eClinicalWorks

MY EMPLOYER PORTAL GUIDE

V11 Browser for Chrome™ - April 2021

CONTENTS

Major New Features

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ABOUT THIS GUIDE

This guide was created for the eClinicalWorks® Occupational Health employers using the Employer Portal.

For more information, refer to the topics:

- Product Documentation
- Webinars
- Getting Support
- Conventions

Product Documentation

The eClinicalWorks documentation supports the eClinicalWorks Electronic Medical Record (EMR), Practice Management (PM), and/or additional software features.

eClinicalWorks documentation is available from:

https://my.eclinicalworks.com Customer Portal

- click the *Documents and Videos* widget on the Knowledge tab to display the documents available in PDF format
  - click the *HelpHub* widget on the Helpdesk tab to display the documents available in the HelpHub
- eClinicalWorks application - from the Help menu, click the *HelpHub* link.

For more information, refer to the sections Webinars and Getting Support.

Webinars

For more information, take advantage of the free unlimited eClinicalWorks Webinars—interactive seminars conducted online. These courses are presented by product trainers who are experts with eClinicalWorks and all of its capabilities. To sign up for an eClinicalWorks Webinar, go to:

my.eclinicalworks.com Customer Portal.

To view and register for Webinars, click the Knowledge tab and then click the Webinars widget.

Getting Support

For support-related issues, open a Support Case on the eClinicalWorks Customer Portal at: https://my.eclinicalworks.com

You may also call or e-mail eClinicalWorks Support:

Phone: (508) 475-0450

Email: support@eclinicalworks.com

Conventions

This section lists typographical conventions and describes the icons used to call out additional information and to indicate item keys, new features, and enhancements to the application.

- Typographical conventions:

Bold	Identifies options, keywords, and items in a description.
Italic	Indicates variables, new terms and concepts, foreign words, or emphasis.
`Monospace`	Identifies examples of specific data values, and messages from the system, or information that you should actually type.

- Icons are used to highlight new features and indicate enhanced features and item keys:

Icon	Description
	Indicates a Patient Safety feature.
	Indicates an item key.
	Identifies new features, suggested by clients, from the eCWIdeas website: http://ecwideas.eclinicalworks.com
	Identifies new features.
	Indicates enhanced features.
	Points out helpful tips or additional information.

Icon	Description
	Indicates the feature helps meet MACRA and/or Medicaid Meaningful Use requirements. Depending on the practice, this could be MIPS or Advanced APM.

IMPORTANT! Refer to the Safety, Security, and Compliance section on the my.eclinicalworks.com Customer Portal for any current communications related to Patient Safety, Security, or Compliance.

Note: No issues related to Patient Safety, Security, or Compliance were identified in this document during the document review process.

Note to eClinicalWorks Private Cloud/SaaS Users: When accessing the eClinicalWorks application via RDP (Remote Desktop Protocol) as a backup, be advised that Microsoft® Office® applications such as Excel® and Word® will not be supported.

Employer Portal Accounts and Overview

The Employer Portal enables employers to manage their employees, occupational health documents, employee appointments, and health surveillance. The Employer Portal opens to the Dashboard by default, providing a high level overview of employee appointments and documents.

Both practice and portal administrators can provide portal access to an employee. The new user will then receive a signup e-mail to begin configuring their account.

For more information about creating accounts and accessing the Employer Portal, refer to:

- Employer Portal Activation
- Employer Portal Setup
- Create Your Account
- Access the Employer Portal
- Employer Portal Overview

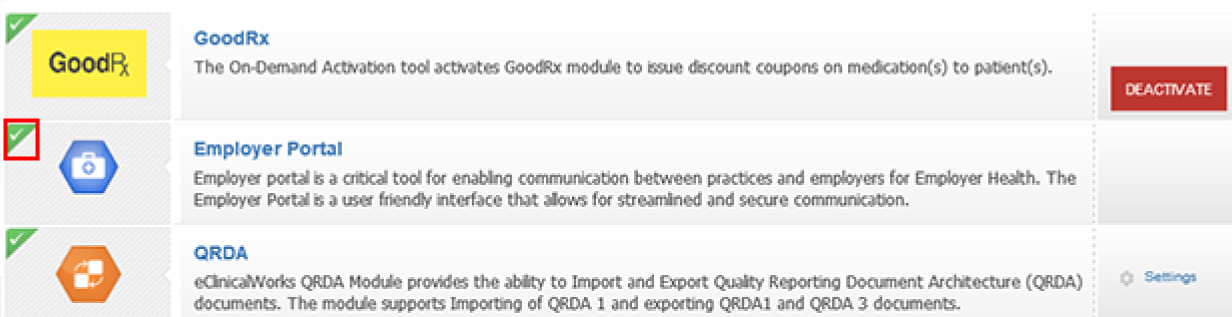
Employer Portal Activation

Path: *Admin menu* > *Product Activation*

The Employer Portal is activated from eClinicalWorks.

On the Product Activation window, search for the Employer Portal, and then click the *Activate* button on the right-hand side.

A green check-mark on the left indicates that the Employer Portal is currently activated:



Employer Portal Setup

This section describes the settings required for the Employer Portal:

- **Occupational Health Settings** - The Occupational Health Portal settings are configured in eClinicalWorks. The portal administrator must activate their portal login. Once the portal login is activated, then the employer portal can be configured by both portal administrators and practice administrators.

  For more information about setting up the Employer Portal, refer to the *Occupational Health User Guide*.

- **Portal Branding Tab** - Configure the images and message that display in the Employer's My Employer Portal from the Portal Branding tab.

  For more information about setting up Employer Portal branding, refer to the *Occupational Health User Guide*.

Create Your Account

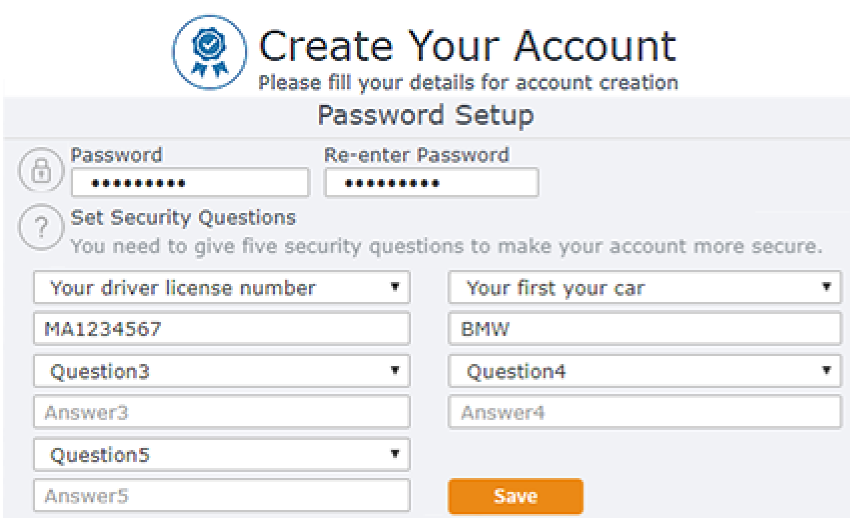
Each new portal user receives a welcome-to-portal e-mail. This e-mail provides the user with their Employer Portal username and a verification link. The user must click the verification link to create their Employer Portal account.

To create an Employer Portal account:

1. Click the verification hyperlink in the signup e-mail.

   The Create Login window opens.

2. Enter and re-enter a password.
3. Use the *Question1* drop-down list to select a security question:



4. Enter the security question's answer in the *Answer* field.

Note: Users must select and answer five security questions.

5. Click *Save*.

   The user's account is created and the user is logged in to their Employer Portal.

Note: Users should save the Employer Portal URL to their Web favorites.

Access the Employer Portal

eClinicalWorks suggests saving the Employer Portal Login window to their Google™ Chrome™ Favorites Bar.

Log in to the application to begin working in the Employer Portal.

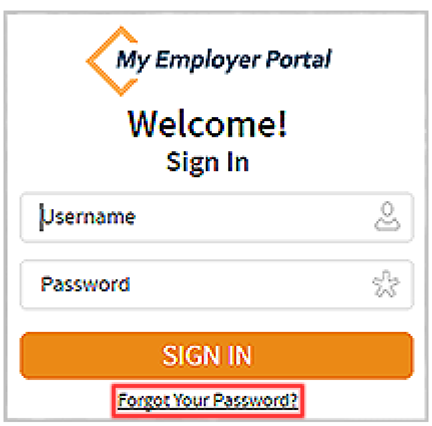
For more information about logging in, refer to the section Logging in to the Employer Portal.

Logging in to the Employer Portal

Log in to the Employer Portal from the Login Page.

