Clinician Education Journey

Clinician Education Journey

1 Clinician Education Journey

1.1 Introduction 7

2 Step 1

2.1 Tools - Options 9

3 Step 2

3.1 Exploring SOAPware 11

4 Step 3

4.1 Meaningful Use Dashboard 13

5 Step 4

5.1 Meaningful Use Patient Dashboard 15

6 Step 5

6.1 Document Review 17

7 Step 6

7.1 Intro to Charts 19

8 Step 7

8.1 Data Entry in SOAPware 21

9 Step 8

9.1 Creating SMARText Items 23

10 Step 9

10.1 Pick Lists 25

11 Step 10

11.1 Docuplates 27

12 Step 11

12.1 Docutainers 29

13 Step 12

13.1 Summary Documentation 31

14 Step 13

14.1 Vital Signs 33

15 Step 14

15.1 SOAPnote 35

16 Step 15

16.1 Adding an Addendum 37

17 Step 16

17.1 Creating a Billing Statement 39

18 Step 17

18.1 Task Manager 41

19 Step 18

19.1 ePrescribing 43

20 Step 19

20.1 Document Designer 45

21 Step 20

21.1 Creating Patient Education Handouts 47

22 Step 21

22.1 Health Maintenance 49

23 Step 22

23.1 Document and Chart Management 51

24 Step 23

24.1 Data Explorer 54

25 Step 24

25.1 Flow Sheets 56

26 Step 25

26.1 Order Entry 58

27 Step 26

27.1 Clinical Alerts 60

28 Step 27

28.1 Clinical Quality Measures - How to Use the CMS Quality Reporting Dashboard 62

29 Step 28

29.1 Meaningful Use for Clinicians 64

30 Step 29

30.1 Meaningful Use Core Set Objectives (All 15 Required) 67

31 Step 30

31.1 Meaningful Use Menu Set Objectives (5 of 10) 70

32 Practice!

32.1 Schedule Hands-on Practice 74

Clinician Education Journey

Introduction

A Note to the Clinician.....

This education journey is geared toward the clinician(s) at the clinic. Clinicians in most offices need to have a general working knowledge of all areas of SOAPware in general, especially if he/she also serves as the Office Manager/Clinical Administrator for the clinic. Should this be the case, please also refer to the Office Manager/Clinical Administrator Education Journey as well.

The following steps presented, give those in this position, a condensed version of what information regarding the use of SOAPware, is pertinent, based on this specific role. SOAPware recommends going through each step, and viewing each lesson highlighted. It will also be helpful to take time to practice what each lesson teaches, through hands-on learning in SOAPware.

For easy navigation, Click on the link at the bottom of each lesson within this journey, to access the next lesson.

Continue to Step 1

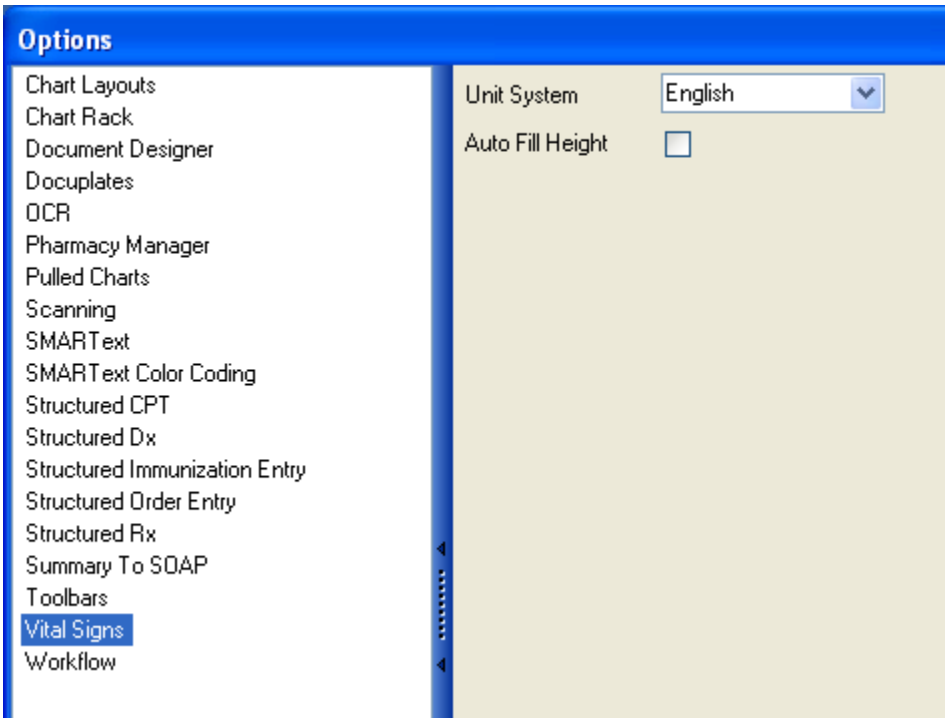
Next Lesson

Step 1

Tools - Options

The Options dialog contains numerous miscellaneous options to allow SOAPware to best match the user's preferred needs and work-flows.

Link



Tools - Options

Continue to Step 2

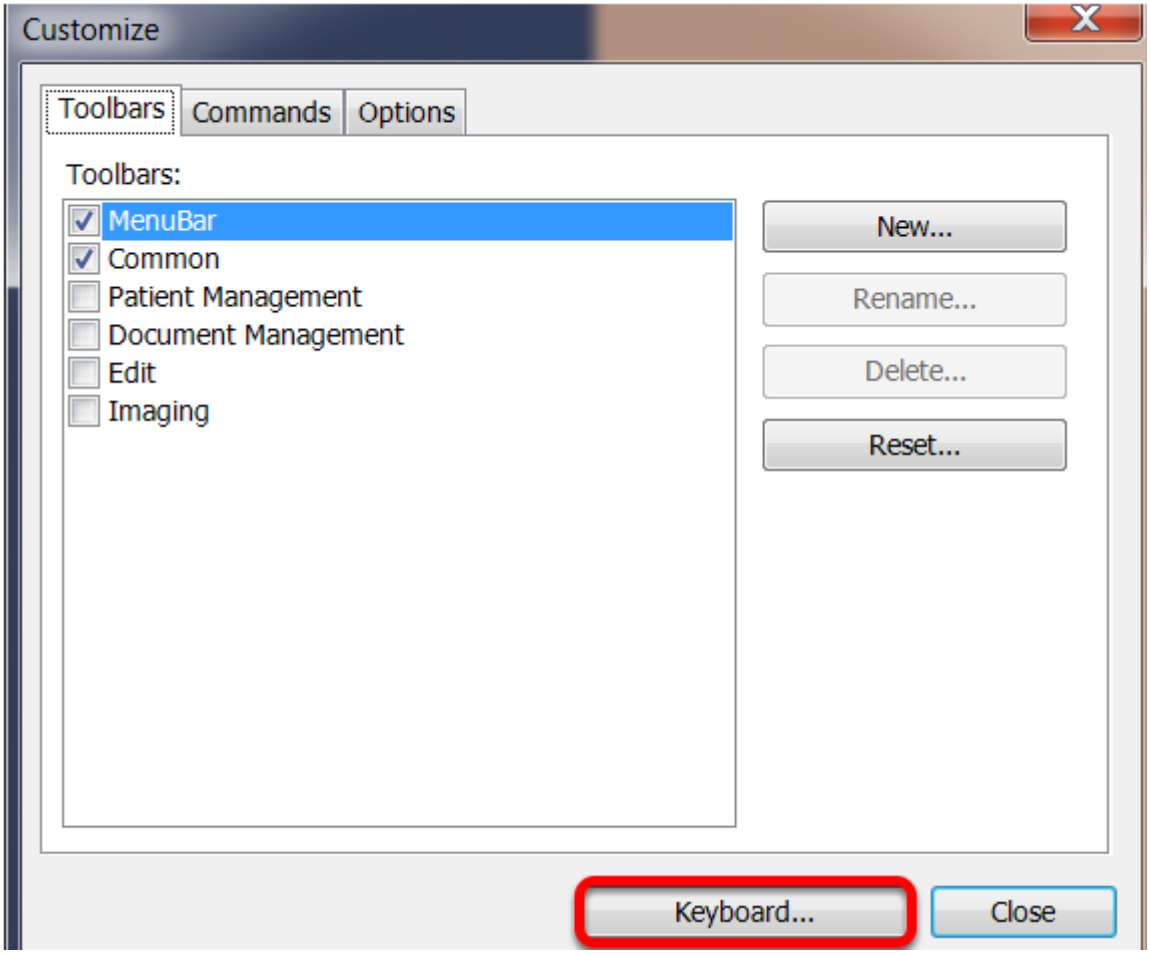
Next Lesson

Step 2

Exploring SOAPware

To learn what can be a docked tab, toolbars in SOAPware, all about key commands and more, see the link provided below.

Link



Exploring SOAPware

Continue to Step 3

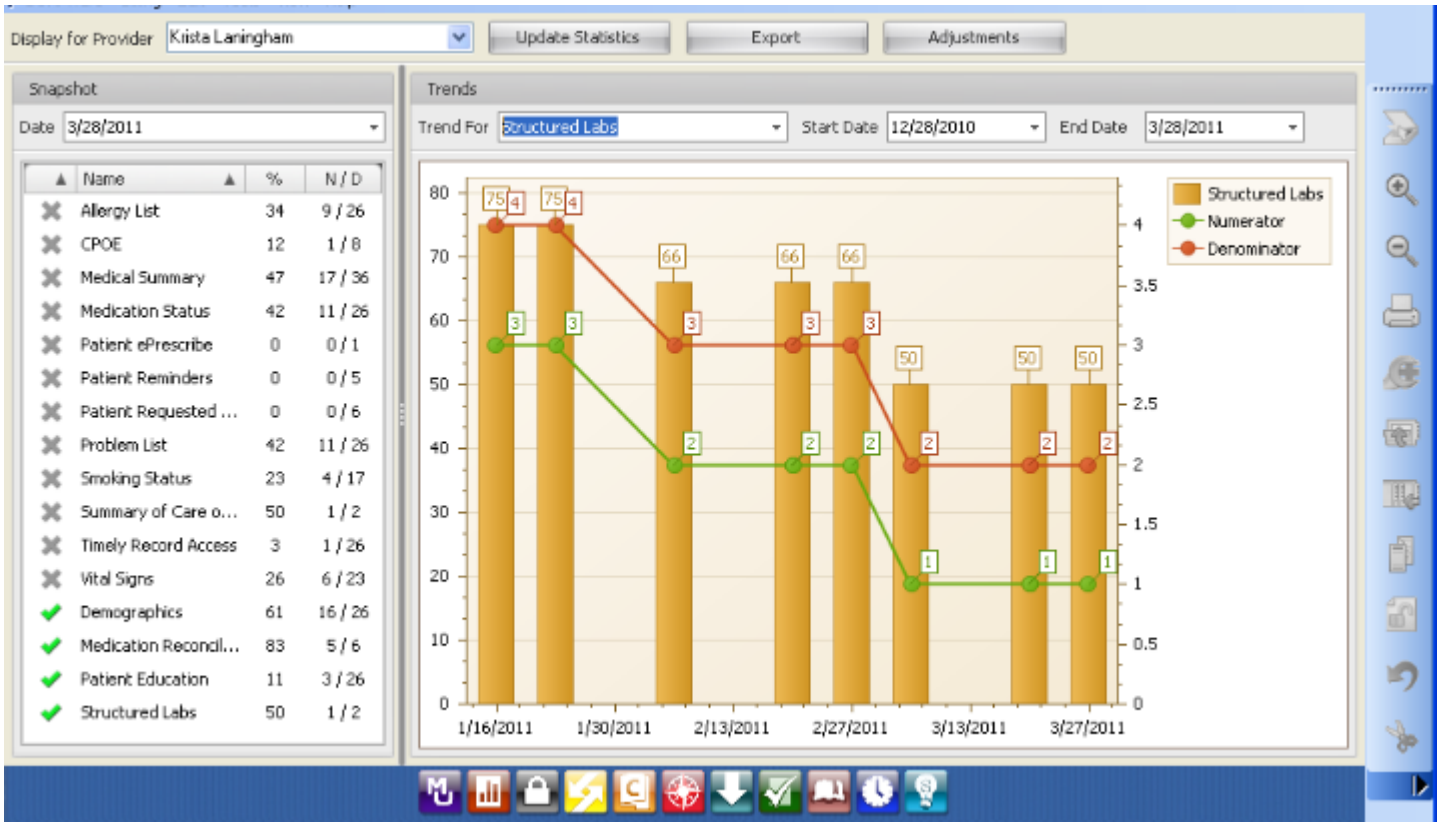
Next Lesson

Step 3

Meaningful Use Dashboard

In 2011+ versions of SOAPware, providers can now view, export and trend Meaningful Use usage statistics.

