eClinicalWorks

DOCUMENT TYPE: NOTICE

Topic: Patient Safety

October 31, 2016

This notice presents a compilation of issues identified within eClinicalWorks, each of which could present a potential risk to patient safety. For each issue, the status of efforts by eClinicalWorks® to resolve the issue is provided, as well as actions users can take to resolve the issue or minimize the risk associated with it.

Importantly, these issues occur **only** when very specific workflows, which are described in detail in this notification, are followed.

As this Patient Safety Notice indicates, many of these issues can be promptly resolved by upgrading to eClinicalWorks Version SP2. eClinicalWorks recommends that you complete this upgrade at your earliest convenience.

Note: The extent to which you experience some or all of the issues described in this notification will depend on the version of eClinicalWorks software, including eClinicalMobile® and eClinicalTouch®, that you are using.

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Detailed Issue Description

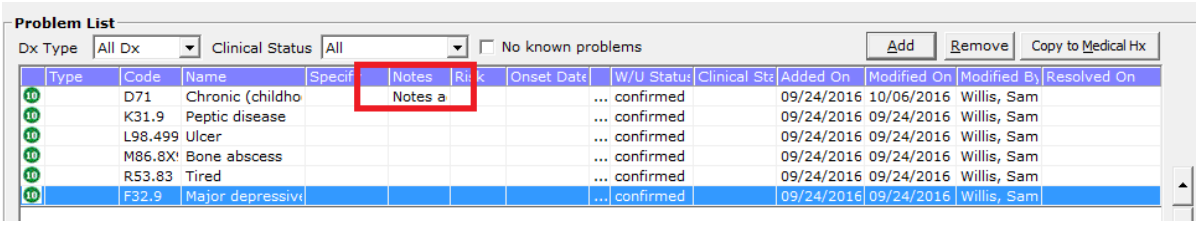
Issue: Problem Lists - Notes on ICD Do Not Display When Problem is Added to Medical History

The following example illustrates the workflow in which this Problem List issue arises:

1. Access the Progress Notes of a patient that has notes for an ICD listed in the Problem List.

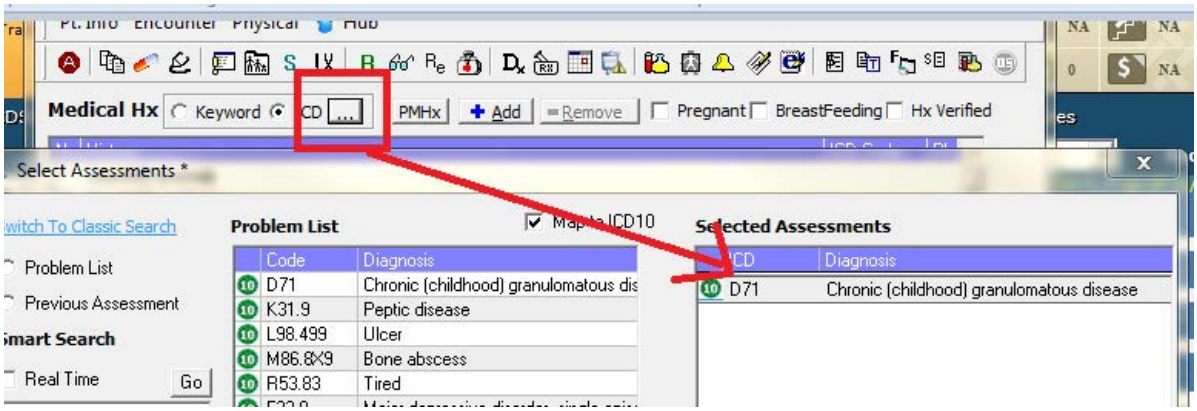
   In the figure below, notes are added to the ICD Code *D71:*

Figure 1. – Problem List Notes



2. Click the More (…) button from the Medical History section of the Progress Notes and add the ICD Code with the existing notes:

Figure 2. – Problem List Notes Added



3. Access a set of Progress Notes for a new visit and click *Verified* on the Medical History window.

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Potential Risk

In the scenario presented above, the notes added for the ICD Code D71 do not display under the Problem List section on the ICW (Right Chart Panel). This non-display issue also occurs for any other information completed for the ICD Code on the Problem List window (*e.g.*, Onset Date). In addition, this issue is not limited to the ICD Code D71 and applies to all other ICD Codes when the workflow described above is followed.

Action Taken by eClinicalWorks

This issue has been resolved by eClinicalWorks. There is also a report available under the Reports menu > Report Console > Advisory Reports.

Recommended User Action

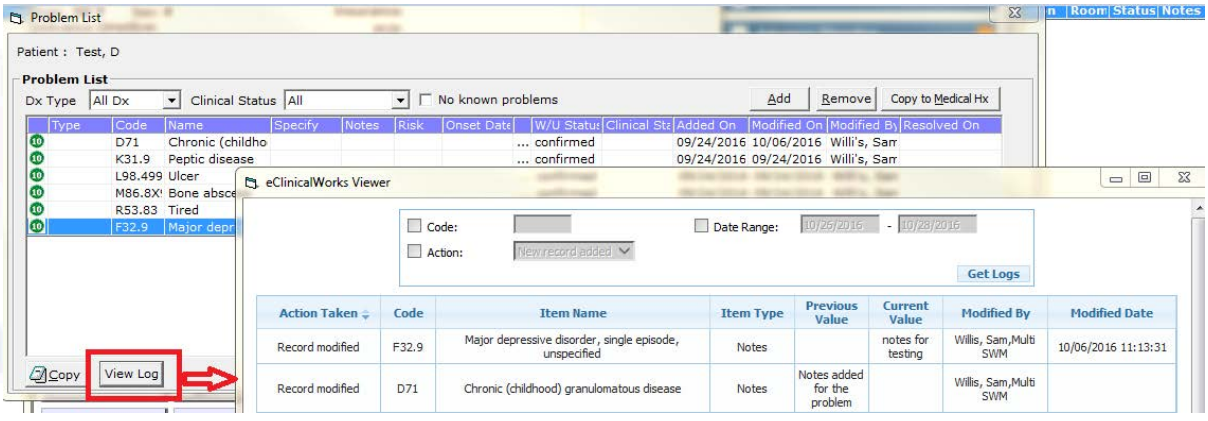
☐ eClinicalWorks recommends that clients upgrade to eClinicalWorks Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

