# Tips and Tricks in ECW 11

Every user wants to document their work more quickly in ECW. I have found a few functions in ECW that truly do speed up my documentation:

- mini-exam templates
- lab favorites
- lab aliases
- medication favorites
- templates
- macros
- medication summary filtered by medication
- pulling previous assessments using the upside down triangle (called a nabla, though many users call it a caret)

Some users would add patient-specific templates to this list, but I find them to be too blunt a function to be that useful to me.

Mini-Exam Templates
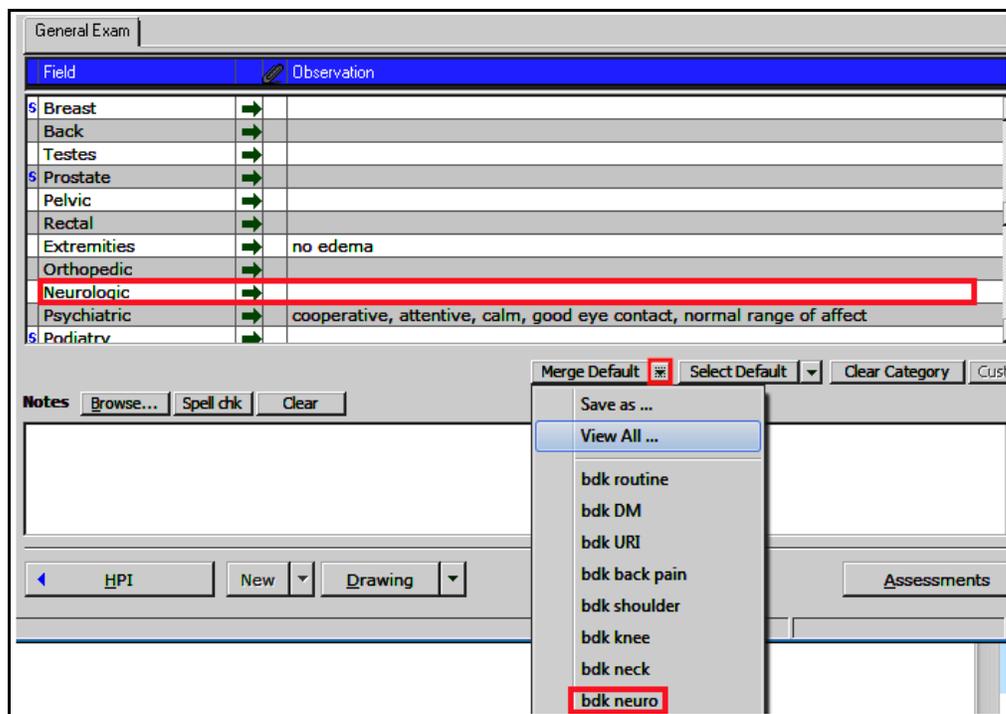
Mini-exam templates are extremely useful in cutting down on time spent charting. These are very easily created, and very easy to implement. The only requirement is that the exam area to be modified has to be empty in order for the text to be successfully merged into the note. In this case, I will merge the neurologic exam into this note with one click. "Select Default" can be used as well, but this copies over the entire note with the data in the template. Even if the exam template has only a neurologic exam included, EVERYTHING in the current exam will be wiped out, leaving ONLY the neurologic exam. I almost never use the "Select" function – and almost always use the "Merge" function.

I created this template with line breaks to make it easier to modify during the visit. To eliminate the line breaks, click on spell check. In ECW 11, this eliminates all formatting (in ECW 11e, it does not eliminate formatting).
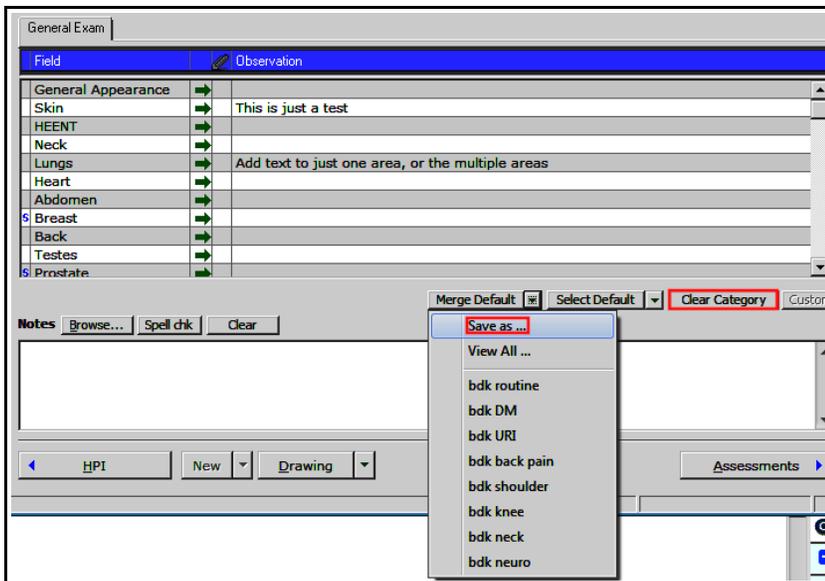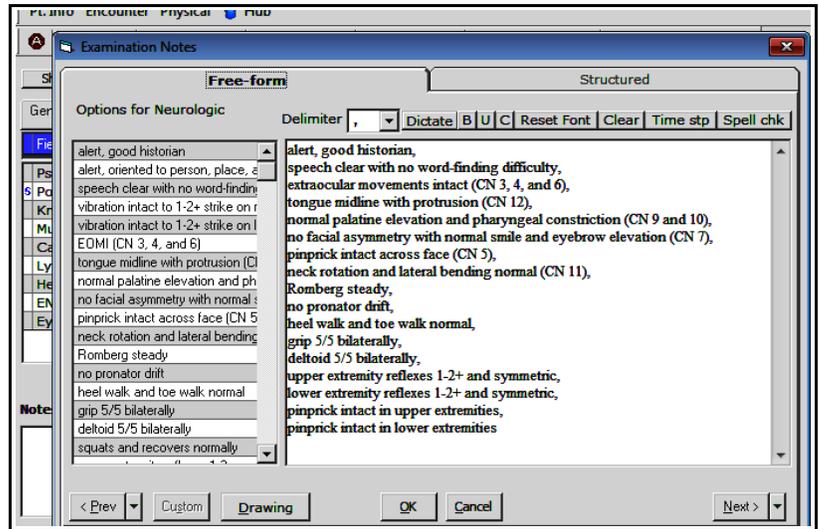

To create your own mini-exam template, I suggest selecting a test patient and starting with an empty physical exam. Click on "Clear Category" to eliminate all text in the exam. Then type in the text to create your own exam template. Click "Save as..." and choose a name for this template.

