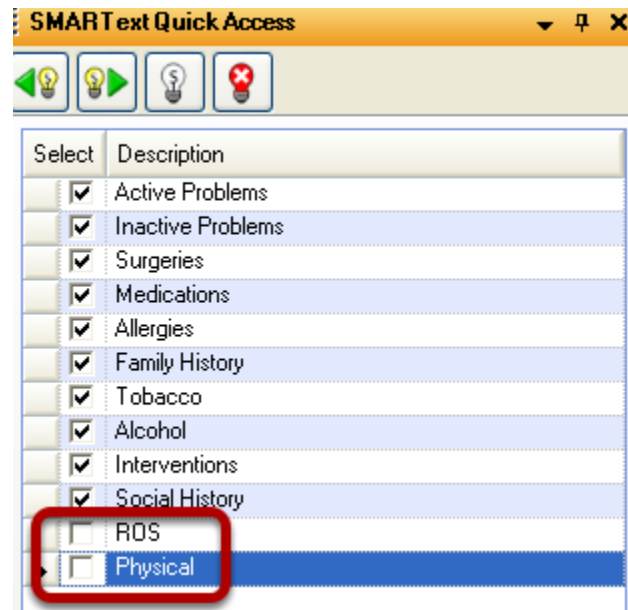
Highlighting a docuplate, will display the information in the docuplate preview window.



Right-click at the very bottom of the docuplate, and Select, "Manage Sub Items."



The field headers in the Summary default docuplate will display in the SMARText Quick Access Window.



Deselecting field headers will hide/remove the field headers, and reflect this change in the current docuplate displayed in the docuplates window.




[CHILDREN:](#)
[GRANDPARENTS:](#)
[SIBLINGS:](#)
[UNCLES/AUNTS:](#)
[OTHERS/DISTANT:](#)

Tobacco
[Pick List - Tobacco - Summary](#)

Alcohol
[Starter - Alcohol - Summary](#)

Interventions

Social History
[Starter Pick List - Social History](#)

 **Summary**

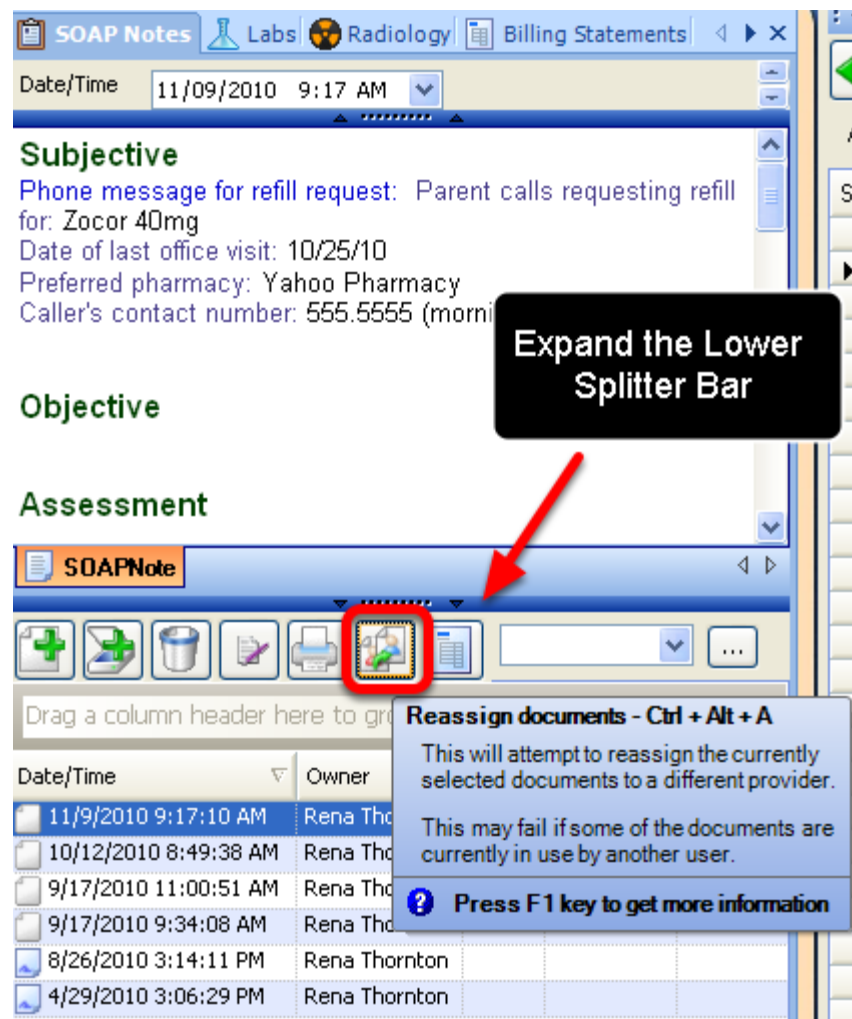
ROS and Physical field headers have been removed/hidden in the current docuplate selected.



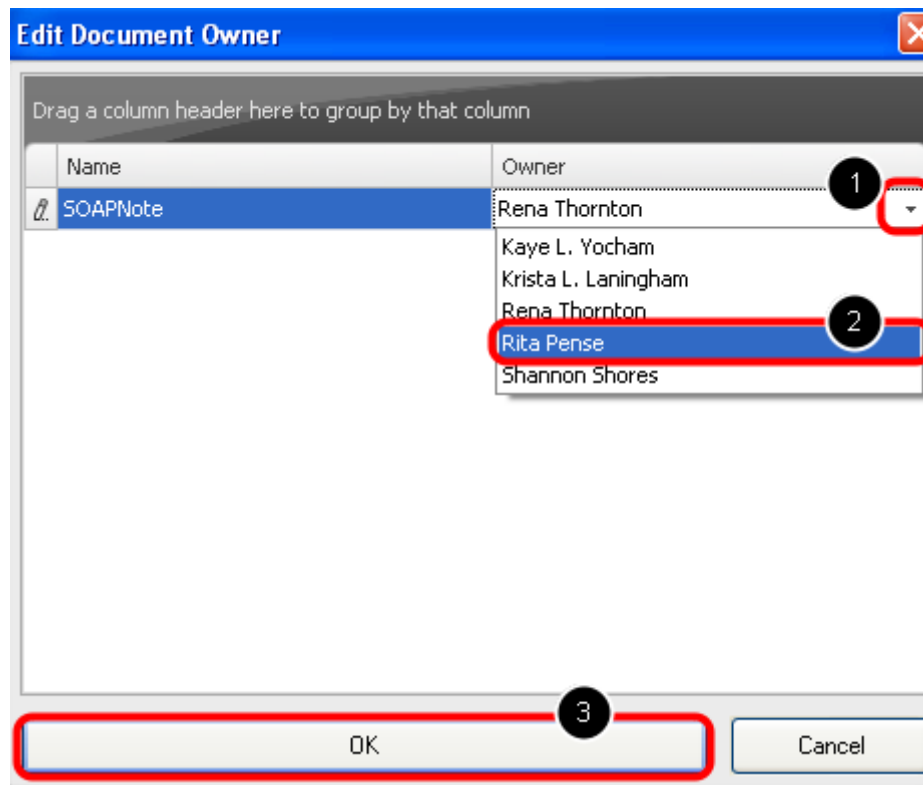
Q: How do you reassign ownership of a SOAPnote to another Provider?

A: To reassign a current SOAPnote to another provider, Click on the Reassign button in the mini-toolbar located behind the lower splitter bar.

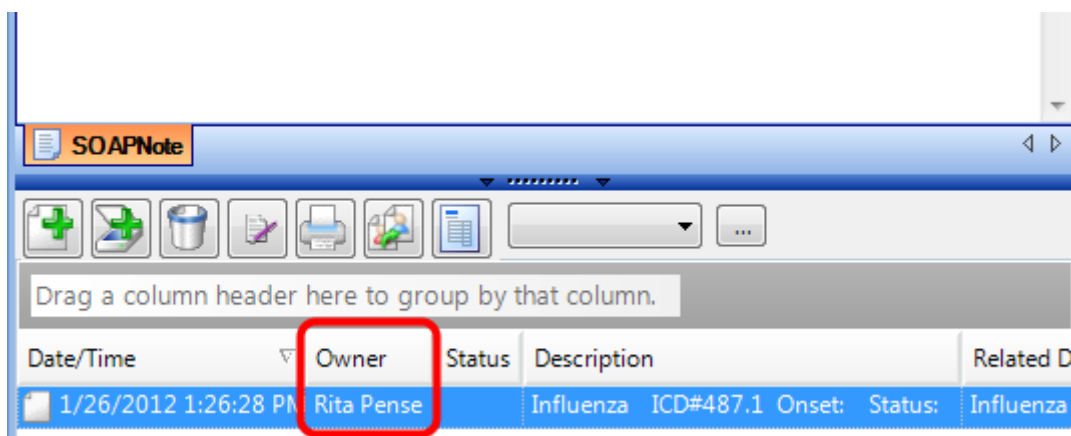
***Note:** If a SOAPnote has been signed off, the provider/ownership cannot be reassigned.