To log in to the Employer Portal:

1. Enter your username.
2. Enter your password.
3. (*Optional*) If you forget your password, click the *Forgot Your Password?* hyperlink.



For more information about resetting your password, refer to the section Resetting a Forgotten Password.

4. Click *Sign In*.

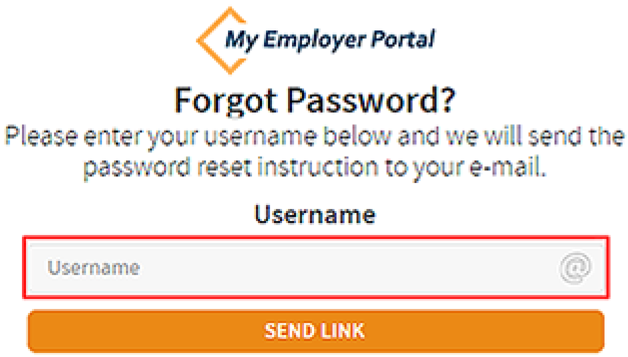
   The Employer Portal dashboard displays.

Resetting a Forgotten Password

When required, reset your password.

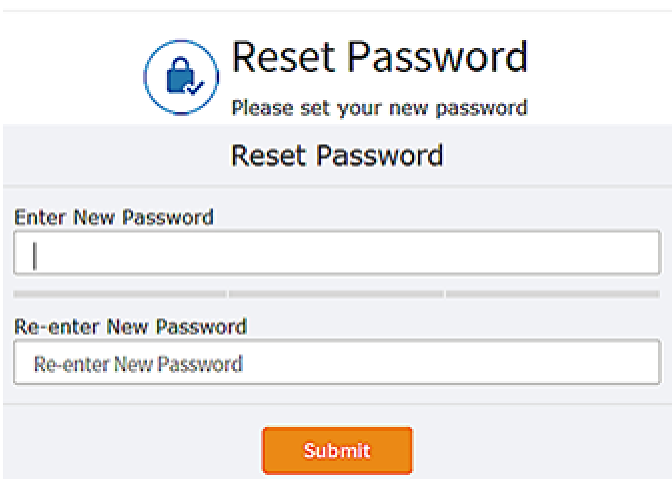
To reset your password:

1. Click the *Forgot Your Password?* hyperlink.
2. Enter your username:



3. Click *Send Link*.
4. Log in to your e-mail and access the Reset Password Link e-mail.
5. Click the *Click here to reset password* hyperlink.

   The Reset Password window opens.
6. Enter the answer to the displayed security question.
7. Click *Submit*.
8. Enter and re-enter a new password:

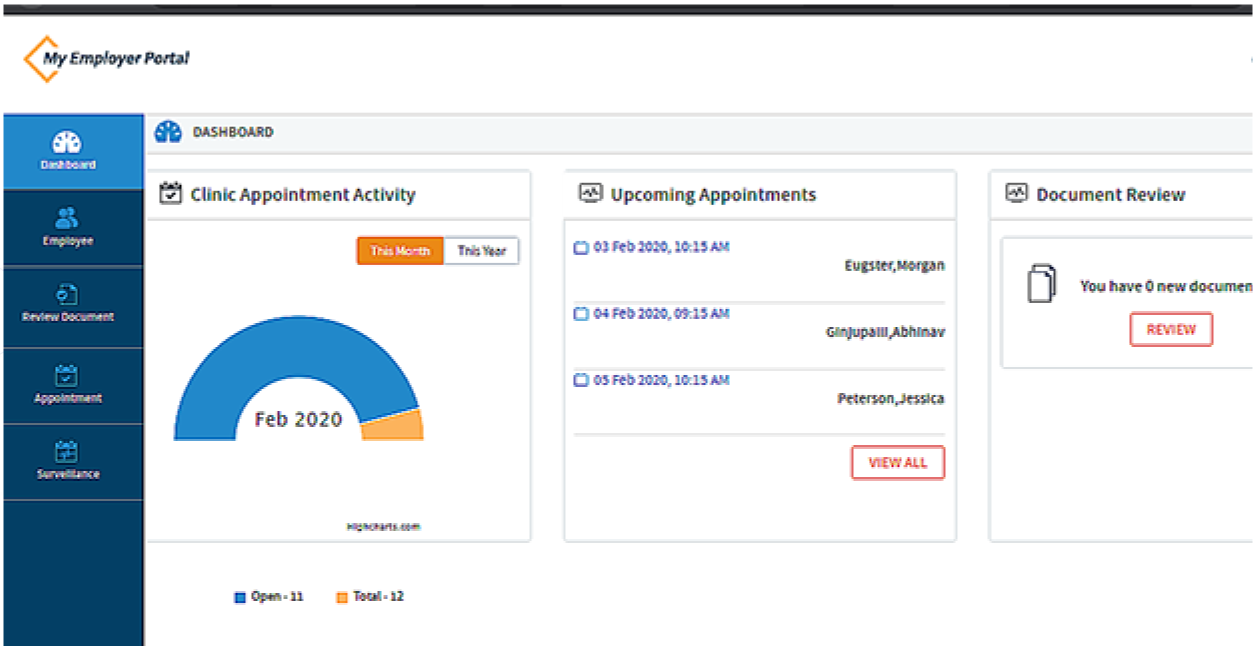


9. Click *Submit*.

   The password is reset and the Employer Portal dashboard displays.

Employer Portal Overview

The Employer Portal contains a navigation band, dashboard overview, access to user management, and a user-specific drop-down list:

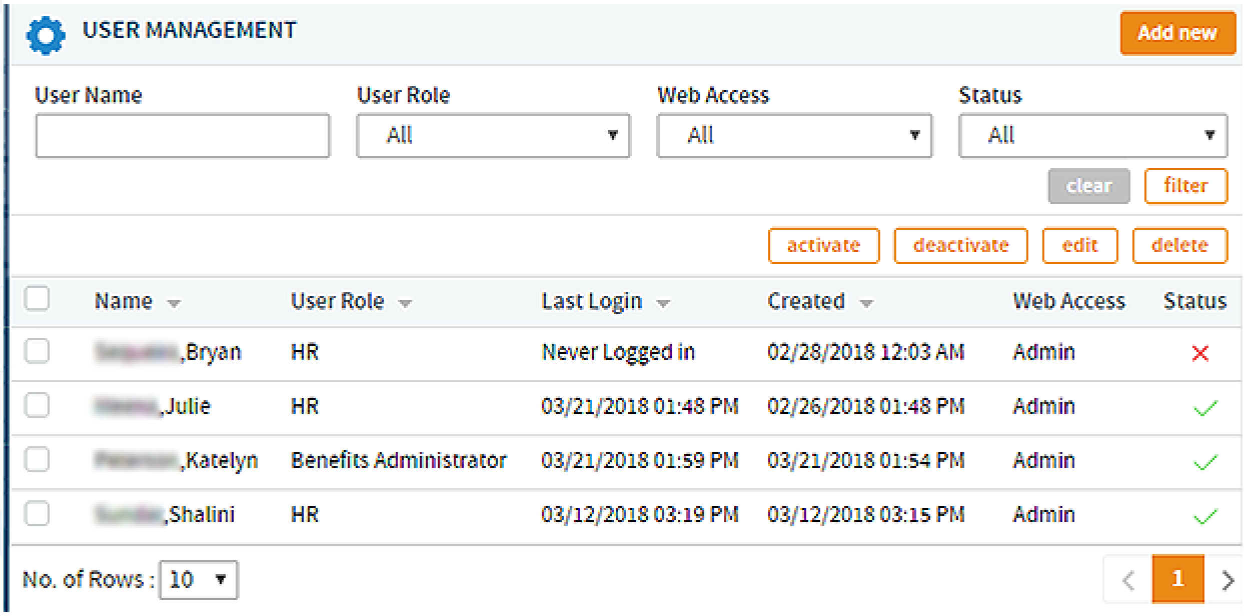


The following table describes the features available from the Employer Portal:

Feature	Description
Gear icon	Click to display the User Management window. For more information about this window, refer to Configuring User Management.
User icon	This feature displays the user's profile picture. Click the drop-down list to access your profile or log out. For more information about the user's My Profile, refer to Editing Your Profile.
Dashboard	For more information about this feature, refer to the Employer Portal Dashboard chapter.
Employee	For more information about this feature, refer to the Employer Portal Employees chapter.
Review Document	For more information about this feature, refer to the Employer Portal Document Review chapter.
Appointment	For more information about this feature, refer to the Employer Portal Appointments chapter.
Health Surveillance	For more information about this feature, refer to the Health Surveillance chapter.

