What is the Practice Fusion Limited Access EHR product?

The Practice Fusion Limited Access EHR product will be provided to current Practice Fusion customers who have not purchased an EHR subscription plan by May 31, 2018. In limited access, users will not be able to create new patient health information or edit existing patient health information. However, users will still be able to export batch clinical care documents (CCDs) of their existing patient records; view, download, or print existing patient records; and access other functionality that may be helpful when transitioning to another EHR product.

Users can continue to access their EHR data in limited access as long as at least one practice user logs into the EHR at least once a year. For security purposes, Practice Fusion will disable and archive EHR accounts that have not had at least one log-in for 12 consecutive months.

If at any time you wish to resume use of the full functionality of your EHR, you can subscribe to Practice Fusion and transition back to all of the features we offer. For a high-level summary of the capabilities available to users in the limited access EHR, see **Table 1** below. For additional detail, continue reading further.

Table 1: Limited Access Summary of Capabilities

What can I do?	What can't I do?
● View, print, and download patient data from the summary, encounters, and timeline ● View, print, and export existing MIPS, eCQM, and Meaningful Use Dashboards ● Batch export patient CCDs for your entire practice ● Export individual CCDs for specific patients in your practice ● View, print, and download documents ● View historical messages and referrals ● Access your EHR activity feed and audit log	● Add new patients ● Create or edit encounters ● Send e-prescriptions ● Run calculations in the MIPS, eCQM, and Meaningful Use Dashboards for reporting periods not previously run prior to being transitioned to limited access ● Edit, save, or record patient diagnoses, medications, allergies, immunizations and other medical data ● Add or edit new and existing patient appointments ● Send or receive messages from patients or providers in your practice ● Send referrals ● Complete tasks

	• Upload new documents • Approve or deny refill requests

Labs and Imaging Results

If your practice is bound to one or more labs or radiology centers through Practice Fusion, incoming results will continue to be available in your EHR account for a minimum of 60 days following the transition to the limited access EHR to facilitate continuity of care for your patients as you transition to another EHR system. The tables below outline the specific actions that are available during this transition period. After 60 days, your practice bindings to lab and radiology centers will be unbound and you will no longer receive incoming lab and radiology results from previously bound labs and radiology centers.

Data Exports

The limited access EHR allows users to batch export CCDs of their patient records, print patient records, and access other functionality that may be needed for transitioning to another EHR. As a Practice Fusion user, you are also entitled to an export of your patient data upon termination of your Practice Fusion account. To facilitate this request, you must contact our Customer Service team directly. These requests are typically processed within 6 weeks of receipt. Please note that this is an estimated time frame and actual times can vary from practice to practice due to the complexity of this process.

Limited access detailed capabilities

For more detailed information on the specific capabilities of the Limited Access EHR, please view the tables outlined below and organized by feature area:

- Table 2: Patient Summary & Charts
- Table 3: Tasks
- Table 4: Schedule
- Table 5: Messages and Referrals
- Table 6: Reports
- Table 7: Settings
- Table 8: eRx Drafts
- Table 9: Superbill
- Table 10: Refill Requests
- Table 11: Labs and Imaging Orders
- Table 12: Labs and Imaging Results

- Table 13: e-Prior Authorization
- Table 14: Directory

Table 2: Patient Summary & Charts

Section of Chart	What can I do?	What can't I do?
Patient Header	• View pinned note • View history • Refresh page	• Add/change patient photo • Edit or delete pinned note
Patient Portal Status	• Not available	• Invite patients to patient portal • Revoke patient portal access • Add users • Resend invite (when pending) • Print access instructions • Enable or disable “auto-send invite to patient after visit”
Encounter	• View, print, download	• Record/add/edit/delete any encounter field • Access templates
Clinical Decision Support	• Access links to external documents • Refresh CDS alerts • Minimize notifications • Click ‘x’ to dismiss a single notification	• Mark as complete • Record, add, or conduct other call to action (CTA) link
Family History (structured)	• View only	• Record new relative • Unknown family health history
Summary	• View, print, download	• Record/add/edit/delete any Summary field
Profile	• View only	• Record/edit/delete sections within the profile

