

Version 4 to 2011/2012 Education Journey



Version 4 to 2011/2012 Education Journey

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STEP 1

Differences between SOAPware Version 4 and SOAPware 2011/2012

This lesson will point users to valuable information on the differences between SOAPware Version 4 and SOAPware 2011.

Link

Please click on the following link to view this information:

[Differences between SOAPware Version 4 and SOAPware 2011/2012.](#)

Continue to Step 2

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STEP 2

Introductory Videos

Our four introductory videos are great tools to access, to be introduced to SOAPware 2011.

Please view the SOAPware introductory videos. Please be patient as they may take several minutes to load.

**The SOAPware videos that you will be viewing are part of the online SOAPware Learning Center (SLC). The SLC includes additional videos and learning modules. If you are interested in learning more about the SLC, please contact our Sales Department at (800) 455-7627 x2.*

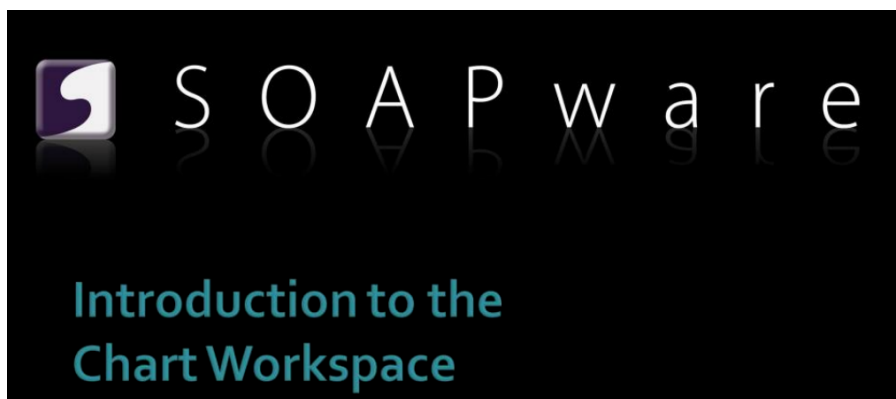
1. Watch the Exploring SOAPware Introductory Video



Please click the link below to begin the video:

[Exploring SOAPware](#)

2. Watch the Introduction to Chart the Workspace Video



Please click the link below to begin the video:

[Introduction to the Chart Workspace](#)

Continue to Step 3

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STEP 3

SOAPware 2011 and 2012 New Features

This video will help users become familiar with some of the new features in SOAPware 2011.

1. Review: New Features in SOAPware 2011

Review the list of features that are available in SOAPware 2011 here: [New Features in SOAPware 2011](#).

*If you are upgrading to SOAPware 2012, we suggest that you review the SOAPware 2011 and SOAPware 2012 New Features videos. SOAPware 2012 includes all new features that are detailed in SOAPware 2011.