eClinicalWorks recommends that users click the View Log button on the Problem List window from the ICW to view the Notes history:

Figure 3 – View Log Button



Issue: Stop Date for Medications Refilled/Continued from a Past Rx

The following example illustrates the workflow in which this issue arises:

1. Access a patient's Progress Notes.

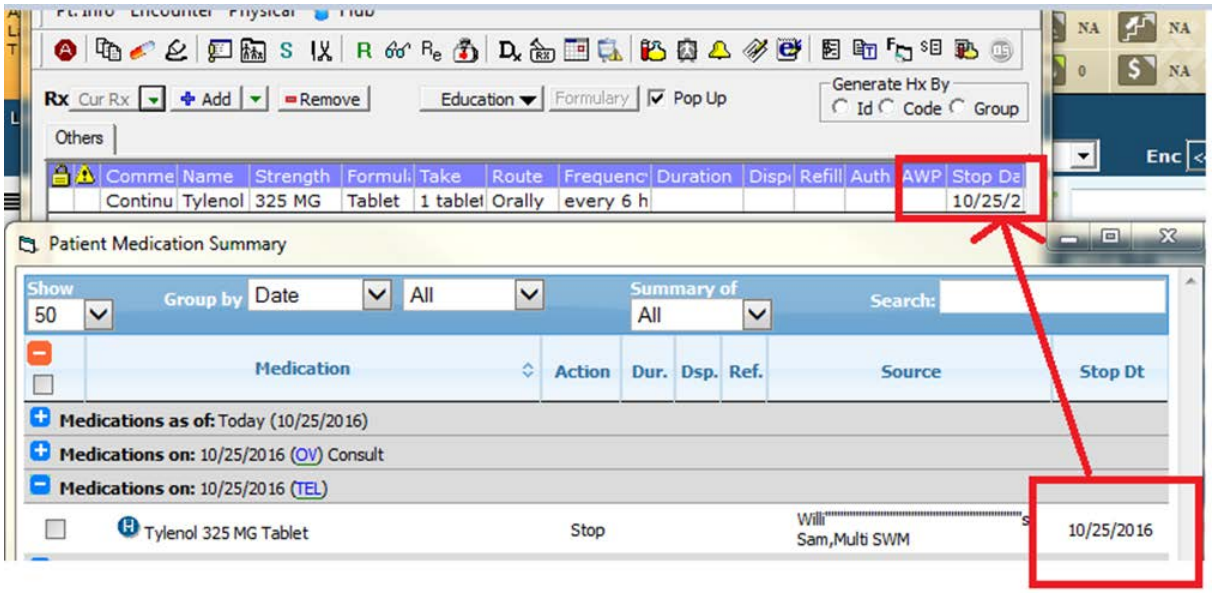
   The chosen patient should have some historical medications that were *stopped* or had a *stop date.*

2. Either *continue* or *refill* one of these medications for that set of Progress Notes.

   The medication is reordered.

3. In the example below, TYLENOL® 325mg tablet is *continued* for the patient from the *Past Rx History* section. This medication was previously stopped on 10/25/2016. As seen below, TYLENOL now displays with the status *CONTINUE*, but the *STOP* date remains as 10/25/2016:

Figure 4 – Medication Stop Date



The same issue applies for *REFILLS*.

Potential Risk

In the scenario presented above, the medication is refilled and/or continued, however it retains the STOP date of the original prescription. TYLENOL 325mg tablet is *continued* for the patient from the *Past Rx History* section. This medication was previously stopped on 10/25/2016. However, it now displays with the status *CONTINUE*, yet the *STOP* date remains as 10/25/2016 when it should be blank.

Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2. While *continuing or refilling* such medications, the STOP date field will be left blank, until a user populates it with the applicable date.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

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Recommended Workflows

Until the resolution is in effect for your practice, eClinicalWorks recommends that users start a new prescription in place of continuing or refilling an existing prescription (which has a past STOP date).

Issue: Character Limit on Notes and Comments for e-Prescribing

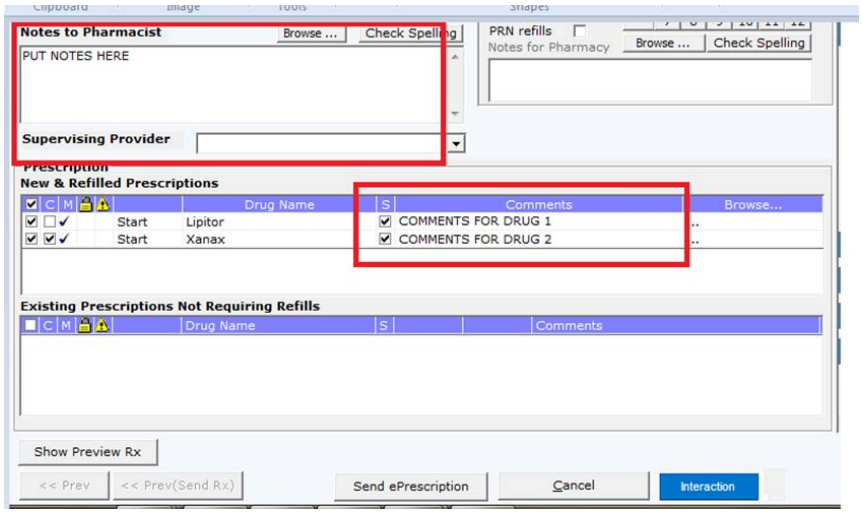
The following example illustrates the workflow in which this issue arises:

1. Access a patient's Progress Notes, add medications in the Treatment section, and then click *e-Prescribe Rx*.

   In this example, Lipitor® and Xanax® are to be sent electronically to the pharmacy.

2. Add notes in the section *Notes to Pharmacist* and/or in the *Comments* section for each medication:

Figure 5 – e-Prescribing Notes



3. Click the *Send ePrescription* button.

Potential Risk

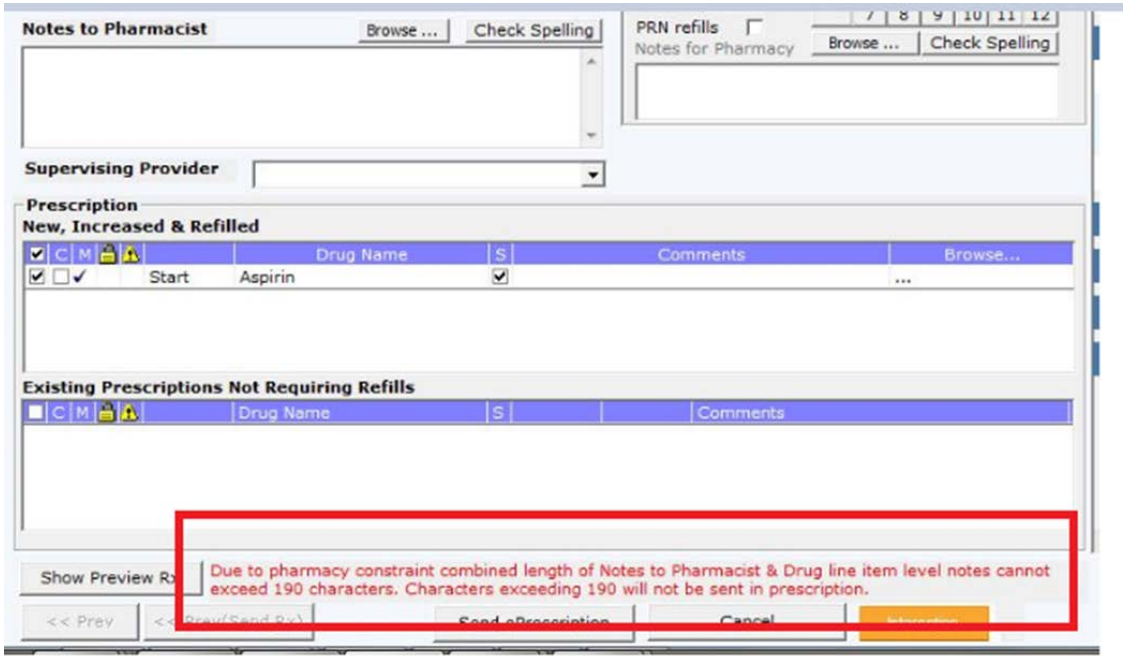
Due to constraints on prescription formats (per standard specifications), text in the Notes to Pharmacist and Comments section together cannot exceed 190 characters.

In the scenario presented above, ONLY the *Notes to the Pharmacist* section was being sent to the pharmacy, due to the character limit issue.

Action Taken by eClinicalWorks

The resolution for this issue is available in Version SP2. The e-Prescribe Rx window now includes a warning message, alerting users to the 190-character limit:

Figure 6 – e-Prescribing Notes Warning Message



Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows

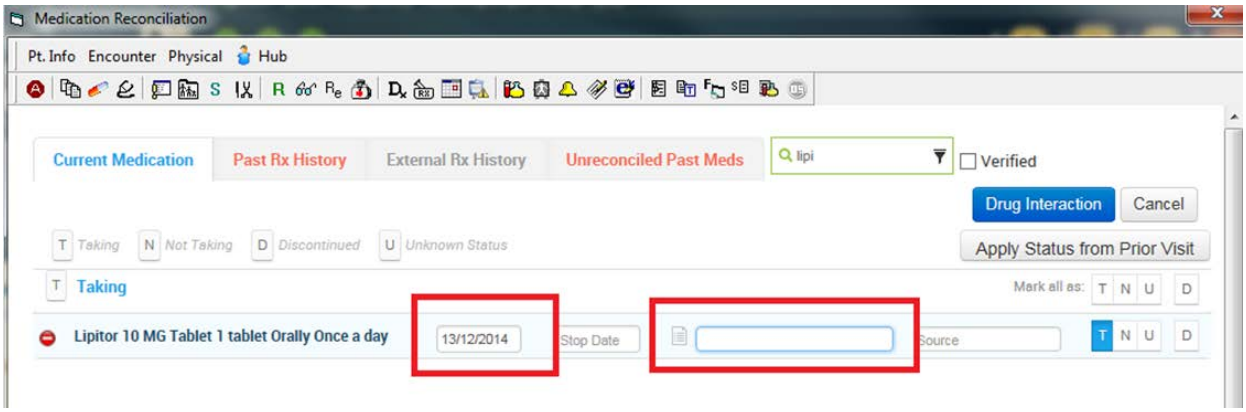
eClinicalWorks recommends that the users only use the *Notes to Pharmacist* section on Send eRX window and do not exceed 190 characters.