Actions Menu Within Encounter	• Print an encounter • Print a visit summary • Access syndromic surveillance • Create a clinical document • Print a patient's chart • Refresh a patient's chart • View access history • View exported patient records • View imaging lab orders • View recent activity	• Add a referral • Add a superbill • Copy note to clipboard • Delete an encounter • Send a follow-up message • Add an imaging order • Copy a link to the patient • Enter imaging results • Enter lab results • Send a message • Create a task
Patient Timeline	• View Appointments • View Documents pending • View Documents signed • View e-Prescriptions • View Encounters • View Exported patient records • View Imaging orders • View Imaging results • View Lab orders • View Lab results • View Patient intakes • View Prior authorizations • View Referrals • View Prescription drafts	• Create new encounter • Make referral check boxes (receipt and follow up)
Immunizations	• Print • Download • Open existing vaccine details • Remove an immunization registry connection • View immunization history for a patient	• Connect to registry • Transmit all • Add vaccine • Record/edit/delete immunization fields
Diagnosis	• Read only • Close pane (cancel or x)	• Associate with an encounter • Select/clear acuity • Choose start/end date

		• Associate with medication (or edit an association) • Add/edit comment • Delete diagnosis • Save diagnosis • Add to my Dx list
Allergies	• Read only • Close pane (cancel or x)	• Select severity/edit • Add/edit reaction • Select/edit onset time/date • Add/edit comment • Edit status • Delete allergy • Save allergy
Medications	• Read only • Close pane (cancel or x) • View prescription receipt • Print prescription receipt	• Delete medication • Order medication • Record medication • Add/edit sig • Add/edit associated diagnosis • Add/edit medication comment • Check box “attach medication to this encounter” • Print prescription from the prescription receipt • ‘Discontinue’ duplicate medication
Smoking Status	• Read only • Close pane (cancel or x)	• Open smoking status detail pane • Edit “current status” • Edit “effective date” • Save smoking status • Delete smoking status
Gender Identity	• Read only • Close pane (cancel or x)	• Add/edit/delete any field

Sexual Orientation	• Read only • Close pane (cancel or x)	• Add/edit/delete any field
Attachments (documents) - unsigned	• View, print, or download • Close pane (cancel or x)	• Add/edit/delete any field • Sign • Save
Attachments (documents) - signed	• View, print, or download • Close pane (cancel or x)	• Add/edit/delete any field
SIA	• View screenings/interventions/assessments • Close pane (cancel or x)	• Add/edit/delete any field
Observations (Functional and Cognitive)	• View observations • Close pane (cancel or x)	• Add/edit/delete any field
Patient Risk Score	• View patient risk score • Print patient risk score	• Open patient risk score detail pane
Advanced Directives	• View advanced directives • Print advanced directives	• Open Advanced Directives detail pane
Health Concerns	• View health concerns • Print health concerns	• Open health concerns detail pane
Goals	• View goals • Print goals	• Open Goals detail pane
Implantable Devices	• View implantable devices • Print implantable devices	• Add/edit/delete any field • Save
Toolbar	• Print (encounter, summary) • Create (Timeline>Exported Patient Records) • Search Encounter • Refresh Patient Chart	• Sign (encounter) • Save (encounter, profile)

	• Use “Go to…” menu • Customize encounter (via “Go to…” menu) • Customize summary (via “Go to…” menu)	

Table 3: Tasks

Section of Tasks	What can I do?	What can’t I do?
Toolbar	• No actions are allowable in limited access	• Connect labs • Connect imaging centers • Create new task
Actions Column	• No actions are allowable in limited access	• View/review task • Edit task • Mark task as complete • Sign
Actions Menu	• Refresh tasks	• Convert historical unsigned encounters into tasks • Send new message • Create task
Display Preferences (wrench icon)	• No actions are allowable in limited access	• Access preferences to customize tabs for tasks

Table 4: Schedule

Section of Schedule	What can I do?	What can’t I do?
Toolbar	• View/edit filters • Refresh page • Change facility (drop down) • Print schedule	• Add appointment from the Day or Week tab

Appointments Tab	• View a pinned note	• Add/edit/delete a pinned note • Change status (drop down)
Appointments Tab: confirmation view	• Open confirmation screen (via “Edit confirmation)	• Edit any field in the confirmation screen • Save Confirmation
Appointments Tab: Copay view	• Open Copay screen (via link) • Print Copay receipt	• Edit any field in the copay screen • Save Copay
Appointments Tab: Eligibility View	• Open Eligibility screen (via “View details” link)	• “Check” eligibility • Edit insurance information • Link payer to supported payer
Day Tab:	• Open existing appointment/block time details screen (via double click on appt. block)	• Add appointment (via button) • Add appointment (via click in schedule time slot) • Drag and drop appointment to change time/date
Week Tab:	• Open existing appointment/block time details screen (via double click on appt. block)	• Add appointment (via button) • Add appointment (via click in schedule time slot) • Drag and drop appointment to change time/date
Add Appointment Screen	• View a pinned note	• Add/edit/delete pinned note • Edit patient details • Edit any field in appointment modal • Delete appointment
Block Time Screen	• No actions are allowable in limited access	• Edit any field on the block time screen • Delete blocked time
Settings Tab	• No actions are allowable in limited access	• Access settings tab
Appointment Request	• Deny appointment request • Approve appointment request	• Reschedule appointment request