Mini-exam templates are unique to each provider, so you can use any name for this template that you haven't used in the past.
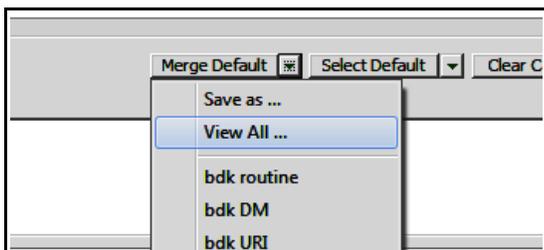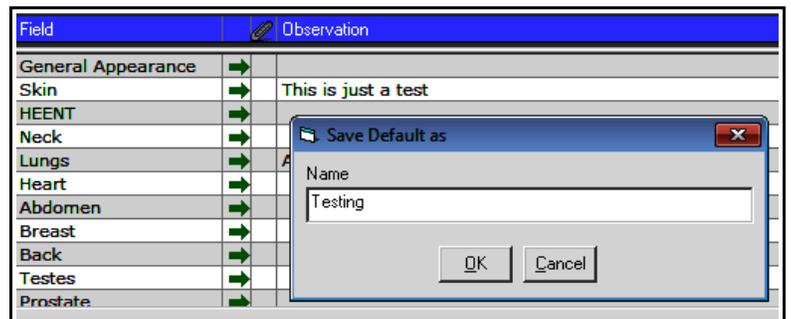

To review or update your templates, click on "View All...".

In this example, I corrected an error in the template. In this screen, I can also change the order of the templates, or delete a template that I no longer want. The "Global Default" template is the one that appears if the user clicks ON "Merge Default" rather then on the dropdown menu arrow next to "Merge Default".
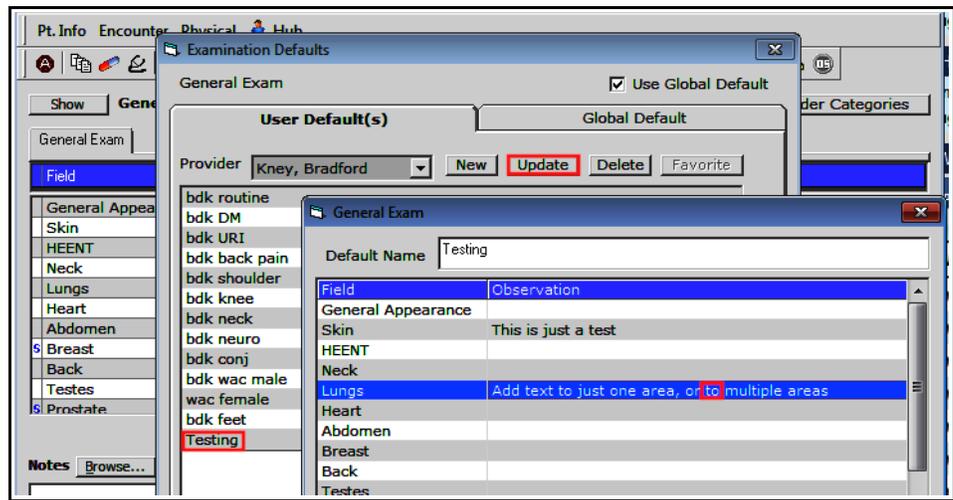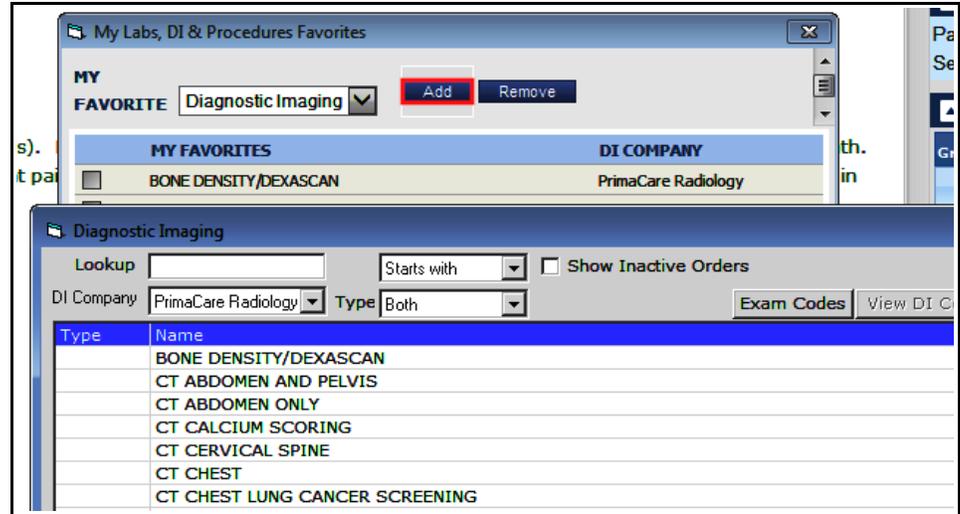

