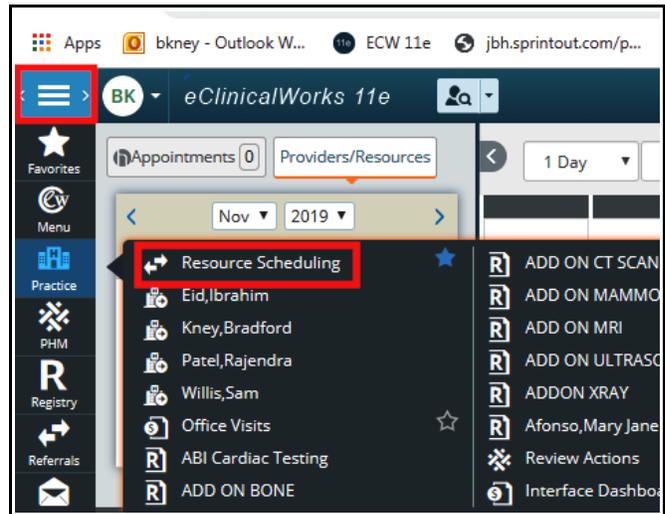


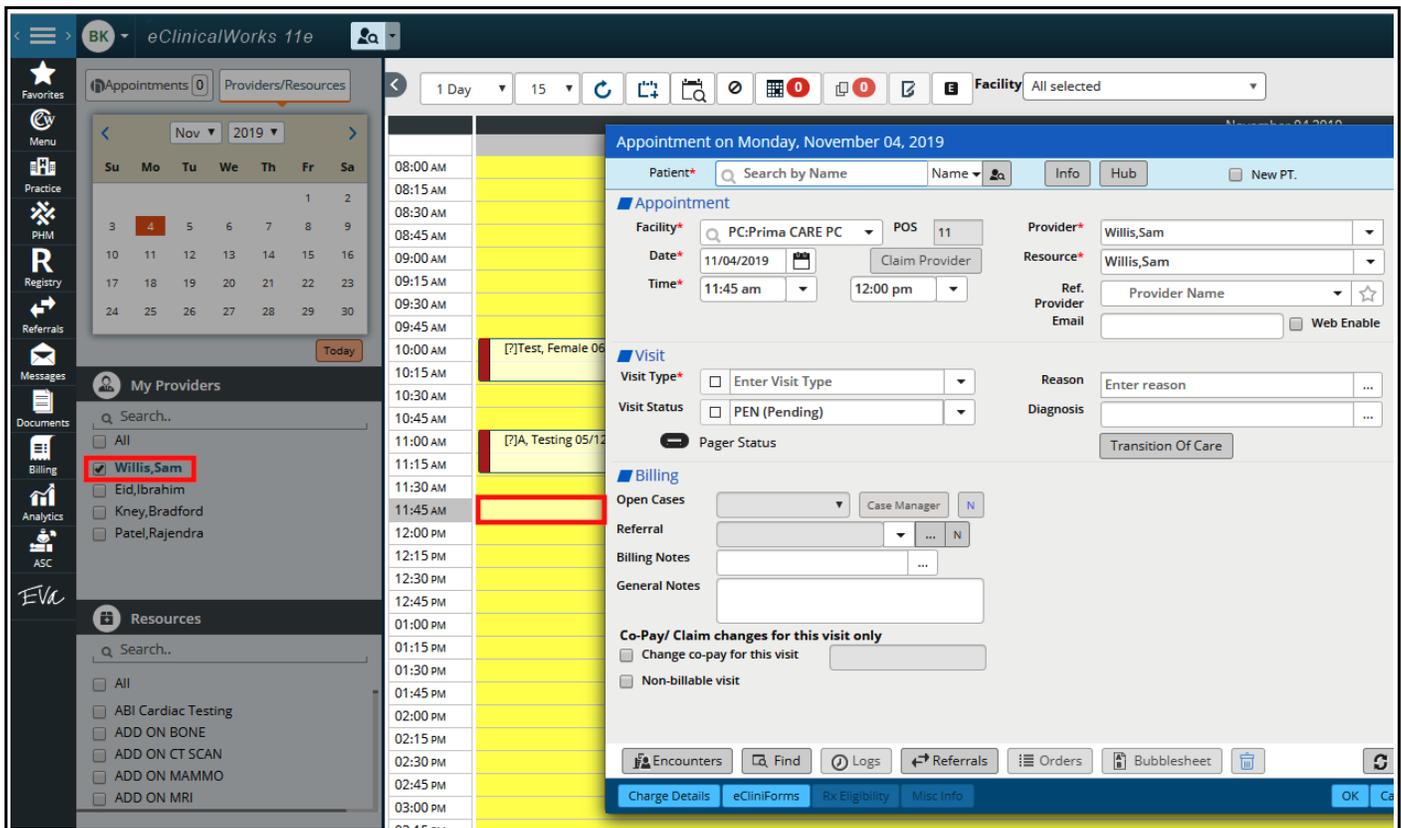
# Making an Appointment in eCW 11e

Appointments should always be made from the Resource Schedule. Although it is possible to make an appointment from the Hub and from the practice schedule, all the necessary information is not consistently pulled into the appointment if it is not generated from the Resource Schedule.

If the side panel is hidden, click on the 3 parallel lines at the top left of the screen (eCW calls this a hamburger). Then choose “Practice”, then choose “Resource Scheduling”.



Click on the provider with whom the appointment is to be scheduled, and then double click on the time chosen for the appointment.