Issue: Start Date in Current Medication Date Issue and Notes Section Character Limit

The Start Date in the Current Medications section transposes the date format when entered manually, and related Notes section produces an error when the 255-character limit is exceeded. The following example illustrates the workflow in which these issues arise:

1. Access a patient's Progress Notes, click the *Current Medication* section, and then add a new medication.
2. Edit the Start Date (manually typed) and copy more than 255 characters in the Notes section. In the example below, the start date is erroneously listed as 13/12/2014, rather than 12/13/2014.

Figure 7 – Current Medications Date



Potential Risk

In the scenario presented above, the entered start date of 12/13/2014 will automatically transpose to 13/12/2014. Also, if the notes in the Notes section adjacent to the date field exceed the 255-character limit, the system will display an error message and will NOT save the notes.

Action Taken by eClinicalWorks

The resolution for this issue is available in Version SP2. The START DATE for the current medications can now only be entered via the drop-down calendar; manual keyed entry is not allowed. The Notes section will not accept more than 255 characters (even when copying/pasting text).

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

eClinicalWorks recommends that the users validate the date entered in current medications to ensure it is the correct date. When the system displays an error regarding the Notes section, please revise the notes to stay within the 255-character limit.

Issue: eClinicalTouch - Future Lab Orders Do Not Display on Quick-Launch Button ONLY

The following example illustrates the workflow in which this issue arises:

1. Access a patient's Progress Notes on eClinicalTouch (iPad®) platform.
2. Order a lab/DI order as a future order.

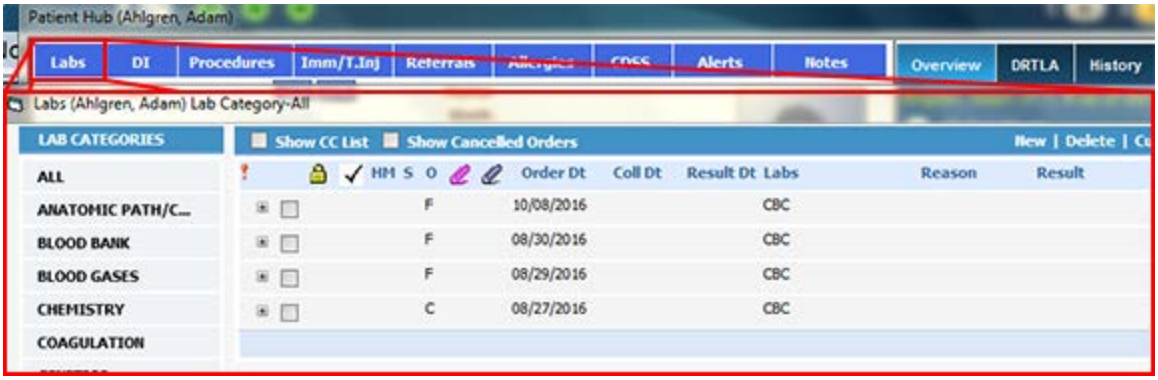
Potential Risk

The future order does not display on the L Quick-Launch (Jelly Bean) button.

Where are the orders?

1. The orders remain in the patient's Current Orders:
   - From the Patient Hub, click the *Lab* or *DI* tab:

Figure 8 – Future Lab Orders



Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2 and eClinicalTouch 3.0.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 and eClinicalTouch 3.0, when available, for resolution of this issue.

Recommended Workflows

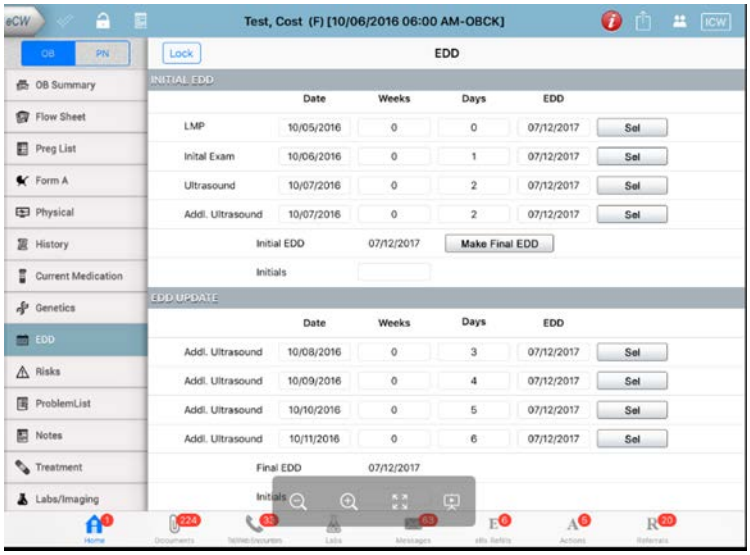
Until the resolution is in effect for your practice, eClinicalWorks recommends that users order any future orders via the eClinicalWorks client (exe) application rather than the eClinicalTouch application.

Issue: eClinicalTouch - Initial EDD and EDD Update Dates Do Not Display

The following example illustrates the workflow in which this issue arises:

1. Access the OB Flowsheet on eClinicalTouch and tap the *EDD* section.
2. Complete the fields under the Initial EDD section (*e.g.,* LMP, Initial Exam, etc.)

Figure 9 – OB Flowsheet EDD



3. Refresh the window, or exit and access this section again.

Potential Risk

In the scenario presented above, the information entered on Initial EDD and the EDD Update sections does not display.