Configuring User Management

From the Employer Portal home page, click the gear icon to display the User Management window. From this window, configure the Employer Portal's users:



The following table describes the features available in the User Management window:

Feature	Description
Add New	Click to add a new user. For more information about this feature, refer to Adding New My Employer Portal Users.
Filters	Users can filter the list of employees displayed in the User Management window by username, user role, web access, and status. Click the *Filter* button to apply the selected filters, or the *Clear* button to reset the filters.
Activate	Click to activate the selected user. For more information about this feature, refer to Activating Users in the Employer Portal.
Deactivate	Click to deactivate the selected user. For more information about this feature, refer to Deactivating Users in the Employer Portal.
Edit	Click to edit the selected user. For more information about this feature, refer to Editing Users in the Employer Portal.
Delete	Click to delete the selected user. For more information about this feature, refer to Deleting Users from the Employer Portal.
User-level icon	Point to a user to display the *Edit* icon.
Navigation	Users can view additional employees in the user management list by using the *No. of Rows* drop-down list and the *Previous* and *Next* arrows.

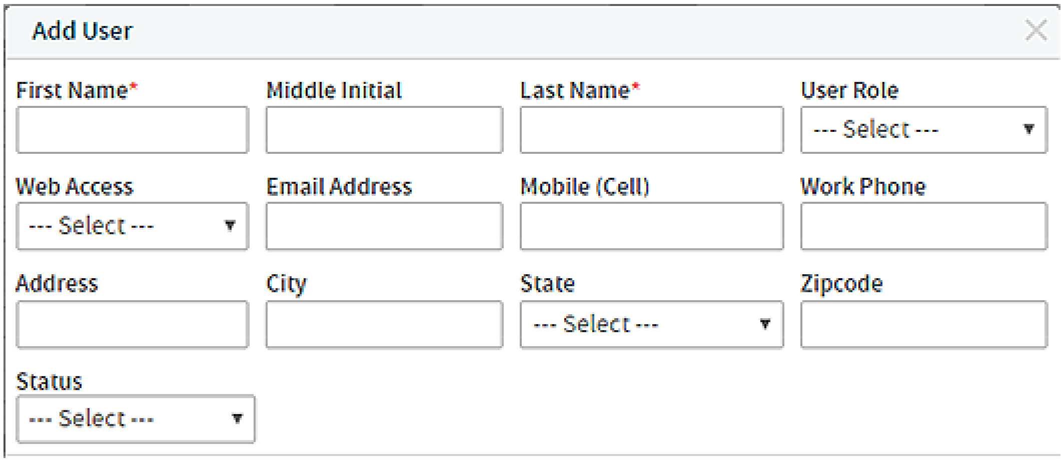
Adding New My Employer Portal Users

Path: *My Employer Portal* > *User Management*

When required, add a new user to the Employer Portal from the User Management window.

To add a user:

1. Click *Add New*.
2. Enter the user's information into the available fields:



> **Note:** The items displayed in the User Role drop-down list are configured by the practice in eClinicalWorks. Contact the practice administrator for more information.

3. Click *Save*.
4. From the system-displayed confirmation message, Click *OK*.

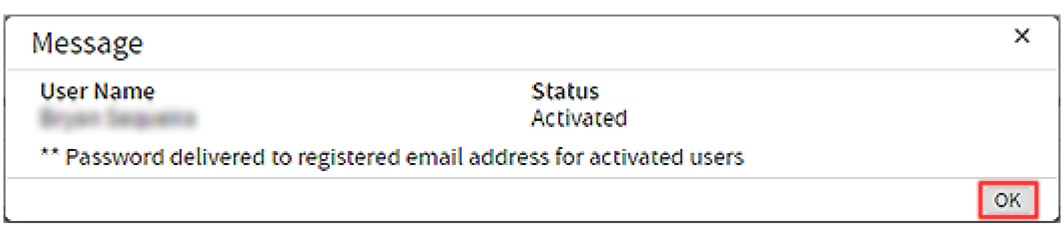
   The new user is added to the Employer Portal and will receive a signup e-mail.

Activating Users in the Employer Portal

When required, activate a user in the Employer Portal from the User Management window.

To activate a user:

1. Check the box of a user.
2. Click *Activate*.
3. From the system-displayed confirmation message, click *OK*:



   The selected user is now activated.

Deactivating Users in the Employer Portal

When required, deactivate a user in the Employer Portal from the User Management window.

To deactivate a user:

1. Check the box of a user.
2. Click *Deactivate*.
3. From the system-displayed confirmation message, click *OK*:

A red *X* displays under that user's *Status* attribute.

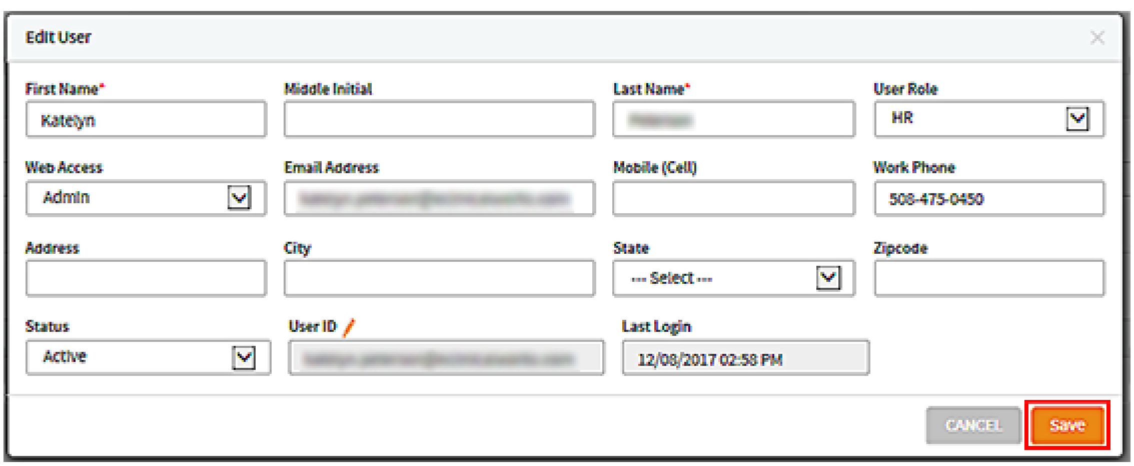
Editing Users in the Employer Portal

When required, edit a user in the Employer Portal from the User Management window.

To edit a user:

1. Check the box of a user.
2. Click *Edit*.

   The Edit User window opens.
3. Enter the edits into the applicable fields.
4. Click *Save*:



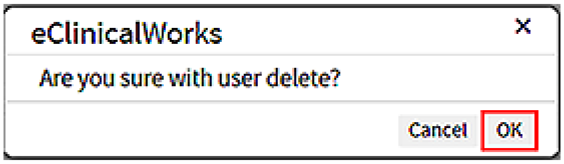
The user's information is updated.

Deleting Users from the Employer Portal

When required, delete a user from the Employer Portal from the User Management window.

To delete a user:

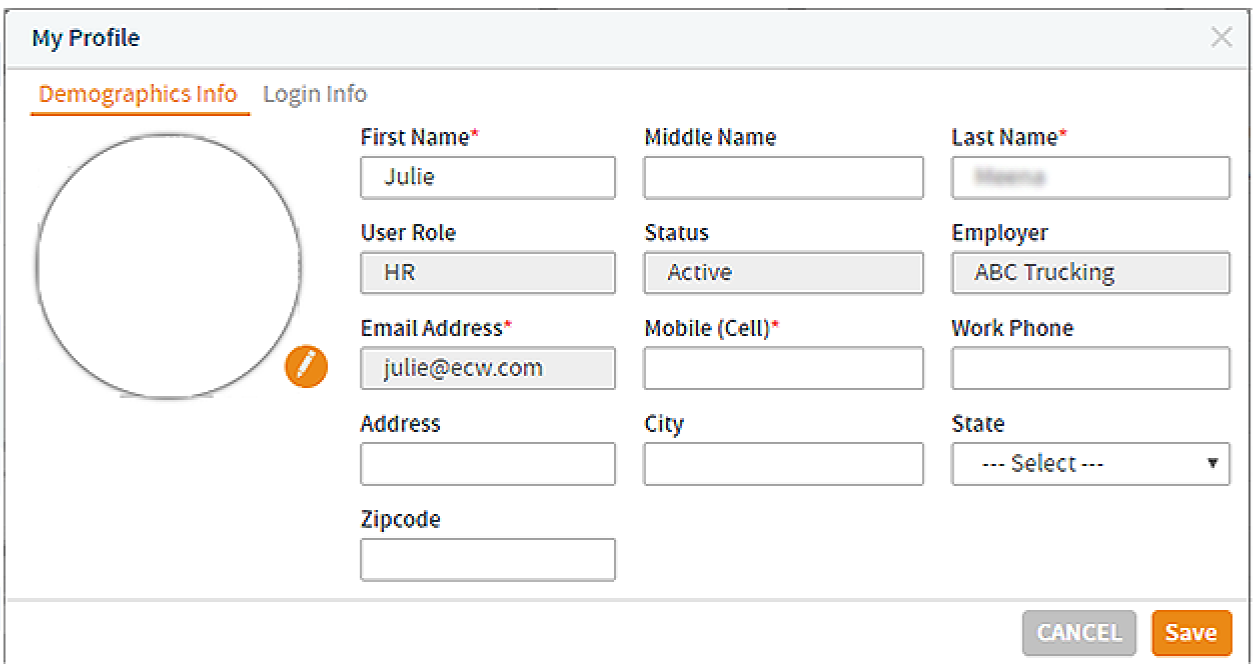
1. Check the box of a user.
2. Click *Delete*.
3. From the system-displayed confirmation message, click *OK*:



The user is no longer listed in the Employer Portal.