Click the Reassign Documents button to change the provider ownership of document.



1. In the Owner column, Click on the name of the existing owner to receiving the drop down menu.
2. Select the correct Owner/Provider from the drop-down menu.
3. Click OK to save the changes.



The new Owner of the document will now display in the document list.

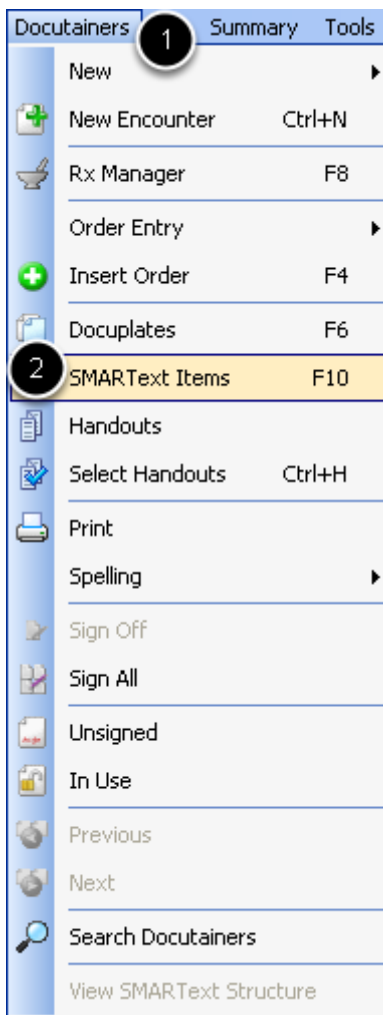


Q: How do I import my signature directly into the SOAPnote or Encounter?

A: There is a SMARText item type called "Clinician Signature," which will import the signature that has been imported into Provider Manager, into the SOAPnote.

For instructions on importing the signature into Provider Manager, click [here](#).

Access the SMARText Items Manager



1. Click on Docutainers on the menu bar.
2. Click on SMARText Items
or press F10 on the keyboard

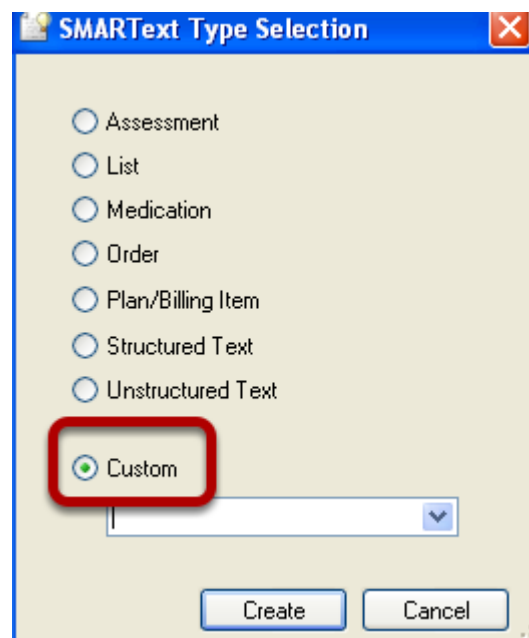


Create a SMARText Item

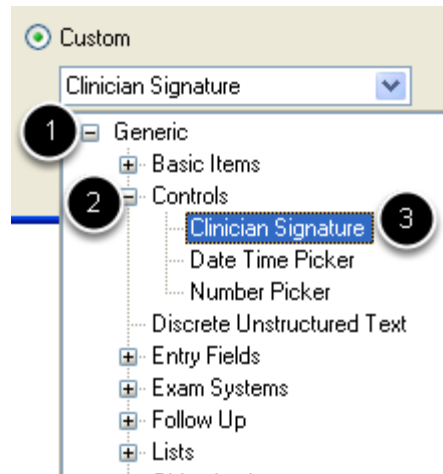


Click on the Button with the green plus.

Custom SMARText Item

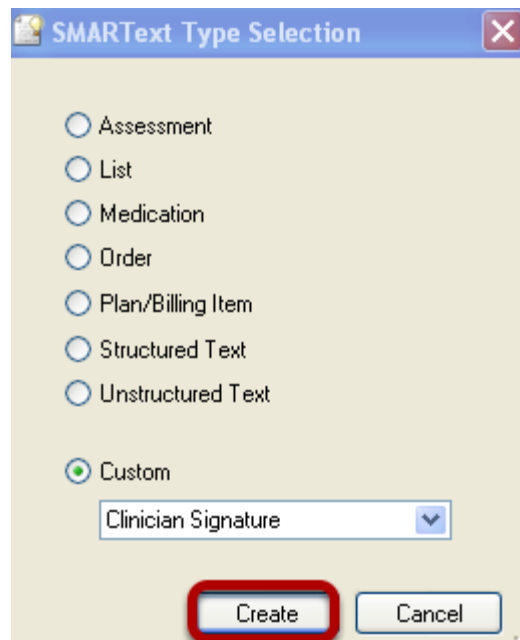


Click on the radio button next to "Custom."



1. Using the drop-down arrow, Click on the + (expander node) next to "Generic."
2. Click on the expander node next to "Controls."
3. Double-click on "Clinician Signature."

Create



Click on the Create button.



SMARText Designer

SMARText Designer

Shortcut: 1

Description: 2

Keywords: 3

☒ Display Header ☐ only when item is empty.

Advanced

General

Item Type:

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and)

☒ Separate with ☐ English List (or) ☐ End with

☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused -

Coding / Notes

Structure Viewer

4 Save Cancel

1. Assign the SMARText Item a shortcut code.
2. Type in a description.
3. Type in keywords, single words separated by commas for searching purposes.



4. Click Save.

Insert the Shortcut Code into the SOAPnote

Follow Up[

Robert Oates MD

]

In an open SOAPnote, in the Follow Up field, type in the shortcut code, and press the spacebar. The signature will be displayed.



Q: How do you document phone calls and/or e-mail messages received from patients?

A: Phone calls for medication refills, email messages, test results or just patient triage phone calls, should be documented in the SOAPnote chart section of a patient's chart. This allows any patient documentation to be signed off, preventing alteration of patient information. Documentation relating to a patient phone call, plan, any medications prescribed, and follow up, can be documented in one centralized area.

The screenshot displays the SOAPware application window. At the top, there are tabs for 'SOAP Notes', 'Labs', 'Radiology', and 'Billing Statements'. Below the tabs is a 'Date/Time' field showing '11/09/2010 9:17 AM'. The main content area is divided into sections: 'Subjective', 'Objective', 'Assessment', 'Plan', 'Medications', and 'Follow Up'. The 'Subjective' section contains a 'Phone message for refill request' where a parent calls requesting a refill for Zocor 40mg, with the date of last office visit as 10/25/10, preferred pharmacy as Yahoo Pharmacy, and caller's contact number as 555.5555 (mornings only). The 'Assessment' section is labeled 'Phone Call'. The 'Plan' section includes an 'Answer for refill request' stating that medication will be refilled one time only, with a reminder for a follow-up visit and a note that a prescription was called to the pharmacy. The 'Medications' section lists 'Simvastatin (Zocor)' with a strength of 40 mg (tablet), a SIG of '1 each once a day orally', and a quantity of #30. It also indicates 'Substitutions Allowed', 'Refills- 0', and a 'Comment- Notes-'. The 'Follow Up' section instructs the patient to 'Return if problems develop or worsens' and shows a 'Schedule:[]' field.

SOAP Notes | **Labs** | **Radiology** | **Billing Statements**

Date/Time: 11/09/2010 9:17 AM

Subjective
Phone message for refill request: Parent calls requesting refill for: Zocor 40mg
Date of last office visit: 10/25/10
Preferred pharmacy: Yahoo Pharmacy
Caller's contact number: 555.5555 (mornings only)

Objective

Assessment
Phone Call

Plan
Answer for refill request May refill medication one time only, but remind patient that a follow up visit is due for evaluation.
Prescription called to pharmacy.