Lab and DI Favorites

These are pretty straight-forward – easy to set up, easy to use. To set up lab and DI favorites, go to EMR → Labs, DI & Procedures → My Labs, DI, & Procedures Favorites.
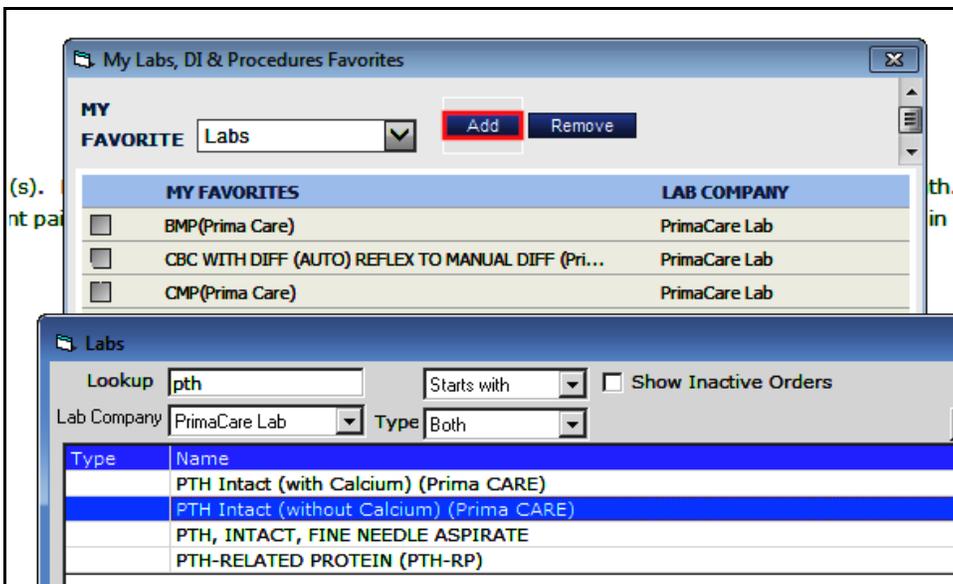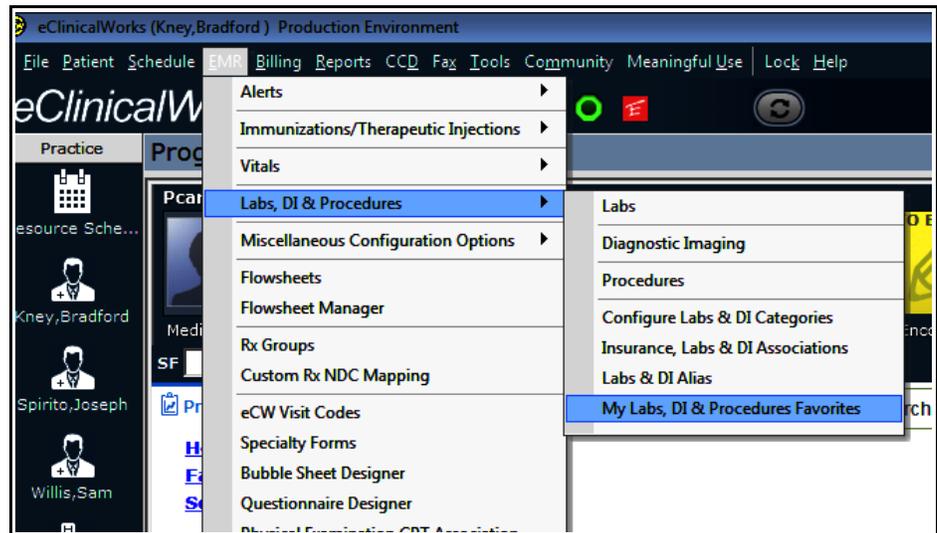
In this screen, my favorite labs are shown. To add a favorite lab, just click on "Add", type in the name of the lab, choose exactly what you want, and click OK.

Choosing favorite diagnostic images works in just the same way. To remove a favorite, select it by checking the box to the left of the name, and click "Remove".

When ordering labs and DI, just toggle the star on and off to show your favorites (or not).