Editing Your Profile

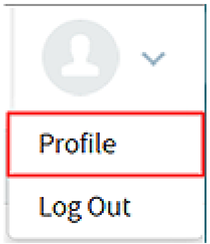
Each user profile contains information entered when an administrator added the employee login and additional fields that the user can edit:



To access the My Profile window:

1. From the Employer Portal home page, click the profile icon:

2. Then, click *Profile*:



The My Profile window opens to the Demographics Info section.

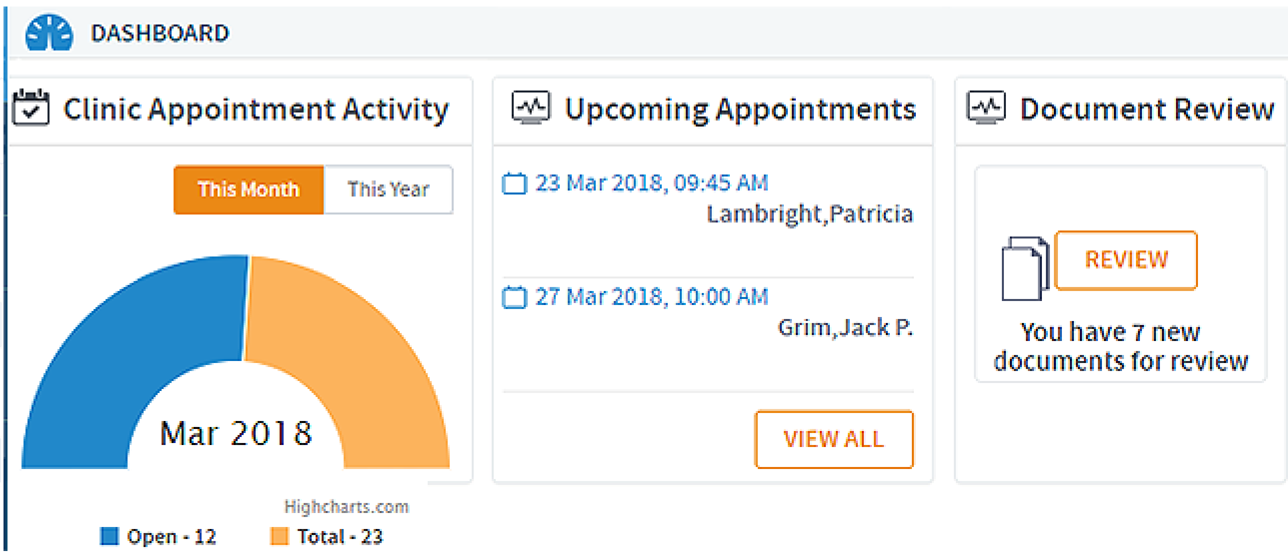
The following table describes the features available in the My Profile window:

Feature	Description
Upload Image	Click the pencil icon, and then select an image to be uploaded as your profile picture.
Demographics Information	Enter any missing, or update existing information.
Login Info	Click this tab to display your login username and the feature to change your password.
Save	Click to save the information in your profile.

EMPLOYER PORTAL DASHBOARD

Path: *Employer Portal > Dashboard*

The Employer Portal dashboard displays a high-level overview of the clinic's appointment activity, upcoming appointments, and documents in tile-format:



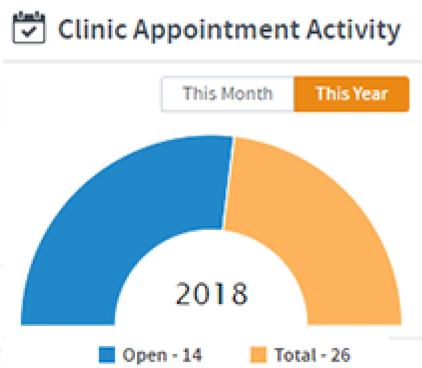
This window displays by default. From another Employer Portal window, click the Dashboard menu item to navigate back to this window:

For more information about each tile, refer to the sections:

- The Clinic Appointment Activity Tile
- The Upcoming Appointments Tile
- The Document Review Tile

The Clinic Appointment Activity Tile

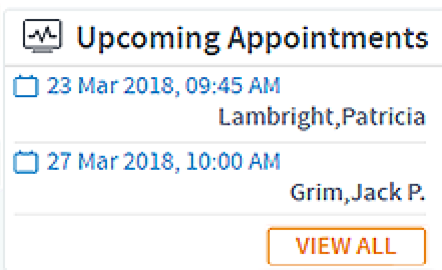
The Clinic Appointment Activity tile displays the number of open appointments against the total number of appointments, by either the current month or year:



Point to the Open or Total segment of the graph to display its percentage.

The Upcoming Appointments Tile

The Upcoming Appointments tile displays upcoming employee appointments. Click *View All* to navigate to the Appointment window:

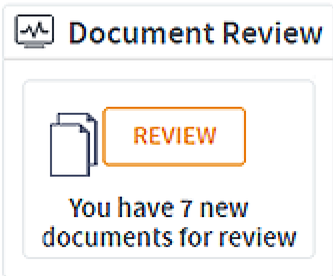


For more information about working in the Appointment window, refer to Employer Portal Appointments.

The Document Review Tile

The Document Review tile displays the number of documents that are pending review and enables the user to launch the Review Documents window.

Click *Review* to launch the Review Documents window:

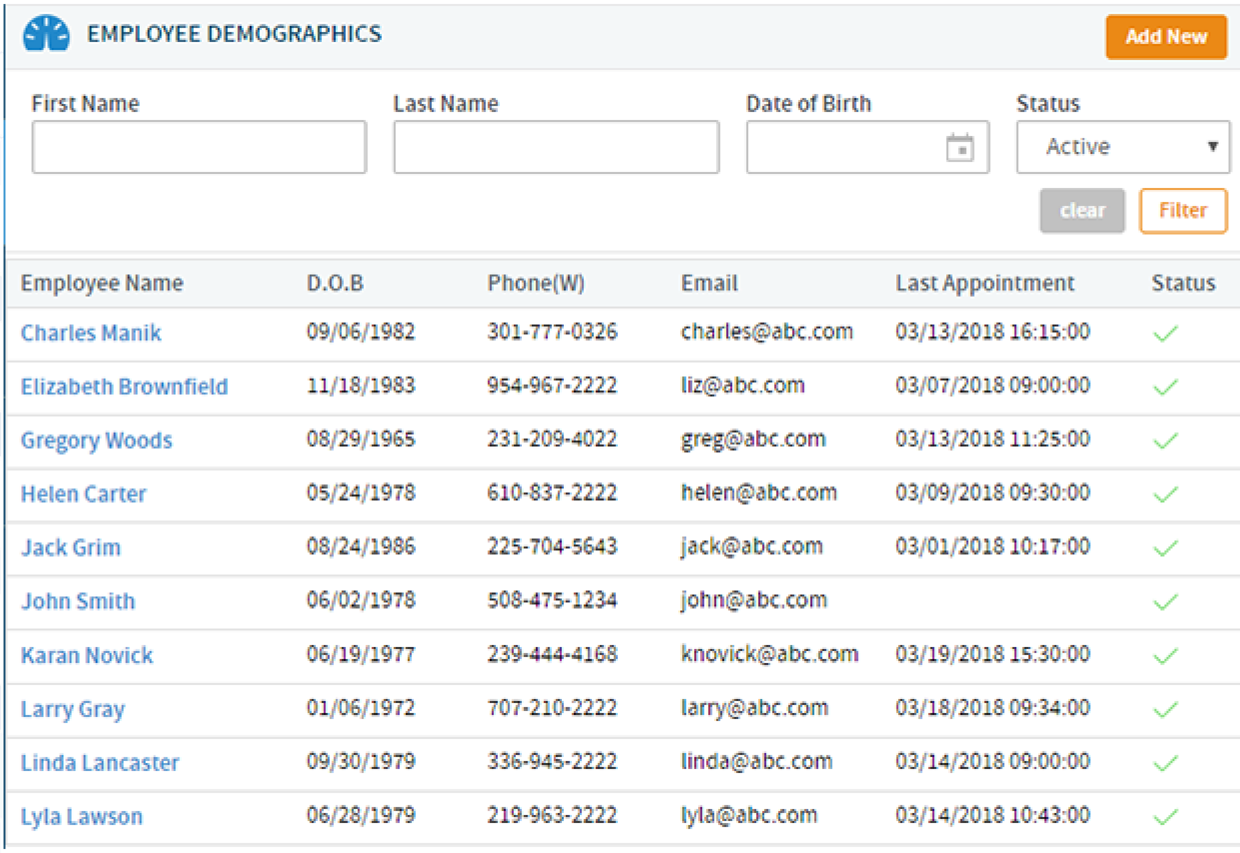


For more information about working in the Review Documents window, refer to Employer Portal Document Review.