Medications
Simvastatin (Zocor): Strength- 40 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: []

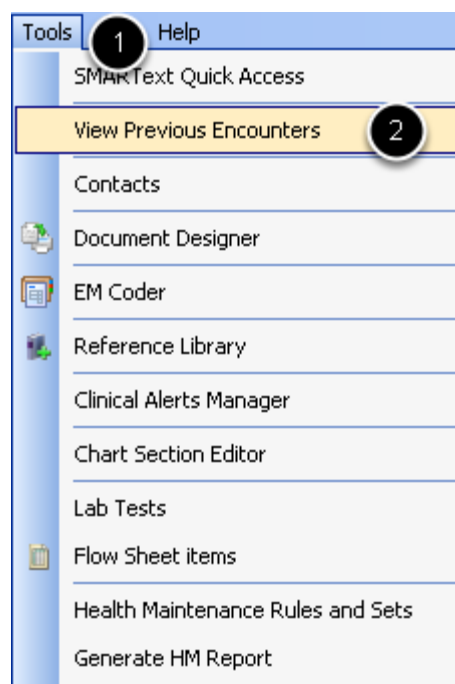


Q: How can a patient's past visits be viewed while also viewing the current encounter?

A: The "Encounter Viewer" dialog can be utilized to see multiple patient encounters at one time.

The "Encounter Viewer" dialog can also be docked.

Access Encounter Viewer Dialog



1. With a chart open, Click on Tools.

2. Click on "View Previous Encounters."



Encounter Viewer

Encounter Viewer

By Date By Rx By Dx

Subjective
CHIEF COMPLAINT: Back pain (lower or lumbar-sacral).
HPI: SYMPTOMS/RELATED: Reports symptoms of muscle pain, pain in back is worse than leg pain, pain pattern is more referred rather than radicular, pain with movement.
Denies symptoms of urination problems, stool/bowel movement changes.
INTENSITY/SEVERITY: [
ROS: GEN- Constitutional: Denies symptoms such as weight loss.
]

Objective
Exam: GENERAL: Appearance: General appearance can be described as in mild distress.
HEAD, EARS, NOSE AND THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars,

SOAPNote Xray.jpg

Date	Description
7/29/2010 9:59 AM	
7/29/2010 9:59 AM	
7/7/2010 10:43 AM	Low Back Pain ICD#724.2 Onset: Resolved:
7/6/2010 12:26 PM	
7/1/2010 3:39 PM	Renal cancer ICD#189.0 stage 3 terminal
6/29/2010 2:12 PM	
6/23/2010 4:03 PM	

Add Active Field to Current Encounter Add Active Document to Current Encounter

The Encounter Viewer dialog box will be displayed. This can be dragged to any position on the screen, and also docked if desired.

To view a previous encounter, simply click to highlight the line item (encounter).



Add a Previous Encounter to the Current Encounter

Encounter Viewer

By Date By Rx By Dx

Subjective
CHIEF COMPLAINT: Back pain (lower or lumbar-sacral).
HPI: SYMPTOMS/RELATED: Reports symptoms of muscle pain, pain in back is worse than leg pain, pain pattern is more referred rather than radicular, pain with movement.
Denies symptoms of urination problems, stool/bowel movement changes.
INTENSITY/SEVERITY: [
ROS: GEN- Constitutional: Denies symptoms such as weight loss.
]

Objective
Exam: GENERAL: Appearance: General appearance can be described as in mild distress.
HEAD, EARS, NOSE AND THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars,

SOAPNote Xray.jpg

Date	Description
7/29/2010 9:59 AM	
7/29/2010 9:59 AM	
7/7/2010 10:43 AM	Low Back Pain ICD#724.2 Onset: Resolved:
7/6/2010 12:26 PM	
7/1/2010 3:39 PM	Renal cancer ICD#189.0 stage 3 terminal
6/29/2010 2:12 PM	
6/23/2010 4:03 PM	

Add Active Field to Current Encounter Add Active Document to Current Encounter

Make sure a new encounter is open and with the previous encounter desired in view, Click "Add Active Document to Current Encounter." This action will transfer the entire previous note into the new/current encounter.



Add a Previous Field to the Current Encounter

Encounter Viewer

By Date By Rx By Dx

Objective

Exam: GENERAL: Appearance: General appearance can be described as in mild distress.
HEAD, EARS, NOSE AND THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.
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 no wheezing, rhonci, rales or rubs and with equal breath sounds.
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.

SOAPnote Xray.jpg

Date	Description	Pr
3/27/2011 1:58 PM	soapnote	Rite
3/24/2011 3:21 PM		Rite
3/16/2011 1:04 PM		Rite
3/15/2011 11:54 AM		Rite
3/11/2011 4:21 PM	Anemia ICD#285.9 Onset: 2/21/1999 Status: A	Rite
3/3/2011 2:22 PM		Rite
2/25/2011 10:17 AM		Rite

Add Active Field to Current Encounter **Add Active Document to Current Encounter**

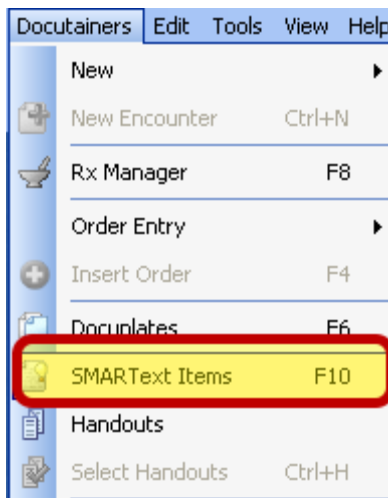
Make sure a new encounter is open and with the previous encounter desired in view, Click next to the field that is to be inserted into the current SOAPnote. Click "Add Active Field to Current Encounter." This action will transfer that field only to the current SOAPnote.



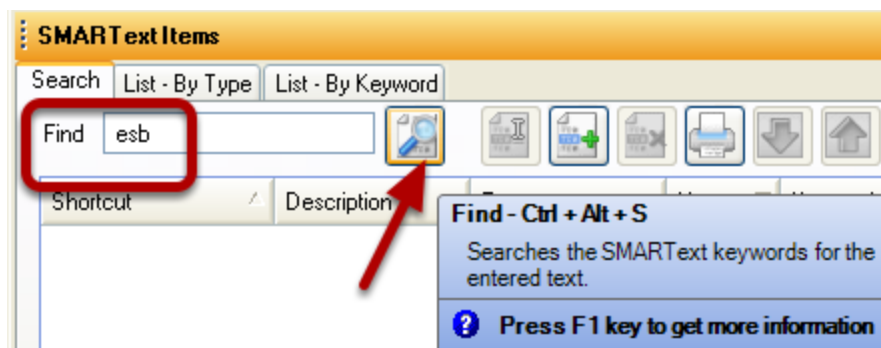
Q: How do I enter "Electronically Signed By" into my SOAPnote?

A: The shortcut "esb" will need to be uploaded to your local library so that it may be inserted into the SOAPnote Follow Up field. This code insertion can be done automatically when entered in the Provider Manager/Codes Tab.

Download Shortcut "esb"



Open SMARText Items Manager by using the F10 key located on the keyboard, or go to Docutainers > SMARText Items.




From within SMARText Items Manager, enter "esb" in the "Find" window and Click the Search button.



SMARText Items

Search List - By Type List - By Keyword

Find



Shortcut	Description	Type
esb	Electronically Signed	Structured Text
esb	Electronically Signed	Structured Text
avanteesb	Esberitox	Rx
esb	Electronically Signed	Structured Text
klyesb	Electronically signed by, Kaye Y...	Misc. (US)

Download - Ctrl + Alt + D

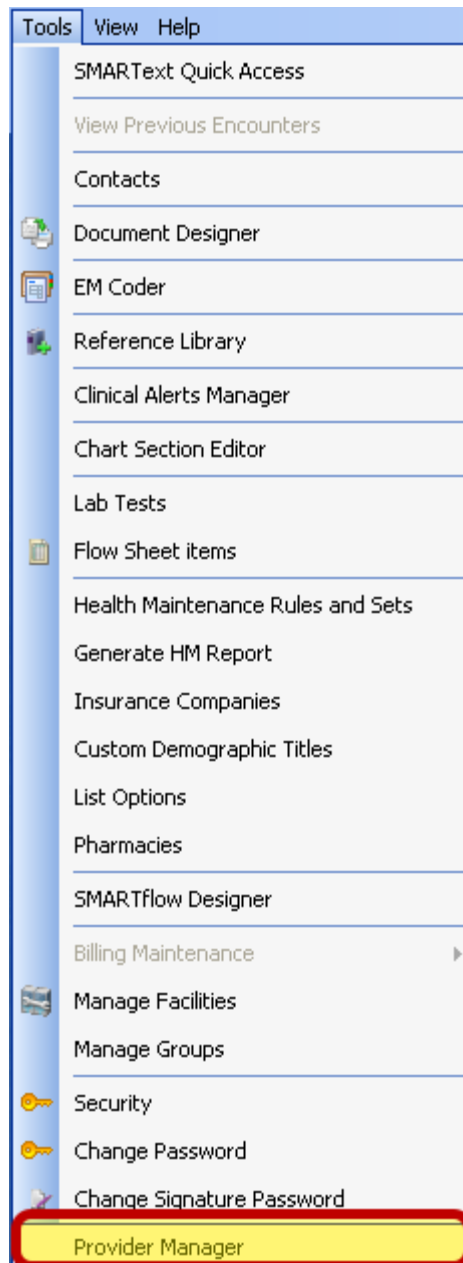
This will allow you to download the selected SMARText items from the SOAPware Library. Once downloaded they will be available in the local database.