Lab Alias

A lab alias is like a lab favorite, but it is practice-wide. I find these most useful in situations where many labs are required – like the annual bariatric labs, or the routine work-up of liver steatosis. In the screen to the right, the fatty liver alias is selected – the user can click on any of the desired labs very quickly.
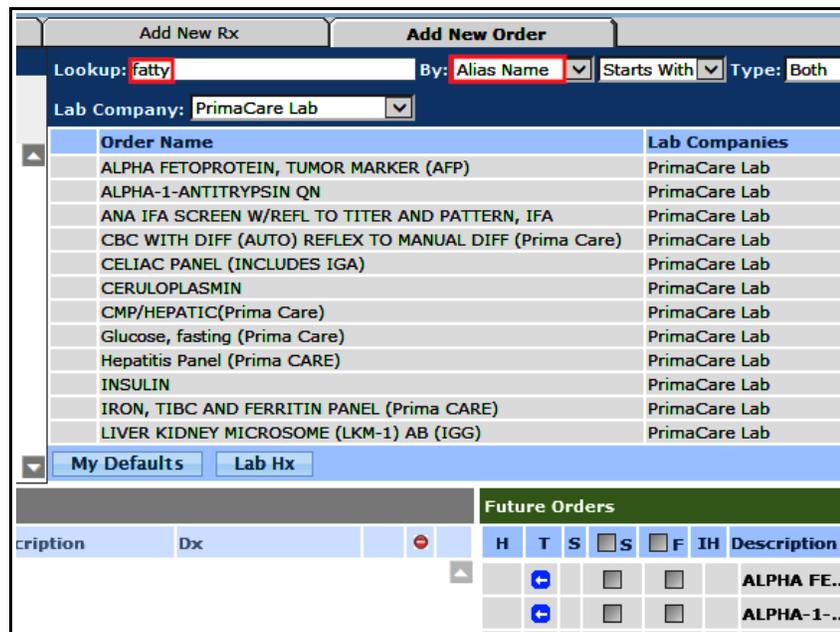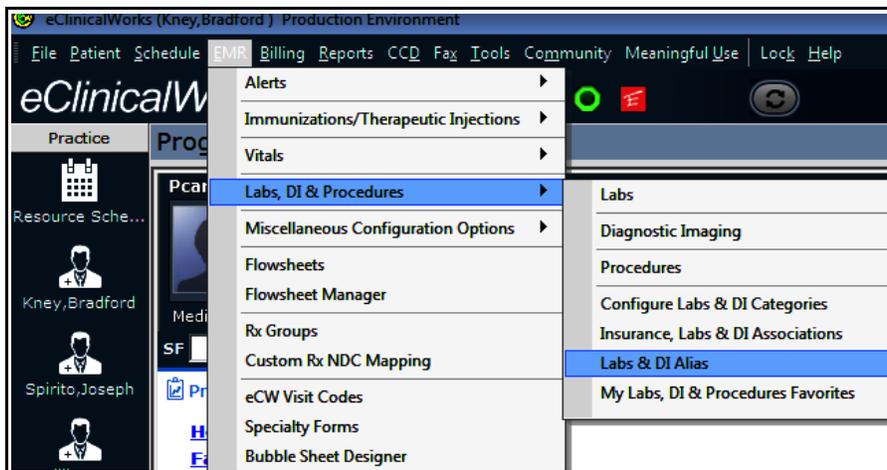
To create, update, or delete an lab alias, go to EMR → Lab, DI & Procedures → Labs & DI Alias.
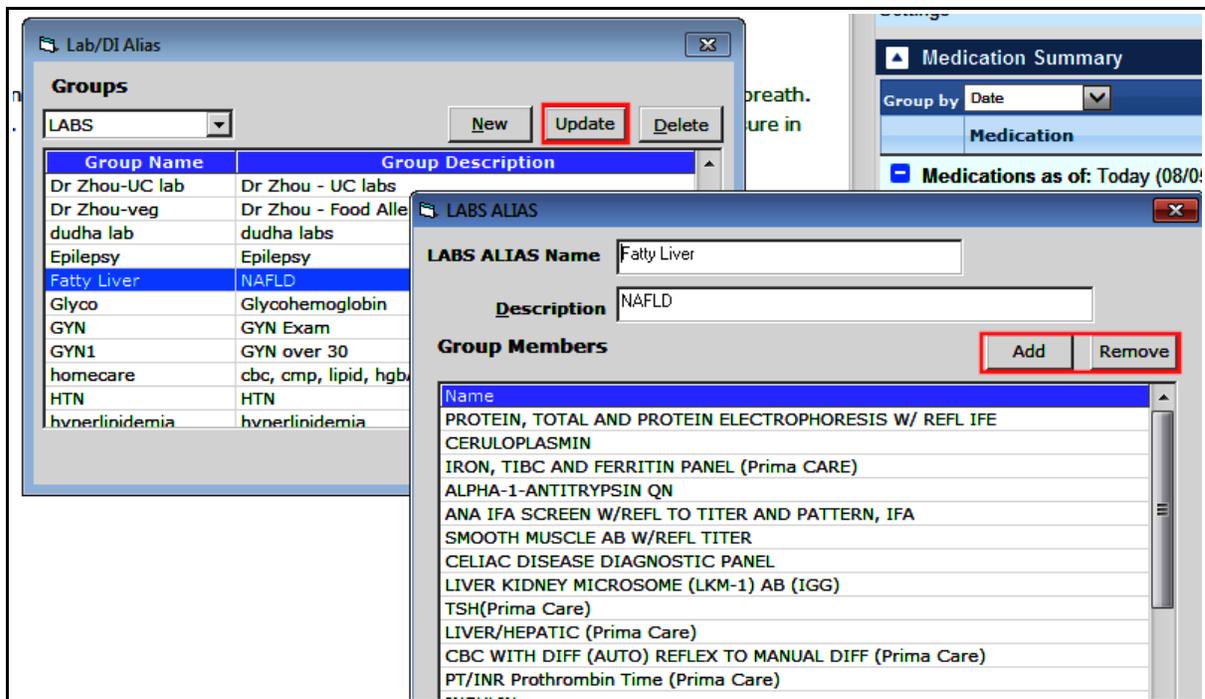
To see what is in an alias, just click on "Update" - but please DO NOT alter someone else's alias. You are free to use any alias you like, but don't change it unless you created it. To create your own alias, just click on "New", name it (the name must be unique – and it is best to preface the alias with your name or initials), and click on "Add" to select one lab at a time to add to the alias. To delete an alias you created, select it and hit "Delete".
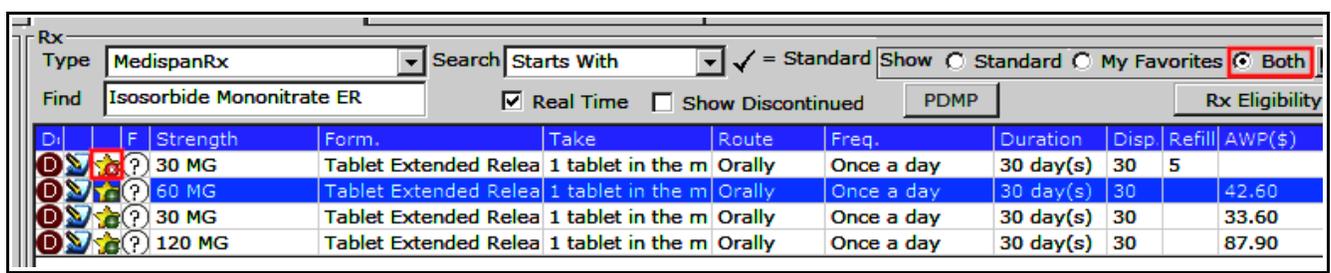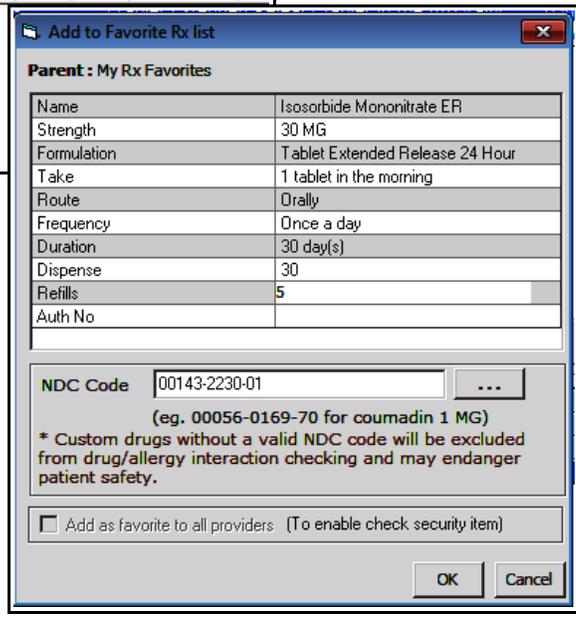
Medication Favorites