EMPLOYER PORTAL EMPLOYEES

Path: *Employer Portal > Employee*

The Employee Demographics window displays the employer's list of employees and enables the user to add new employees to the system:



Employee Name	D.O.B	Phone(W)	Email	Last Appointment	Status
Charles Manik	09/06/1982	301-777-0326	charles@abc.com	03/13/2018 16:15:00	✓
Elizabeth Brownfield	11/18/1983	954-967-2222	liz@abc.com	03/07/2018 09:00:00	✓
Gregory Woods	08/29/1965	231-209-4022	greg@abc.com	03/13/2018 11:25:00	✓
Helen Carter	05/24/1978	610-837-2222	helen@abc.com	03/09/2018 09:30:00	✓
Jack Grim	08/24/1986	225-704-5643	jack@abc.com	03/01/2018 10:17:00	✓
John Smith	06/02/1978	508-475-1234	john@abc.com		✓
Karan Novick	06/19/1977	239-444-4168	knovick@abc.com	03/19/2018 15:30:00	✓
Larry Gray	01/06/1972	707-210-2222	larry@abc.com	03/18/2018 09:34:00	✓
Linda Lancaster	09/30/1979	336-945-2222	linda@abc.com	03/14/2018 09:00:00	✓
Lyla Lawson	06/28/1979	219-963-2222	lyla@abc.com	03/14/2018 10:43:00	✓

The following table describes the features available in the Employee Demographics window:

Feature	Description
Add New	Click to add a new employee. For more information about employee configuration, refer to the section New Employee Configuration.
Filters	Filter the list of employees by first name, last name, date of birth, and status.
Clear	Click to clear selected filters.
Filter	Click to filter the Employee Demographics window.

Feature	Description
Employees	Click on an employee to display their demographic information, employment history, and their documents and certificates. Point to an employee to display their employee-specific *Edit* icon. For more information about using this icon, refer to New Employee Configuration.
Rows Per Page	Use the drop-down list to select the number of employees to display in this window.

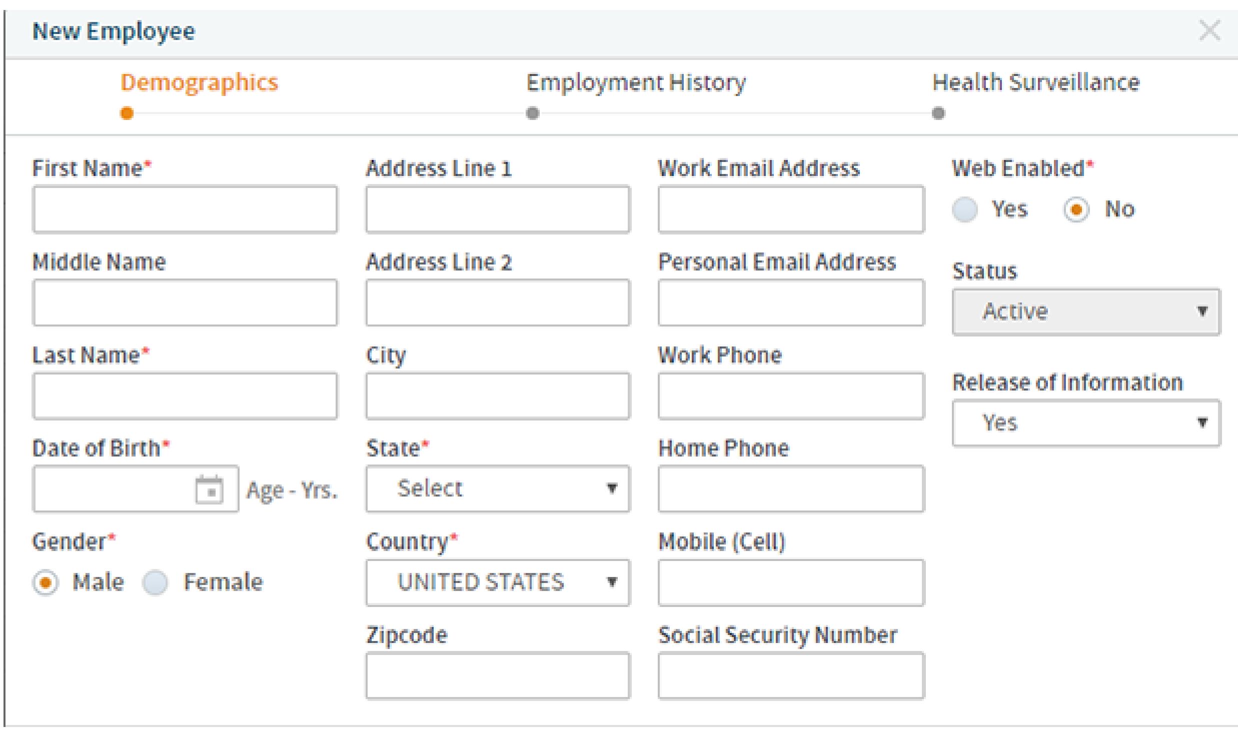
New Employee Configuration

Path: *Employer Portal > Employee*

Add new employees to the employer's list of employees when required. These employees then display as patients in the eClinicalWorks® software.

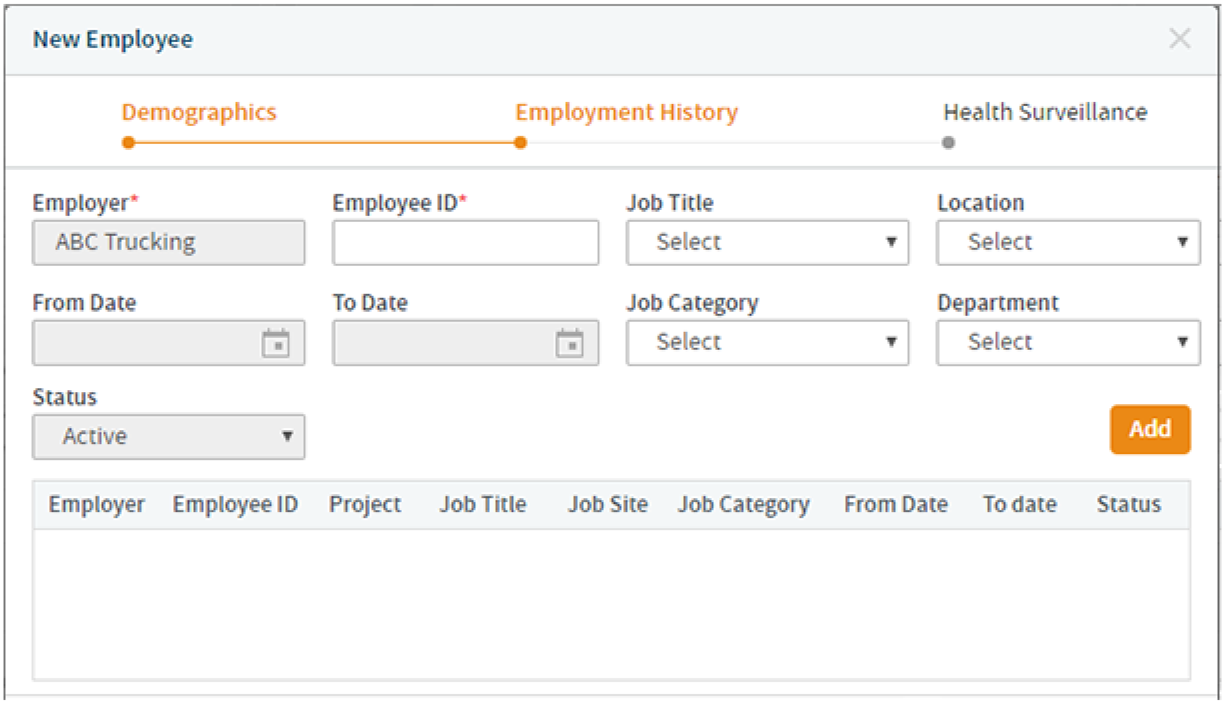
To add a new employee:

1. Click *Add New*.
2. Complete the Demographics section of the New Employee window:



3. Click *Next*.

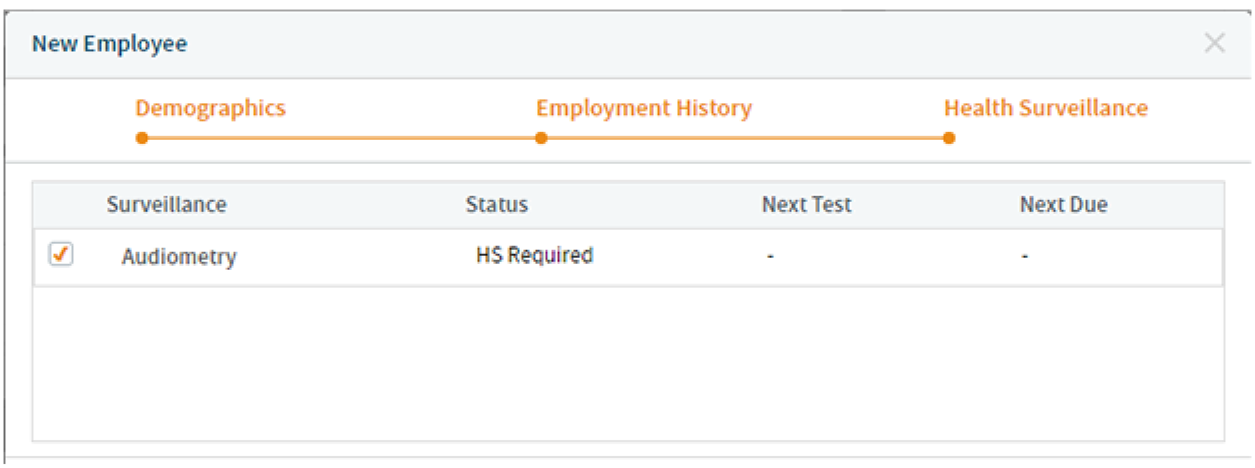
4. Complete the Employment History section of the New Employee window:



5. Click *Add*.

   The employment history displays in the Employment History list.

6. Click *Next*.
7. Check the applicable boxes of each Health Surveillance screening required for the employee:



Note: Required screenings are generally based on the employee's role.

8. Click *Save*.

   The system displays a message confirming the employee was created successfully.

9. Click *OK*.

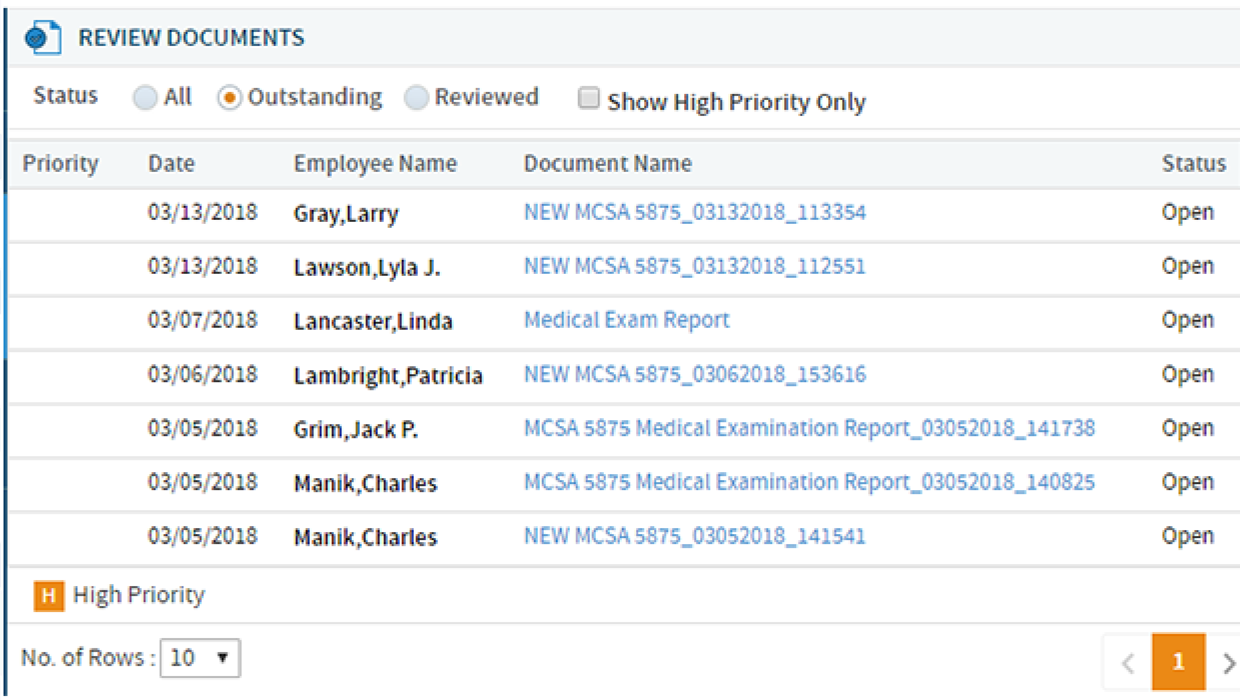
Employer Portal Document Review

Path: *Employer Portal* > *Review Document*

The number represents the number of documents that need to be reviewed.

Review employee documents in the Review Documents window. The list of documents displayed is imported from the practice-configured Occupational Health Settings folder.

The following image and table describe the features available in the Review Documents window:



Feature	Description
Status filters	Select a *Status* radio button to determine which documents display. Check the *Show High Priority Only* box to display the high-priority documents that need to be reviewed.
Documents	Documents display with their date, employee name, document name, and status. A visual indicator displays next to high-priority documents. Click the document name to open the Review Document window. For more information about working in the Review Document window, refer to the section The Review Document Window.

Feature	Description
No. of Rows	Use the drop-down list to configure the number of rows that display in the Review Documents window.
Navigation Arrows	Click the *Previous* or *Next* arrow to display additional documents for review.

