



Workshop 2010 Agenda

To follow the path at home go to:

http://soapedia.mysoapware.com/010_Introduction_Guides/SOAPware_Getting_Started/1_-_Welcome_To_SOAPware

Click the link at the bottom of each page to continue to follow the path as you get started on using SOAPware!

Welcome to SOAPware

- **Welcome to SOAPware and our Quick Start Guide**
- **Soapware Resources**
 - Community
 - Training
 - Support
 - Sharing

- **Intro to SOAPedia**
 - Site Layout
 - Navigation Tree
 - Page Bar
 - Page information
 - Site Bar

- **Implementation for SOAPware-Do not fail to plan**
 - Share Point

- **Exploring SOAPware**
 - Open and log into SOAPware
 - Explore the SOAPware Interface
 - User vs. Provider
 - Exploring Toolbars
 - Exploring Docked Tabbed Viewers
 - Expanding/collapsing Docked Tabbed Viewers
 - Pin open Docked Viewers
 - Closing Docked Viewers
 - Moving Docked Viewers
 - Removing Docked Tabbed Viewers
 - Explore the SOAPware Workspaces
 - Understand SOAPware commands
 - Find Help When Needed

- **Intro to Chart**
- **Chart Interface Basics**
 - Chart Rack
 - Creating Charts
 - Retrieving Charts
 - Chart Navigator
 - Chart Section List
 - Accessing Chart Sections not in current layout
 - Close Chart Section viewer
 - Docutainers
 - Upper Splitter bar/Docutainer Demographics
 - Lower Splitter bar/Docutainer/document list
 - Docutainer mini-toolbar
- **Preferred Chart Layout**
 - Chart Layout
 - Chart Layout Examples
 - Customizing Chart Sections in Chart Layouts
 - Sections Menu
 - Menu items in the Chart Section Tab
 - Saving Chart Layouts
 - Lock Chart Layouts
- **Custom Chart View/Layouts**
 - Add a Horizontal Separator to a Chart Layout
 - Add a Vertical Separator to a Chart Layout
- **Chart Navigator Views**
 - Relationship View
 - Find Docutainer/Documents
 - Add Chart Section to Chart Layout
 - Linear View
 - Timeline View
- **Intro to Task Manager**
 - The Challenge of Common Tasks
 - Tasks Manager has 2 key functions
 - New Task items are Created in 2 Fashions
- **Introductions into Editing of Text**
 - Placing the Insertion Point
 - Bracket Colors

- **Select Data Entry Methods**
 - Free Text or Structured Data?
 - **SMARTText Introduction**
 - Overview
 - The Details—“AMP up your documentation”
 - Structured Text
 - Objects vs Free-text
 - Highlight-Selecting
 - Cut Copy Paste
 - Delete
 - Move or Drag-and-Drop

- **Select Data Entry Methods Part II**
 - Examples of Free Text vs Structured Text

- **Intro to Editing of Text Part II**
 - Editing/Highlight/Cut and Copy/Drag and Drop/Delete Rules for Free Text
 - Editing/Highlight/Cut and Copy/Drag and Drop/Delete Rules for Structured Text

- **Find SMARTText Items When Creating Documentation**
 - SMARTText Items Manager
 - Finding Items
 - Inserting Items
 - Filter to Narrow Searches
 - Pick Lists Types
 - F11 Pick Lists
 - Shift + F11 Pick Lists
 - Spacebar Pick Lists
 - Quick Access Location Pick Lists
 - Quick Access SMARTText Pick Lists
 - Alternative to Finding Items-Type in Free Text

- **Select Data Entry Methods-Part III**
 - SMARTText in Pick Lists
 - Docuplates
 - Free Text and Unstructured
 - Dragon Naturally Speaking
 - Scan in Paper Encounter Forms
 - Dictate and use Transcriptionists
 - Scan in your Handwritten Documentation
 - How to “Start to Chart” the 90%