There is no question in my mind that medication favorites are the most effective tools to improve efficiency. A medication favorite can be added on the fly while you are seeing patients. Any prescription your write can be made a favorite with two clicks.
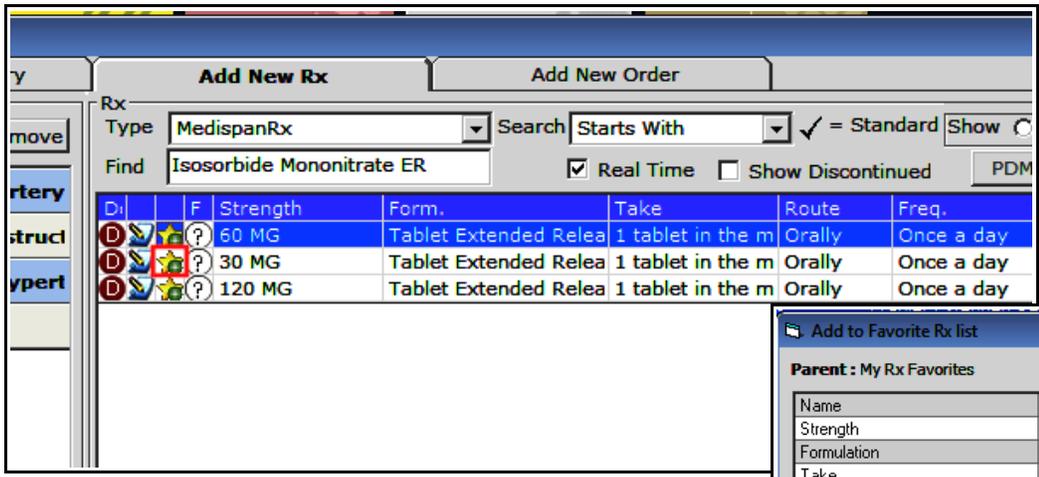
While writing a prescription for Imdur, click on the yellow star with a plus sign.

Fill in the details you wish in this favorite, click "OK", and you now have isosorbide mononitrate ER 30 mg, #30, 5 RF, as a favorite.

Clicking on the star again (now with "x" instead of "+" at the corner) will delete this from your medication favorites list. I prefer to see both my favorites and standard doses, so I set the default in "My Settings" to show both.
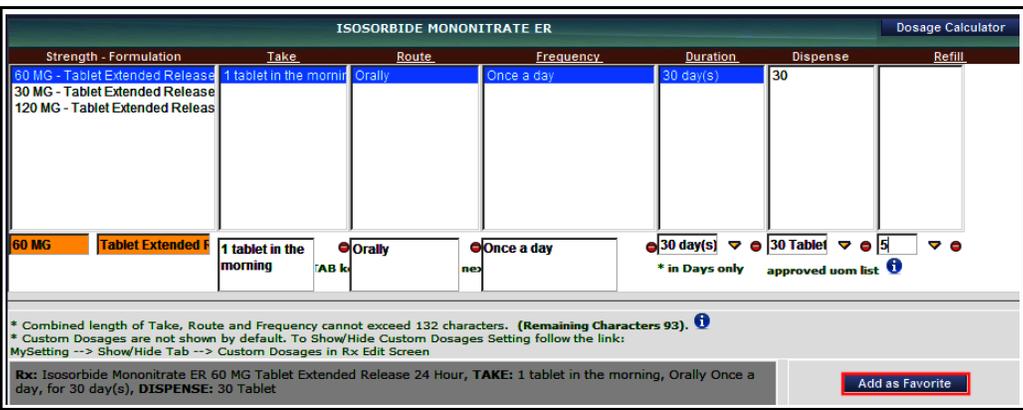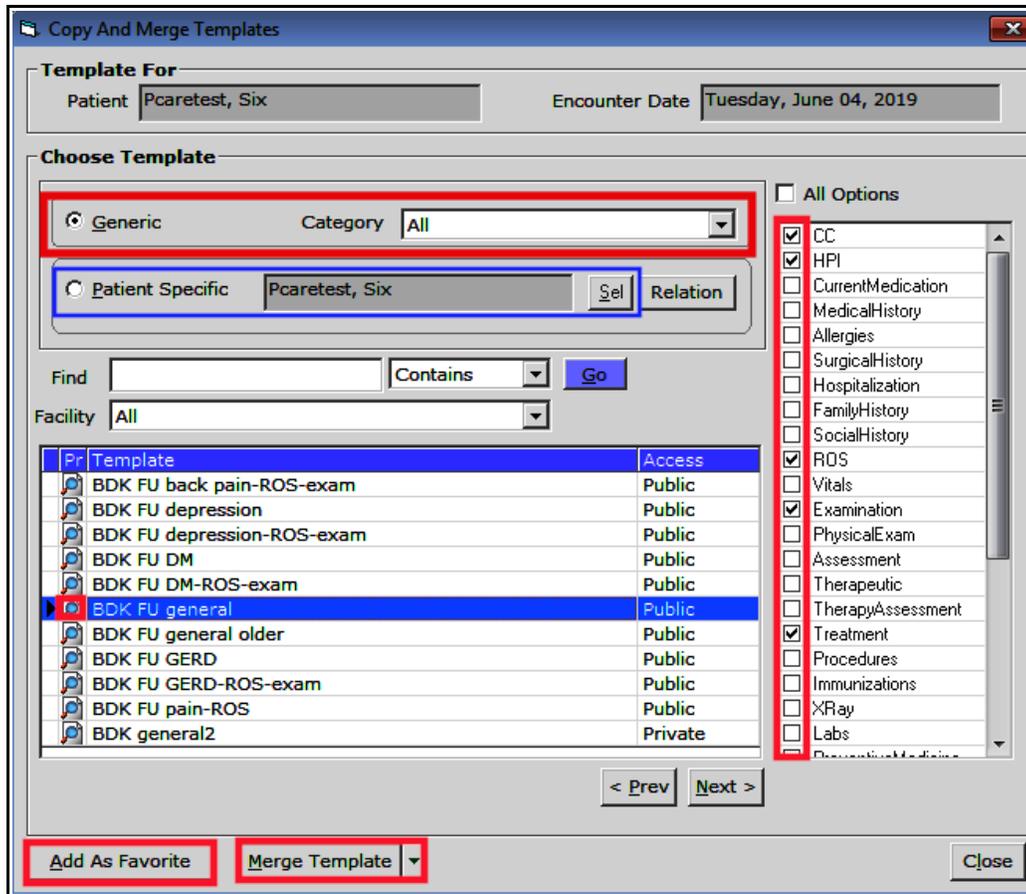