Link



Meaningful Use Dashboard

Continue to Step 4

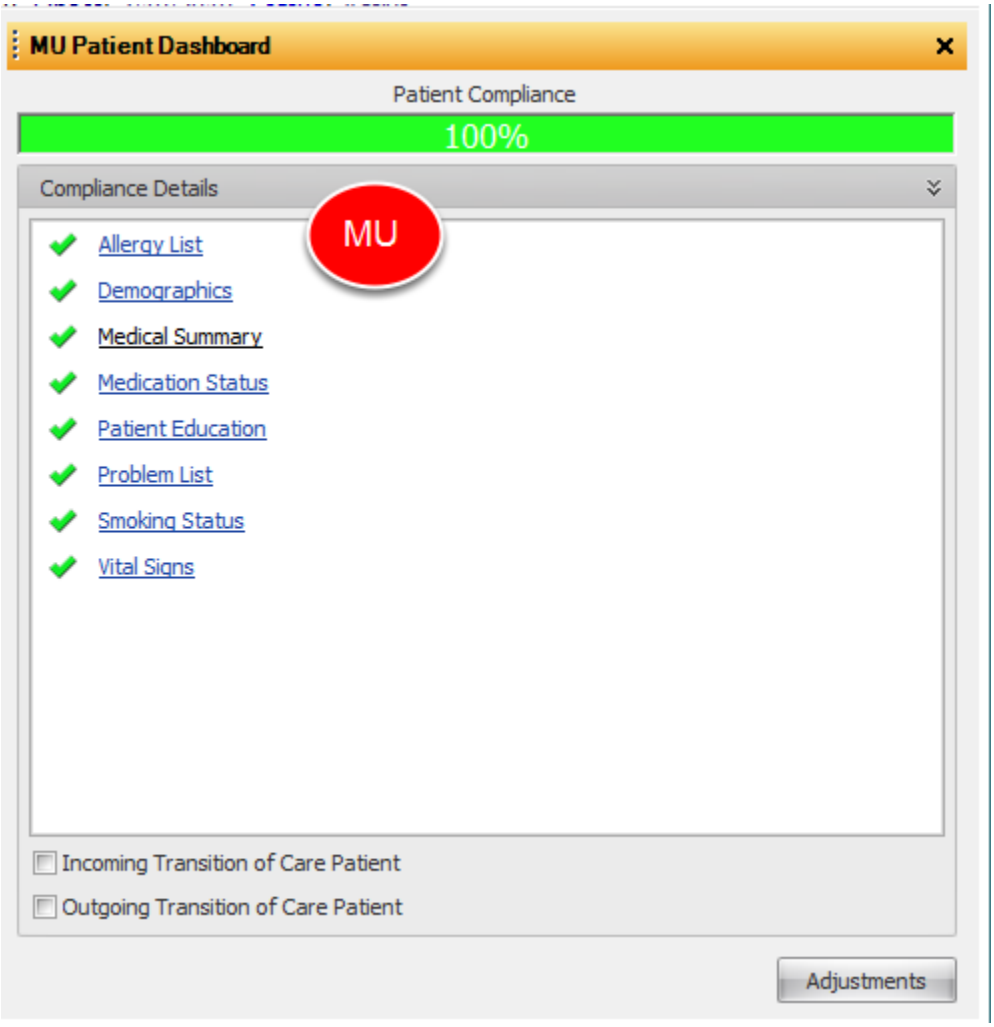
Next Lesson

Step 4

Meaningful Use Patient Dashboard

To learn about Patient Dashboard, as well as the outgoing and incoming transition of care patient, refer to the link provided.

Link



Meaningful Use Patient Dashboard

Continue to Step 5

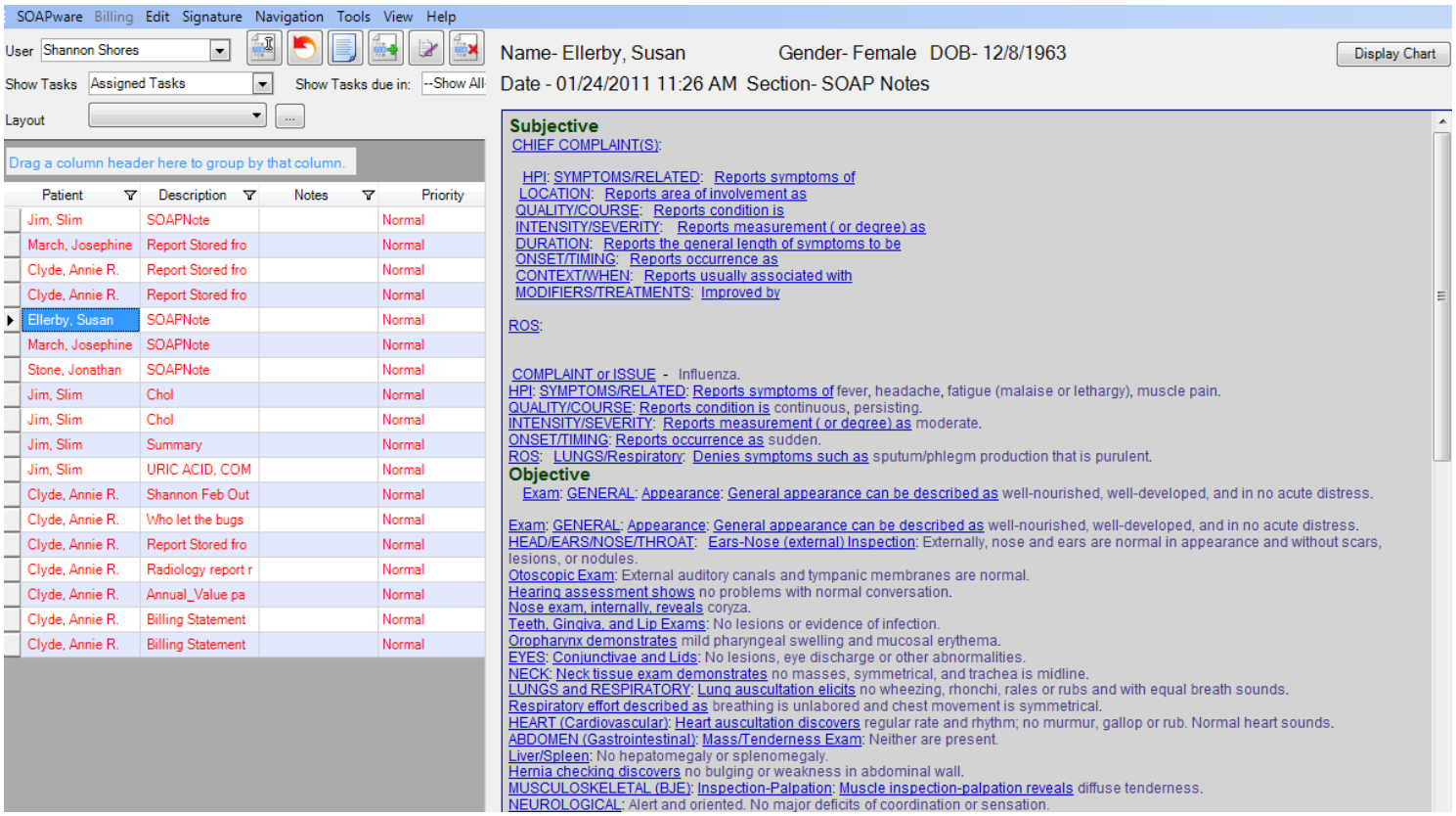
Next Lesson

Step 5

Document Review

Document Review is a workspace in SOAPware where users can review tasks and documents associated with those tasks, without having to open each patient's chart.

Link



Document Review Workspace

Continue to Step 6

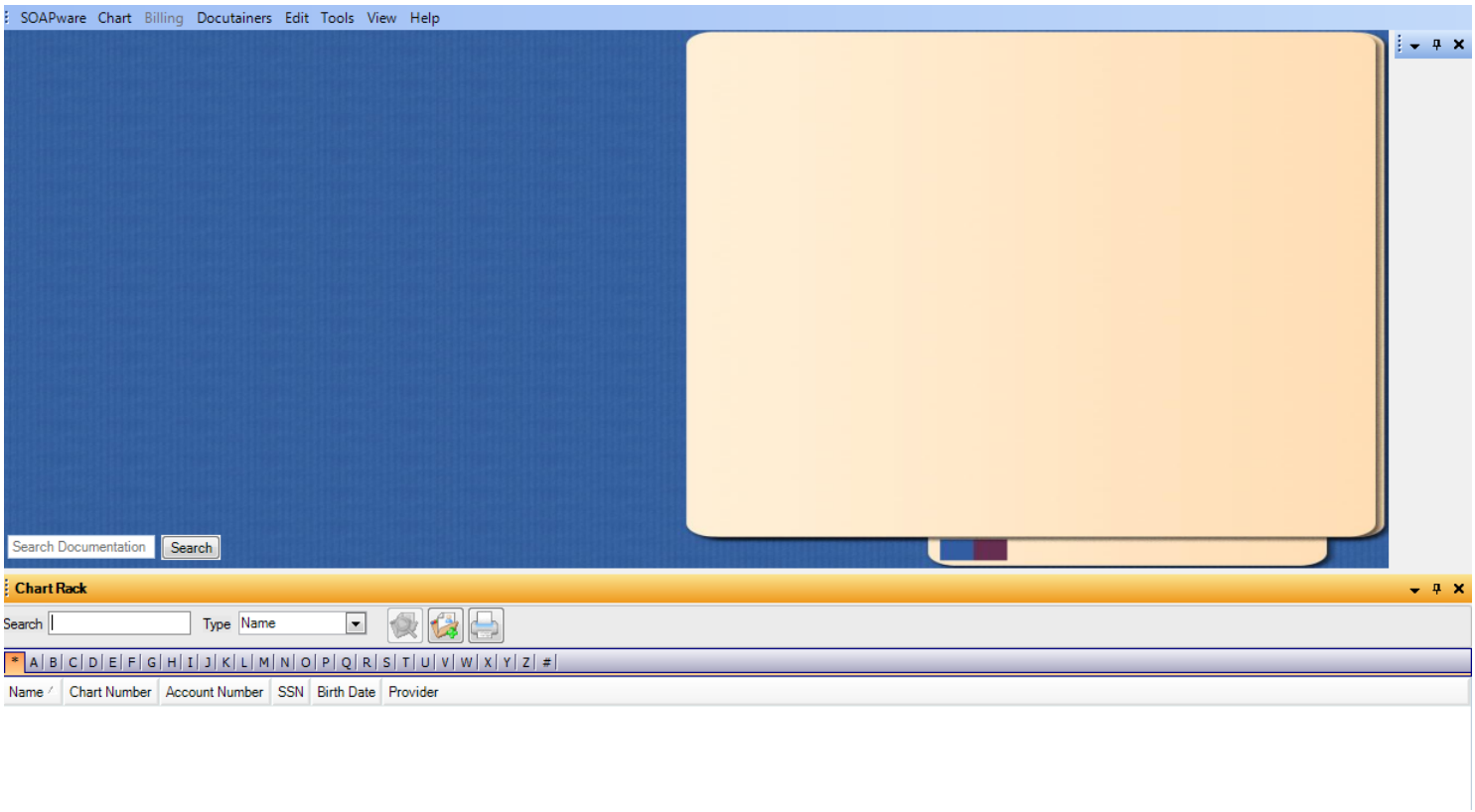
Next Lesson

Step 6

Intro to Charts

To learn about the Chart workspace in general, Chart Navigator, Chart Layouts and so much more, refer to the link provided.