Table 5: Message & Referrals

Section of Messages and Referrals	What can I do?	What can't I do?
Toolbar (Inbox, Sent, & Archived tabs)	• Refresh page • Filter (drop down) • Manage Messaging settings	• Create a new message
Actions Menu	• View previous Patient message settings	• Create a new message • Create task • Set up Direct messaging
Inbox Tab	• View and print existing messages • View attached documents • Add an attached document to Documents	• Add a message to patient's chart • Reply or forward message • Archive a message
Sent Tab	• Print messages	• Add a message to patient's chart • Reply or forward message • Archive a message
Archived Tab	• Print messages	• Add message to patient's chart
Referrals Toolbar	• Refresh page • Filter by referral type • Filter by provider • Search for patient	• Send referral
Referrals Action Menu	• No actions are allowable in limited access	• Send a referral • Retrieve a referral with the referral access code
Outbound Referrals	• See details of outbound referrals	• Mark receipt as confirmed with the checkbox • Mark the Follow up as complete with the checkbox • Archive an outbound referral

Inbound Referrals	• Receive inbound Direct Message referrals • See details of inbound referrals	• Archive an inbound referral
Archived Outbound Referrals	• See details of archived outbound referral	• Mark receipt as confirmed with the checkbox • Mark the Follow up as complete with the checkbox
Archived Inbound Referrals	• See details of archived inbound referral	
Referrals - Document (inbound and outbound)	• Show patient contact info • Show sender details • Print message • Print attachment	• Reply to a referral message

Table 6: Reports

Section of Reports	What can I do?	What can't I do?
Quality Reporting	• View, print, and download reports from the eCQM Dashboard • View, print, and download reports from the Meaningful Use Dashboard • View, print, and download reports from the Meaningful Use Dashboard Historic (if applicable) • View, print, and download reports from the MIPS Dashboard	• Modify MIPS preferences • Select new 90 day reporting periods in the MU dashboard
Clinical Reporting	• View exported batch CCD files • Execute a batch export of patient CCDs for entire practice	• Access Chart notes report • Access Diagnosis registry • Access Drug interactions report • Access e-Prescription report • Access Medication report • Access Patient list report

		● Access Patient list report NEW ● Access Patient list report - Saved queries ● Access Patient Rx history report ● Access Prescription report ● Access Referrals report
Practice Management	● Access Activity Feed and audit report	● Access Appointment report ● Access Billing report ● Access Payer report ● Access Prior authorizations

Table 7: Settings

Section of Settings	What can I do?	What can't I do?
Billing Settings Pages	● View previous payer list settings ● View previous eligibility settings	● Edit settings in Account setup ● Request information about supported Billing solutions
Billing Payer list	● View previous payer list settings ● View list of payers and sort by active/inactive	● Add payer ● Restrict patient insurance to this list
Billing Eligibility	● View previous eligibility settings ● Click on "user settings" link	● Perform eligibility checks ● Click on "e-Prescribing" link (two locations on page) ● Click on "Verify your identity" link (two locations on page)
Chart Settings	● View previous chart note types settings ● View previous flowsheet settings	● Access Charting template settings ● Access Encounter type settings ● Access Patient list default settings ● Access Timeline default settings ● Access Diagnoses list settings

Charting: Chart note types	• Show/hide inactive types	• Enter and add a chart note type • Create a superbill task • Edit the active column
Charting: flowsheets	• Search practice flowsheets • Open a flowsheet template	• Create a flowsheet • Access the “Community” tab • Use the checkboxes • Save or delete a flowsheet template • Edit a flowsheet template
e-Prescribing	• View previous EPCS user settings	• Set permissions
Intake forms for Online Check-in	• Not Available	• Access Intake templates
Labs and imaging	• View previous imaging connection settings • View previous lab connection settings • View previous lab ordering specimen collection settings • View previous imaging templates • View previous lab templates	
Labs and imaging - Lab and Imaging connection pages	• View previous imaging connection settings • View previous lab connection settings	• Connect a lab or imaging center
Labs and imaging - Lab ordering specimen collection settings	• View previous lab ordering specimen collection settings	• Save settings • Edit setting details