Medication favorites can also be added from the RxEdit screen by clicking on "Add as Favorite".
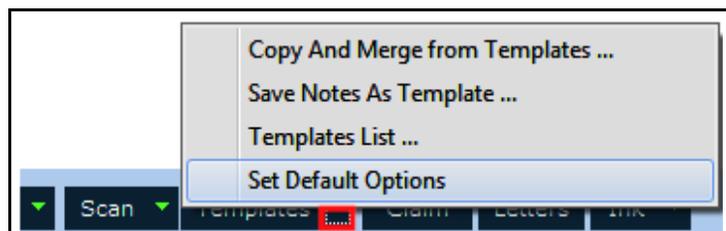
Templates

At the bottom of the progress note is a panel of options – one of which is to choose a template for the visit. Clicking on the "Template" button opens the template screen.


The filter in the screen above is set to "Generic" and "All". Once you set up your favorites, it will be much easier to quickly locate the template you wish to use by setting the category to "My Favorites". Selecting a template ("BDK FU general" in this example), then clicking on "Add As Favorite" will add the template to your favorites list. Clicking on the magnifying glass will open a view of the template. Select the options in the right panel to import into the note.

Access the menu shown to the right by clicking in the upside down triangle adjacent to "Template". Selecting the "Set Default Options" opens a screen to choose the sections of the note to include by default.

Clicking on "Merge Template" will merge the template into the note – meaning that if there is already text in a portion of the note, whatever is in the template will be merged with that text. If "Copy Template" is chosen instead, any section chosen in the right panel of the template screen will overwrite anything already in the note.
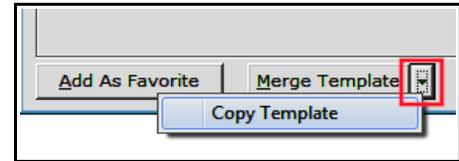
Patient specific templates (in the blue rectangle in the graphic on the previous page) are like copy and paste on steroids. It provides you with a list of this patient's previous visits, and allows you to import the entire note (or selected portions of the note) into the current note. You can even choose another patient's note to import into the current visit. I find this to be too blunt of an instrument, but in some circumstances, it can be helpful.
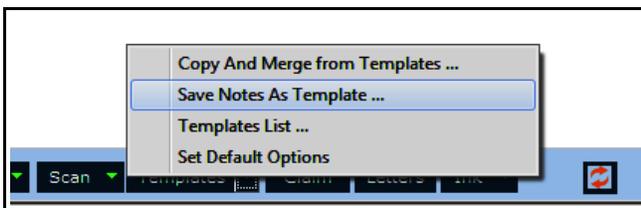

"Save Notes As Template..." is a very useful function. The link below opens a 4 page document explaining how to create your own templates from other templates and progress notes.

http://www.drkney.com/Videos_BDK/11_template.pdf

Macros

Macros are shortcuts to small sections of text. These can be used in the HPI and the treatment area. They are accessed by typing in the shortcut name, and then hitting the control key and spacebar at the same time.

To view, create, and update macros, go to EMR → Miscellaneous Configuration Options → Configure Macros.
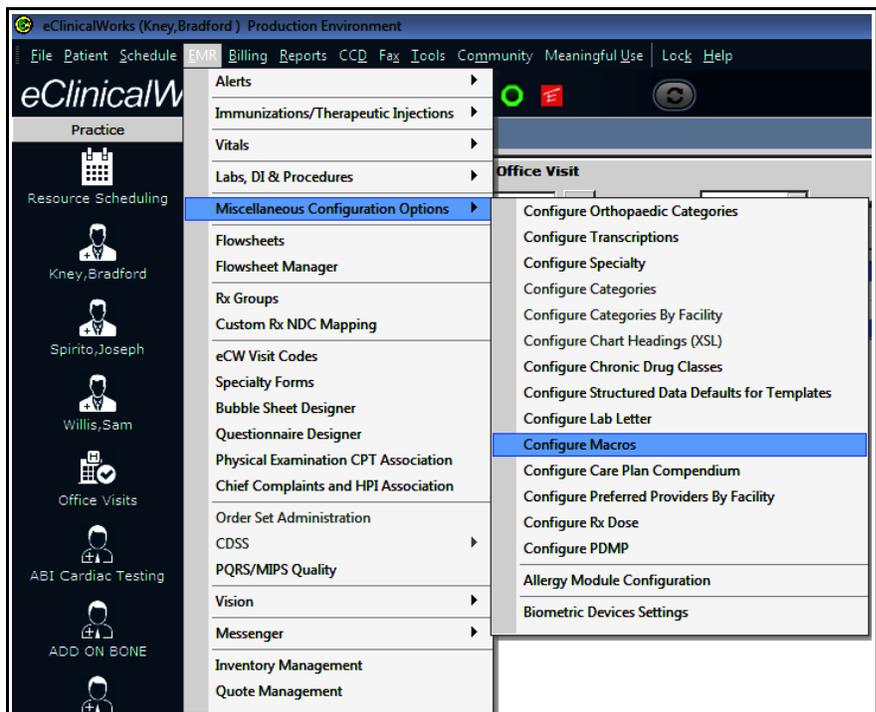
Create a name for the macro. Then add the shortcut name – this needs to be unique. Starting with your initials makes it very unlikely that any existing macros carry the same shortcut name (if the name is not unique, ECW will prompt you to create a different shortcut name).
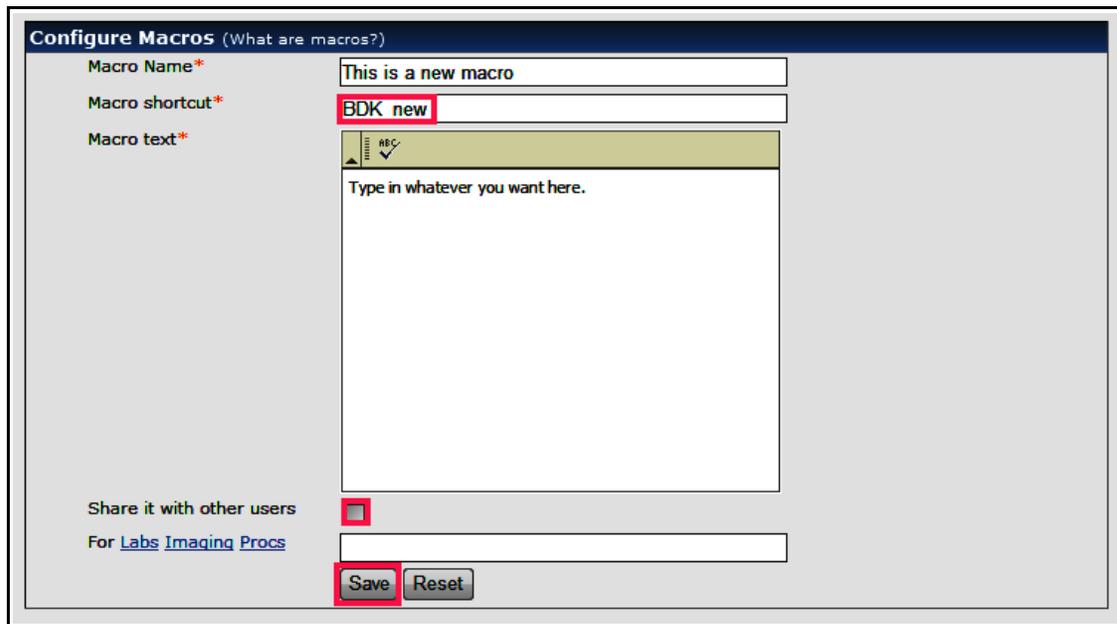

