P2P Setup Manual for eCW Users

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Support

If you have any questions, please contact:

- Dr. Laura Hill, eCW/P2P Physician Support – 922-0400, laurashea@mac.com
- Deb Kimball, Physician Liaison/P2P Education – 935-3388, dkmball@mhc.net
- Renee Gerrie, eCW Support – 935-6558, rgerrie@mhc.net

Websites

- munsonhealthcare.org/P2P
- jointhenetwork.com
Product Activation

1. Click Product Activation
2. Click eCW P2P
3. Click Activate Now
4. Click Yes

You will see validation screens and then receive confirmation that P2P has been activated.

What environment is this?

This is my Production Environment

Why is this important?

Strongly recommended that you activate this only on your production environment. Activating it on production environment gives you an opportunity to connect your

Security Warning

Do you want to view only the webpage content that was delivered securely?

This webpage contains content that will not be delivered using a secure HTTPS connection, which could compromise the security of the entire webpage.

More Info

Yes
Provider Registration

1. Go to Admin Band, eCW P2P Admin area

2. Enter E-mail, NPI, and Zip Code for each provider.

3. Check box and click “Register” for the provider you would like to register.
4. After a provider is registered in P2P, you can click on the “Edit Settings” link. Settings can be used to block access for other P2P clinics from scheduling on your schedule, what notification you would like to receive via email, give access to P2P jellybeans for other staff members, and set up your direct address.

4. Edit Settings

![Image of eClinicalWorks settings page]

Schedule Access
- Allow access to all users except selected users
- Do not allow access to any user except selected users

Notifications
- Appointment
- Referral
- Patient Record
- Secure Message

Authorized Staff for creating P2P Appointment, Referral and Patient Record

Enter invitation key
- Invitation Key:

HISP - Direct
- Provide Direct Addresses
5. To update provider’s address for any reason, click on “Edit Profile”.

P2P menu options (green P icons) activated under the M, S, and T Quick-Launch buttons (jelly beans):

<table>
<thead>
<tr>
<th>M Jelly Bean</th>
<th>S Jelly Bean</th>
<th>T Jelly Bean</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inbox (4)</strong></td>
<td><strong>Review Progress Notes (2)</strong></td>
<td><strong>Telephone Enc (0)</strong></td>
</tr>
<tr>
<td><strong>eCW P2P Invitations (0)</strong></td>
<td><strong>Office Visits</strong></td>
<td><strong>Web Enc (0)</strong></td>
</tr>
<tr>
<td>Outbox</td>
<td><strong>Resource Schedule</strong></td>
<td><strong>Actions (0)</strong></td>
</tr>
<tr>
<td>Deleted Messages</td>
<td><strong>eCW P2P Appointments</strong></td>
<td><strong>eCW P2P Patient Records (5)</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>New Telephone Encounter</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>New Action</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Create eCW P2P Appointment</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Send eCW P2P Patient Record</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Send eCW P2P Referral/Consult</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Create New Message</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Create eCW P2P Message</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Add eCW P2P Providers</strong></td>
</tr>
</tbody>
</table>
Practice Registration

Practices can link their providers to the one facility.

1. Click on ADMIN BAND.
2. eCW P2P Admin
3. Facility Registration.
4. Click “add a facility on the network”.
5. Choose the name of the practice facility.
6. Select the names of the providers in that facility and authorized staff.

7. Click “Create and Add new”
Joining the Northern Michigan P2P Network

Munson-Hosted Practices

1. Email Ed Worthington, NPO, ehxsupport@npoinc.org, to request that an invite be sent to you.

2. In eCW, go to the P2P Admin Section and click on the Communities heading.

3. Accept the invite.

   Note: the invite will not be emailed to you.

Non-Hosted Practices

1. Email Ed Worthington, NPO, ehxsupport@npoinc.org, to request that an invite be emailed to you.

2. Ed will email an invite, which will include an invitation key.

3. See Provider Registration on pg. 3 on where to enter invitation key.
Non-Provider Staff Authorization (optional)

Non-provider staff can be authorized for eClinicalWorks P2P access, and this feature is also referred to as the On Behalf Of setting. Authorized staff members can be assigned to send and receive P2P information on behalf of the provider who authorizes their access. Authorized staff members can send messages, patient records, and referrals on behalf of the provider. It also allows authorized staff to manage incoming patient records as needed. To authorize non-provider staff members for P2P use:

1. From the Settings page, click the Browse button to locate the staff member(s):

   - Enter staff member and click Browse

   2. Locate and select the staff member(s) who will be responsible for sending and receiving P2P information on behalf of the authorizing provider.

   3. When the staff members have been selected, click OK to close the Staff Lookup window and return to the P2P Settings window.