Labs & imaging - Imaging templates	• View previous imaging templates	• Add/edit/delete a template • Delete or save a template in the details pane
Labs & imaging - Lab templates	• View previous lab templates	• Add/edit/delete a template • Delete or save a template in the details pane
Messaging	• No actions are allowable in limited access	• Access Message settings • Access Inbound CCDA display preferences
Notifications and alerts	• View previous CDS and surveillance settings • View previous drug alert settings	
Notifications and alerts - CDS and Surveillance	• View previous CDS and surveillance settings • Cancel	• Save settings • Edit checkbox columns
Notifications and alerts - Drug alerts	• View previous drug alert settings	• Edit drug interaction alerts using checkboxes • Edit drug allergy alerts using checkboxes
Patient engagement - Patient Communications	• View previous Patient communications settings	• Edit Patient Portal invitation settings • Edit Appointment reminder settings • Enable Patient messages
Practice Setting	• View previous Emergency access settings • View previous settings for Facilities • View previous settings for Practice details • View previous settings for Prescription task delegation • View previous settings for Schedules • View previous settings for Users	• Import patient demographics

Practice Setting - Facilities	• View previous settings for Facilities	• Add a facility • Edit facilities
Practice Setting - Practice details	• View previous settings for Practice details	• Edit practice details
Practice Setting - Prescription task delegation	• View previous settings for Prescription task delegation	• Edit prescription task delegation settings
Practice Setting - Schedules	• View previous settings for Schedules	• Edit schedule settings
Practice Setting - Users	• Resend validation link to practice users • Edit profile (user can edit their own profiles; admins can edit anyone's profile)	• Save changes • Add new users • "Get Link" button in the "Online profile and appointment booking" section of profile
Tasks	• No actions are allowable in limited access	• Access Task types settings
Vaccines and immunizations	• View previous Immunization registry settings • View previous Vaccine registry settings	• Make changes settings
Vaccines and immunizations - Immunization registry	• View registry details • Delete registry item	• Register with your state • Connect and EHR facility to your state registry • Update or save manual transmission settings • Edit registry details, save draft, or register
Vaccines and immunizations - Vaccine inventory	• View vaccine details • View lot usage history	• Add a vaccine • Edit or save vaccine details

Table 8: eRx Drafts

Section of Rx Draft	What can I do?	What can't I do?
Order Summary Page	• View coupons • Print coupons • View Rx Adherence • Print Rx Adherence	• Access patient preferred pharmacies • Click medication link (navigates to order details screen) • Remove medications (via "x" icon) • Change pharmacy • Change supervising provider • Click "Print Rx", "record" or "Save draft" • Click "Send eRx" • Click Back • Delete Draft • Mark as "ready to sign"

Table 9: Superbill

Section of Superbill	What can I do?	What can't I do?
Toolbar	• Download superbill • Print superbill	• Save superbill as a draft • Mark superbill as "ready for biller" and electronically send to integrated billing partner • Archive superbill
Body	• View history	• Add a procedure • Edit procedure • Delete procedure • Add a diagnosis • Delete diagnosis • Add a modifier • Delete a modifier • Refresh patient information • Edit other details

Table 10: Refill Requests

Section of Refill Requests	What can I do?	What can't I do?
Refill Requests	• View details of refill request • Click "Cancel"	• Approve/deny refill requests • Search for a patient in unassigned refill request • Assign refill to a patient • Deny with "new prescription to follow" • Edit any field (number of refills, matching med, note to pharmacy, reason for denial) • Undo assign patient • Select reason to override drug allergy interaction

Table 11: Labs and Imaging Orders

Section of Labs and Imaging Orders	What can I do?	What can't I do?
Imaging Orders: draft	• Click "Cancel"	• Allow autosave of details pane • Access the toolbox (templates) • Add/edit information (Imagining center, Add a study, Add a diagnosis) • Save • Delete order • Use back or next buttons • Send order
Imaging Orders: Sent - Order details pane	• Show/hide order history • View details of studies ordered (details pane) • Print order	• Access the toolbox (templates) • Attach order to a chart note • Use back or next buttons
Imaging Orders: Sent - Main order section	• Print order	• Add a result