Link



Introduction to Charts

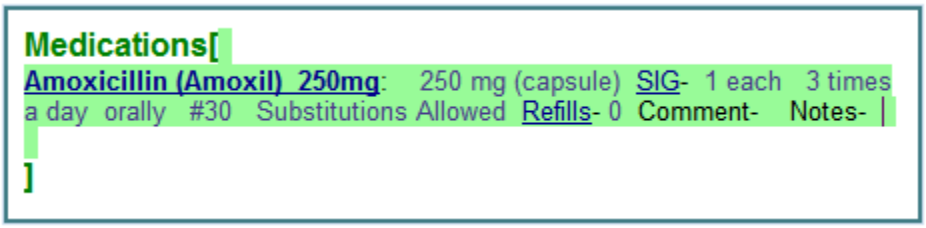
Continue to Step 7

Next Lesson

Step 7

To view examples of free text versus structured text, and to learn about SMARText used in SOAPware, click on the link provided below.

Link



Data Entry in SOAPware

Continue to Step 8

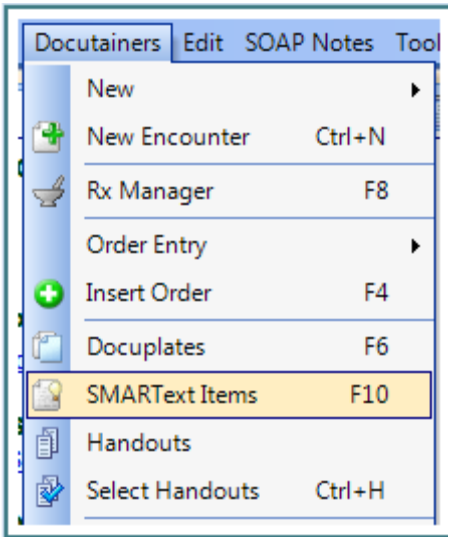
Next Lesson

Step 8

Creating SMARText Items

To learn about a code expander/macro, creating SMARText items from Quick Access, and more on this topic, see the link below.

Link



Creating SMARText Items

Continue to Step 9

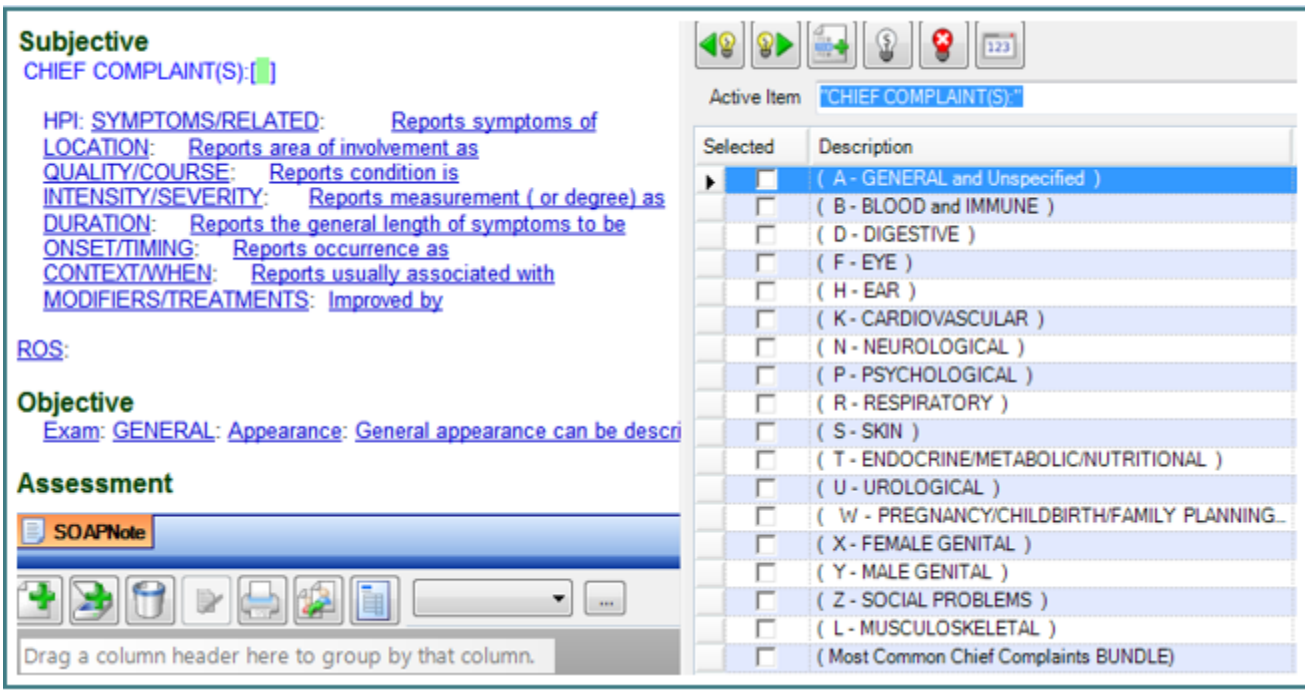
Next Lesson

Step 9

Pick Lists

Pick Lists are an efficient way to enter data quickly, as they are predefined lists of data items. Click on the link below to learn all about them!

Link



Pick Lists

Continue to Step 10

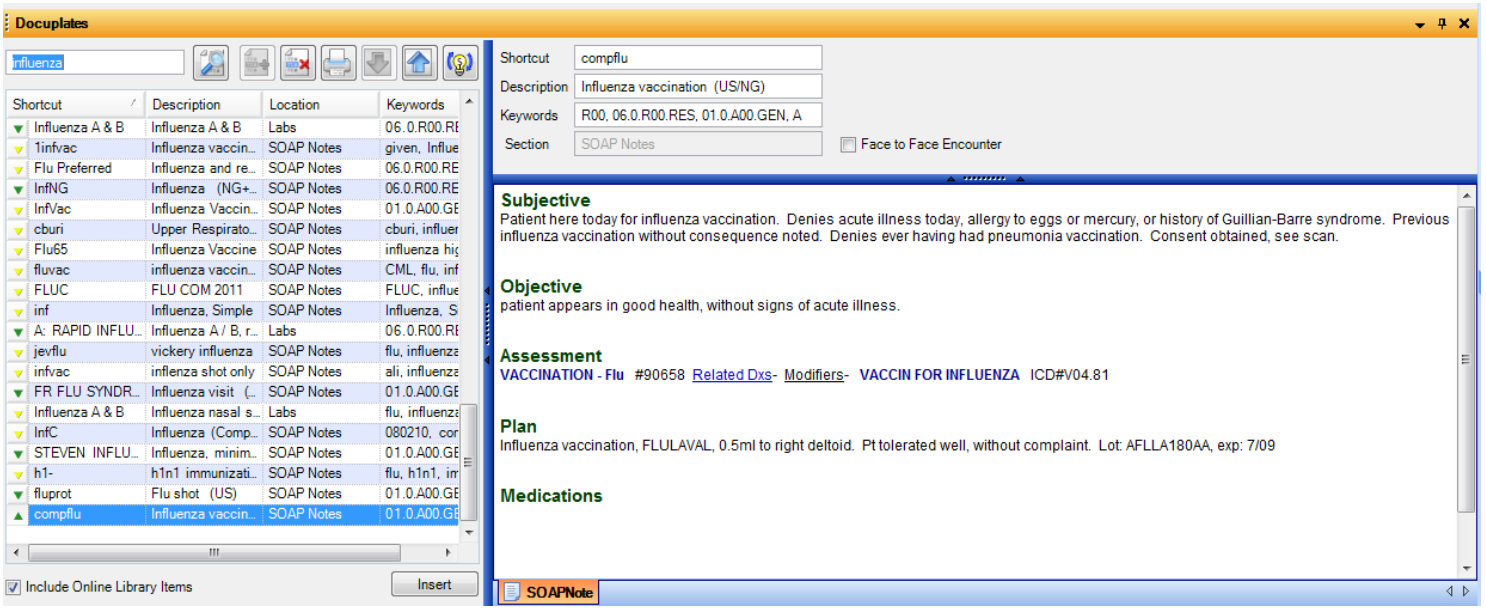
Next Lesson

Step 10

Docuplates

For more information on creating a docuplate, inserting a docuplate, the F5 quick entry of a docuplate, and more on the topic of docuplates in SOAPware, please see the link provided below.