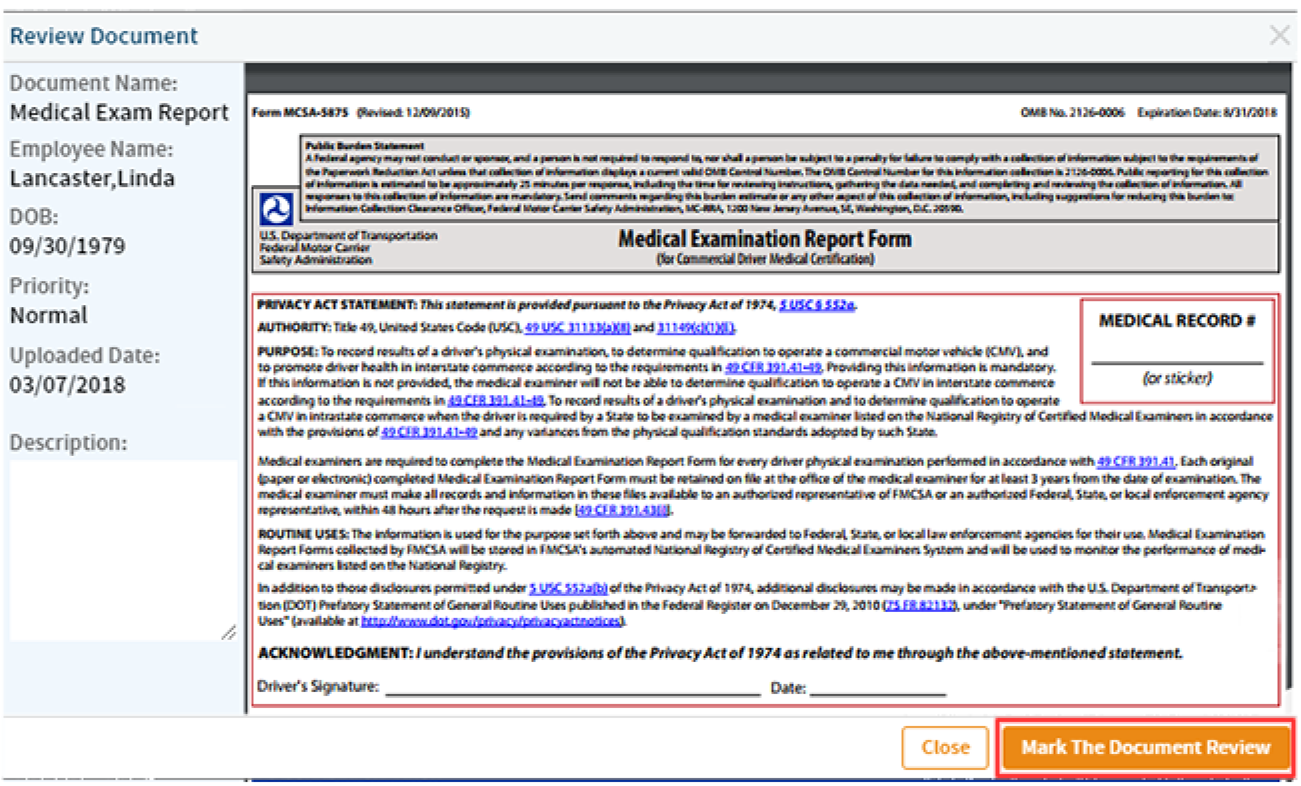
The Review Document Window

The Review Document window displays the selected document for review as well as the document's name, the employee's name, the employee's date of birth, the document's priority, the date the document was uploaded to the Employer Portal, and an editable description field.

Reviewed documents also display the name of the user who marked the document as *Reviewed* with the date and time.

To mark a document as reviewed:

1. Open a document to be reviewed.
2. Review the document.
3. Click *Mark The Document Review*:

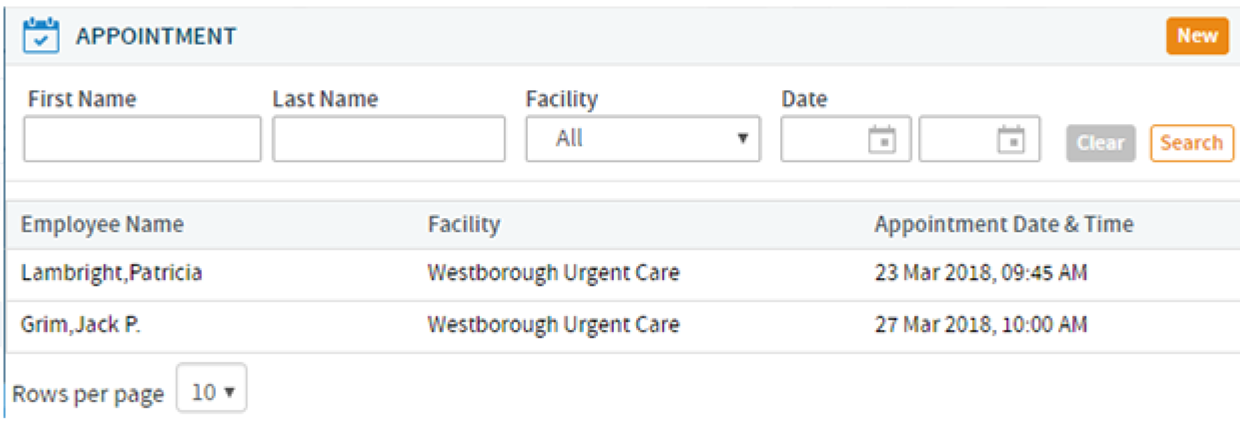


The document is reviewed, and the *Reviewed By* and *Reviewed Date* fields display.

Employer Portal Appointments

Path: *Employer Portal > Appointment*

The Appointment window displays appointments, can be filtered, and enables a user to add a new appointment:



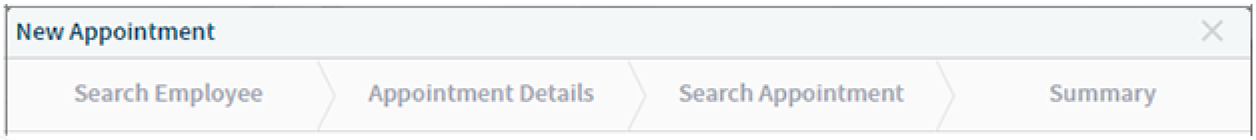
The following table describes the features available in the Appointment window:

Feature	Description
New	Click to create a new appointment. For more information about this feature, refer to the section Configure New Appointments.
Filters	Use the following filters to refine the list of appointments: ▪ **Patient Name:** Enter the patient's first or last name. ▪ **Facility:** Use the drop-down list to select the facility for which the appointment is booked. ▪ **Date:** Use the calendar icons to enter a date range.
Clear	Click to clear the selected filters.
Search	Click to apply the selected filters.
Rows per page	Use the drop-down list to the number of appointments that will be displayed in the Appointment window.

Configure New Appointments

Path: *Employer Portal* > *Appointments*

The New Appointment window enables the Employer Portal user to book employee appointments though a four-step process. The user must complete the displayed section before progressing to the next step. The following image displays the new appointment booking process:

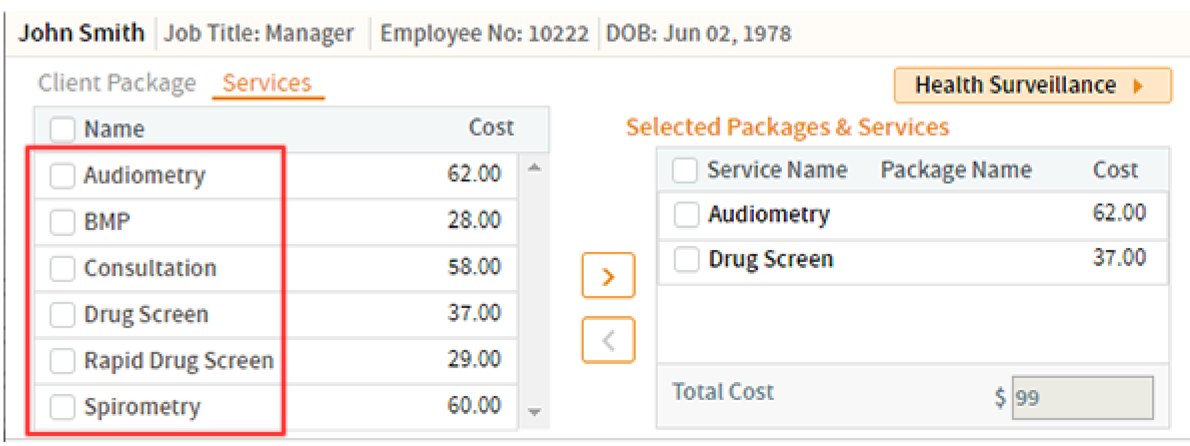


To create a new appointment:

1. Click *New* to open the New Appointment window.
2. Complete the Search Employee section of the New Appointment window:
   a. Enter employee information into the filters:

   b. Click *Search* to display the filtered patients.
   c. Click the employee for which the appointment is being booked.

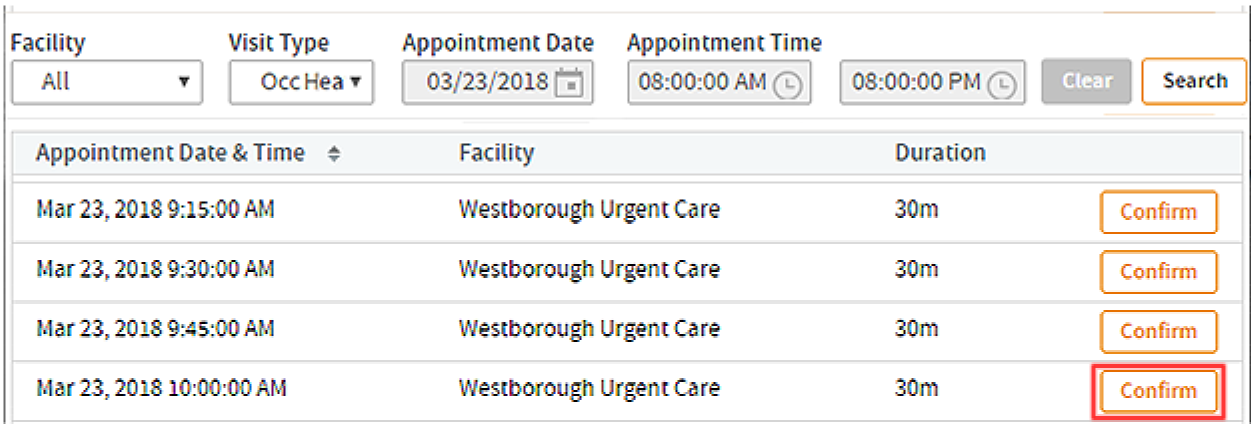
   This system navigates to the Appointment Details window.
3. Complete the Appointment Details section of the New Appointment window:
   a. Check the box of each package and service to be performed during the appointment:



   b. Click the *Import* arrow to move the checked items into the Selected Packages & Services section.
   c. Click *Next*.