Imaging Orders: Sent - Study details	• View details of studies ordered • Print order details	• Access toolbox (templates) • Use back or next buttons
Imaging Orders: Sent - Summary	• View details of imaging studies ordered • Print order summary	• Access toolbox (templates) • Use back or next buttons
Lab Orders: Draft	• Allow autosave of details pane • Click “Cancel”	• Access the toolbox (templates) • Add/edit information (Vendor, Add a test, Add a diagnosis) • Save lab order • Delete lab order • Use back or next buttons • Send order
Lab Orders: Draft - Test details pane	• View details of test ordered • Cancel	• Access the toolbox (templates) • Add/edit the test details (checkboxes, notes field, add diagnosis search, specimen type dropdown, collection date, label qty field, specimen note) • Use back or next buttons • Save • Delete
Lab Orders: Draft - Summary details pane	• Not Available	• Access the toolbox (templates) • Add/edit order and diagnosis details (checkbox and clinical information note) • Add/edit payment details (payment type dropdown, primary and secondary insurance) • Add/edit provider details (primary provider, ordering provider, note, chart note dropdown)
Lab Orders: Sent details pane	• View order history • View test details • Print lab order details	• Access the toolbox (templates) • Attach order to a chart note • Use back or next buttons

Lab Orders: Sent - Main order section	• Print lab order details • View test details • View questions • View summary	• Add a result
Lab Orders: Sent - Questions details pane	• Print	• Access lab order templates • Use back or next buttons
Lab Orders: Sent - Summary details pane	• Print lab order summary	• Access the toolbox (templates) • Use back or next buttons
Lab and Imaging Orders Action Menu	• Create a clinical document • Print patient chart • Refresh patient chart • View access history • View exported patient records • View imaging orders • View lab orders • View recent activity	• Add an imaging order • Add a lab order • Add a referral • Copy link to patient • Invite patient to patient portal • Enter imaging results • Enter lab results • Record patient reminder • Send a message • Create a task

Table 12: Labs and Imaging Results

If your practice is bound to one or more labs or radiology centers through Practice Fusion, incoming results will continue to be available in your EHR account for a minimum of 60 days following the transition to the limited access EHR to facilitate continuity of care for your patients as you transition to another EHR system. The table below outlines the actions that are available during this transition period. After 60 days, your practice will no longer receive incoming lab and radiology results from bound labs and radiology centers.

Section of Labs and Imaging Results	What can I do?	What can't I do?
Lab and Imaging Result Toolbar	• Assign to a provider • Sign individual results • Send result to PHR • "Sign all results"	• Select order # • Invite patient to Patient Portal • Edit a lab result
Labs and Imaging Result Details	• View 'i' tooltip next to lab logo • View 'i' tooltip next to main comments field • Show/hide order details • Show/hide test details • View 'i' tooltip next to test comments field • Share results with PHR • Show/hide observation details • Click on chart icon next to date/status column in test details • View 'i' icon next to testing site in test details • Mark as signed • View attachments	• Add or edit comments in main comments field • Record a diagnosis • Order a medication • Add or edit comments in test comments field • Add results to flowsheet
Lab and Imaging Results - Assign to patient	• No actions are allowable in limited access	• Add a new patient • Add comment to test result • Invite patient to Patient Portal
Lab and Imaging Results Action Menu	• Change patient • Print results • Create a clinical document	• Create a new message • Delete results • Add imaging order

	• Print patient chart • Refresh patient chart • View access history • View patient records • View imaging orders • View lab orders • View recent activity • Sign up to use all actions	• Add lab order • Add referral • Copy link to patient • Invite to patient portal • Enter imaging results • Enter lab results • Record patient reminder • Send a message • Create a task

Table 13: ePrior Authorization (ePA)

Section of ePA	What can I do?	What can't I do?
ePA Report	• No actions are allowable in limited access	• Access ePA report
ePA form	• No actions are allowable in limited access	• Send prior authorization • Save prior authorization • View ePA tooltip • Edit any prior authorization form field • Select ePA form in drop-down menu

Table 14: Directory

Section of Directory	What can I do?	What can't I do?
Dashboard Directory	• Search within Practice Fusion • View directory	• Add a new contact • Edit or remove contact • Send message (to selected contact)
Dashboard - Directory actions menu	• No actions are allowable in limited access	• Send a new message • Create a task