

Course Syllabus

Clinical Workshop



Workshop Information

Course Title:	Clinical Workshop
Location:	University of Arkansas Global Campus 2 East Center St Fayetteville, AR 72701
Instructors:	SOAPware Certified Trainers
Course Description:	An introduction to documenting procedures designed to meet Meaningful Use guidelines and how SOAPware can facilitate this process and the new features of SOAPware 2012. <i>Hands-on, practical applications are included to maximize comprehension and learning.</i>
Learning Outcomes:	After completing the Clinical Workshop, users will: <ul style="list-style-type: none">• Have a basic understanding of documenting for Meaningful Use• Be able to identify new features of the SOAPware 2012 user interface• Set up and maintain Security settings• Be able to perform a variety of functions, including chart entries, tasks management; E-prescribing, SMARTText entries, billing statements and scheduling• Be prepared to address possible workflow changes• Be able to train co-workers
Instructional Methods:	This course is taught using direct instruction combined with hands-on, practical application exercises.



Arrival and Registration

Introduction

- Welcome and Introductions
- Lunch, Breaks & Housekeeping
- Workshop overview, explanation of instructional method and assessment procedure.
- Practical Applications

Meaningful Use - Presentation

Begin Set-Up– Presentation

- Launch & Log In to SOAPware
- Beginning the Set-Up Process
 - Provider Manager
 - Set-Up Options
 - Set-Up contacts
 - Set-Up Pharmacies

Creating Users in Security –Presentation

- Set-Up Security Settings & Users
 - Introduction to Security
 - Security Administration – General
- Security Auditing in SOAPware **(MU)**
- Protect Electronic Health Information **(MU)**

User Interface – Exploring SOAPware – Presentation and Practical Application

- Desktop Look & Feel
 - Launch & Log In to SOAPware
 - Menu Bar & SOAPware Workspaces
 - Toolbars
 - Docked Tabs
 - Key Commands

Introduction to Chart Workspace – Presentation and Practical Application

- Chart Rack
- Creating Charts
- Entering Demographics
 - General Demographics **(MU)**
 - Patient Electronic Access/ Patient Portal **(MU)**
 - Splitter Bars
 - Insurance
 - Custom Demographics
 - Chart Navigator



- Chart Layout

SMARText Items Manager– Presentation and Practical Application

- What is SMARText?
- Field Behavior
- Free Text vs. Structured Data
 - Interface of ST Items Manager
 - Searching for ST Items
 - Arrows within ST Manager window
 - Inserting ST Items
 - Filter to narrow searches

SMARText Documentation- Presentation and Practical Application

- Shift F11
- F11 Search
 - Shortcut Codes
- SMARText Pick Lists
 - Quick Access Pick Lists
 - Location Pick Lists
- Item Comment Box
- Editing SMARText
 - Cut/Copy/Paste

Creating SMARText Items- Presentation and Practical Application

- Create a Unstructured SMARText Item
- Create a Pick List
- Editing SMARText Items

Introduction to Docutainers and Docuplates – Presentation

- Docutainers
 - Definition and Example
 - Using Chart Navigator to Find
 - View Docutainer Content
 - Document Mini-Toolbar
- Docuplates
 - Definition
 - Accessing Docuplates
 - Docuplate Controls & Information
 - Setting a Default Docuplate



Tasks Manager – Presentation and Practical Application

- Task Items
- Task Manager Interface
- Auto-generated Task Items
- Manual Addition of Tasks
- Task List Functions
- Sign-Off Multiple Document, Multiple Patients
- Grouping Task Items
- Document Review Workspace
- Tasks Workflow

Summary Part 1– Presentation and Practical Application

- Introduction to Summary Section
- Patient Dashboard **(MU)**
 - Medication Reconciliation **(MU)**
 - Transition of Care Summary **(MU)**
- Meaningful Use Dashboard **(MU)**
- Active Problems **(MU)**
- Inactive Problems
- Surgeries

Summary Part 2- Presentation and Practical Application

- Medications **(MU)**
- Allergies **(MU)**
- Family History
- Tobacco **(MU)**
- Alcohol
- Interventions
- Social History
- Removing Unused Items
- Document History
 - Access and use of Document History

Vital Signs and Growth Charts – Presentation and Practical Application

- Vital Signs **(MU)**
 - Accessing Vital Signs
 - Customizing Vital Signs Unit System (English vs. Metric)
 - Inserting Vital Signs **(MU)**
 - Graphing Vital Signs
 - Transferring Vital Signs to the Objective field in SOAP Note
 - Select Vital Readings
 - Creating a Vital Signs Docuplate