Press F1 key to get more information

Click to highlight the item for "Electronically Signed," and Click on the download button to download this item to your local library.



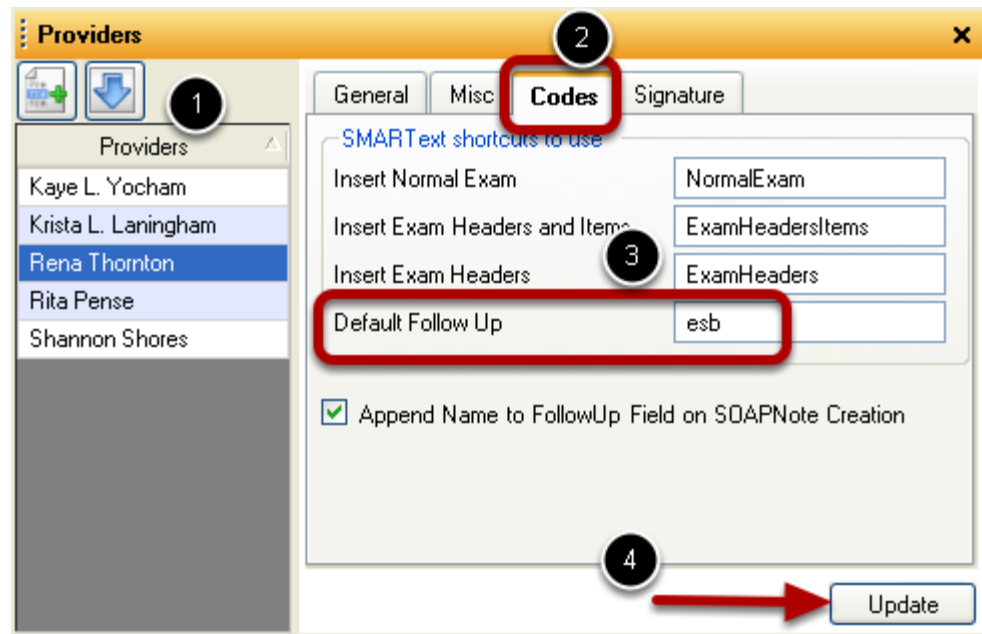
Insert Code in Provider Manager



After this item has been successfully downloaded to your local database/library, go to Tools > Provider Manager, to enter this shortcut in the Codes tab to be automatically inserted into the SOAPnotes Follow Up field.



Codes Tab in Provider Manager



- 1) Click to highlight the preferred provider in list to add shortcut code.
- 2) Click on the Codes tab.
- 3) Insert the shortcut "esb" in the Default Follow Up field.
- 4) Click Update.



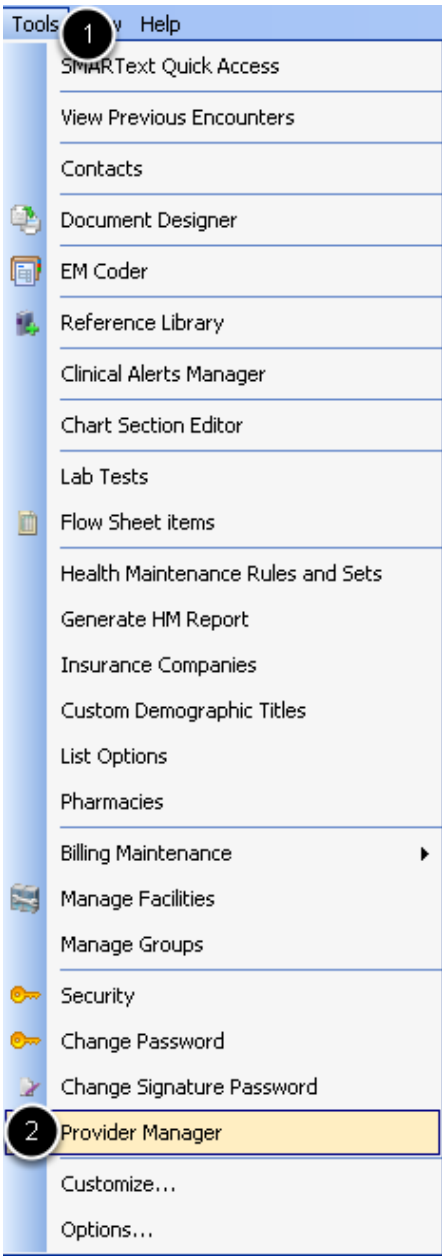
Support Specific



Q: I renewed my support agreement but still get a pop up asking me to renew.

A: If after renewing your support agreement, a provider's license might need to be refreshed.

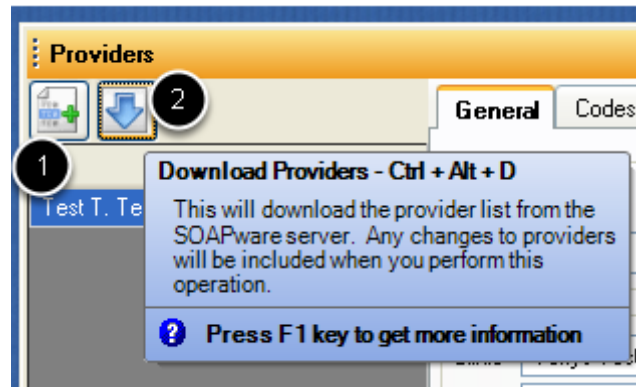
Tools - Provider Manager



- 1. Click on Tools.
- 2. Click on Provider Manager.



Refreshing the License Change



1. Click to highlight the desired provider.
2. Click on the blue download arrow.

Logout and back into SOAPware for changes to take effect.



Version 4



Q: How do I convert my old V4 shortcut codes into structured SMARText items?

A: Version 4 shortcut codes can be reassigned to a structured SMARText item. This will allow the user to continue using familiar shortcut codes with the new structured SMARText Items.

1. Search for and Download Structured SMARText Items

Assessment[
asthma

Shift + F11 Search

QA	Description	Shortcut	Type	Usage
▼	"Asthma, allergic" (ICD#493.02)	AstAll	Dx	1
▼	"Asthmatic bronchitis" (ICD-493.90)	AstBro	Dx	1
▼	"Asthmatic bronchitis" (ICD#493.90)	AstBro	Dx	1
▼	"Asthma, exercise induced" (ICD#493.90)	AstExe	Dx	1
▼	Asthma, unspecified, w/o status asthmaticus or acute exacerbatio...	asthmadx	Dx	1
▼	493.00, "Extrinsic asthma w/o mention of status asthmaticus or ac...	asthmadx	Dx	1
▼	493.90, "Mild intermittent asthma" (ICD-493.90)	asthamildx	Dx	1
▼	"Asthma" (nonspecific - 493.10)	AsthmaX	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10)	AstI	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10) **	AstI	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10) **	AstI	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10) **	AstI	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10) **	AstI	Dx	1
▼	"Asthma - Intrinsic, Stable" (ICD#493.10) **	AstI	Dx	1
▼	"Intrinsic Asthma" (acute - ICD#493.12)	AstIA	Dx	1
▼	"Intrinsic Asthma" (acute - ICD#493.12) **	AstIA	Dx	1
▼	"Intrinsic Asthma" (acute - ICD#493.12) **	AstIA	Dx	1
▼	"Intrinsic Asthma" (acute - ICD#493.12) **	AstIA	Dx	1