2. View the SOAPware 2011 New Features Video

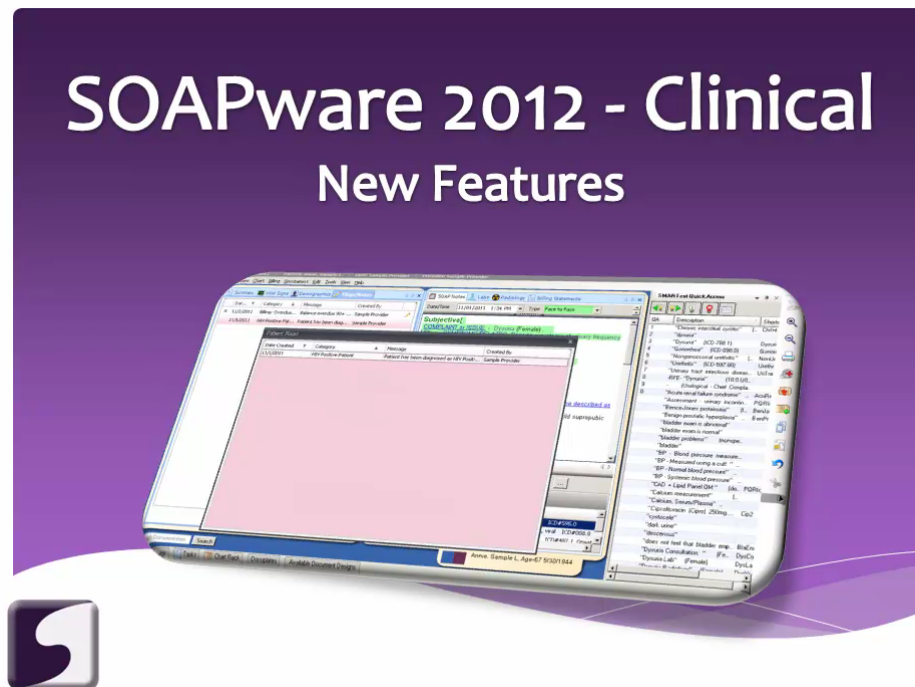


Please click the following link to view a larger version of the video: [SOAPware 2011 New Features](#).

3. Review: New Features in SOAPware 2012

Review the New Features in SOAPware 2012 by clicking here: [New Features of SOAPware 2012](#).

2. View the SOAPware 2012 New Feature Video



Please click the following link to view the video: [SOAPware 2012 New Features](#).

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STEP 4

Areas that do not Convert

This lesson will point users to valuable information on areas that will not convert from from Version 4, when upgrading to SOAPware 2011.

Link

Please click on the following link to view this information:

[Areas That Do Not Convert](#)

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STEP 5

Chapters to Review from the SOAPware Clinical User Manual

This lesson will provide various links to chapters that we recommend users review prior to converting from version 4 to 2011.

SOAPware 2011 and 2012 are very different from Version 4. It is essential that users become familiar with the changes to their workflows prior to converting their live software. Please review the documentation from our Clinical User manual below.

1. Setup

To access the Setup chapter see:

[Setup](#)

2. Security Settings

To access the Security Settings chapter see:

[Security Settings](#)

3. Exploring SOAPware

To access the Exploring SOAPware chapter see:

[Exploring SOAPware](#)

4. Workflow Considerations

To access the Workflow Considerations chapter see:

[Workflow Considerations](#)

5. Introduction to Charts

To access the Introduction to Charts chapter see:

[Introduction to Charts](#)

6. Data Entry in SOAPware

To access the Data Entry in SOAPware chapter see:

[Data Entry in SOAPware](#)

[Continue to Step 6](#)

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STEP 6

Meaningful Use Information to Review

This lesson will provide several links we recommend users review for information on Meaningful Use.

If the user is planning to participate in the Medicare and Medicaid EHR Incentive Program for Meaningful Use, we recommend reviewing the requirements for the incentive program and SOAPware's Meaningful Use Roadmap.

1. Meaningful Use Roadmap



Meaningful Use Resources

[Meaningful Use Roadmap](#)

[Clinical Quality Measures User Guide](#)

[SOAPware ONC-ATCB Certification Details](#)

[CMS Medicare & Medicaid EHR Incentive Program Overview](#)

The Meaningful Use Roadmap is meant to be a guide for SOAPware users while preparing workflows that will meet meaningful use requirements. The lessons included in the Roadmap will guide users through each requirement and how to meet that requirement withing SOAPware.

Follow each lesson in the Meaningful Use Roadmap to review and learn the workflows for each meaningful use requirement:

[Meaningful Use Roadmap: Begin here](#)

2. Clinical Quality Measures

In SOAPware 2011+, many of the Meaningful Use Clinical Quality Measures (CQMs) now have pick lists available to assist with the necessary structured data entry. Within this chapter, there are 44 Clinical Quality Measure lessons, sorted by those that are the Core, Alternate Core, and Additional measures.