Now enter whatever text you wish – you can copy and paste this into the macro from another source.

You can choose to share this macro with others – just be aware that all other users will see this when they open their own macro configuration screen. I don't recommend sharing your macros across all of Prima CARE.
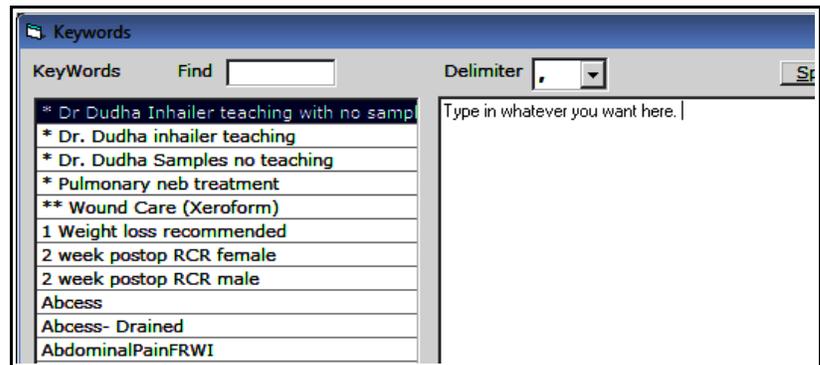
Now, save this macro, and you can use it immediately.

Macros work in HPI "Notes", but not in treatment "Notes" or "Clinical Notes" UNLESS you click on "Browse..." - macros do work in the "Keywords" screen of the treatment section.
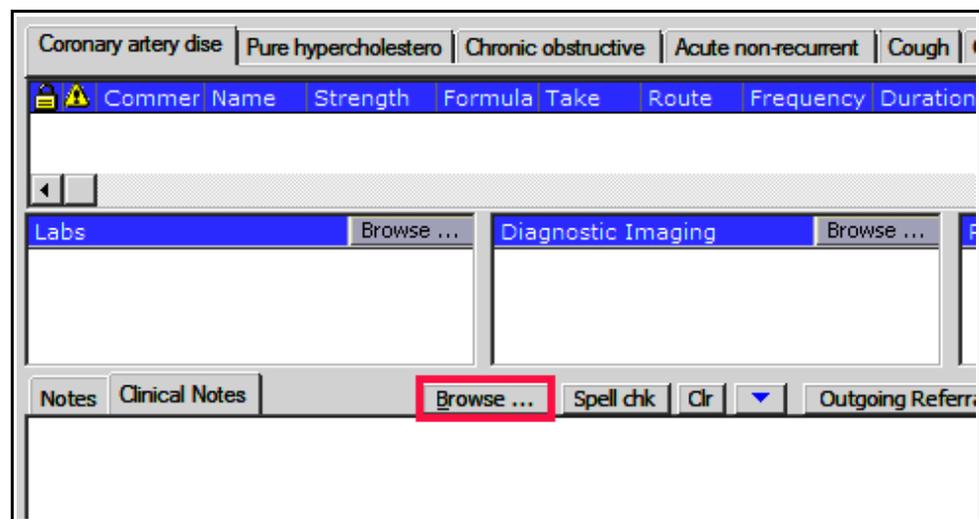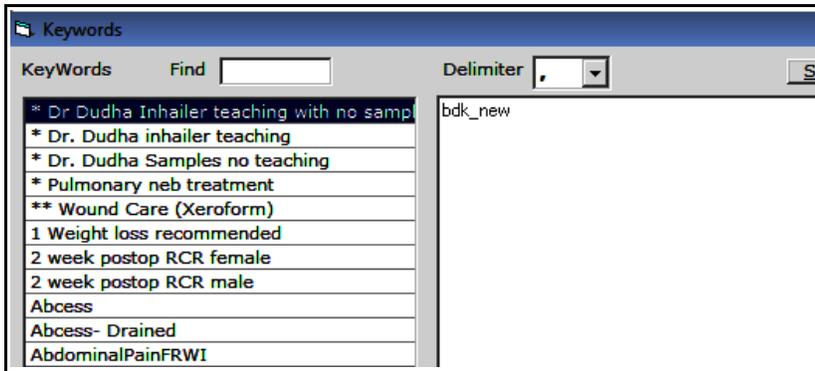
Enter the shortcut name – it is not case-sensitive – and then hit the control/spacebar keys at the same time...

