Provider Workflow Guide

Learn how to view your schedule, review and update clinical history, track trends in flowsheets, chart your encounter, e-prescribe, create lab and imaging orders, and submit superbills.

1. View schedule
2. Review clinical history
3. Chart the encounter
4. e-Prescribe
5. Document quality of care
6. Send referral via eFax
7. Create lab and imaging orders
8. Manage your tasks
9. Phenomenal support and education
1. Start with your schedule or pending tasks

In the schedule, go to the *Appointments* tab to see an ongoing queue of patients to be seen.

INSIDER TIP – You can filter this view by provider, appointment type or appointment status by clicking on the button pictured above. Once a patient is ‘checked-in’ you can go directly into the new encounter (SOAP) note by selecting “View encounter”.

Alternatively, you can go to your *Tasks* and select the “Sign encounter” task for your patient visit. Remember when your staff ‘checks’ the patient in for their appointment, the “Sign Encounter” and “Submit superbill” Tasks are automatically generated in your queue.

SIMPLY SELECT “SIGN ENCOUNTER” AND YOU’LL BE TAKEN DIRECTLY INTO THE PENDING ENCOUNTER (SOAP) NOTE.

**ADDITIONAL RESOURCES**

ARTICLE: How do I view and print my daily schedule?
ARTICLE: How do I use the Tasks section?
2. Update patient’s clinical history and flowsheets

Review the Chief Complaint, vital signs, relevant flowsheet observations, and clinical history by scrolling through the top half of the encounter. Your nurse or medical assistant can pre-populated this detail for you. See the nurse/medical assistant workflow guide for full workflow guide.

**INSIDER TIP:** you can always select the “Go To...” button at the top left of the screen to quickly navigate to any section of the encounter note. You can also customize your encounter view from this menu.

**ADDITIONAL RESOURCES**

**ARTICLE:** How do I use flowsheets?
**ARTICLE:** How do I add PMH, allergies, Rx, and Dx to an encounter?
3. Chart the complete visit with your pre-designed templates

After reviewing the active vitals, lab flowsheets, diagnoses, allergies, medications, smoking status and Past Medical History – you’ll begin charting your encounter (SOAP) note by selecting “Record” next to the Subjective section.

Before selecting your pre-designed templates, you can access Past medical history and previous encounters by selecting “Previous”.
Begin utilizing your templates to populate the encounter note.

Remember, items with “??” will prompt you to replace these items. You can [Tab] from one “??” to the next “??” using your keyboard.

**INSIDER TIP:** if you’re using Dragon Medical dictation software (Dragon Naturally Speaking is not supported), turn on Dragon and begin speaking directly into your encounter (SOAP) note.
Select “Go to Objective” and you’ll be presented with a new set of template items. You can navigate from section to section using the “Go to {Objective, Assessment, Plan}” button at the bottom right corner of the Note box or select “Back” to navigate backwards to the previous section.

Note that when you arrive to the Assessment portion of the encounter (SOAP) note, you’ll have the option to add and attach diagnoses.

Your Diagnoses section will have three tabs: “Frequent” (your most commonly used Dx), “Previous” (any Dx already in the patient’s chart) and “Record” (where you can search and add new Dx).

**INSIDER TIP:** only diagnoses that are attached to the encounter will appear when the encounter note is either printed or included in an electronic referral.
4. Send e-prescriptions directly from the Plan, including eCoupons and note needed ePrior Authorization forms

In the Plan, select “Medications”. Your Medications section will have three tabs: “Frequent” (your most commonly added Rx), “Previous” (any Rx already in the patient’s chart) and “Record” (where you can search and add new Rx).

Select “Record”, search for your medication, select the appropriate dosage and select “Order”.

**INSIDER TIP:** After selecting “Order” you can include more medications in your order. Simply search for additional medications or choose from the “Patient Rx List” and “Frequent” list in the tab on the left.
If any medications are eligible for a manufacturer’s eCoupon, we’ll notify you with the message below:

Select “Coupon available” and you’ll have the option to include the coupon in your e-prescription and print the coupon for the patient in the office.

INSIDER TIP: eCoupons help your patient reduce their out-of-pocket cost and improve adherence.

ADDITIONAL RESOURCES

ARTICLE: How do I use e-Coupons
ARTICLE: How do I prescribe multiple medications in a single order?
After selecting “Next”, you’ll complete the order details by filling out the “SIG”, “DISPENSE”, “UNIT” and “REFILLS”.

**CVS Ibuprofen 200 MG Oral Capsule**

**ALERTS**
No drug or allergy alerts triggered for this medication.

**RECORDED**
05/07/2015 07:38 PM  Nina W ARNP

**SIG**
Enter shorthand

Take 1 capsule (200 mg) by mouth every 6 hours as needed
After completing the order details, you’ll search for the patient’s pharmacy by selecting “Select a pharmacy”. You can search for the patient’s pharmacy by name, zip code or address. A zip code search is recommended.

Lastly, simply select “Send eRx” and your order will be delivered to the pharmacy instantly.

**INSIDER TIP:** you can always see a history of your e-prescriptions in the patient’s chart under the *Timeline* tab.
Note that if a **Prior Authorization** is required, the *Prior Authorization required* alert will display in the order as well.