123

☐ Show Unused

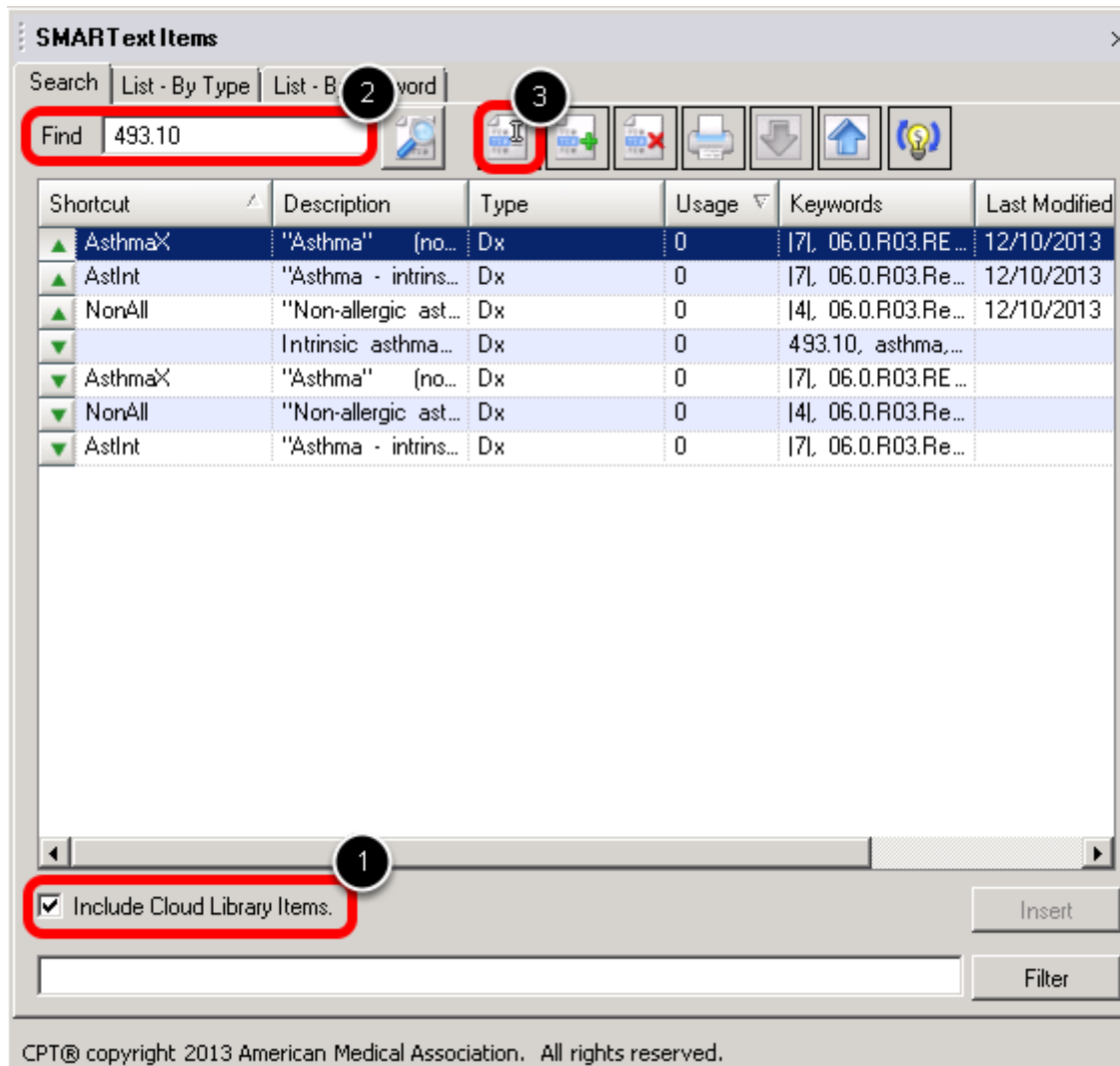
Find

To search for and download a structured SMARText Item:

1. Type the diagnosis, medication or CPT description into the appropriate field (ex: type "asthma" into the Assessment field).
2. Press **Shift + F11** on your keyboard to search for a structured SMARText item.
3. Locate the correct diagnosis and double-click on it to download and insert the item.



2. Change the Shortcut Code for the Structured SMARText Item



Next, we will change the shortcut code for our newly downloaded SMARText Item to be the shortcut code that we are familiar with using in version 4:

Open the SMARText Items Manager by pressing F10 on the keyboard.

1. Un-check the **Include Cloud Library Items** box.
2. Search for the item that you wish to assign a new shortcut code to (ex: In the above screenshot, we searched on the diagnosis ICD9 code. Users can also search using the name of the diagnosis, medication or CPT code).
3. Highlight the newly downloaded SMARText Item and click the **Edit** button.



SMARText Designer

Shortcut: asthx **4**

Description: "Asthma - intrinsic, stable" (ICD-493.10) **

Keywords: [7], [ICD10], Intrinsic, 493.10, asthma, d--, icdsw, pulmo, Astl, stable, 06.0.R96.RES, R96, AstInt, IntAst, InAstSta, StalntAst,

☒ Display Header: Asthma - intrinsic, stable ☐ only when item is empty.

Advanced

General

Item Type: Assessment Item

Asthma - intrinsic, stable ICD#493.10

Item Properties

Item Settings

Item Separators

☐ As Is ☐ English List (and) ☐ English List (or) ☐ End with

☒ Separate with ☐ Separate Lines

☒ Include in EM Coder point calculations.

Remove this item via Remove Unused - Never

Coding / Notes

Structure Viewer

5

Save Cancel

4. Change the current shortcut to the shortcut code that the user is familiar with from version 4.
5. Click the **Save** button to save your changes.



3. Delete the Old Version 4 Shortcut Code from the Users Database

SMARTText Items

Search List - By Type List - By Keyword

Find asthx

Remove (red X)

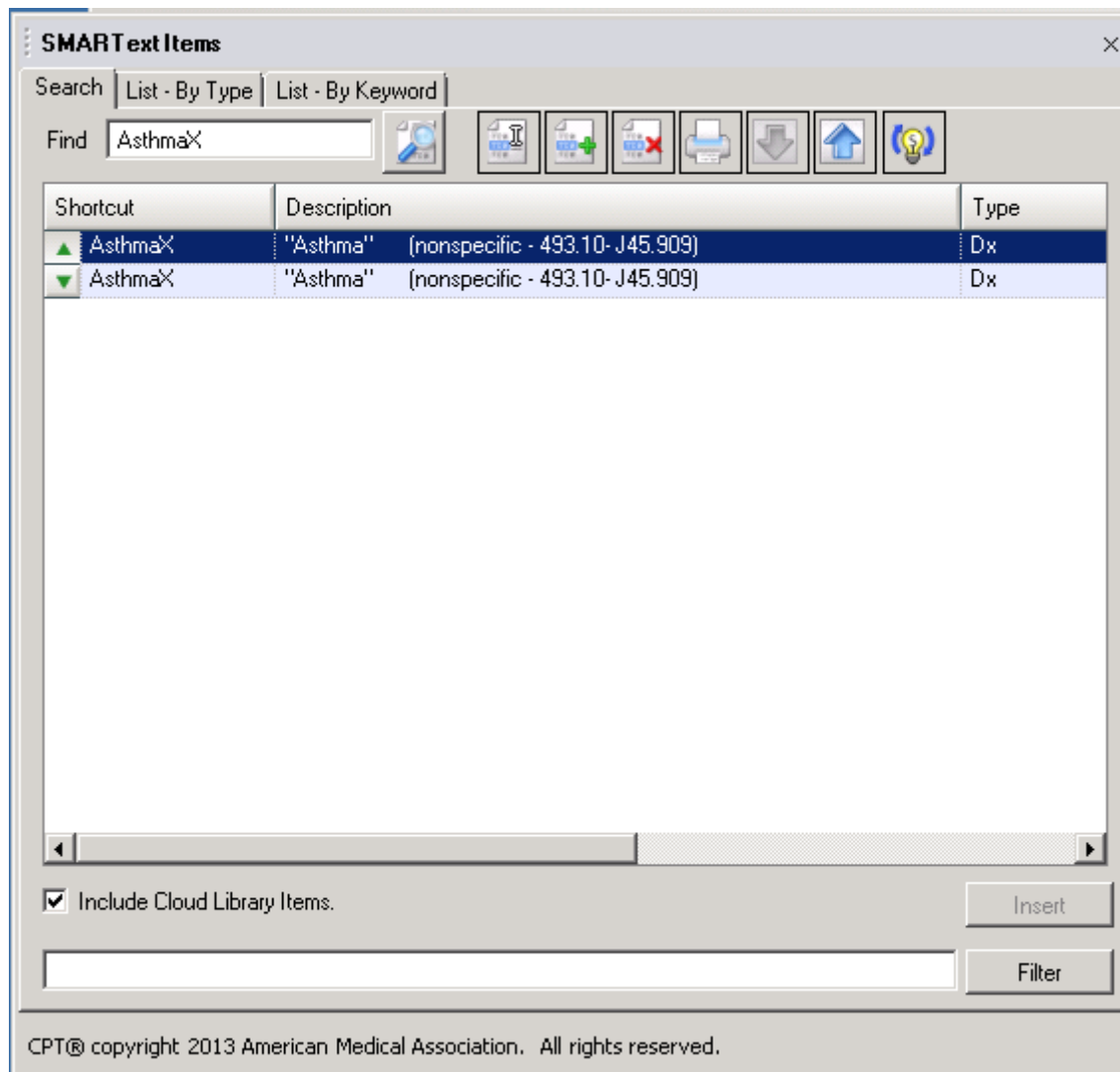
Shortcut	Description	Type	Usage	Keywords	Last Modified	ID
asthx	"Asthma - intrinsic, stable" (ICD-493.10 **	Dx	1	[7], [ICD10], 06.0...	7/7/2011 9:34 A...	155a0b12-0936-4...
asthx	Asthma, non-specific 493.10	Misc. (US)	2	493.10, asthma	8/1/2011 10:06...	0872fa2c-a1b5-4f...