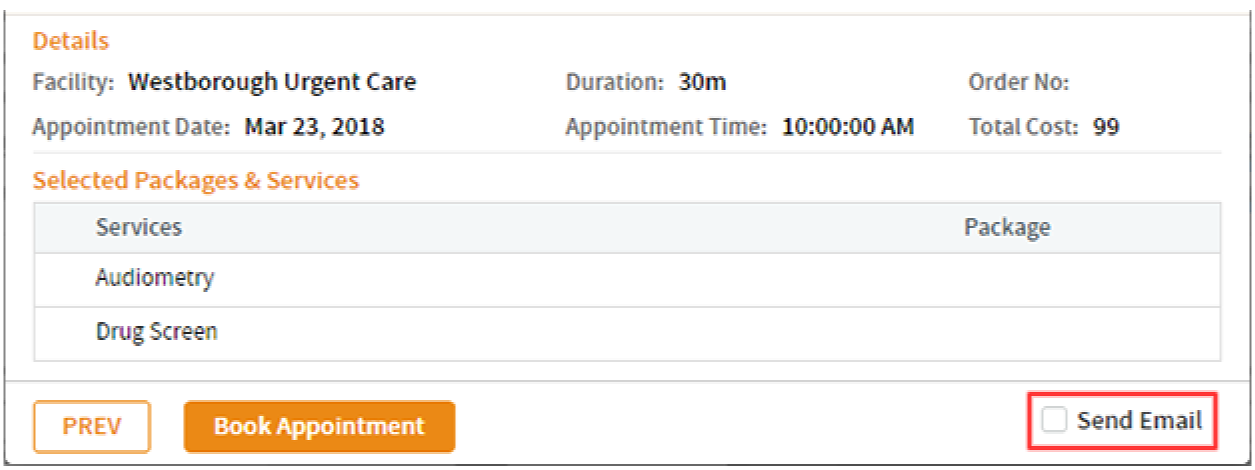
   The Search Appointment window opens.

4. Complete the Search Appointment section of the New Appointment window:
   a. Use the *Facility* drop-down list to select a facility for the employee's appointment.
   b. Use the *Calendar* icon to select a date for the employee's appointment.
   c. Use the *Clock* icon to enter the appointment time.
   d. Click *Search* to display the list of available appointments.
   e. Click *Confirm* to select a specific appointment date and time for the employee's appointment:



   This system navigates to the Summary window.

5. Complete the Summary section of the New Appointment window:
   a. Confirm the appointment details.
   b. (*Optional*) Check the *Send Email* box to send an appointment confirmation e-mail to the employee:



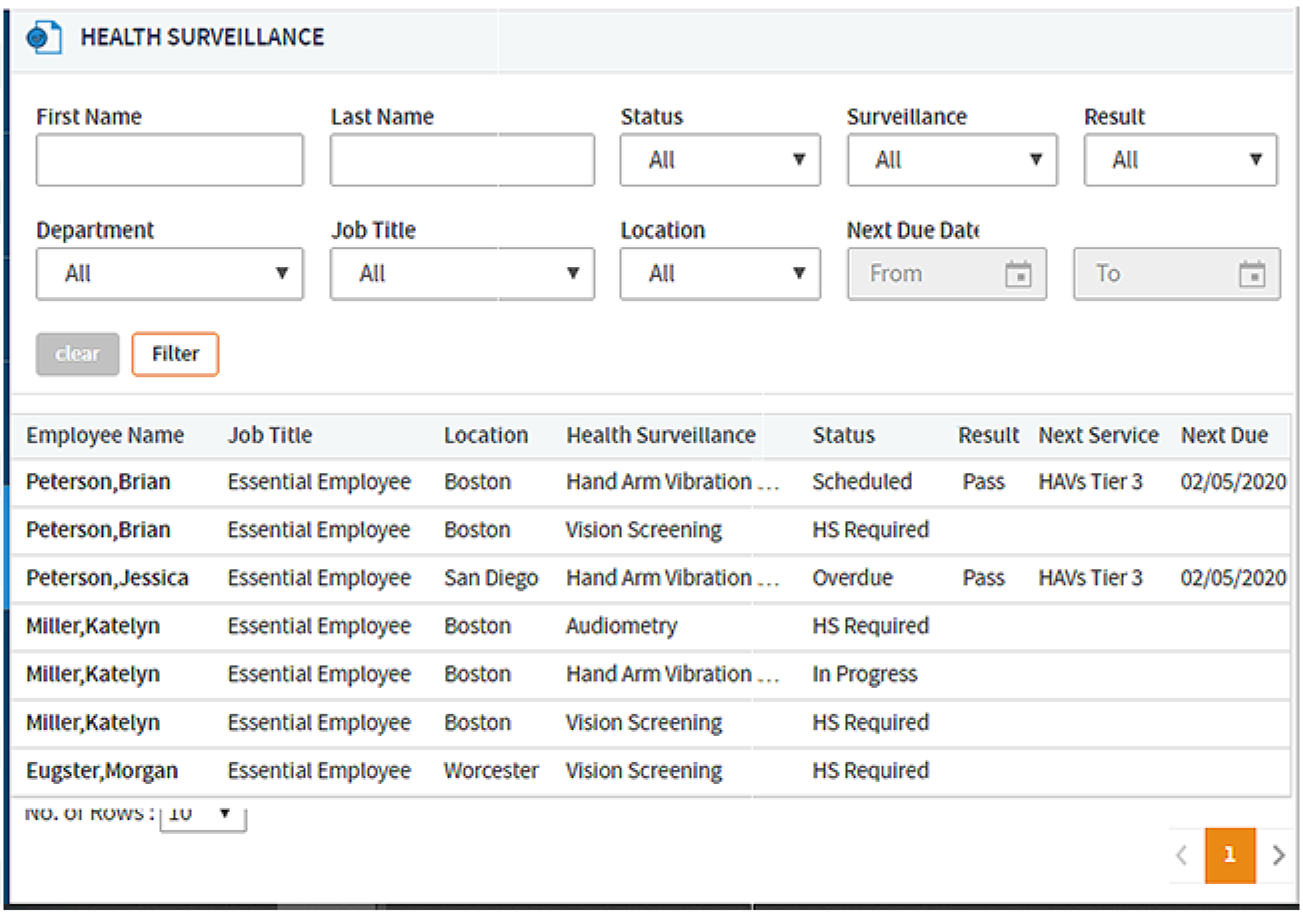
   c. Click *Book Appointment*.

   The appointment displays in the appointment list, in the upcoming appointments tile in the dashboard, and on the selected facility's appointment schedule.

HEALTH SURVEILLANCE

New Feature

The Health Surveillance module enables users of the eClinicalWorks Occupational Health module to track health services and their status for the employer's patients. Health Surveillance assists in monitoring an employee's compliance with various regulations. For each regulation, a health surveillance must be created in eClinicalWorks and linked to a service. For example, if an occupational regulation requires an employee to have an audiology screening each year, create a health surveillance to track the audiology service. The system will then alert the user when an employee is due or overdue for their next audiology screening:



The following table describes the features available in the Health Surveillance window:

Feature	Description
First Name	Enables users to refine the list by employee first name.

Feature	Description
Last Name	Enables users to refine the list by employee last name.
Status	Enables users to refine the list by surveillance status. The following standard statuses are available: ▪ **Complete -** The results for the health surveillance have been saved. ▪ **Due -** 30 days before the next due date. ▪ **HS Required -** HS is assigned to a patient from the Employer Portal. ▪ **In Progress -** An appointment with a health surveillance service has been attached; the status changes to ARR. ▪ **Overdue -** The due date is passed. ▪ **Scheduled -** An appointment is booked with the service that linked to HS. If the appointment is canceled after being scheduled, the HS status will be either HS Required or Overdue based on the date, or In Progress when the appointment visit status changes to check-in.
Surveillance	Enables users to refine the list by surveillance.
Result	Enables users to refine the list by surveillance results.
Department	Enables users to refine the list by department.
Job Title	Enables users to refine the list by job title.
Location	Enables users to refine the list by location.
Next Due Date	Enables users to refine the list by date range.
Clear	Enables users to clear the filters.
Filter	Enables users to apply the filters.
Pagination	Enables navigation to and from additional health surveillance information.

APPENDIX A: NOTICES

The following sections list the Trademarks contained in this system.

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