- **Visit Documentation**

- Demographics
- **Contacts/Referrals**
 - Viewing Contacts
 - Adding Contacts
 - Updating/Editing Contacts
 - Removing Contacts
- **Insurance Companies**
 - Insurance Companies Overview
 - Using Insurance Companies
 - Adding a New Insurance Company
 - Edit or delete an Insurance Company
- **Custom Demographics**
- **Visit Documentation continued**
 - Summary Documentation
 - SOAP note Encounter Notes
 - Logistic Considerations For Data Entry
 - Classic and Legacy SOAP note Fields
 - First SOAP note Encounter Note Entry
 - View Previous Encounters
 - Subjective Entry
 - Chief Complaint
 - Free Text Chief Complaint Entry
 - Structured Chief Complaint Entry
 - RFE=Reason for Encounter
 - History of Present Illness
 - Insert a 2nd or 3rd complaint or issue
 - Objective Entry
 - Vital Signs
 - Exam Systems Data Entry
 - Assessment Entry
 - Plan Entry
 - Medication Entry
 - Follow up
 - Remove unused items
- **Creating Handouts**
 - Paper Connection
 - The Handouts Manager
 - Selecting Handouts within the Handouts Manager
 - Selecting Handouts Automatically
 - Adding a New Handouts

- Editing an Existing Handouts
- Deleting an Existing Handouts
- Printing a Handout- Individually
- Upload and Download Handouts

- **End of Visit**
 - Prescriptions/Electronic Prescribing
 - Print Prescriptions from Rx Manager
 - Summary Update in Rx Manager
 - Available Document Designs
 - Print Handouts Automatically when other Documents are Printed
 - Creating a Billing Statement
 - Printing a Billing Statement
 - Addendum
 - Document History
 - Signing Off

- ***Practical Application Part 1***

- **Tasks Manager**
 - Interface
 - Access the Tasks Manager
 - Task Manager Area
 - Task Item Area
 - Functionality
 - Choosing Tasks to View
 - Customize the Tasks Manager View
 - Select Task Item Details/Columns
 - Show Inactive and Deleted Task Items
 - Editing a Task
 - Editing Multiple Items
 - Performing Edits
 - Viewing Task Note
 - Viewing an Associated Document
 - Using Task Manager to Retrieve Charts
 - Adding a New Task
 - Signing off on Task
 - Completing/Complete a Task
 - Removing/Delete a Task
 - Document History
 - Printing Task Lists

- **Document Review**
 - Documents Pending Signatures
 - Navigation Key Commands

- **Creating and Managing a New Lab Report**
 - In-house
 - HL7

- **Docuplates-Speeding up Documentation**
 - Definition of a Docuplate
 - Find a Docuplate
 - Insert a SOAP note Docuplate-train_Infc

- **Pick List Creation**
 - Create a code expander/macro
 - Update SMARTText Items Prior to Creating Pick Lists
 - Create a Simple Pick List
 - Add Items to a Pick List Using SMARTText Items in the Local Library
 - Remove Items from a Pick List
 - Add a Pick List to Documentation

- **Obtaining Pick List Sub-Items**
 - Check the Library First
 - Edit or Duplicate Existing SMARTText Items

- **Docuplates - Part II**
 - Creating a Docuplate
 - Save a Docuplate
 - Edit a Docuplate
 - Delete a Docuplate
 - F5 Quick Entry of a Docuplate
 - Docuplate Toolkit

- **E-Prescribing**
 - Register and Map License
 - Pharmacy set-up
 - Erx Monitor
 - Refills
 - Setting up your Structured Rx
 - G Codes

- **Health Maintenance**
 - Health Maintenance Demo
 - Addressing a Rule
 - Generate a Health Maintenance Reports

- **Flow Sheets**
 - Introduction
 - Adding a New Flow Sheet Item to a Chart
- ***Practical Application Part 2***