Link



Docuplates

Continue to Step 11

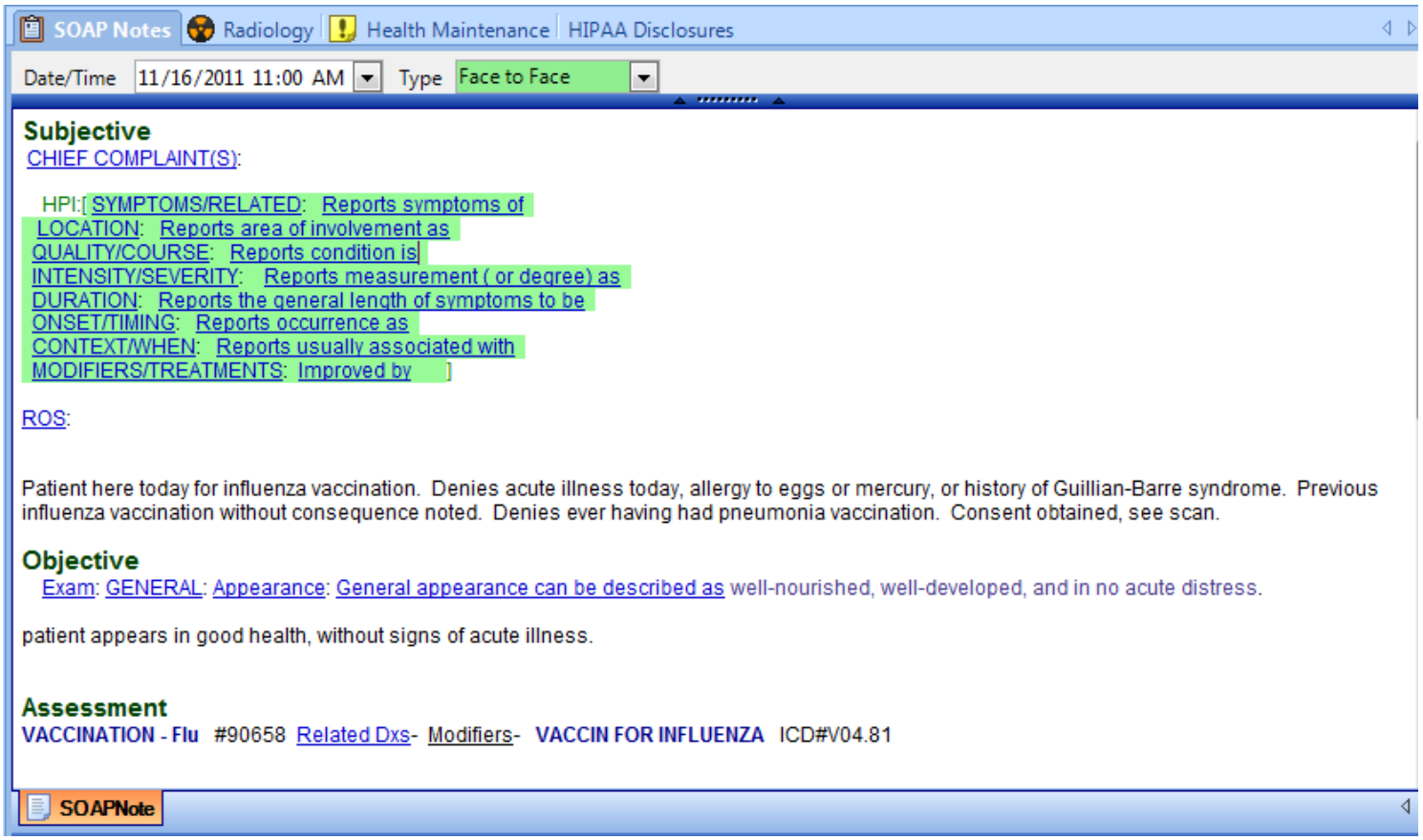
Next Lesson

Step 11

Docutainers

For more information on docutainers, splitter bars, and how to find docutainer documents via the Chart Navigator, refer to the link provided below.

Link



Please see: **Docutainers.**

Continue to Step 12

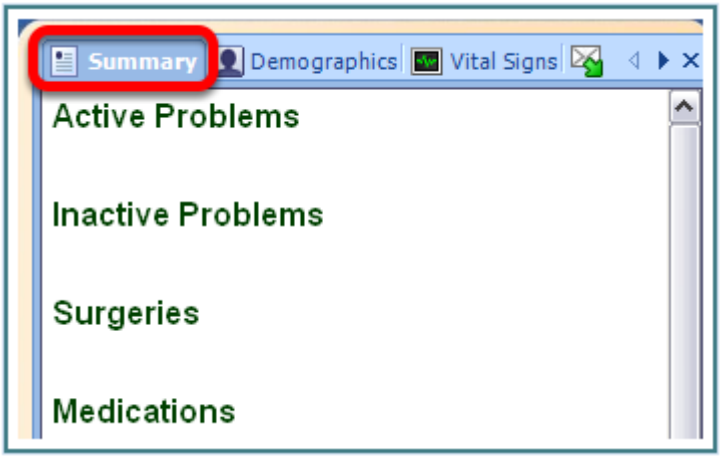
Next Lesson

Step 12

Summary Documentation

Documenting the patient's medical history in SOAPware is very important. Refer to the link below for several lessons regarding Summary Documentation.

Link



Summary Documentation

Continue to Step 13

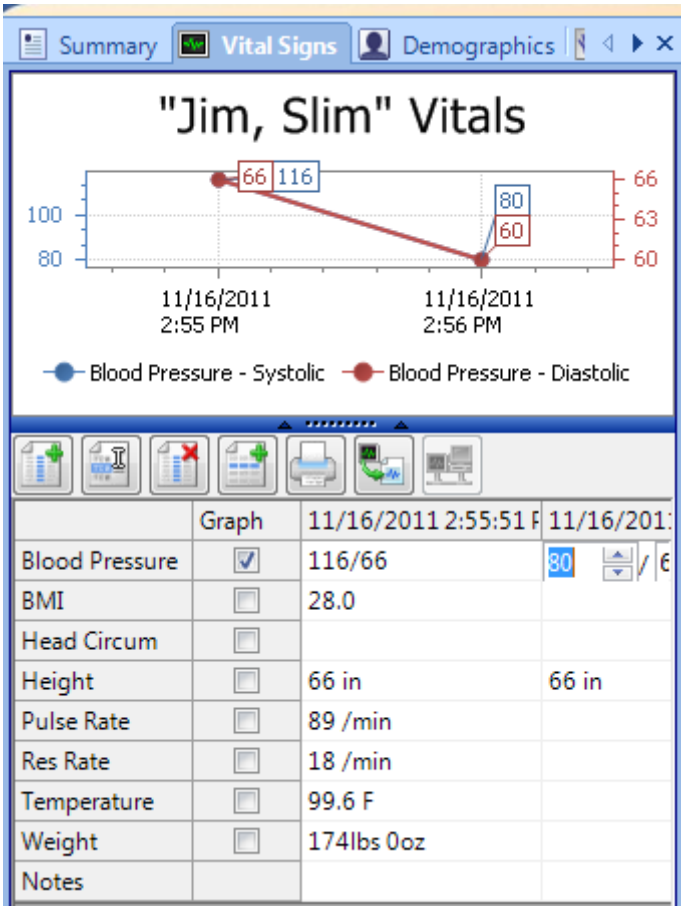
Next Lesson

Step 13

Vital Signs

To learn all about entering Vital Signs into SOAPware, check out the link below.

Link



Please see: **Vital Signs.**

Continue to Step 14

Next Lesson

Step 14

SOAPnote

To learn how to create a SOAPnote, sign off, remove unused items and more regarding SOAPnotes, refer to the link provided below.

Link

Objective[
Exam: GENERAL: Appearance: General appearance can be described as mildly ill.
LYMPHATIC: Neck node findings include diffuse tenderness.
Axillary node exam reveals no swollen or tender nodes under either arm.
HEAD, EARS, NOSE AND THROAT: Ears-Nose (external) Inspection: Externally, nose and ears are normal in appearance and without scars, lesions, or nodules.
Otoscopic Exam: External auditory canals and tympanic membranes are normal.
Hearing assessment shows no problems with normal conversation.
Nose exam, internally, reveals coryza.
Teeth, Gingiva, and Lip Exams: No lesions or evidence of infection.
Oropharynx demonstrates mild pharyngeal swelling and mucosal erythema.
NECK: Neck tissue exam demonstrates no meningeal signs.
Thyroid exam reveals no masses, enlargements or tenderness.
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.
Edema-Varicosity Exam: No significant peripheral edema or venous varicosities.
ABDOMEN (Gastrointestinal): Mass/Tenderness Exam: Neither are present.
Liver/Spleen: No hepatomegaly or splenomegaly.
MUSCULOSKELETAL (BJE): Gait and station demonstrate standing and walking are stable and functional.
Inspection-Palpation: Muscle inspection-palpation reveals diffuse tenderness.
SKIN: Skin Inspection: No rashes or lesions.
Skin Palpation: Normal turgor and without induration or nodules.]

Patient Visit Documentation - SOAPnotes Encounter Notes

Continue to Step 15

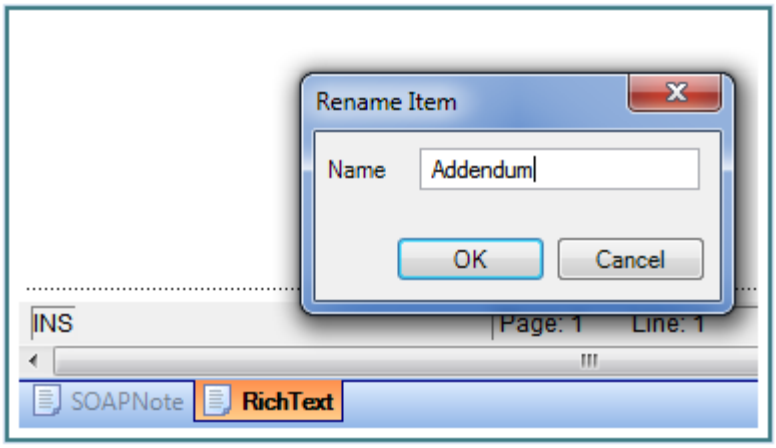
Next Lesson

Step 15

Adding an Addendum

The user can add an addendum to a SOAPnote if information needs to be added after the SOAPnote has been signed off.

Link



Creating an Addendum

Continue to Step 16

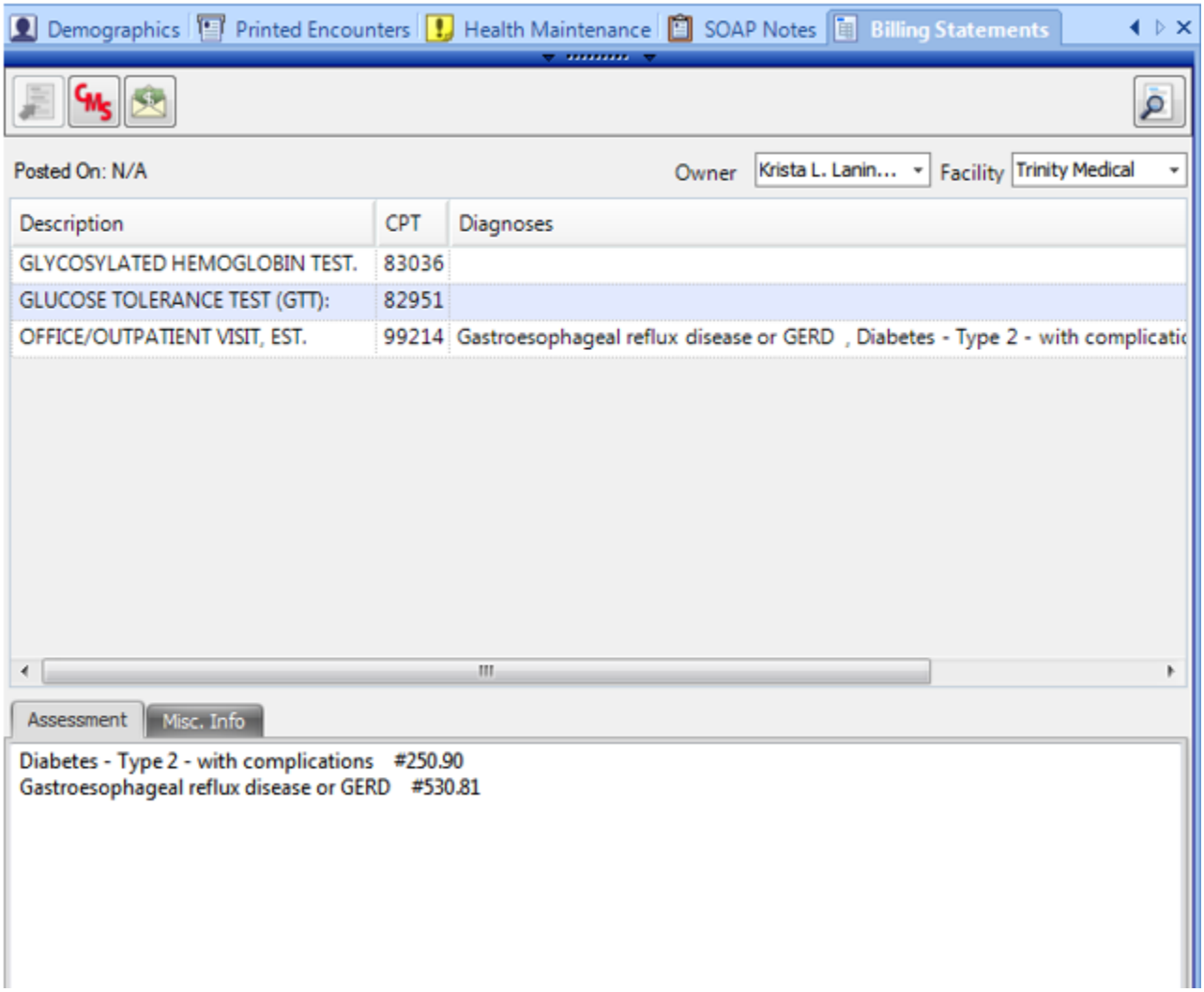
Next Lesson

Step 16

Creating a Billing Statement

The Billing Statements section displays previous superbills and allows for the creation of new billing statements. Billing statements can often facilitate direct posting into the practice management system (this requires the SOAPwareXchange enhancement).