Appointment on Monday, November 04, 2019

Patient\*  Name

**Appointment**

Facility\*

Date\*

Time\*

**Visit**

Visit Type\*  Enter Visit T

Visit Status  PEN (Pending)

Pager Status

- Name
- SSN
- DOB
- Account No
- Phone No
- Subscriber No
- Guarantor Name
- Home/Work/Cell Phone
- Previous Name
- Medical Record No

Select the patient for whom the visit is being made. Filters for this search include name, DOB, phone number, plus a few other choices.

There is an option for a secondary filter if needed.

Appointment on Monday, November 04, 2019

Patient\*  Name Info Hub  New PT.

**Appointment**

Facility\*

Date\*

Time\*

**Visit**

Visit Type\*  Enter Visit Type

Visit Status  PEN (Pending)

Pager Status

**Additional Search By**

- Name
- SSN
- DOB
- Account No
- Previous Name
- Medical Record No

Active

Appointment on Monday, November 04, 2019

Patient\*

Pcaretest, Five | 24 Sep 1936 | 508-965-7118

**Appointment**

Facility\*

Date\*

Time\*

**Visit**

Visit Type\*  Enter Visit Type

Visit Status  PEN (Pending)

Pager Status

**Billing**

Open Cases

Referral

Billing Notes

General Notes

**Co-Pay/ Claim changes for this visit only**

Change co-pay for this visit

Non-billable visit

**Alerts for Pcaretest, Five**

**Global Alerts**

Name	Notes
HIPAA SIGNED	

**Billing Alerts**

Testing for the Hub video

**Insurance Alerts**

Confirmation required. Patient requires wellness visits once a year.

**MU Alerts**

This patient has no Meaningful Use alerts.

**Payment Plan**

This patient has no Payment Plan

OK Cancel

Once the patient is chosen, an alert screen pops up. In most cases, just click on "OK" or "Cancel" - but if there is a pertinent alert, address it.

Appointment on Monday, November 04, 2019

Patient\* Pcaretest, Five x Name Info Hub

Pcaretest, Five | 24 Sep 1936 | 508-965-7118 | bradkney@gmail.com

**Appointment**

Facility\* PC:Prima CARE PC POS 11 Provider\* Willis,Sam

Date\* 11/04/2019 Claim Provider Resource\* Willis,Sam

Time\* 11:45 am 12:00 pm Ref. Provider Email bradkney@

**Visit**

Visit Type\* Enter Visit Type

Visit Status MVA (Motor Vehicle Accident)

NEW (New Patient)

NP (New Patient)

Nuclear (Nuclear Stress)

NV (Nurse Visit)

OOF (Out of Office)

ORTHO CONS (Ortho Consult)

General Notes OV (Office Visit)

Reason Enter reason

Diagnosis Transition

Select the type of visit from the dropdown menu.

A reason does not need to be entered, but it does provide anyone viewing the appointment schedule in the future with useful information about the upcoming visit.

Note that the Hub, the Info screen, and Encounters can be accessed easily from the appointment screen. A billing note or general note can be added in this screen as well.

Appointment on Monday, November 04, 2019

Patient\* Pcaretest, Five x Name Info Hub New PT.

Pcaretest, Five | 24 Sep 1936 | 508-965-7118 | bradkney@gmail.com

**Appointment**

Facility\* PC:Prima CARE PC POS 11 Provider\* Willis,Sam

Date\* 11/04/2019 Claim Provider Resource\* Willis,Sam

Time\* 11:45 am 12:00 pm Ref. Provider Email bradkney@gmail.com

**Visit**

Visit Type\* OV (Office Visit)

Visit Status PEN (Pending)

Reason Knee pain

Diagnosis

Transition Of Care

**Billing**

Open Cases Case Manager N

Referral ... N

Billing Notes ...

General Notes

**Co-Pay/ Claim changes for this visit only**

Change co-pay for this visit

Non-billable visit

Encounters Find Logs Referrals Orders Bubblesheet

Charge Details eCliniForms Rx Eligibility Misc Info OK Cancel

Once the appointment is saved, the billing information on the right opens when the appointment is accessed again. The little red arrow at the top right opens and closes the right panel.

At the bottom of the screen are links to the referrals screen and orders screen, as well as a log of changes made to this appointment. In the blue band at the very bottom of the screen are a few more links.

Appointment on Monday, November 04, 2019

Patient\* Pcaretest, Five x Name Info Hub New PT.

Pcaretest, Five | 24 Sep 1936 | 508-965-7118 | bradkney@gmail.com

### Appointment

Facility\* Prima CARE PC:PC POS 11 Provider\* Willis, Sam  
Date\* 11/04/2019 Claim Provider Resource\* Willis, Sam  
Time\* 11:45 am 12:00 pm Ref. Provider Email bradkney@gmail.com

### Visit

Visit Type\* OV (Office Visit) Reason Knee pain  
Visit Status PEN (Pending) Diagnosis  
Transition Of Care

### Billing

Open Cases Case Manager N  
Referral ... N  
Billing Notes  
General Notes Needs a wheelchair  
Co-Pay/ Claim changes for this visit only  
 Change co-pay for this visit  
 Non-billable visit

Charges & Co-pay Details	
Total Charges	0.00
Allowed Fee	0.00
Co-Pay	0.00
Patient Portion	0.00
Patient Total	0.00
Balance	0.00

Patient Account Summary	
Guarantor Balance	0.00
Account Balance	0.00
Insurance Balance	0.00
Patient Balance	0.00
UnPosted Payment	0.00
Credit(s)	0.00

Insurance Eligibility  
Not Verified Check  
RX Eligibility

Encounters Find Logs Referrals Orders Bubblesheet

Charge Details eCliniForms Rx Eligibility Misc Info OK Cancel

[?]Pcaretest, Five 09/24/1936 (508) 965-7118 OV Knee pain Needs a wheelchair

Brad Kney, MD  
November 11, 2019