- **Document Management**
 - Drag and Drop Files into SOAPware
 - Scanning Documents Directly into Chart

- **Chart Merger**

- **Chart Archiver**

- **Intro to Document Import**
 - Document Import Workspace
 - Select Patients in Mini-Chart Rack
 - Select Folders in Folder Browser
 - Select files to Import
 - Selecting Multiple Items to Import
 - View Files Options
 - Select the Chart Section For the Import
 - Creating Task List items for Imports

- **Intro to Chart Sharing**
 - Chart Sharing Interface Basics
 - Selecting Charts to Share
 - Selecting Chart Sections to Share
 - Selecting the Export Location
 - Saving export formats
 - HIPAA and Encrypted E-mail
- ***Practical Application Part 3***

- **Intro to Scheduler**
 - Set up Facilities
 - Details Tab/Clinic information
 - Scheduler Tab
 - Adding a Resource
 - Clinician Working Hours Management
 - Recurrence Management
 - Business Hours Management
 - Facility Closings
 - Creating Schedupdates
 - Scheduling an Appointment

- **Intro to Data Explorer**
 - Intro
 - Searching for Data
 - Managing Results
 - Reporting

- **SOAPware Set Up**
 - To Address First
 - Activate Licenses
 - E-prescribing
 - SOAPwareXchange
 - SOAPware HL7
 - SOAPware Faxing Service
 - Clinical Knowledge
 - SOAPware Off Site Back Up
 - Welch-Allyn vitals Integration (Professional Version only)
 - Instant Medical History Integration (Professional Version only)
 - IQMark ECG,Holter, Spirometry Integrations (Professional Version only)
 - Dragon Naturally Speaking

- **Intro to Security Manager**
 - Why security?
 - Creating a new user
 - Search Audit Log

- **Set up Security Manager**
 - Groups
 - Roles
 - Users
 - Setting up a Group/Roles
 - Setting up Users
 - Setting Practice Security Defaults
 - Password Policy
 - Lockout Policy
 - Transaction Logging
 - Idle Logout
 - Login Window

- **Delete a User and Reassign Tasks**

- **Set up Groups/Pay-To Information**

- **Set up Clinician(s) and Provider Manager**
 - Accessing Provider Manager
 - Adding a Provider

- Provider Manager Tabs
- Editing in Provider Manager
- **List Options**
 - Creating a New List
 - Adding Items to a New List
 - Modify an Existing Item
 - Delete an Item from a List
 - Delete a List
- **Tools-Options**
 - Toolbars
 - Vital Signs
 - Workflow
 - Chart Layouts
 - Chart Rack
 - Document Designer – **Quick Print Key-Commands**
 - Docuplates
 - Drug Interactions
 - OCR
 - Pulled Charts
 - Scanning
 - SMARText
 - Structured Billing
 - Structured Dx
 - Structured Order Entry: Order Manager
 - Plan Options
 - Structured Order Entry: Plan
 - Structured Rx-SOAPware 2008
 - Structured Rx- SOAPware 2009-Default Layout Tab
 - Structured Rx- Summary Layout Tab
 - Structured Rx-Printing Faxing Tab
 - Structured Rx-Scheduled Drugs Tab
 - Item Headers
 - Rx Layout
- **Intro to Document Designer**
 - Example of a Document Design
 - Document Designer Interface
 - Data Items Menu
 - Design Properties
 - Headers and Footers
 - Inserting page numbers
 - Inserting an image/signature
 - Using Tables

- Ask User
- ***Practical Application Part 4***

- **Customizing Toolbars**
 - Interface
 - Selecting a Toolbar to be Displayed
 - Creating a New Toolbar
 - Renaming a Toolbar
 - Deleting a Toolbar
 - Resetting a Toolbar
 - Saving a Toolbar