Link



Creating a Billing Statement

Continue to Step 17

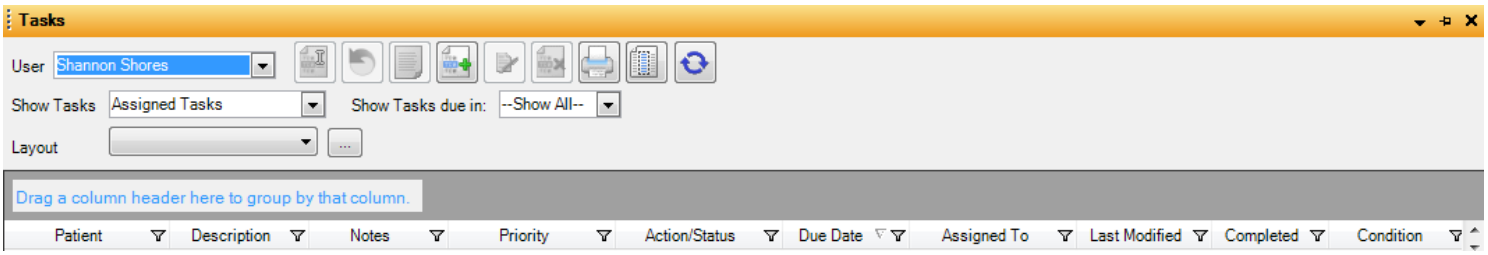
Next Lesson

Step 17

Task Manager

Task Manager allows a user to track the status of all tasks, as well as send messages or reminders to other users.

Link



For more information see: **Task Manager**.

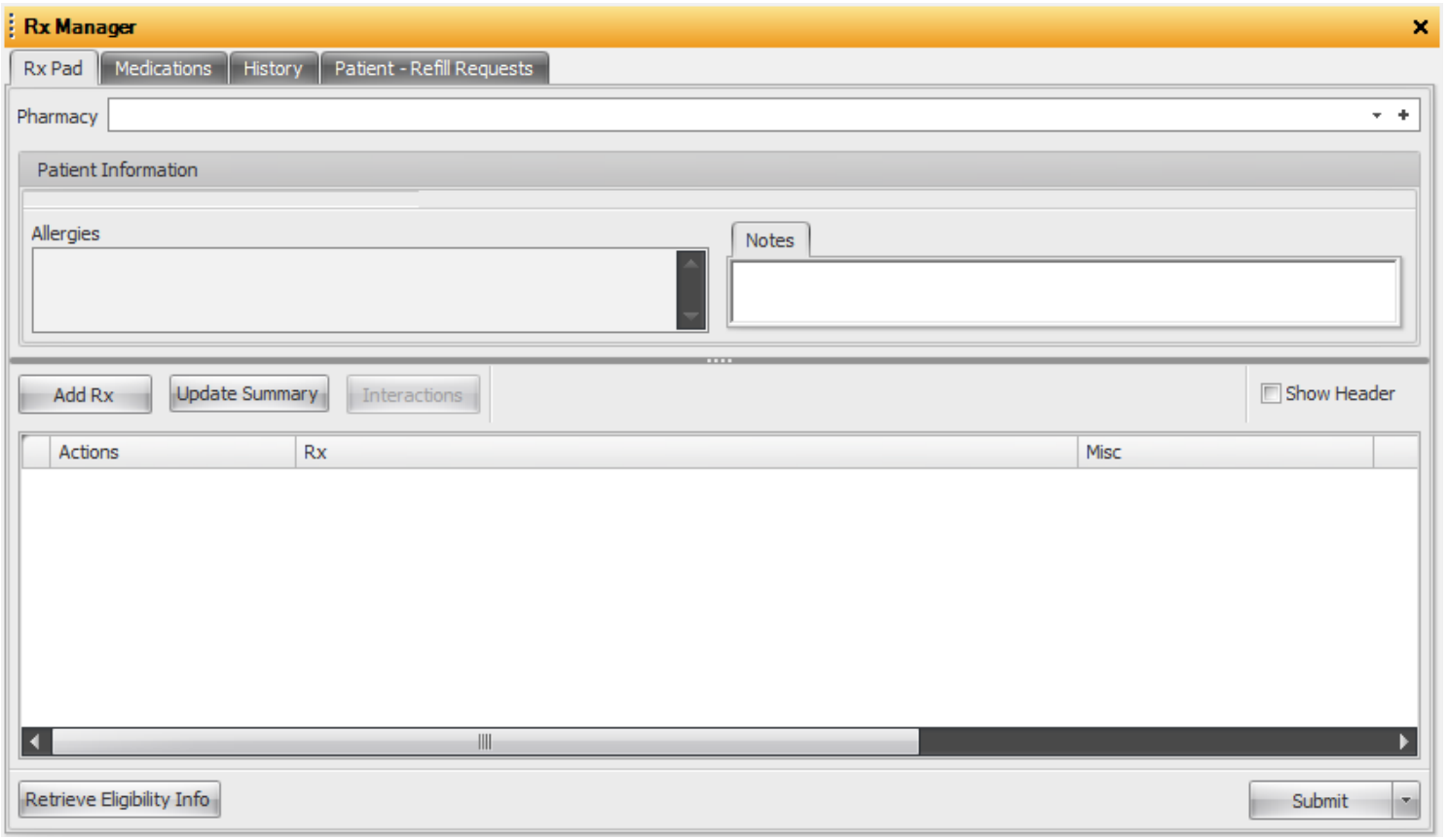
Continue to Step 18

Next Lesson

Step 18

To learn about the Rx Manager, electronic refill requests, an example of an eRx workflow and so much more, refer to the link provided below.

Link



ePrescribing

Continue to Step 19

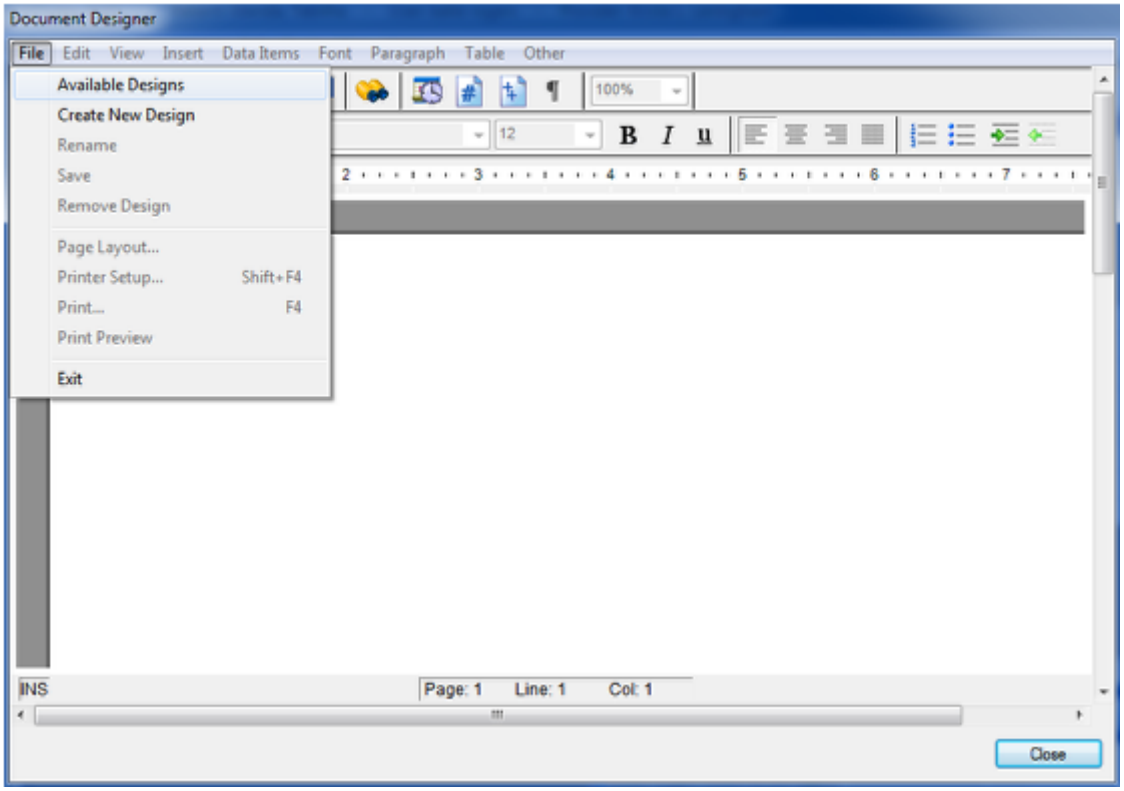
Next Lesson

Step 19

Document Designer

To learn about quick print key commands, how to create a basic document design, and many more topics regarding Document Designer within SOAPware, see the link below.