Action Taken by eClinicalWorks

The resolution for this issue will be made available in eClinicalTouch Version 3.0.

Recommended User Action

☐ eClinicalWorks recommends that upgrade to eClinicalWorks SP2, as well as the latest version of eClinicalTouch (3.0), when available, for resolution of this issue.

Recommended Workflows

Until the resolution is in effect, eClinicalWorks recommends that the use of the eClinicalWorks client (exe) application rather than the eClinicalTouch application to document this information.

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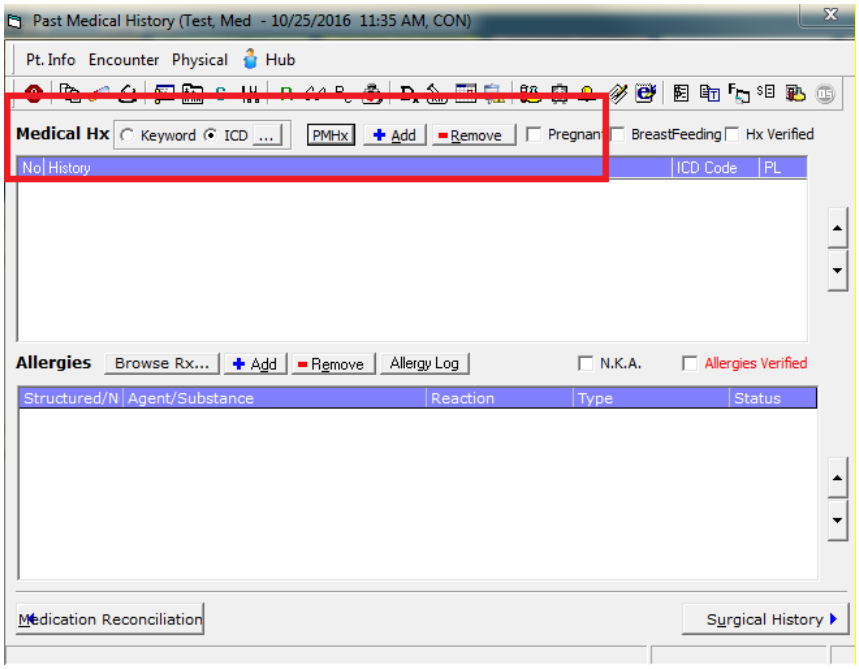
Issue: Past Medical History Documented in Progress Notes Do Not Display on Progress Notes and ICW

The following example illustrates the workflow in which this issue arises:

1. Access the Progress Notes for an existing encounter and document a condition under the Past Medical History section:

Figure 10 – Medical History



2. Access the Progress Notes of a future encounter for the same patient with the past Medical History section.
3. Do not click on the section to verify or update it.
4. Lock the note.

Potential Risk

In the scenario presented above, any or all of the following behaviors may occur:

- History section does not retain the information
- History section no longer displays in the Progress Notes
- History section no longer displays in the ICW section
- Updates do not display on the ICW

Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

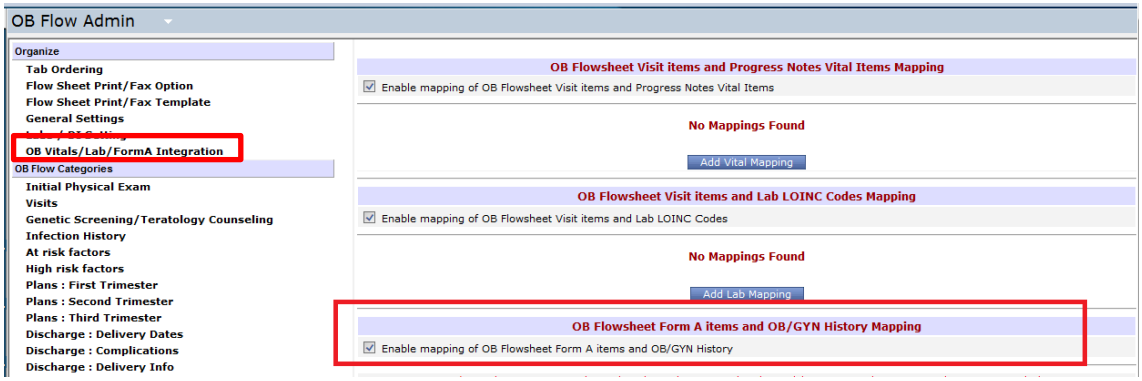
Please verify the History section of all Progress Notes.

Issue: OB Flowsheet FORM A Overwrites the Information Under Past OB History Section on ICW

The following example illustrates the workflow in which this issue arises:

1. Map Form A items to OB History (Admin > OB Flow Admin > Organize > OB Vitals/Lab/Form A Integration):

Figure 11 – OB Flow Admin



2. Access a patient's Progress Notes and document the information under the Past OB History section:

Figure 12 – Past OB History

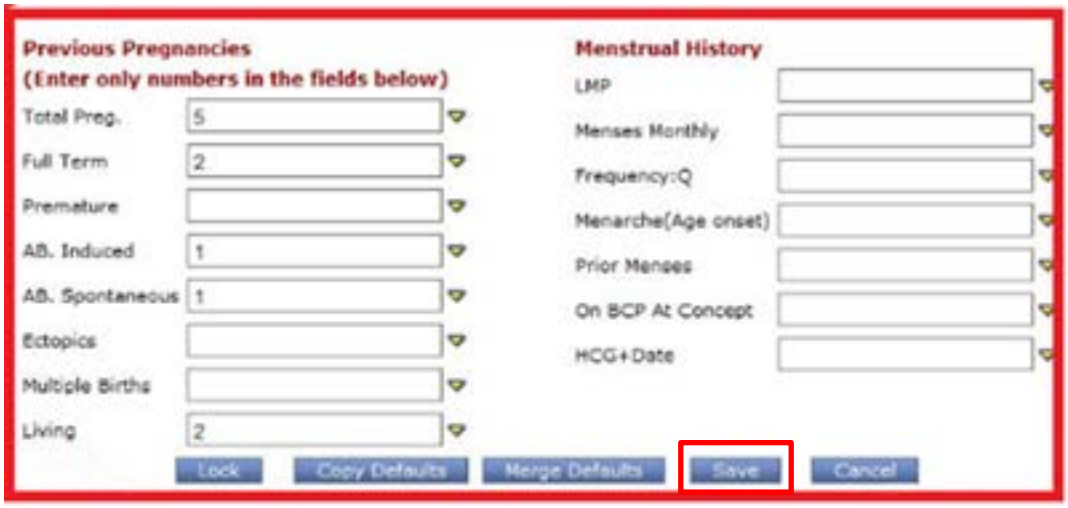
This information displays on the ICW section of OB History:

Figure 13 – OB History

3. Create an OB appointment for the same patient and access the OB flowsheet.

   Enter data under the FORM A section and click *Save:*

Figure 14 – Form A



Potential Risk

In the scenario presented above, once the FORM A is saved, the information under OB History section on the ICW is replaced.

In the example outlined above, the information in Step 2 is replaced with GP Gravida:

Figure 15 – OB History Replaced

Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

eClinicalWorks recommends that users verify and correct the past OB history, in the event it is overwritten by the FORM A information.

Issue: Rx Formulary Check Displays Incorrect Dispense Value for Azithromycin, Zithromax, and Z-Pak

The following example illustrates the workflow in which this issue arises:

1. Perform Rx Eligibility for a patient and set the formulary.
2. Access the patient's Progress Notes and order Azithromycin (or Zithromax/Z-Pak), *e.g.*, Azithromycin 5-Day Dose Pack – 250mg tablet.

Potential Risk

After the formulary has been set up (Step 1), the system prepopulates the Dispense field with the number 2. This value is not necessarily applicable or correct, and therefore can lead to the pharmacy dispensing extra or inaccurate quantities.

Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

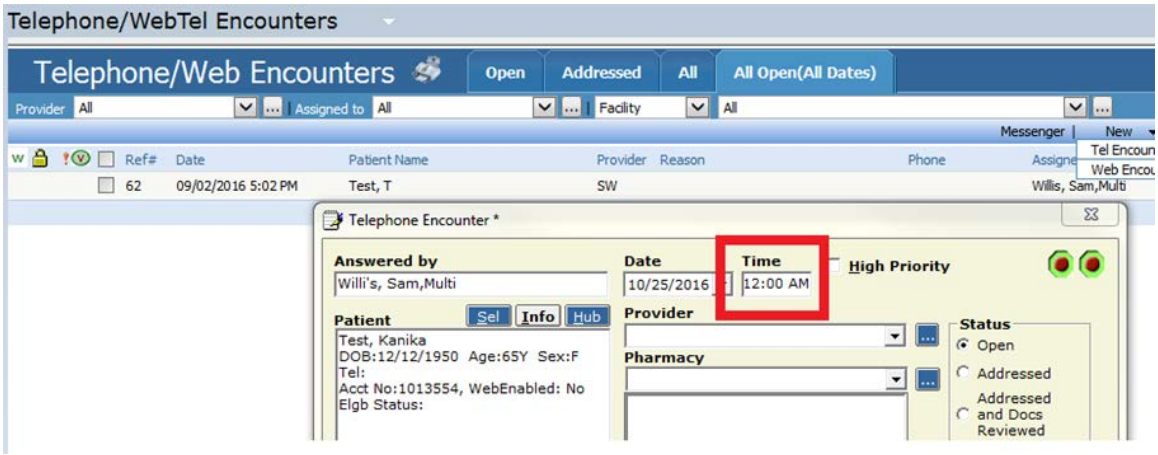
eClinicalWorks recommends that users check the dispense value of these medications and manually change the values as needed prior to sending the script to the pharmacy.

Issue: Telephone Encounters Created at 12:00 A.M. Do Not Display in T Quick-Launch Button

The following example illustrates the workflow in which this issue arises:

1. Create a new Telephone Encounter for a patient at 12:00 A.M.

Figure 16 – Telephone Encounters



2. Document the necessary information and assign it to the required staff member.

Potential Risk

In the scenario presented above, the Telephone Encounter does not display in the T Quick-Launch button (also known as the "Jelly Bean"). Additionally, any Telephone Encounter created after the initial 12:00 AM encounter will also not display.

Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

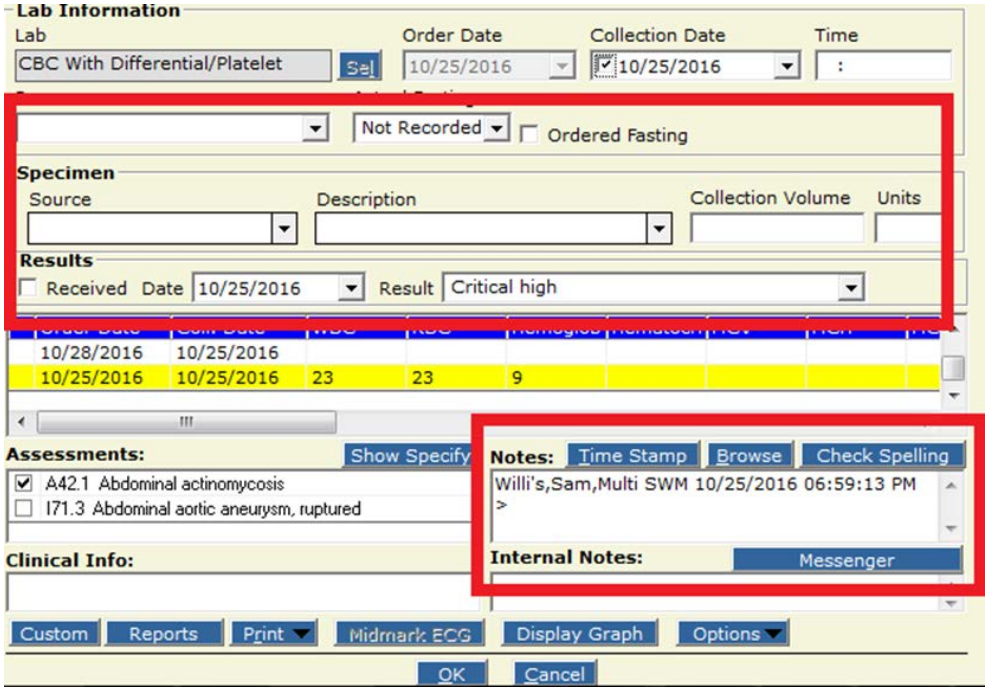
eClinicalWorks recommends that Telephone Encounters should be not be created exactly at 12:00 A.M. Please change the time to 11:59 P.M. or 12:01 A.M. and timestamp the changes made appropriately under *Action Taken* section.

Issue: Lab Results Are Copied to Pending Standing Orders

The following example illustrates the workflow in which this issue arises:

1. Access the Progress Notes of a patient and order a lab under the *Treatment* section.
2. Document the Result field (from the drop-down), Reason, Collection Date, Time, and other values (Source, Description, Collection Volume, Units, Notes, Internal Notes):

Figure 17 – Lab Results Copied to Pending Standing Orders



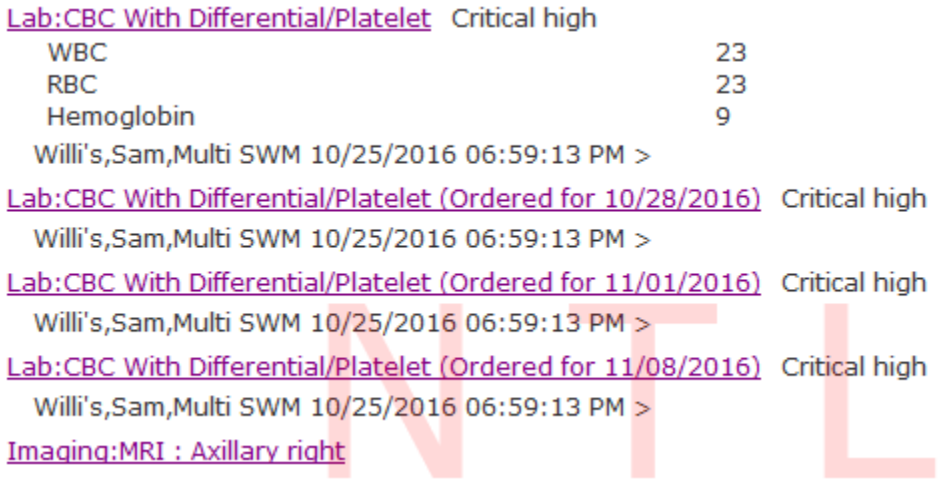
3. Access the Manage Orders window and create Standing Orders of the lab order in Step 1.

Potential Risk

In the scenario presented above, all details completed in Step 2 are copied to the Standing Orders created in Step 3. However, any related, resulted values are NOT copied over.

In the example, all fields are copied except the WBC, RBC, and Hemoglobin results:

Figure 18 – Lab Results



Action Taken by eClinicalWorks

The resolution for this issue will be made available in Version SP2.

Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

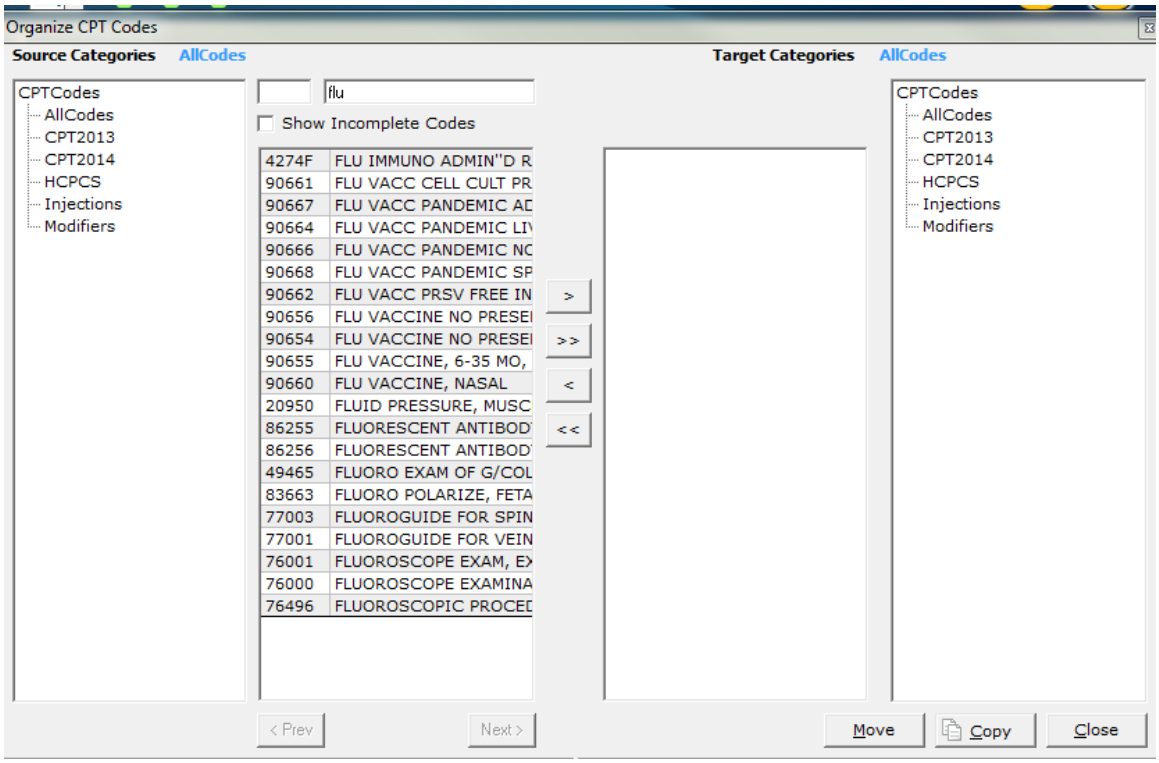
eClinicalWorks recommends that users create *Standing Orders* BEFORE documenting in the order. Once the Standing Orders are created, the user can access Today's Order and complete the necessary information.

Issue: Changing CPT Setup with Immunization to Another Category (Admin)

The following example illustrates the workflow in which this issue arises:

1. Move the Current Procedural Terminology (CPT) code from Immunization to another category.
2. From the Billing menu, click Organize > Organize CPT Codes:

Figure 19 – Organize CPT Codes



For example, move CPT Code 90661 from the *All Codes* folder to *Injections*.

Potential Risk

In the scenario presented above, immunizations that have been changed do not display on patient records.

Action Taken by eClinicalWorks

The resolution for this issue is currently present in eClinicalWorks Version 10 SP1-C20.8. A report has also been added under Reports > Report Console > Advisory Reports > Orders. This report lists records that do not display on the patient's chart. Users can add these immunizations back to the patient's Progress Notes based on the list:

Figure 20 – Advisory Report

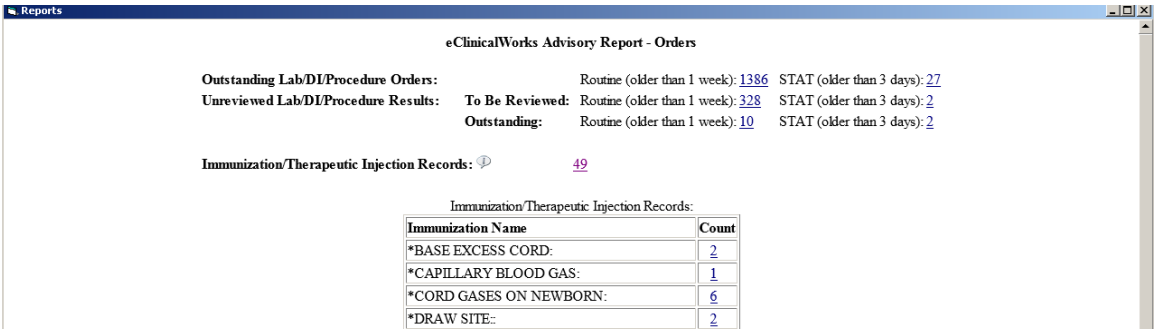
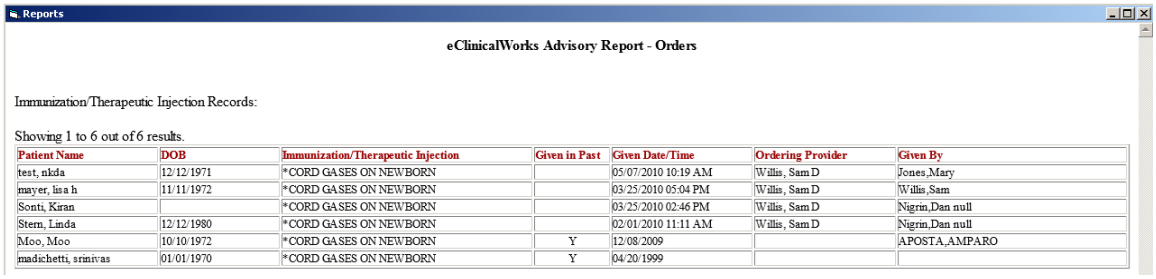


Figure 21 – Advisory Report Detail



Recommended User Action

☐ eClinicalWorks recommends that clients upgrade to Version SP2 or the latest instance of V10 SP1-C20.8 for resolution of this issue.

Recommended Workflows Prior to SP2 Upgrade

Note: The following workflow is intended for use until an upgrade to SP2, or for clients who elect not to upgrade to Version SP2.

eClinicalWorks recommends that users do not change the category mentioned above, unless the upgrade has been performed and is complete.

Resources

eClinicalWorks strongly encourages you to carefully review the contents of this notice, develop your own determination of the frequency of these issues and level of risk to your organization, and advise your employees and patients accordingly.

If you have any questions or concerns, please reach out to your Strategic Account Manager (SAM), or log a case on the eClinicalWorks Customer Portal at https://my.eclinicalworks.com

APPENDIX A: NOTICES

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