Follow each lesson in the Clinical Quality Measures chapter to review and learn the steps/shortcut codes to assist with reporting Clinical Quality Measures to CMS or States:

[Clinical Quality Measures: Begin here](#)

3. CMS EHR Incentive Program

The Centers for Medicare & Medicaid Services have lots of resources and documentation for eligible providers located on their website. Please review the CMS EHR Incentive Program documentation by clicking the link below:

[Medicare and Medicaid EHR Incentive Program](#)

[Continue to Step 7](#)

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STEP 7

Install Practice Database

This lesson will provide information regarding the process for installing a SOAPware practice database.

SOAPware 2011 and 2012 are very different from Version 4; therefore, we recommend that all users have sufficient time to be able to practice their workflows and become familiar with SOAPware 2011/2012 before the live conversion takes place. It is essential that the clinic allow sufficient time for each of their staff members to practice on the new version. This will help them to become comfortable in navigating and performing their workflows in the new software and will make the transition from Version 4 much more efficient.

1. Contact Sales

Contact sales to purchase the SOAPware upgrade.

Customers can contact our Sales Department by calling them at (800) 455-7627 Ext. 2 or you can request a quote by clicking [here](#). (Select "Sales/Quote" from the drop-down menu and a member of the Sales department will contact you.)

Note: SOAPware does offer a 30 day return policy should a practice decide to return SOAPware/cancel the upgrade.

2. Submit a ticket to Support

Once the customer has purchased the SOAPware upgrade, our Support Department can assist the user with downloading a practice database. This will allow the clinic to get hands on practice with the new version prior to completing their live conversion.

In order to install the practice database, please request the install by [submitting a ticket](#) to our Support department.

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[Next Lesson](#)

STEP 8

Set up users in Security on local Practice Database

In this lesson, information will be provided to help users set up their clinic staff as users, in the practice database.

Security Settings

It is important to practice setting up users in your local practice database and to see the various security setting options for your users. SOAPware recommends setting up each user with a unique ID and password (HIPAA regulations), and assign each user to a role/group.

To view how to set up users and other security related information, see [Security Settings](#).

Please Note: Setting up users on the practice database will not transfer once the live conversion is completed. The clinic's SOAPware Administrator will have to set up all Users again once the live conversion is completed.

Continue to Step 9

[Next Lesson](#)

STEP 9

Schedule Hands-on Practice and Training for Providers and Staff

Training

The differences between version 4 and 2011/2012 are vast. In our experience, it is essential that users who are converting from version 4 have at least 3 hours of one-on-one remote training. In the remote training sessions a SOAPware Certified Trainer will assist the user with becoming more familiar with the differences and help them become comfortable with any new workflows.

1. Purchase Hourly EMR Training Session(s)- Minimum of 3 Hours Recommended

Hourly Remote Training

SOAPware offers hourly remote training sessions which are tailored around the topic or material of your choice. Whether you're looking for a quick overview of software features, a detailed instruction on Meaningful Use, or simply have a question that begins *How do I...*, these focused online lessons are designed to meet the specific training needs of your clinic.



Hourly Remote Training Services

Product Options: Clinical Training | Practice Management Training

Training Hours: Monday-Friday, 8a-5p CST

Price: \$150 per hour

[Purchase Training Sessions](#)



You can purchase EMR training in hourly increments. This type of training is conducted by remote training sessions, and is best utilized for training focused on specific areas of the SOAPware program. To purchase a training session, [click here](#).

NOTE: We recommend a minimum of 3 training sessions for the providers and staff, prior to your conversion.

2. Practice Workflows

It is important to practice your updated workflows on a daily basis to ensure that you and your staff have familiarity to the new version before converting. It is also essential to make the time to have hands-on practice for providers and staff between each training session for retention purposes, and to trigger questions for our training staff, to discuss at the next training session.