and the text in the macro appears in the note. One inconsistency in ECW is that clicking on the "x" in most screens functions in the same way as clicking on "OK" does – but not in this screen. If you "x" out of this screen, any newly entered text is not saved. So click the "OK" button at the bottom of this screen when you are done.
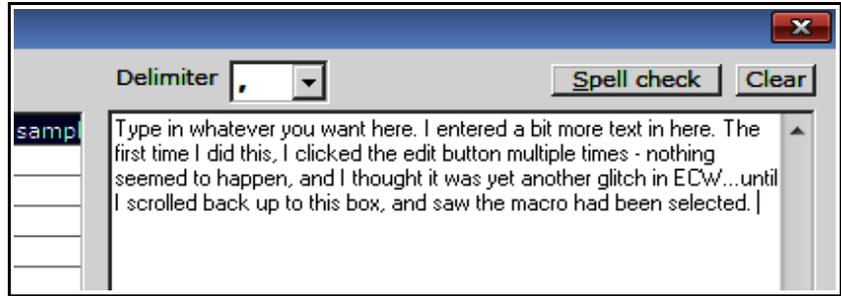

To edit the macro, go back to the macro configuration screen, and click "Edit". Nothing seems to happen, but if you scroll back up to the configuration box, the macro is selected.
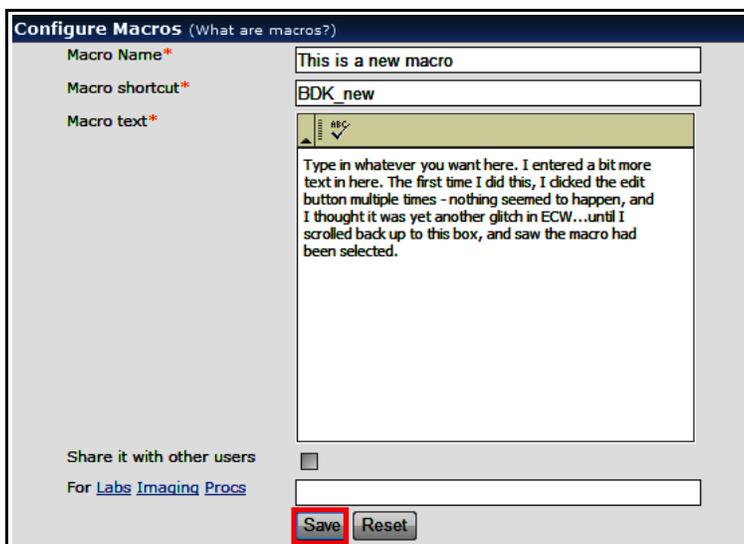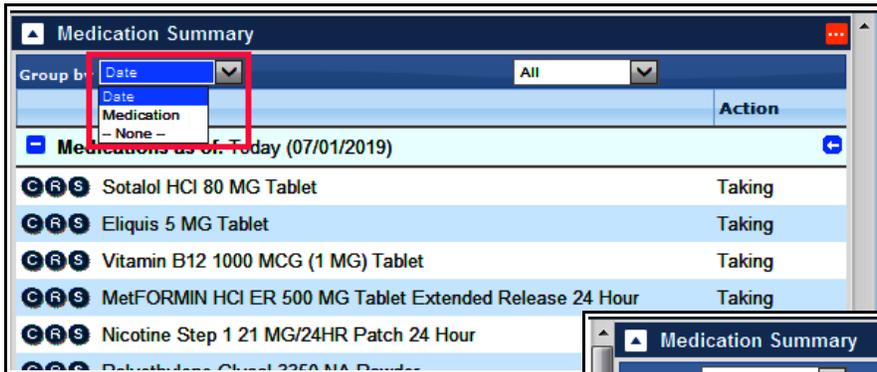

Update the macro, and click "Save".

Entering "bdk_new" and hitting the control/spacebar added the amended text into the note.
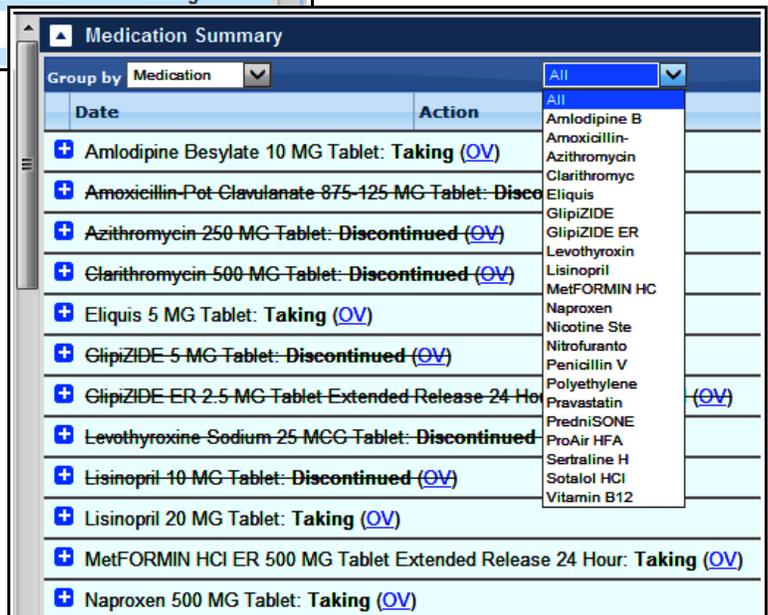

To get rid of the macro, just hit "Delete".

Medication Summary Filtered by "Medication"

In general, I prefer to filter the medication list in the Overview tab of the right panel by date...

...but changing the filter to "Medication" can be very useful to determine when a certain medication was started or stopped (or whether a medication was ever prescribed). In this example, choosing metformin from the dropdown list will open the screen on the following page.

Here, I can see that the metformin was stopped on 11/6/16, but then started again on 4/10/19. It looks like someone discontinued it in again on 5/22/19, but it was added back to the list on 6/17/19. To get more detail about these changes, I could easily go to "Encounters" and open the office visit from the date in question.

Using the Nabla to Import Past Visit Data

Clicking on the upside down triangle, or nabla, next to "Assessment" opens the last 2 assessments. This can be filtered by provider.

Clicking on "Show More" opens 2 more assessments. Check the boxes next to the assessments you want, then click "Merge" or "Copy" (copy overwrites any previous assessments, merge adds the choices to the current list of assessments).

This can also be accomplished using patient-specific templates, but using the nabla is much quicker and allows selective importation as opposed to importing all assessments.

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