☐ Include Online Library Items. Insert Filter

CPT copyright 2010 American Medical Association. All rights reserved.

Now that we have changed the shortcut code for our newly downloaded SMARTText Item to the shortcut code the user is familiar with from version 4, we need to delete the old obsolete code.

1. In the SMARTText Items Manager, search using the shortcut code.
2. You should see two items in your search results. One item will be your newly downloaded SMARTText Item. This item will have a Type of either "Dx", "Rx", or "ST Plan Item". The second item will be your old version 4 shortcut code. This item will have a Type that says either "(US)" for unstructured or "(Obsolete)". Highlight the old shortcut code and press the **Remove** (red X) button.



After removing the old version 4 shortcut code, this should leave only the newly downloaded SMARTText item remaining in the users database.

4. Insert the New SMARTText Item Using the Shortcut Code

Assessment[
asthx]
]

Hit the spacebar to
expand

To insert the new SMARTText Item using the shortcut code you assigned:

1. Return to the SOAPnote and type in the shortcut code.



2. Hit the spacebar on the keyboard to expand the item.

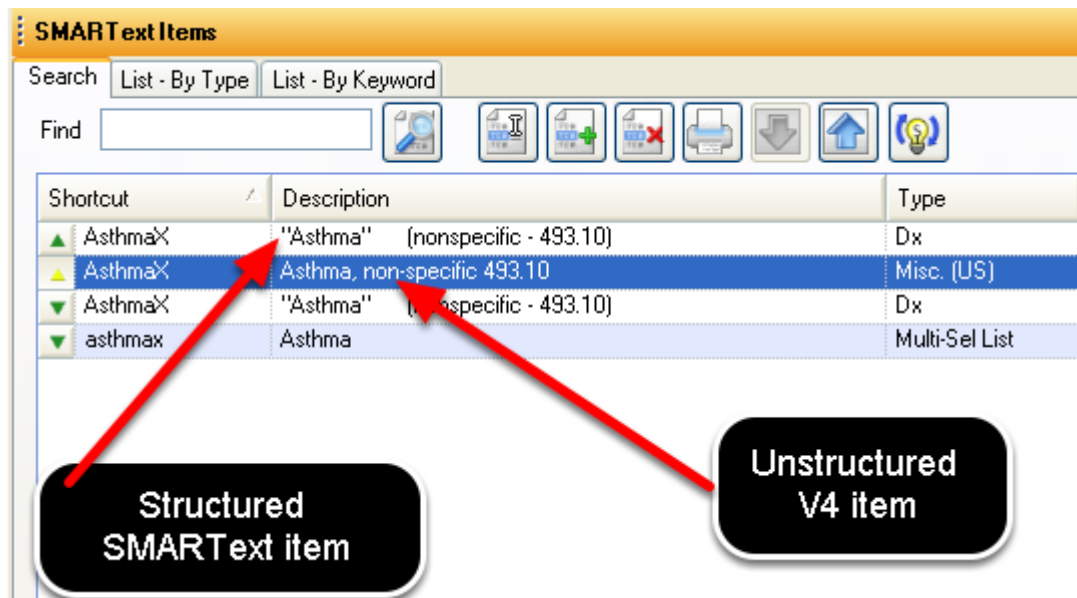
```
Assessment[  
Asthma - intrinsic, stable ICD#493.10 |  
]
```

The structured SMARTText Item will be inserted using familiar version 4 shortcut code.

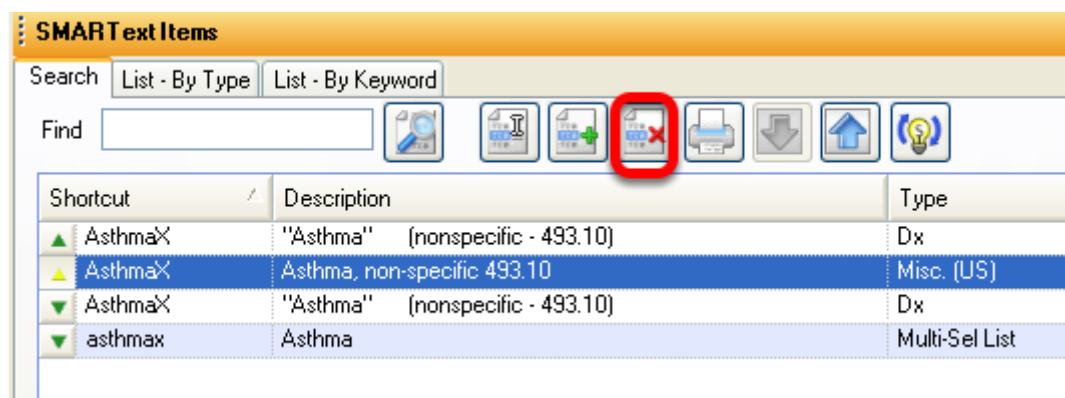


Q: When reassigning V4 shortcut codes to a structured SMARText item, how can this change be permanent?

A: Version 4 shortcut codes will need to be removed from the local database.



In the image above, notice that there is an unstructured Asthma diagnosis with the shortcut of "AsthmaX". There is also a structured SMARText item for this diagnosis with the same shortcut of "AsthmaX."



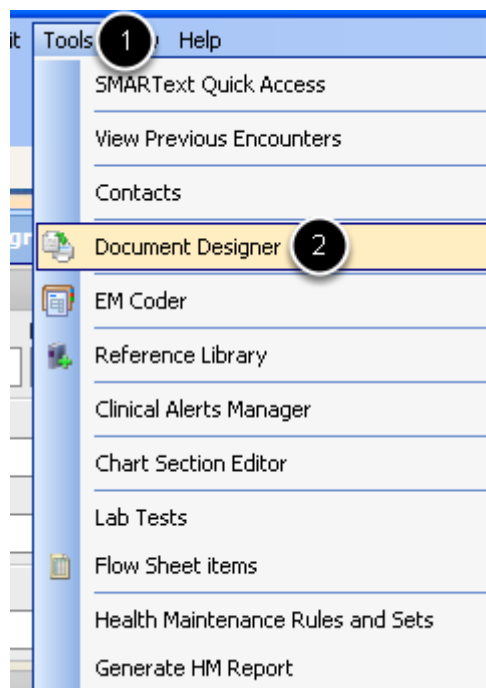
Highlight the unstructured diagnosis (indicated by the "US" in the type column) , and Click the delete button to remove the V4 unstructured SMARText item. The structured SMARText item will now be what is left on the local database.



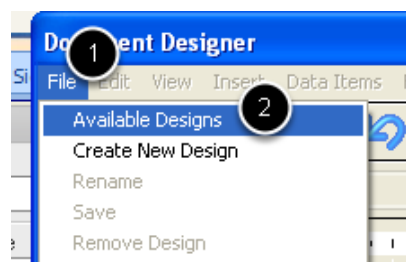
Q: Why are my print reports from V4 not printing out the patient's name/dob/address in SW 2012?

A: It is possible that the data command that was placed on the V4 report, is not pulling the information over onto the report in 2012. The data command will need to be replaced with the appropriate 2012 data command.