3. SOAPware EMR Workshops

For a more comprehensive clinic training for those who intend to train their staff on the SOAPware software, we recommend attending our workshop. [Click here for more information!](#)

4. Communicate to our Trainers prior to Conversion

Have Questions?

If you have questions about our training services or would like to receive more information, call us toll-free at 800.455.7627, Ext. 5 or submit the contact form below.

Contact Training

Have a question about our Training services? The form below will email your question directly to our trainers, and you will receive prompt and personal attention.

Please note:

- Our Training Team will answer emails in the order they are received and most questions can be answered within 1-3 business hours.
- Emails received on Saturday and Sunday will be addressed on the following Monday.

Email your questions to: trainersgroup@soapware.com, and a certified trainer will get back with you! You can email us directly, or [click here](#) to fill out the contact form as shown above.

Continue to Step 10

Next Lesson

STEP 10

Additional Chapters to Review from the SOAPware Clinical User Manual

This lesson will provide various links to additional chapters we recommend you review prior to converting.

1. Summary Documentation

To access the Summary Documentation chapter see:

[Summary Documentation](#)

2. Patient Visit Documentation- SOAPnotes

To access the Patient Visit Documentation- SOAPnotes chapter see:

[Patient Visit Documentation- SOAPnotes](#)

3. Docuplates

To access the Docuplates chapter see:

[Docuplates](#)

4. Introduction to Task Manager

To access the Introduction to Task Manager chapter see:

[Introduction to Task Manager](#)

5. e-Prescribing

To access the e-Prescribing chapter see:

[e-Prescribing](#)

6. Document and Chart Management

To access the Document and Chart Management chapter see:

[Document and Chart Management](#)

7. Patient Meaningful Use Dashboard

To access the Patient Meaningful Use Dashboard chapter see:

[Patient Meaningful Use Dashboard](#)

8. Meaningful Use Dashboard

To access the Meaningful Use Dashboard chapter see:

[Meaningful Use Dashboard](#)

9. Practice!

Put your new-found knowledge from reviewing the chapters above to good practice, by scheduling some hands-on practice in your practice database.

[Continue to Step 11](#)

[Next Lesson](#)

STEP 11

Determine Go-Live Plan

This lesson will give you direction as you determine your go-live plan prior to conversion.

1. Determine if you are going to use...

- [Health Maintenance](#)
- [Order Entry](#)
- [Flow Sheets](#)
- [SOAPware Scheduler](#)
- [SOAPWare Billing](#)
- [Clinical Alerts](#)

2. Modify Version 4 Templates

Determine if you are going to modify your Version 4 templates to incorporate SMARTText within the documentation or start with using your Version 4 templates.

If you select to modify your templates, see:

[Docuplates](#)

3. e-Prescribing

Determine if you are going to e-Prescribe.

If so, see:

[e-Prescribing](#)

4. Data Collection for Meaningful Use

Determine your timeline for beginning data collection for Meaningful Use.

For more information see:

[MU Roadmap](#)

[CMS: Registration and Attestation](#)

Continue to Step 12

[Next Lesson](#)

STEP 12

Review the Version 4 to 2011/2012 FAQ's

In this lesson, you will be provided with a link to the version 4 to 2011/2012 FAQ's.

We suggest that users read through the list of frequently asked questions.

Link

For more information, see:

[Version 4 to 2011/2012 FAQ's](#)

Continue to Step 13

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STEP 13

Upload all Custom SMARText Items and Docuplates to the SOAPware Online Library

This lesson will provide you with the necessary information to safely upload all your customized SMARText items and docuplates before you convert.

Customized SMARText Items - Macros - Docuplates

If you have edited or modified any SMARText items, macros, or docuplates in your practice database, it is very important to upload them all to the SOAPware online library, PRIOR to converting.