Link



Document Designer

Continue to Step 20

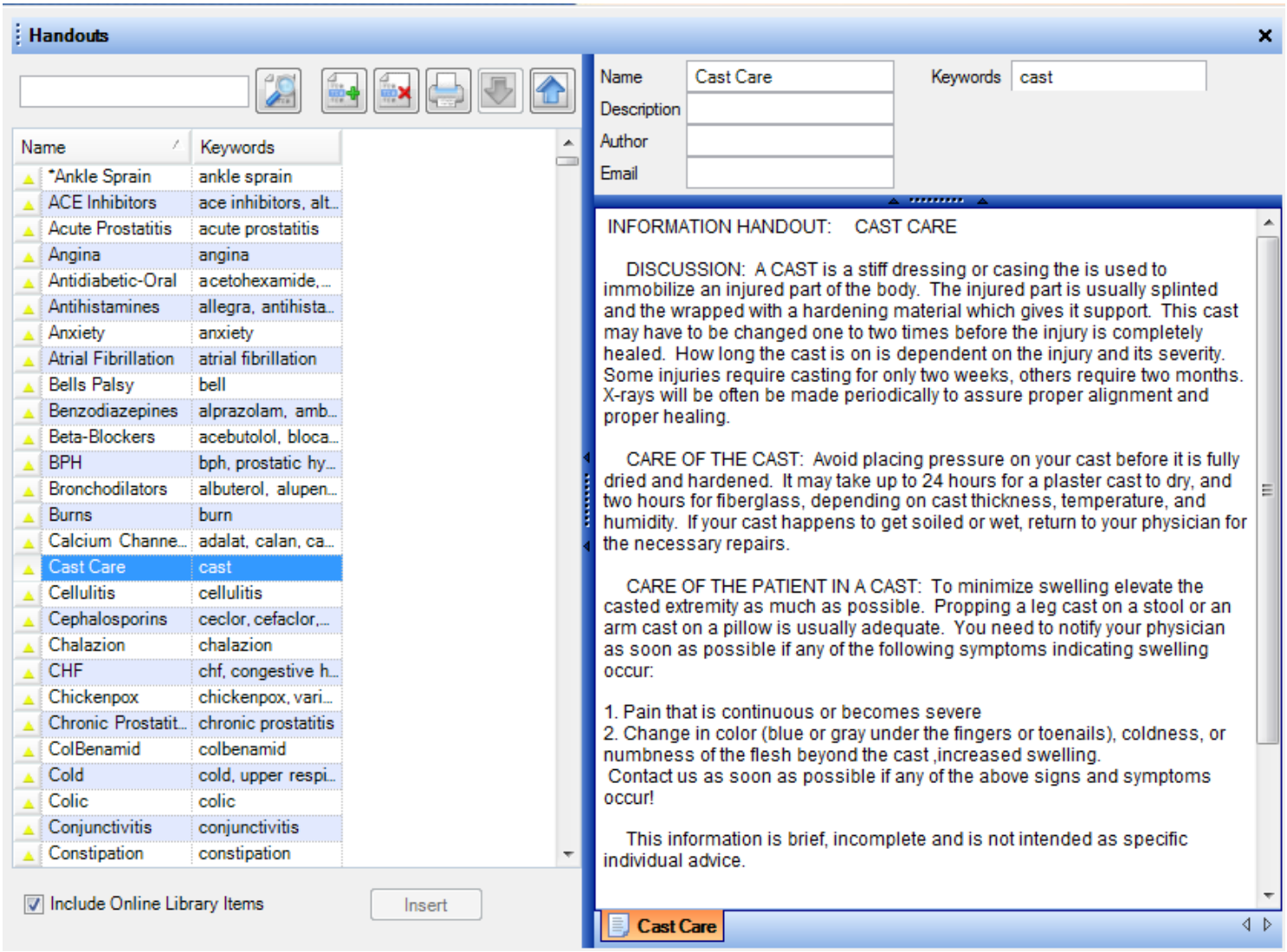
Next Lesson

Step 20

Creating Patient Education Handouts

To learn about the Handouts Manager, how to print or edit a handout, and many more lessons regarding handouts, see the link below.

Link



For more information, see: **Creating Patient Education Handouts.**

Continue to Step 21

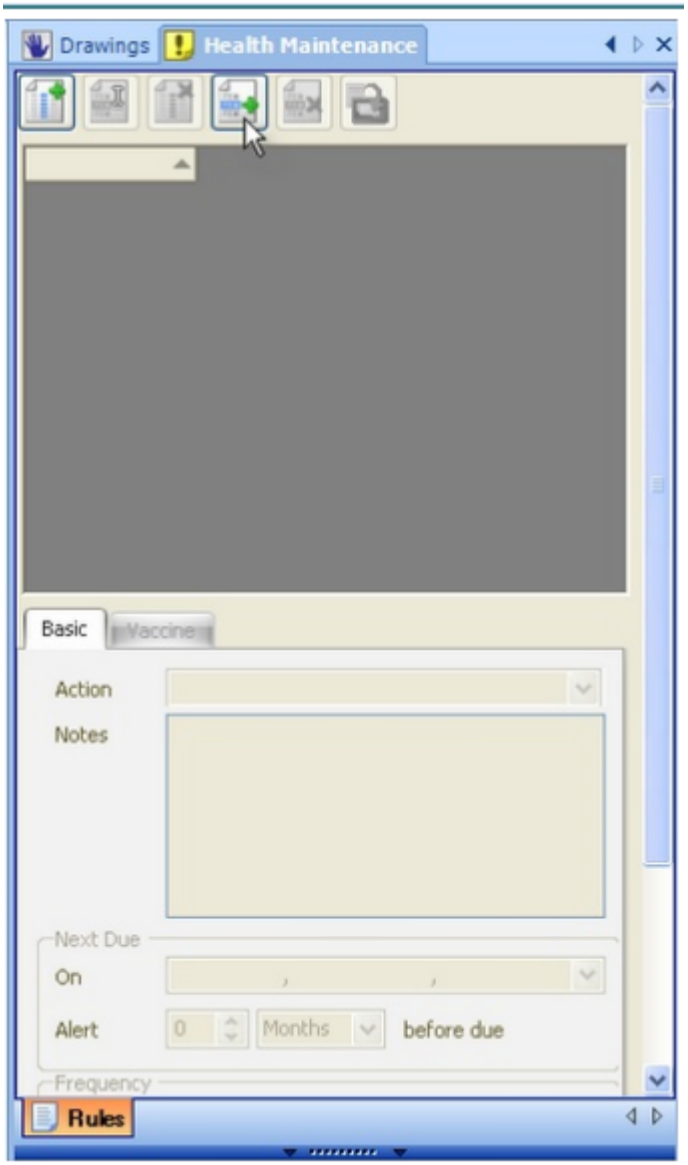
Next Lesson

Step 21

Health Maintenance

To learn more about addressing a rule, using the vaccine rule type, how to generate a Health Maintenance report and more, see the link below.

Link



Health Maintenance

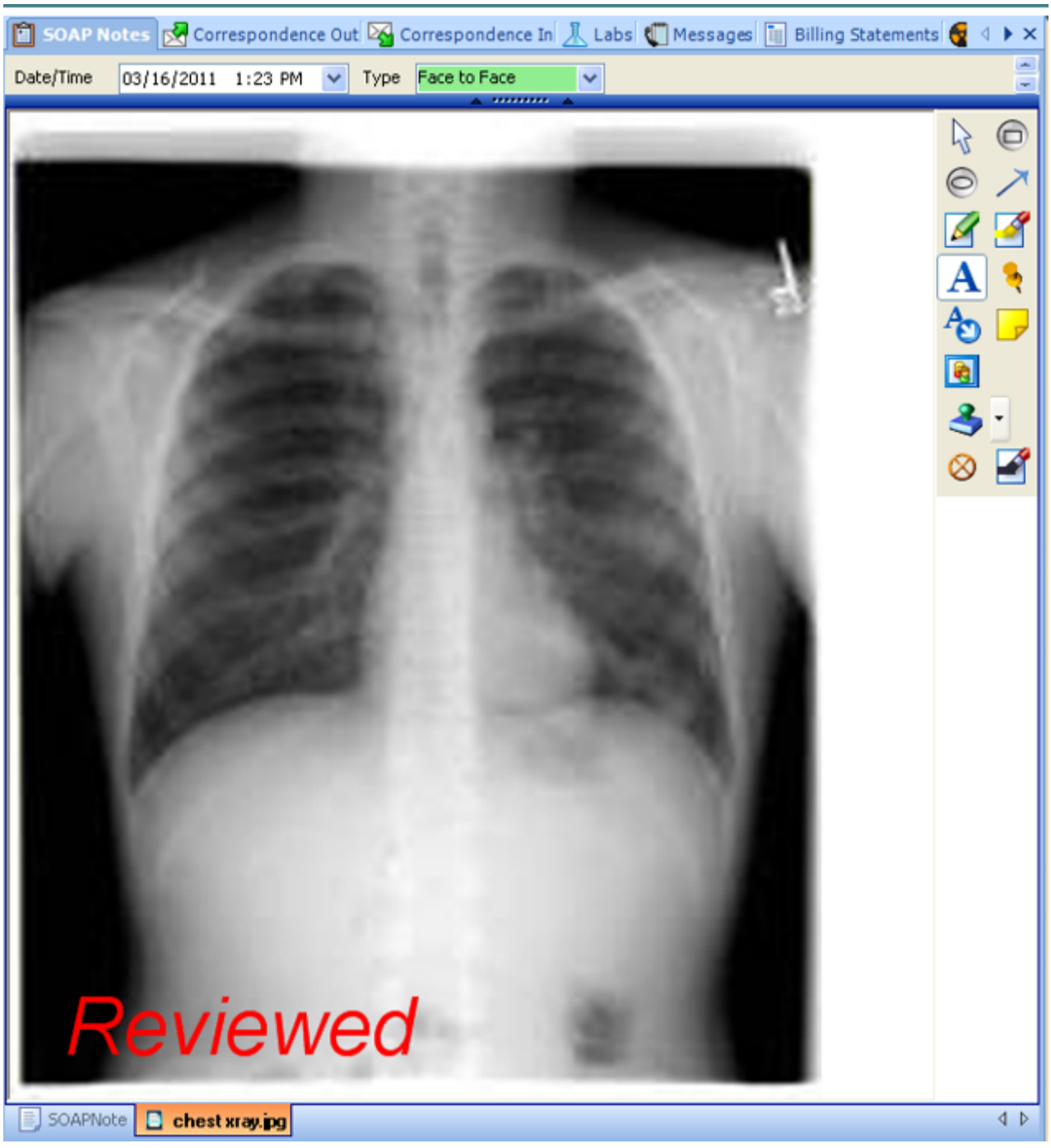
Continue to Step 22

Next Lesson

Step 22

The following four links will give Clinicians a look into their specific tasks in regards to document and chart management within SOAPware.

1. Setting Default Font for Image Annotation



Setting Default Font for Image Annotation

2. Document History

Document History

3. Co-Signatures

Co-Signatures

4. Signature History

Signature History

Continue to Step 23

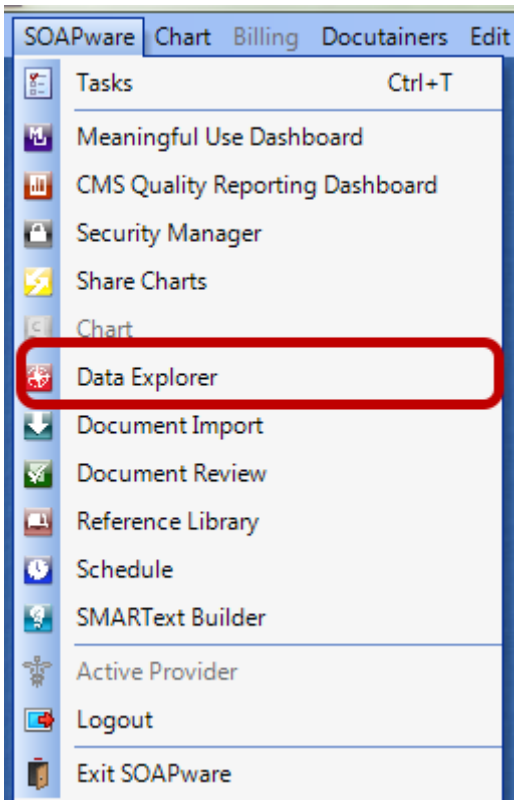
Next Lesson

Step 23

Data Explorer

To learn how to perform a medication search, and Summary diagnosis search, a lab value search, and more topics regarding Data Explorer, check out the link below.