- Growth Charts
 - Accessing Growth Charts **(MU)**
 - Making Growth Charts View Prominent

SOAP Note Encounter Part 1 – Presentation and Practical Application

- Creating a SOAP Note
- View Previous Encounters
- Subjective Entry
 - Chief Complaint
 - Free Text Chief Complaint Entry
 - Structured Chief Complaint Entry
 - RFE: Reason for Encounter
 - ROS – Review of Systems
 - History of Present Illness
 - Insertion of 2nd or 3rd Complaint or Issue
- Objective Entry
 - Transfer Vital Signs to Objective Field
 - Exam Systems Data Entry

SOAPNote Encounter Part 2- Presentation and Practical Application

- Assessment Entry **(MU)**
- Plan Entry
 - Patient Specific Educational Resources (Handouts) **(MU)**
- Medication Entry **(MU)**
- Follow up
- Remove Unused Items
- Print a Clinical/Medical Summary **(MU)**
- Signing Off
- Adding an Addendum
 - Reasons for Addendum Creation
 - Directions to Create
 - Signing Off on Addendum
- Clinical Decision Support Rule/ Clinical Alerts **(MU)**
- Billing Statements
 - Location of Billing Statements Section
 - Creating a Billing Statement
 - Printing a Billing Statement
 - Posting a Billing Statement

Creating Docuplates- Presentation and Practical Application

- Creating, Inserting & Editing



- Sharing and Downloading Docuplates

E-Prescribing – Presentation and Practical Application (MU)

- Enter a Medication
- Rx Manager
 - Drug Interaction Checks (MU)
 - Interface
 - Rx Hub – Eligibility (MU)
 - Prescribing Medications
 - Summary Update in Rx Manager
 - eRx History
 - Patient Refill Requests
- Under the Tools menu - Setting up Structured Rx Options
 - Default and Summary Layout
 - Printing and Faxing
 - Rx Transmission

Electronic Refill Requests – Presentation

- Rx Monitor
- All Refill Requests

Report Clinical Quality Measures (CQMS) to CMS/States – Presentation

Data Explorer – Presentation

- How to run a patient list for Meaningful Use (MU)
- Custom Patient Reports

Health Maintenance – Presentation and Practical Application

- Health Maintenance Demo
- Addressing a Rule
- Generate a Health Maintenance Report / Patient Reminders (MU)

Order Entry – Presentation and Practical Application

- Order Manager
- Order Entry Setup
- Immunization Registries Data Submission (MU)

Clinical Lab Test Results – Presentation

- Creating Lab Tests
- Documenting Labs
- Creating Lab Docuplates



Flow Sheets

- Flow Sheet Docuplates/Examples
- Creating Flow Sheet Items
- Creating a Flow Sheet Docuplate
- Editing a Flow Sheet Docuplate
- Creating a Lab Flow Sheet

Document Designer – Presentation and Practical Application

- Introduction to Document Designer
 - How to Access Document Designer
 - Document Designer Interface
 - Example of a Basic Document Design
 - Entering and Editing Text in Document Designer
 - Using Data Items and Macros in Document Designer
 - Print a Clinical/Medical Summary (MU)
 - Design Properties
- Saving and Printing a Document Design

Document and Chart Management – Exporting – Presentation and Practical Application

- Chart Sharing Feature
 - Interface Basics
 - Selecting Charts to Share
 - Selecting Charts Sections to Share
 - Selecting the Export Location
 - Saving Export Formats
 - Word Documents DO NOT Export
 - HIPAA Regulations RE: Security (Encrypted e-mail)
- Providing Patient Requested Copies of Records (MU)
- Electronic Exchange of Clinical Information (MU)

Document and Chart Management – Importing - Presentation

- Drag & Drop Files into SOAPware
- Scanning
 - Setting Scan Options
 - Scan Directly into SOAPware
 - Scanning Multi-Page Documents
 - Scanned Signatures
- Document Importer
 - Document Import Workspace
 - Importing Files



Scheduler

- Setting Up Facilities
 - Details
 - Scheduler
 - Additional IDs
- Introduction to Scheduler
 - Navigation
 - Views
 - Time Increments
 - Coloring
- Scheduling an Appointment
 - Searching for Available Appointments
 - Change the Appointment Status
 - Scheduling Repeat Appointments
 - Deleting an Appointment
 - Moving an Appointment

Scheduler Reports