Key Points

- Make sure each item/macro/docuplate has a common, unique keyword attached. **For example:** clinic initials, physician's last name...paired with a unique number. [**SLC4**] This unique keyword will aid you in being able to quickly locate all of your items/macros/docuplates, from within the online library.
- CPT codes that were edited or modified cannot be uploaded to the SOAPware online library. (CMS guidelines)

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STEP 14

Schedule Conversion: Submit a Ticket with our Support Department

Submit a Ticket

In order to schedule a conversion from Version 4 to 2011/2012, a user would need to request a conversion, by [submitting a ticket](#) to our Support department.

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STEP 15

Before Conversion: To-Do Items, Pulled Charts, Refill Requests from Version 4

This lesson will point users to valuable information on areas that will not convert from a user's Version 4, when upgrading to 2011/2012.

Link

Note: It is important to finish with all patient refill requests from Version 4 prior to conversion, as these requests will not transfer. On that same note, your to-do items will not transfer. Try to get these items completed prior to conversion, but if you have a few that remain when it is time to convert, print off your to-do list for your reference.

Click on the following link:

[Areas that DO NOT Convert](#)

[Continue to Step 16](#)

[Next Lesson](#)

STEP 16

After Conversion: Set Up Users in Security

In this lesson, information will be provided to help users set up their clinic staff as users, after you have converted to 2011.

Security Settings

Now that you practiced setting up users in your local practice database prior to conversion, it is now time to do the same after conversion. SOAPware recommends setting up each user with a unique ID and password (HIPAA regulations), and assign each user to a role/group.

To view how to set up users and other security related information, see [Security Settings](#).

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STEP 17

After Conversion: Set Up Pharmacies and Download Customizations

This lesson will provide information on what you will need to download into your SOAPware 2011/2012, after your conversion, for the network.

Pharmacies to Pharmacy Manager

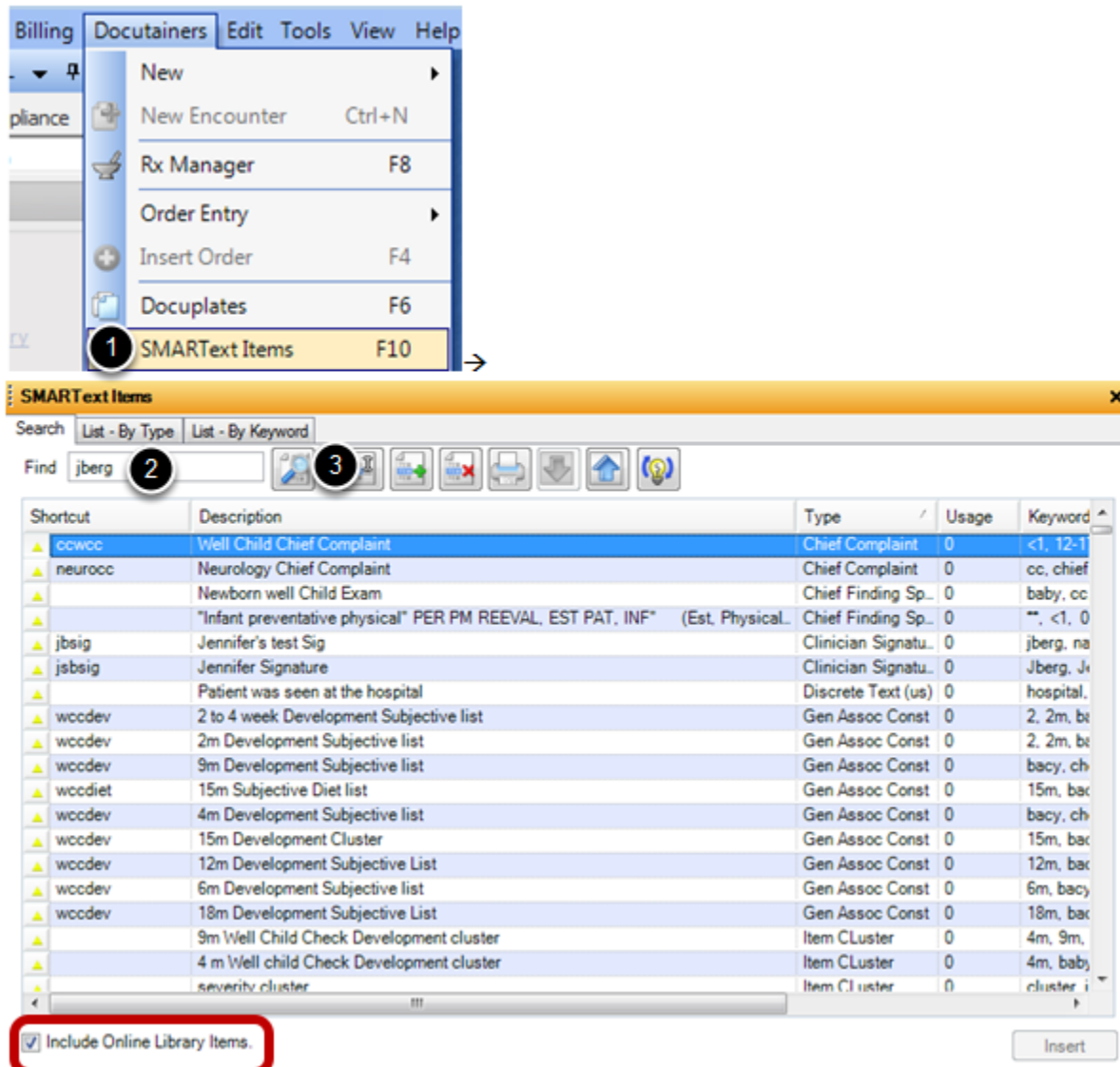
Click on the link below:

Pharmacies

Custom SMARText Items/Macros/Docuplates

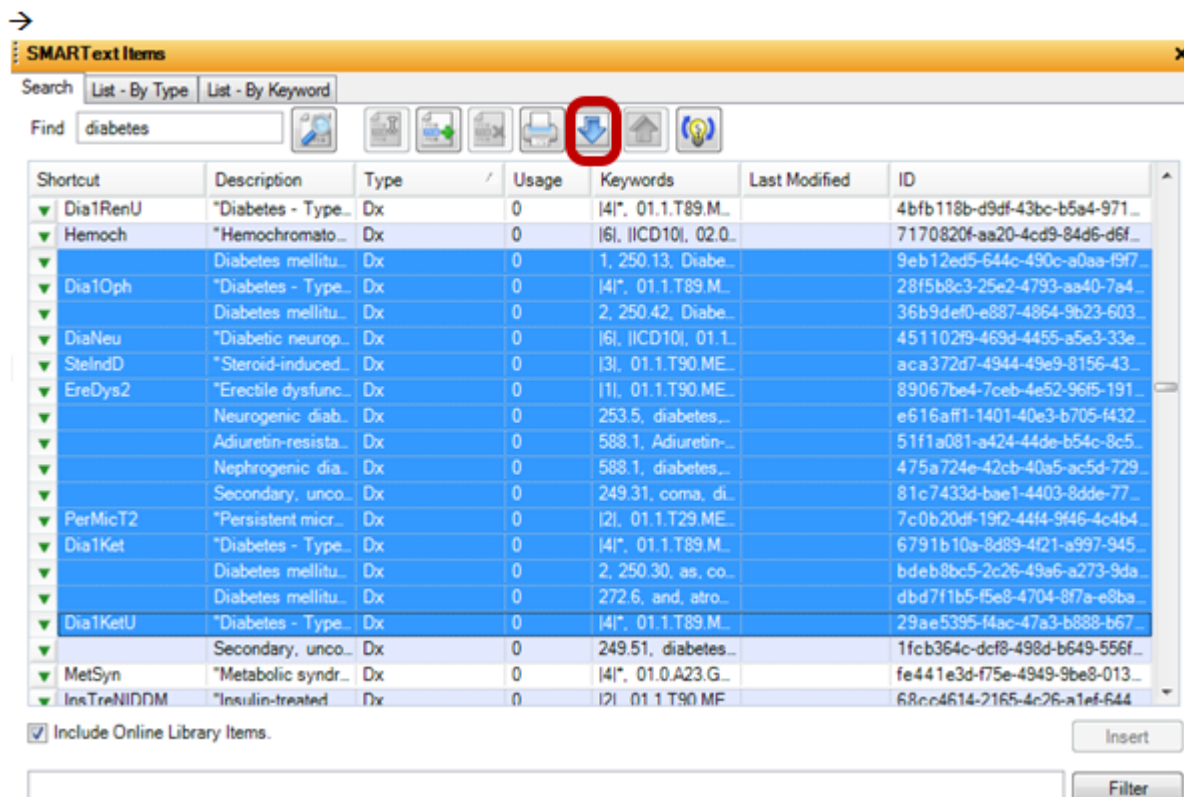
Now that the conversion to 2011/2012 is complete, you will need to download your custom SMARText items, macros and docuplates you created in your practice database, and uploaded to SOAPware's online library prior to conversion.