- **Key-Commands**
 - General Windows Shortcuts
 - Navigation
 - Navigation between SMARText Items
 - Test Manipulation
 - Date/Time
 - Tasks List
 - Chart Navigator
 - Pulled Chart
 - Document Designer
 - SOAP Encounter Notes
 - SMARText/Docuplate/Encounter
 - Objective
 - Assessment
 - Medications
 - Vital Signs
 - Chart Rack

- **Key-command Customization**
 - Introduction
 - Interface
 - Functionality
 - Assigning a Keyboard Shortcut to a Command
 - Removing a Keyboard Shortcut from a Command
 - Resetting all Keyboard Shortcuts

- **Custom Chart Sections**
 - Interface
 - Using the Chart Section Editor
 - Creating a New Chart Section

- Editing a Chart Section
- Removing a Chart Section

- **Creating Field Headers**
 - Enable Editing of SMARText Outside of Fields
 - Create the New Field Item
 - Insert the New Field Item
 - Re-Disable the Editing Outside of Fields
 - Hide a Field/Header

- **Setting up your Default Docuplates**
 - Downloading Docuplates to a Local Database
 - Selecting a Default Docuplate
 - Demo of the new default Docuplate

- **The Framework and E & M Coder**
 - The Framework for SMARText Documentation
 - History
 - Exam
 - Vitals Signs
 - Lymph
 - Decision Making
 - Number of Problems/Diagnosis
 - Data/Studies
 - Level of Risk

- **Get Started with your own Documentation**
 - Starter Shortcuts
 - Practice to gain familiarity

- **Order Entry Setup**

- **Order Entry**
 - Creating an Order in SMARText
 - Destination Manager
 - Placing an Order using Insert Order (F4)
 - Placing an Order Using Order Manager
 - Editing an Order in Order Manager
 - Transferring an Order to the SOAP Encounter Note using Order Manager
 - Setting up Structured Order Entry

- **Order Sets / Structure Editor**
- ***Practical Application Part 5***

- **Example of a Customized Docuplate**
- **Subjective Documentation**
- **Chief Complaint (or Reason for Encounter)**
- **History of Present Illness (HPI)**
- **Review of Systems (ROS)**
- **Subjective workflow demonstration for URI**
- **Free-text typing in Subjective**
- **Pick List in Subjective**
- **Toggles in Subjective**

- **Objective Documentation**
 - Insert from the Objective menu
 - Start the Exam Documentation with a SMARTText Item
 - SMARTText item Objx
 - SMARTText item Objn
 - Enter Docuplate that inserts items

- **Objective workflow demo for URI**
- **Objective Docuplate creation for URI**

- **Assessment Documentation**
 - Free-text typing directly into the field
 - Typing in a shortcut code that expands into the detailed item
 - Quick Access Pick List
 - Docuplates
 - Customized Pick Lists (often included in Docuplate)
 - Double-clicking on an item in the SMARTText Items Manager

- **Plan**
 - Free-text typing directly into the field
 - Typing in a shortcut that expands into the detailed plan item
 - Quick Access Pick List
 - Docuplates
 - Customized Pick Lists often included in Docuplates)
 - Double-clicking on an items in the SMARTText Items Manager

- **Plan, Medication, Assessment Workflow demo for URI**
- **Plan, Medication, Assessment Docuplate creation for URI**

- **SWICPC- Relating SMARTText Items**
- **SWICPC- SMARTText Relations**

- Your “Top 20”

Advanced SMARText #1

- **SMARText Designer**
 - General Area in SMARText Designer
 - Shortcut Field
 - Description Field
 - Keywords Field
 - Item Type Field
 - Display Header and “only when item is empty” checkbox
 - Display Field
 - Item Settings Area in SMARText Designer
 - Item Separators
 - Include in E & M Coder
 - Remove this item via “Removed Unused”
 - Coding-Notes Area
 - Structure Viewer Area
- **Pick list within a pick list**
- **SMARText Item Types**

Advanced SMARText #2

- **Ranking and Usage Counts in Pick Lists**
 - Ranking Rules for Pick List Item
 - Ranking Rules in Quick Access
 - Chief Complaint and Usage Counts
 - Pre-Assigning the Order of Pick Lists via Usage Counts
- **Quick Add**
- ***Practical Application Part 6***

Implementation Planning #1

- Implementation Planning For SOAPware
- Preparing for Implementation
- PEOPLEware
- Change Readiness
 - Change Readiness =Leadership + Change Management
 - How could you know if you are ready?