Link



Data Explorer

Continue to Step 24

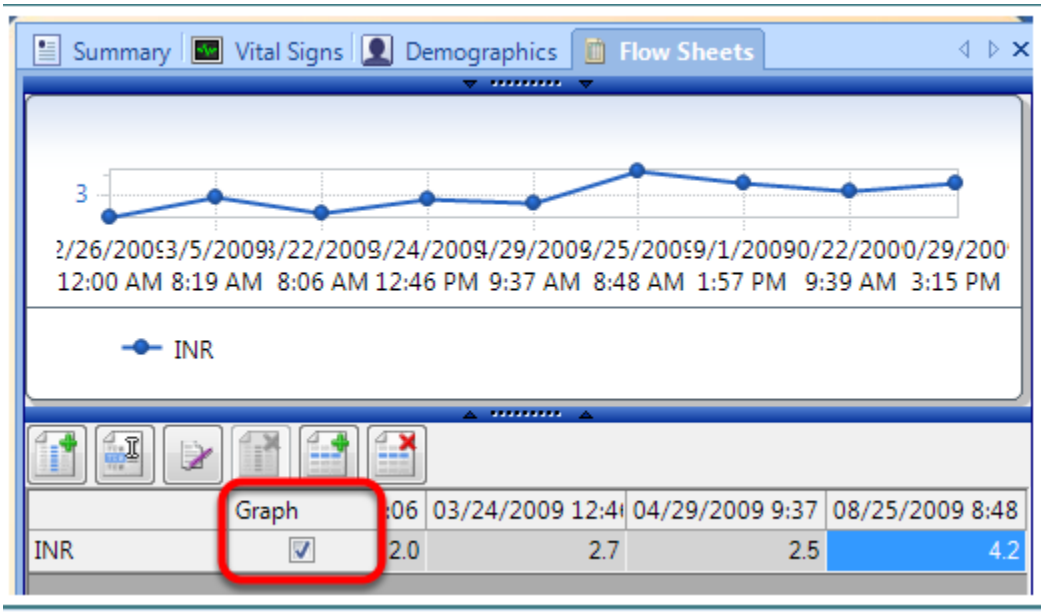
Next Lesson

Step 24

Flow Sheets

To learn how to manage a flow sheet, create a lab flow sheet, and create a new flow sheet docuplate, refer to the link below.

Link



Flow Sheets

Continue to Step 25

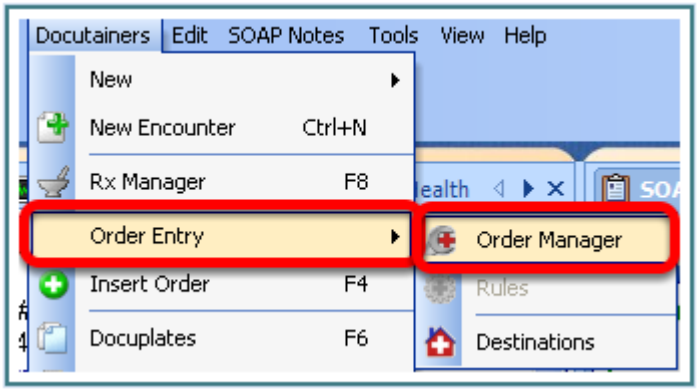
Next Lesson

Step 25

Order Entry

To view more information about Order Entry set up, Order Manager, immunization order items, and more, view the link provided below.

Link



Order Entry

Continue to Step 26

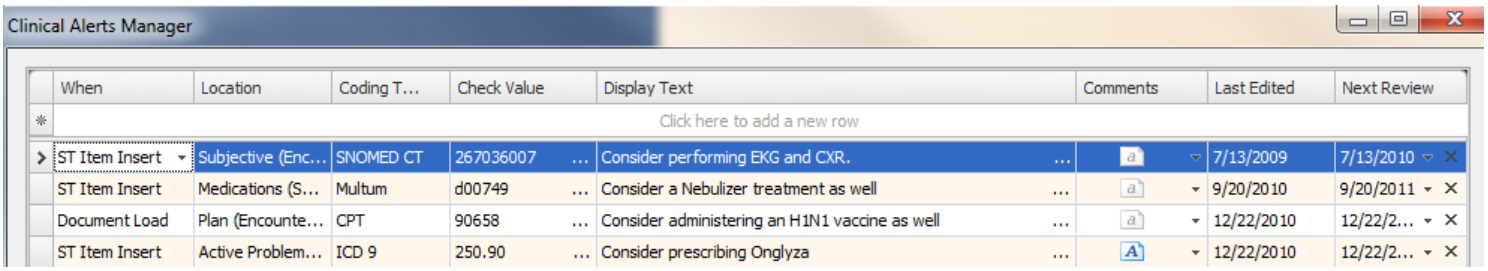
Next Lesson

Step 26

Clinical Alerts

Clinical Alerts are a simple way to have SOAPware display text-based prompts or reminders when a defined value is found in a specific location within the chart.

Link



Please see: **Clinical Alerts**.

Continue to Step 27

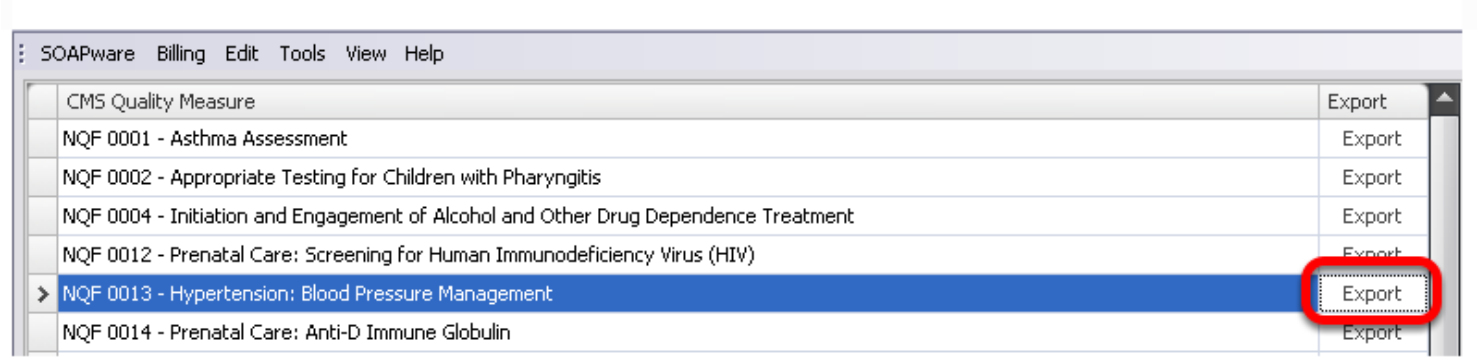
Next Lesson

Step 27

Clinical Quality Measures - How to Use the CMS Quality Reporting Dashboard

The lesson linked below is designed to walk the user through the steps of exporting Quality Measures data for reporting purposes.

Link



How to Use the CMS Quality Reporting Dashboard

Continue to Step 28

Next Lesson

Step 28

Meaningful Use for Clinicians

The following four links will help the clinician if he/she is participating in meeting Meaningful Use requirements.

1. Introduction

Introduction

2. Registration and Attestation

Registration and Attestation

3. FAQ's

FAQ's

4. Clinical Quality Measures Manual

Clinical Quality Measures Manual

Continue to Step 29

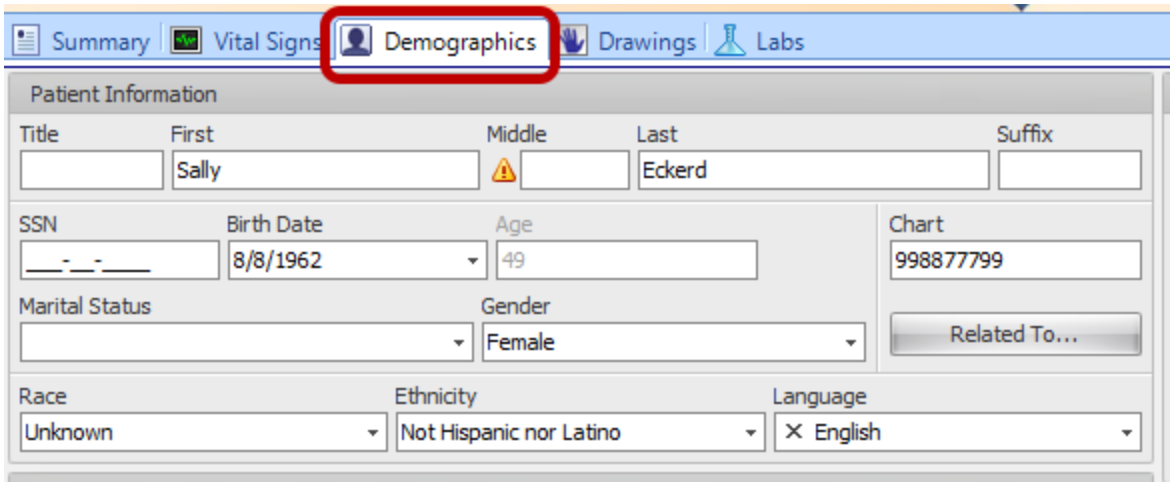
Next Lesson

Step 29

Meaningful Use Core Set Objectives (All 15 Required)

For those Clinicians participating in Meaningful Use, be sure to review the 15 links below to view his/her responsibilities pertaining to meeting these core requirements. Many of the items listed below require specific set up and a check of your security settings in SOAPware in order to meet the objectives listed.

1. Record Demographics



Record Demographics

2. Record Vital Signs

Record Vital Signs

3. Maintain Problem List

Maintain Problem List

4. Active Medication List

Active Medication List

5. Medication Allergy List

Medication Allergy List

6. Record Smoking Status

Record Smoking Status

7. Clinical Summaries

Clinical Summaries

8. Electronic Copy of Health Information

Electronic Copy of Health Information

9. ePrescribing (eRx)

ePrescribing (eRx)

10. CPOE for Medication Orders

CPOE for Medication Orders

11. Drug Interaction Checks

Drug Interaction Checks

12. Electronic Exchange of Clinical Information

Electronic Exchange of Clinical Information

13. Clinical Decision Support Rule

Clinical Decision Support Rule

14. Protect Electronic Health Information

Protect Electronic Health Information

15. Report Clinical Quality Measures (CQMs) to CMS/States

Report Clinical Quality Measures (CQMs) to CMS/States

To view the Clinical Quality Manual see: Clinical Quality Measures Manual.