Download Custom SMARText Items or Macros

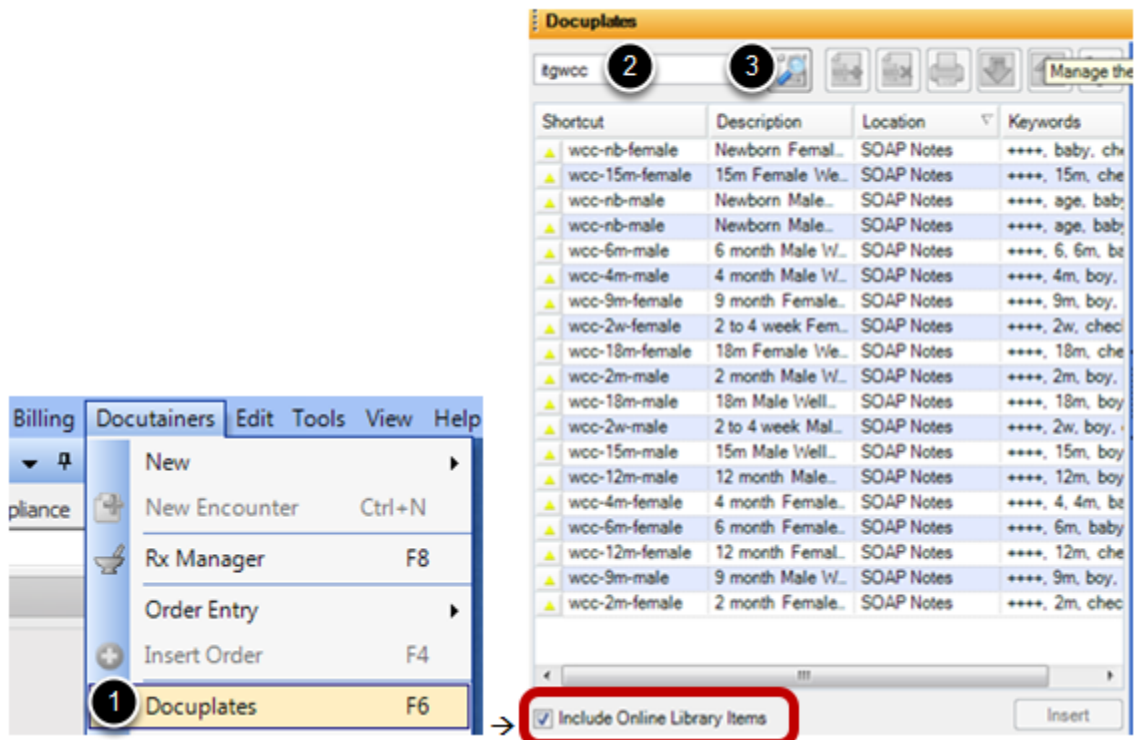


1. Click Docutainers > SMARText Items to access the SMARText Items Manager. (or Click F10 on your keyboard.)
2. Type in your unique keyword you attached to each of your custom SMARText items or macros while working in the practice database.
3. Click the find button.