The **Prior Authorization** can be completed in Practice Fusion by you or your staff. Simply navigate to your *Tasks* section to complete the required form.

**ADDITIONAL RESOURCES**

**ARTICLE:** How do I locate, select, or change a pharmacy?

**ARTICLE:** How do I use e-Prior Authorization?

**VIDEO:** How do I send an e-Prescription or authorize a refill?
5. Finalize the note by adding procedures and documenting quality of care

Next, you can document any procedures performed to the Screenings/interventions/assessments section.

INSIDER TIP: For a full list of available screenings/interventions/assessments, click here. We’re always adding to this list.

Next, enter any notes on Functional and Cognitive statuses (if applicable) and check off applicable boxes in Quality of Care. Lastly, add a Care plan to share directly in the patient’s health record.

ADDITIONAL RESOURCES

ARTICLE/VIDEO: What are screenings, interventions, and assessments?
ARTICLE: What screenings, interventions or assessments are shared with the patient?
6. Send or respond to a referral with an electronic fax

Send a fax directly from Practice Fusion by clicking “Add” next to Referral. Select a destination by click the names of one of your providers from the directory. You can also add new providers by selecting the profile image and “+” sign.

Place your cursor in the “REFERRAL FOR” box and you’ll be presented with both “General Referral” and “General Response” templates.
Under “ATTACHMENTS” you can include documents, lab results and encounter (SOAP) notes in your referral.

Referral attachments cannot total more than 500 KB.

**ADDITIONAL RESOURCES**

**ARTICLE:** How can I manage inbound faxes with Updox?

**VIDEO:** Sending Referrals

**VIDEO:** Seamlessly transfer faxes from Updox into Practice Fusion
7. Create lab and imaging orders

To create lab and imaging order, go to “Actions” and select “Add lab order” or “Add imaging order”.

Select your lab from the drop down list. You can always type leave this blank or type a custom lab name into the “Other” field.
Select the required tests (or studies) and associated diagnoses for the tests (or studies).

Insider Tip: Save frequent test series as a template, saving you and your staff time.

Select “Next” to proceed with the order. If collecting specimens in-house, select “+Add a specimen” to include specimen details.
Once all the specimen details have been included for each test, you’ll complete the order on the final screen:

**INSIDER TIP:** Insurance information from the patient’s profile will be included as a “PAYMENT TYPE” option in the drop down menu.

**INSIDER TIP:** Some lab and imaging centers allow for electronic ordering and you’ll see the option to “Send” rather than “Print”.

**ADDITIONAL RESOURCES**

**ARTICLE/VIDEO:** How do I add or create a lab order?
**ARTICLE:** How do I sign up for a lab integration?
**ARTICLE:** How can I share lab results with my patients?
8. Manage your tasks

*Tasks* are a powerful practice management resource for you and your staff when managing activities in the EHR.

For most tasks, you can “reassign” them to another user in your practice or “mark as complete”. You can also customize your task view by selecting the wrench tab.

**TASK TYPES**
- Unsigned encounter notes
- Lab results needing review
- Refill requests
- Incomplete lab/image orders
- Medication history
- Unsubmitted superbilss
- Patient Intake (Online Check-In)
- Custom reminders
- Unsigned documents
- Undelivered fax referrals

**ADDITIONAL RESOURCES**

**ARTICLE:** How do I use the Tasks section?
**ARTICLE:** How do I customize my Tasks?
**ARTICLE:** How do I create custom reminder Tasks?
**ARTICLE:** How do I sign a result and remove it from my Tasks?
**VIDEO:** Stay organized by managing your Tasks
9. Submit Superbill

Any user may create a superbill for a patient from within an encounter. While in the encounter note, click “Actions” in the top right corner and select “Add Superbill”. You can also click “Record” next to Superbill at the bottom of the encounter. The superbill will open in a new tab.

Inside the superbill, select “(+)Add Procedure” then enter your CPT code.

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Once you add a CPT code, a new link will be generated for you to click “Add a Diagnosis”

Select a diagnosis by searching for the ICD-10 code or selecting a list of diagnoses added in encounter or historical record

Edit patient, provider, and facility details and entering additional notes
Once you have completed your superbill, save it by selecting a status from the drop-down menu in the top-right corner.

ADDITIONAL RESOURCES

ARTICLE: How do I create a superbill?
ARTICLE: Integrated billing partners for seamless claims submissions
ARTICLE: Where do you track the copay on the superbill?
ARTICLE: Can you delete a superbill?
VIDEO: Quickly create superbills for your encounters
9. Phenomenal Support and Education

Practice Fusion resources can be located in the EHR through the “Help” dropdown menu at the top of your screen. Visit the Knowledge Base or Tutorials to continue educating yourself and your practice, and contact PF support if the need arises. You can also share ideas for new feature requests in the Knowledge Base.

For information about features not reviewed in this guide, please visit the Knowledge Base to view step-by-step instructional articles for every feature in Practice Fusion.

For video tutorials and to learn more about Practice Fusion’s newest features, check out the Learning Center!

Additional Sites for Your Reference:
- Meaningful Use Center
- Help Center
- e-Prescribing Center
- Electronic Lab Ordering Center