Continue to Step 30

Next Lesson

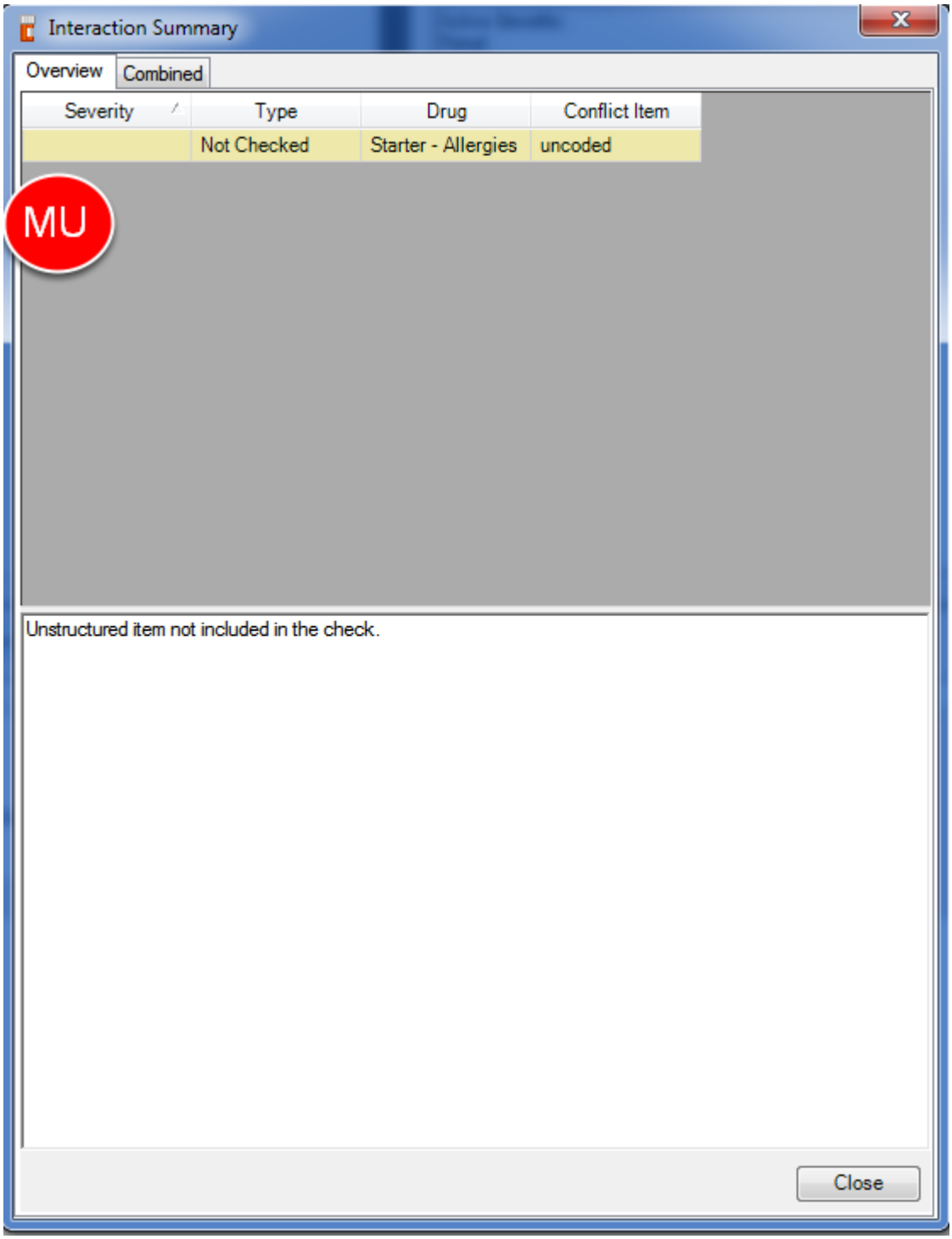
Step 30

Meaningful Use Menu Set Objectives (5 of 10)

**** Report on Total of 5 Measures: choose 1 of 2 public health measures and any other 4 menu measures.****

For those Clinicians participating in Meaningful Use, be sure to review the links below to view his/her responsibilities pertaining to meeting these optional measures. The items listed below require specific set up in SOAPware in order to meet the objectives.

1. Drug Formulary Checks



Drug Formulary Checks

2. Clinical Lab Tests Results

Clinical Lab Tests Results

3. Patient Lists

Patient Lists

4. Patient Reminders

Patient Reminders

5. Patient Electronic Access

Patient Electronic Access

6. Patient-Specific Educational Resources

Patient-Specific Educational Resources

7. Medication Reconciliation

Medication Reconciliation

8. Transition of Care Summary

Transition of Care Summary

9. Immunization Registries Data Submission *(Public Health Measure - one required)

Immunization Registries Data Submission

10. Syndromic Surveillance Data Submission *(Public Health Measure - one required)

Syndromic Surveillance Data Submission

Continue to Step 31- Practice!

Next Lesson

Practice!

Schedule Hands-on Practice

Congratulations!

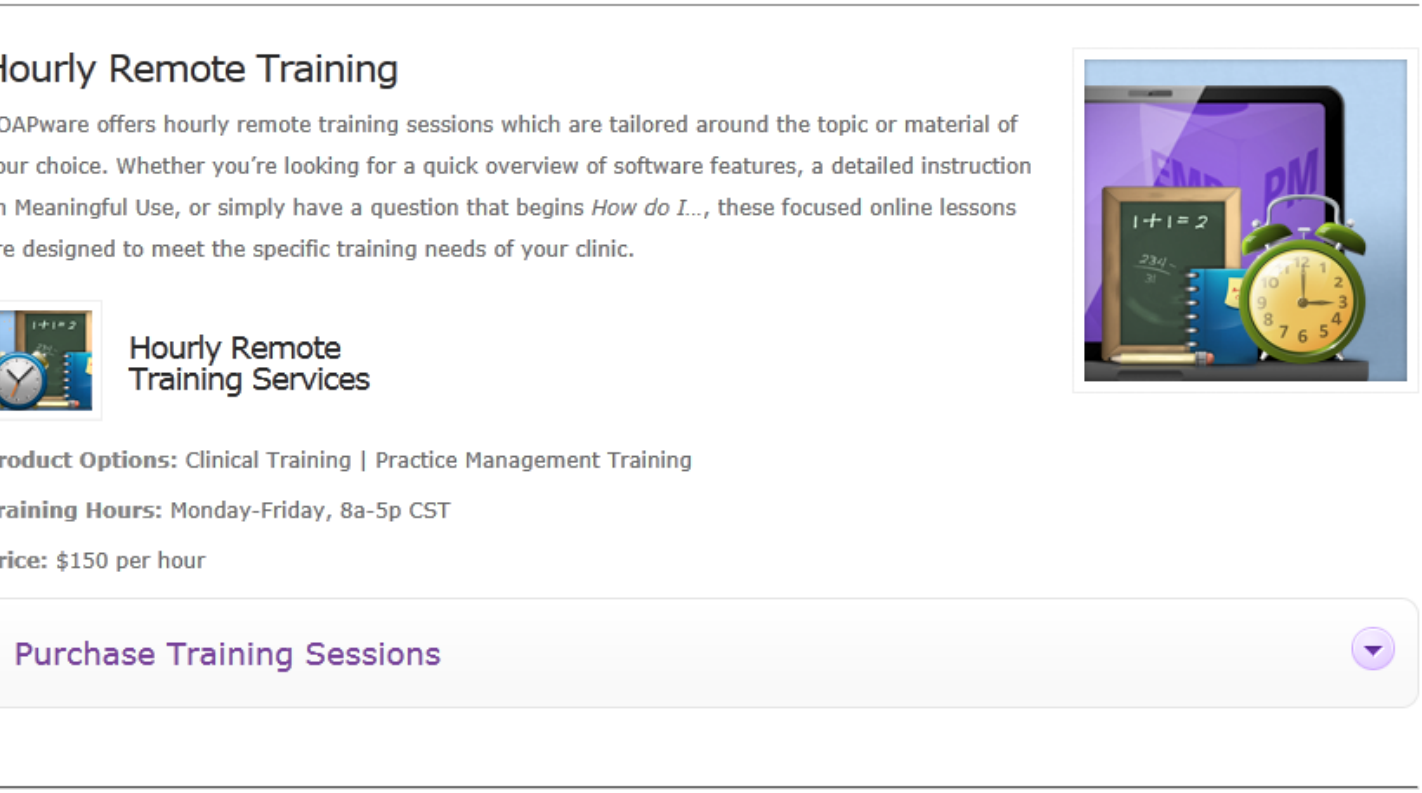
You have reviewed the SOAPware user manual materials related to the clinic role of "Clinician". Now it's time to practice what you have learned!

We recommend that all users have sufficient time to be able to practice their workflows and become familiar with a new version of SOAPware prior to going live. It is essential that the clinic allow sufficient time for each of their staff members to practice. This will help them to become comfortable in navigating and performing their workflows in the new software and will make the transition from the previous version much more efficient.

If your clinic is interested in purchasing additional one-on-one training time with our SOAPware Certified Trainers, please review the information below on your SOAPware training options.

SOAPware Training Options:

1. Purchase Hourly EMR Training Session(s)



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.

2. SOAPware EMR Workshops

Clinical Workshops

Our comprehensive 2-day workshops provide a practical introduction to SOAPware 2011, from application features and functions to step-by-step instruction on proper Meaningful Use documentation. Our skilled training professionals combine direct instruction with hands-on exercises, ensuring maximum comprehension and retention. Upon completion, workshop attendees can expect to:

- Understand the basics of proper Meaningful Use documentation
- Identify new features in the SOAPware 2011 user interface
- Configure and maintain security settings
- Perform basic functions such as chart entries, ePrescribing, billing statements, and more
- Identify and address possible workflow changes
- Successfully train co-workers on the use of SOAPware EMR

SOAPware 2011
Workshop Schedule

Available Dates: ~~September 23-24| 8a-5p CST~~ Sold Out!

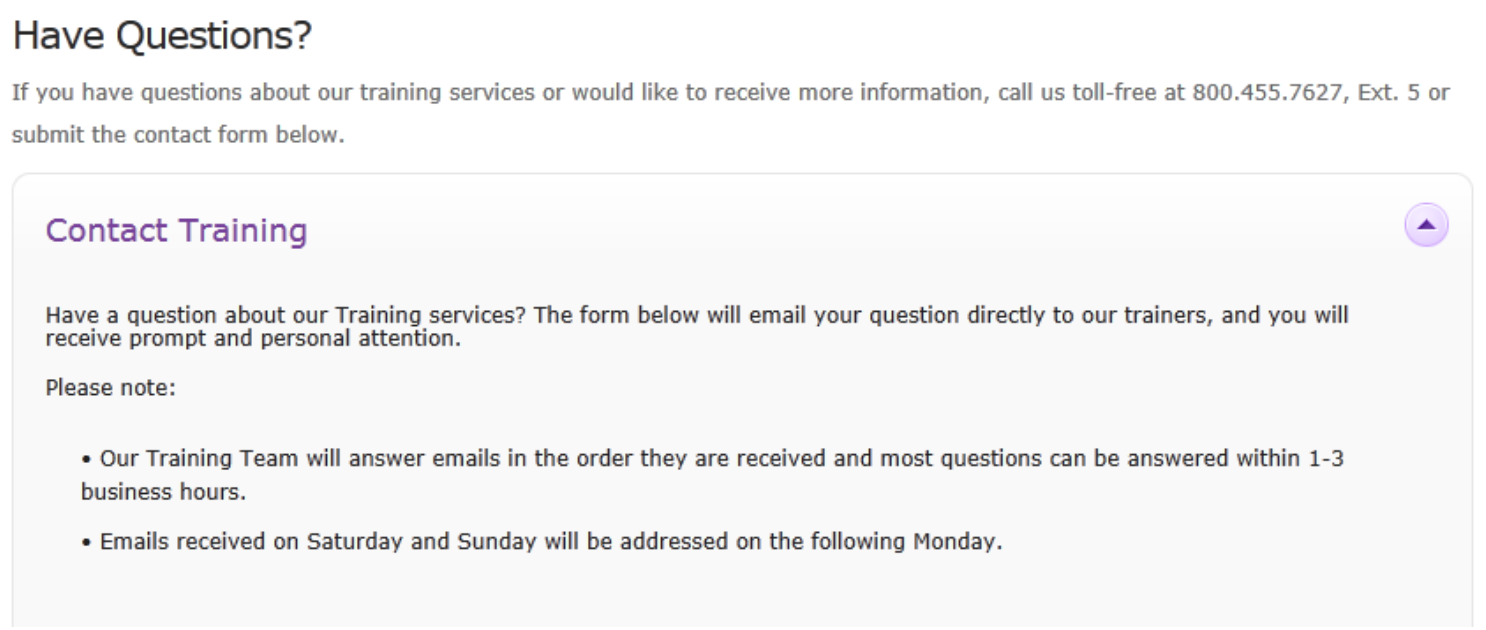
Location: DOCS Professional Building | 4220 N Crossover Rd, Fayetteville AR 72703

Price: $700 | 2-Day Package

Register for Workshop

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!

3. Email your Questions



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.