Note: Be sure to have the "Include Online Library Items" box checked.

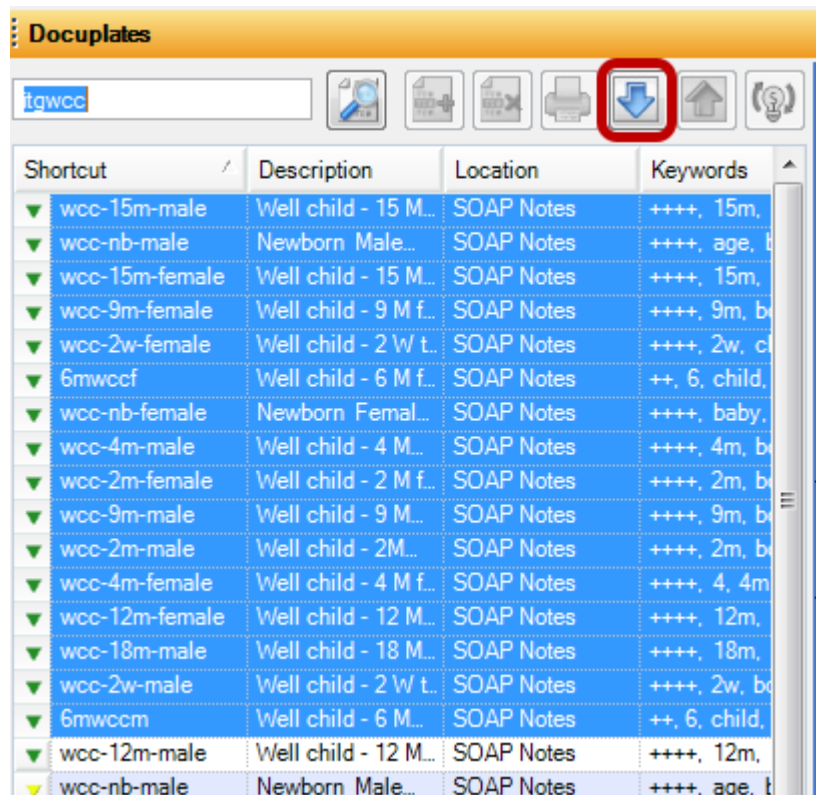


Lastly, you can easily bulk highlight all of your custom items, and Click the download button, to bring all the custom items into your network.



1. Click Docutainers > Docuplates to access the Docuplates Manager. (You can also Click F6 on your keyboard or Select the Docuplates docked tab.)
2. Type in your unique keyword you attached to each of your custom Docuplates while working in the practice database.
3. Click the find button.

Note: Be sure to have the "Include Online Library Items" box checked.



Lastly, you can easily bulk highlight all of your custom docuplates, and Click the download button, to bring all the custom docuplates into your network.

Continue to Step 18

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STEP 18

After Conversion: Update Document Designer Commands

Update the Document Designer Commands that Do Not Convert from Version 4

This lesson will point users to valuable information regarding document design commands (formerly Report Writer commands) that will not convert from a user's Version 4, when upgrading to 2011/2012. These commands will need to be updated following conversion.

Link

Click on the link below, and scroll to the area titled: "Certain Report Writer/Document Designer Codes Do Not Convert."

Areas that DO NOT Convert

Continue to Step 19

Next Lesson

STEP 19

1. Check Back for Updates



Continue to refer to the [Meaningful Use Roadmap](#) for the appropriate workflows that can be used with SOAPware to meet Meaningful Use requirements.