- **Leadership**
 - Personal Mastery
 - Engagement of Other in a Shared Vision
 - Power Sharing
 - Communication
 - Recognition
 - Is there evidence the leader has courage?

- **Change Management**
 - Teamwork
 - Gartner Hype Cycle
 - Change Process Understanding
 - Staff Communication
 - Managing Change Confusion
 - Regularly Reflect

- **Goals, Expectations**
 - Leading Edge High Performance Practices
 - Initially, Focus on Documentation of Office Visits
 - Most transition through 3 stages

- **Alternatives-Bleeding-Edge, Low-Performance Practices**
 - Characteristics of Bleeding-Edge Low Performance Practices
 - What approach are you choosing today?
 - Talk is cheap!

- **Success Culture**
 - Keys to Success
 - Plan for Change
 - Create an Environment and Culture which Values Change

- **Planning**
 - Implementation Phases (example)
 - Plan for Change
 - Develop a week by week implementation schedule
 - Survey staff Implementation Process

- **Workflow Changes**
 - Patient Encounter Note or Record of Visit
 - Prescriptions Refills
 - Return Appointment
 - Letters
 - Templates to Implement Practice Guideline, Standardize
 - Manage Results (i.e. lab, x-ray)
 - Health Maintenance Recalls

- Flow Charts
- Lab Management
- Order Entry-Tracking, Order Sets
- Consultations
- Record Allergies and Type of Reaction
- Interaction Checking
- Message Management-Internal and External
- Images-photos, ekg's, etc.
- Patient Education- Print as Needed, web links
- Interfaces
- Super Bill (ICE and COPT codes for Proper Billing)
- Patient Note for Work or School
- Loose Reports
- Nursing Tasks
- Data Entry Specialist (transcriptionist?)
- Front Office Clerical
- Demographics
- Sign-in (patient registration)
- Sign-out
- Release of Information
- No Shows; Cancellations
- Consent for Treatment
- Release of Information

- **Data Entry**
 - Issues to address
 - Patient History
 - Findings

- **Paper to Paperless**
 - Paper to Paperless Issues
 - Stages
 - Identify all paper-based documents and tasks in the clinic
 - Establish Sequential File Locations
 - Task List Migration

- **Scanning Strategy**
 - Protocol to retire paper chart via abstraction
 - Overview
 - Create a list of Items older than 3 years to enter into EMR
 - Create a list of items not to bring to EMR
 - Summarizing/Abstraction
 - Create a list of Abbreviations

- **Customization**
 - Initial Customizations
 - Customizations Over Time

- **Note Design**
 - Patient encounter note or record of visit
 - Documentation and Clinical Information Tasks
 - Specific Documentation Task to Address
 - Prescription management
 - Return Appointments

- **Transitioning to Live**
 - Series of Pilots
 - Verify the Essential, Unique Customizations have been addressed
 - Just Do It!
 - Soon After Transition to Electronic

- **Training**
 - Training Stages
 - Preliminary or introductory Training
 - Plan with and Use SOAPware with Sample Patients
 - Training Methods
 - Training-Certification

- **Practice the New Workflows**
 - Each Staff Person to Repeat Each Workflow they Routinely Perform
 - A Consistent Path to Success

- **Evolution, not Revolution**
 - Incremental Ramp-Ups
 - Transition Date
 - Discontinue Chart Pulls Date
 - On-going Transitions