Access Document Designer



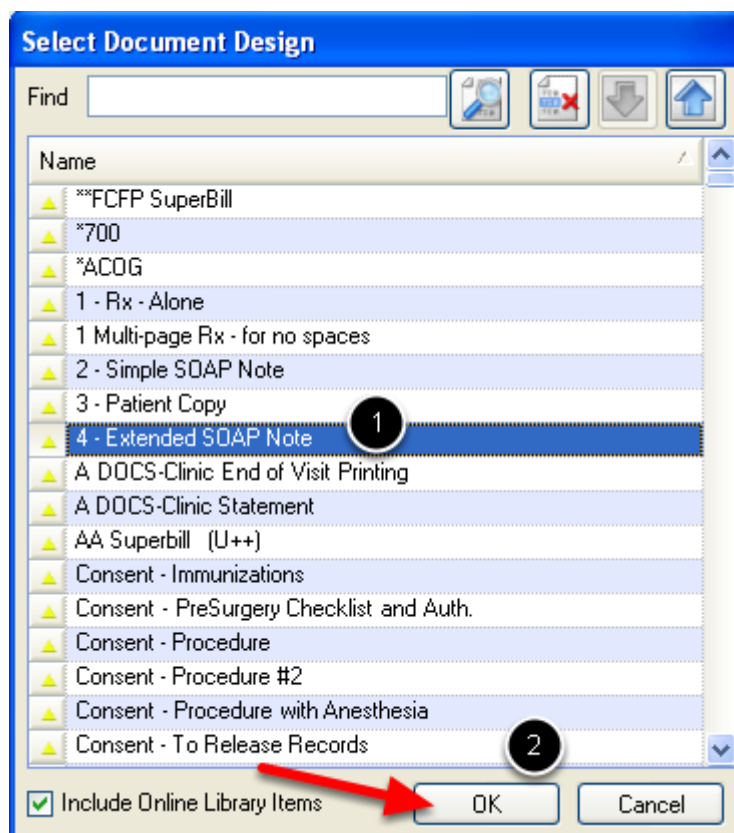
1. Click on Tools.
2. Click Document Designer.



1. Click on File.
2. Click Available Designs.



Open the Design



1. Click to highlight the Document Design to edit the data commands.
2. Click OK to open the design.



##GeneralDemographicsField Last Name\$#, ##GeneralDemographicsField First Name\$# ##GeneralDemographicsField Middle Initial\$# ##GeneralDemographicsField Chart Number\$#



SUBJECTIVE:

##EncounterField Subjective ,reported,denied\$#

##RemoveIfEmptyEnd\$##\$RemoveIfEmptyStart\$#

ACTIVE PROBLEMS:

##SummaryField Active Problems ,,\$#

##RemoveIfEmptyEnd\$##\$RemoveIfEmptyStart\$#

INACTIVE PROBLEMS:

##SummaryField Inactive Problems ,,\$#

##RemoveIfEmptyEnd\$##\$RemoveIfEmptyStart\$#

SURGERIES:

##SummaryField Surgeries ,,\$#

##RemoveIfEmptyEnd\$##\$RemoveIfEmptyStart\$#

MEDICATIONS:

##SummaryField Medications ,,\$#

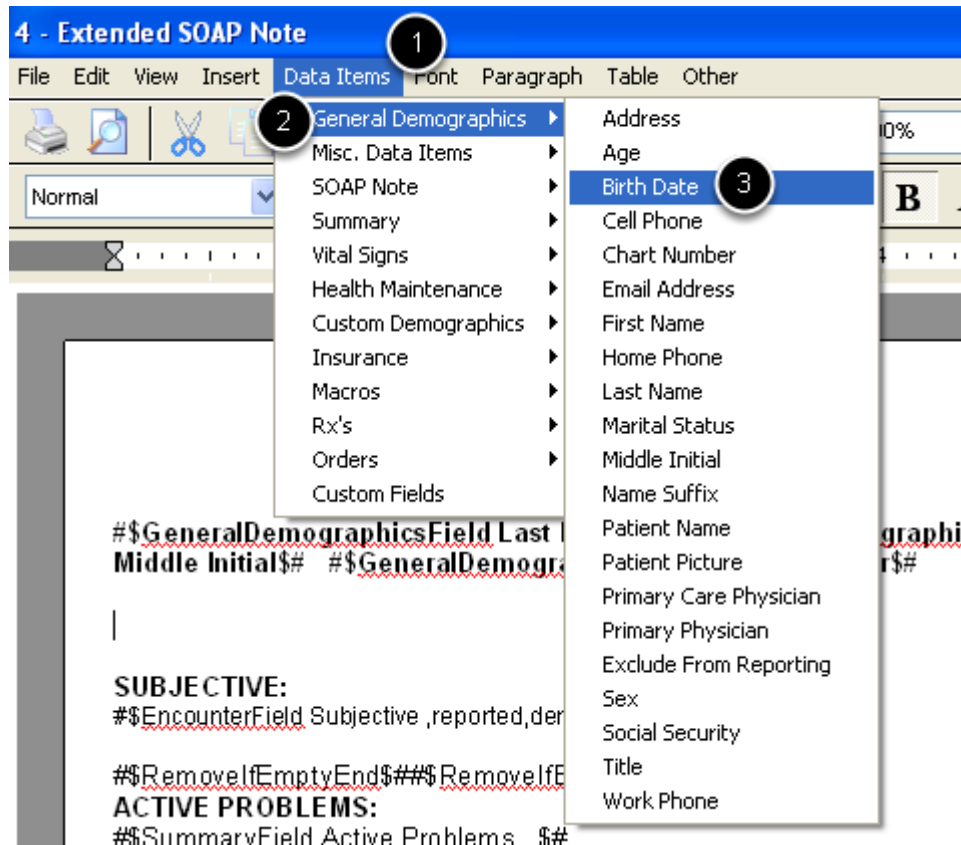
##RemoveIfEmptyEnd\$##\$RemoveIfEmptyStart\$#

ALLERGIES:

Place the cursor point in the location of choice to add the data command, or remove the V4 data command, in order to insert the new 2012 data command.



Insert the 2011 Data Command



1. Click Data Items.
2. Click General Demographics.
3. Click Birth Date.



```
##GeneralDemographicsField Last Name$# ##GeneralDemographicsField First Name$# ##Ge  
Middle Initial$# ##GeneralDemographicsField Chart Number$#
```

```
##GeneralDemographicsField Birth date$#
```



SUBJECTIVE:

```
##EncounterField Subjective ,reported,denied$#
```

```
##RemoveIfEmptyEnd$##$RemoveIfEmptyStart$#
```

ACTIVE PROBLEMS:

```
##SummaryField Active Problems ,,$#
```

```
##RemoveIfEmptyEnd$##$RemoveIfEmptyStart$#
```

INACTIVE PROBLEMS:

```
##SummaryField Inactive Problems ,,$#
```

```
##RemoveIfEmptyEnd$##$RemoveIfEmptyStart$#
```

SURGERIES:

```
##SummaryField Surgeries ,,$#
```

```
##RemoveIfEmptyEnd$##$RemoveIfEmptyStart$#
```

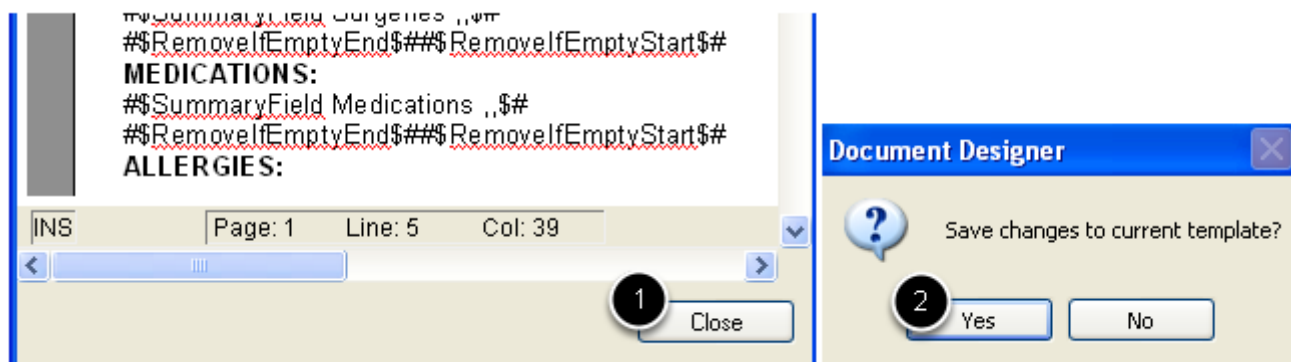
MEDICATIONS:

```
##SummaryField Medications ,,$#
```

```
##RemoveIfEmptyEnd$##$RemoveIfEmptyStart$#
```

ALLERGIES:

The data command for Birth Date has been inserted in the Document Design.

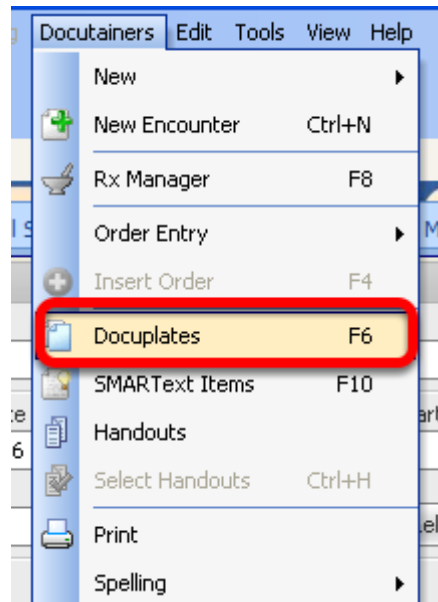


1. Click Close.
2. Click Yes to save changes to that Document Design.

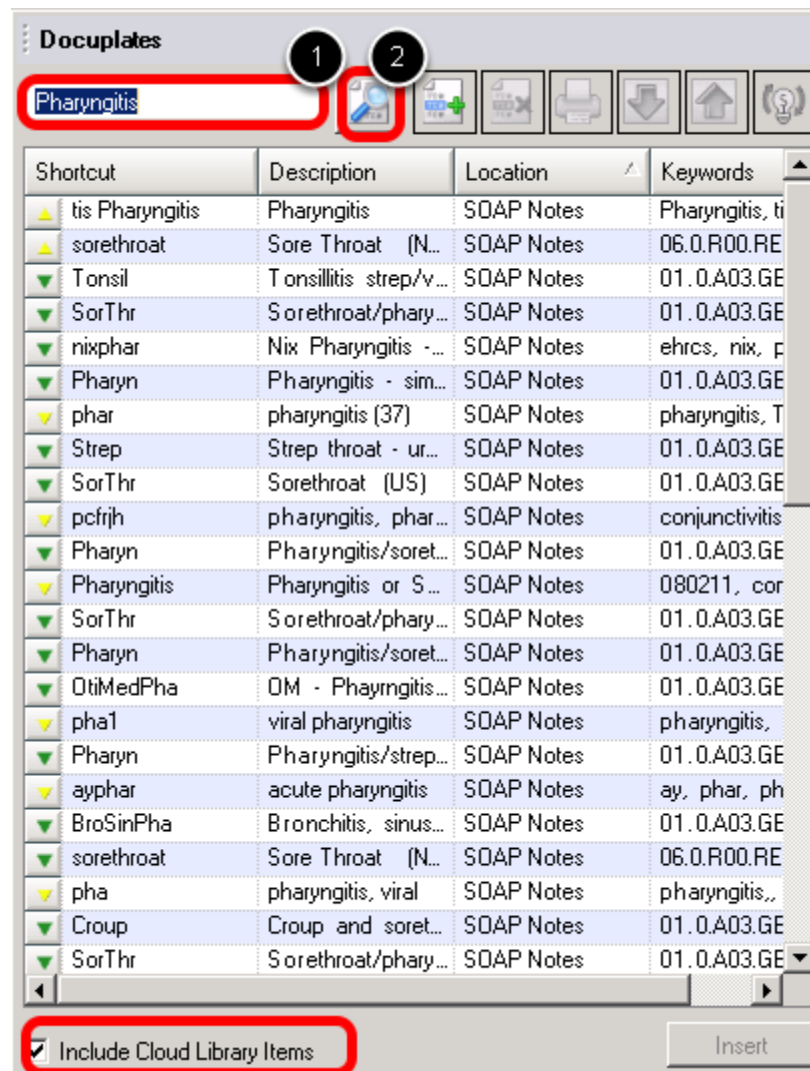


Q: Where are my templates from Version 4?

A: Version 4 templates can be retrieved in Docuplates.



Docuplates can be found by pressing F6 on the computer keyboard, or from the Docutainers Menu Item, click on **Docuplates** (as shown in the screenshot above).



1. Enter the name of the Version 4 template.
2. Click the **Search** button to view Docuplates.

***Note:** Placing a check in the box next to **Include Cloud Library Items**, will bring up a list for all Docuplates that have been created by SOAPware and uploaded to the Cloud Library by SOAPware users.



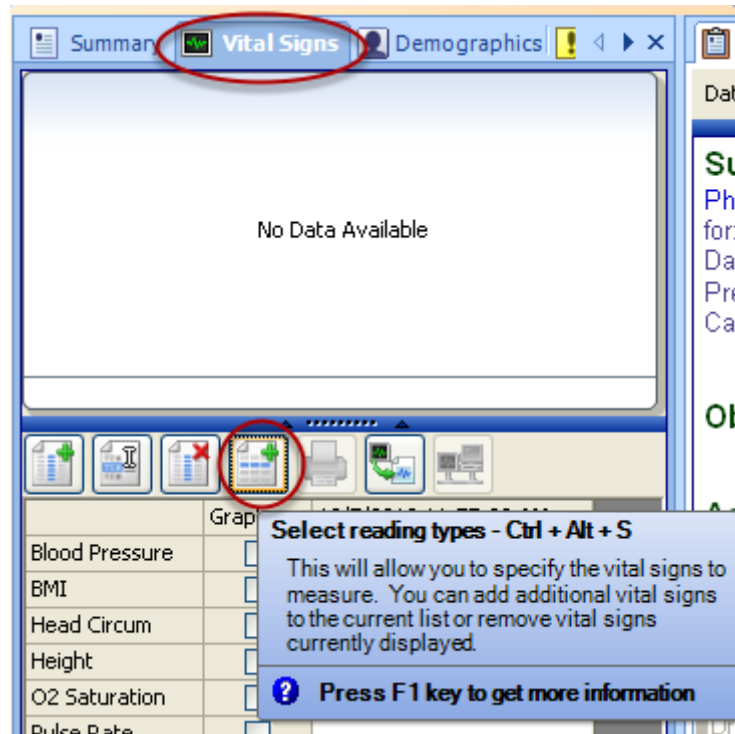
Vital Signs



Q: How do you add another Vital Sign to the Vital Signs chart section?

A: Auser is able to add another Vital Sign reading type from the Vital Signs chart section.

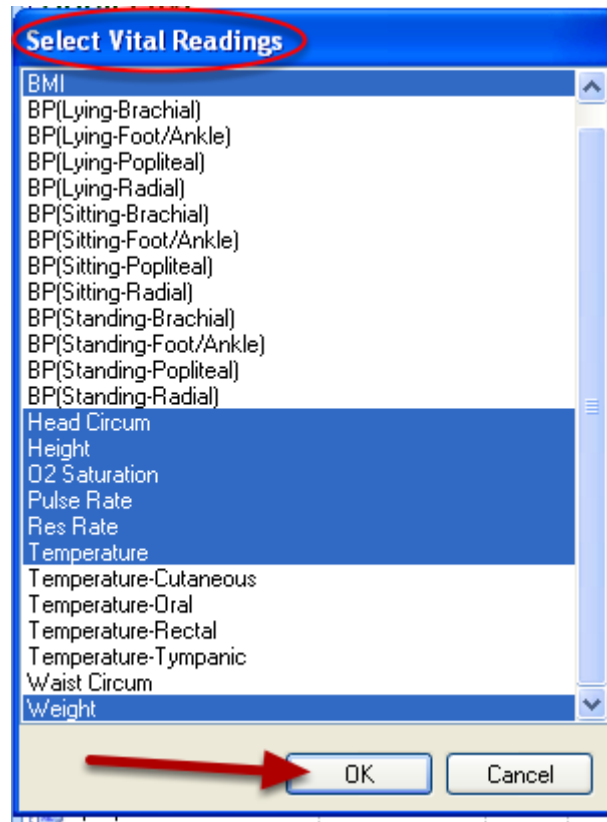
Select a Reading Type



Click on the Select Reading Type button to view the Select Vital Readings window.



Select Vital Readings Window



1. Click to highlight the Vital Reading.
2. Click OK to add the preferred reading to the default reading types in a patient's chart.



Added Reading Type

The screenshot shows the SOAPware Vital Signs chart interface. The 'Vital Signs' tab is selected. The main area displays 'No Data Available'. Below the chart area is a table of vital signs with checkboxes. The 'O2 Saturation' row is highlighted with a red circle.

	Graph	10/5/2010 11:57:29 AM
Blood Pressure	<input type="checkbox"/>	
BMI	<input type="checkbox"/>	
Head Circum	<input type="checkbox"/>	
Height	<input type="checkbox"/>	
O2 Saturation	<input type="checkbox"/>	
Pulse Rate	<input type="checkbox"/>	
Res Rate	<input type="checkbox"/>	
Temperature	<input type="checkbox"/>	
Waist Circum	<input type="checkbox"/>	
Weight	<input type="checkbox"/>	
Notes		

The selected reading type will be added to the vital signs chart section for this particular patient.