



**CureMD UC'24**  
Raleigh, North Carolina  
**Connecting Cure Communities**



# Effortless Documentation: Boosting Efficiency



# Effortless Documentation: Boosting Efficiency

ROLL CALL

**Scan QR Code  
for Session  
Attendance**



# WHAT ARE WE GOING TO LEARN?

- Smart Phrases
- Quick Links
- Dashboard Customization
- Custom Billing Views
- Custom Lists
- Vaccine & Medication Sig Defaults
- Global Tags
- Default Supervising Provider
- Consent Combination



# Smart Phrases

- I repeatedly type out the same words, phrases or instructions in my visit documentation.
- I want to improve my documentation efficiency and reduce errors.
- **I WANT TO SAVE TIME DOCUMENTING!**



# Smart Phrases

Back-End Enabling

Front-End Enabling

Know BEFORE

The screenshot displays a software interface with several key elements and numbered callouts:

- 1**: A gear icon in the bottom-left corner of the sidebar, representing the settings menu.
- 2**: A red circle next to the 'Practice' menu item in the sidebar.
- 3**: A red circle next to the 'My Practice Settings' menu item in the sidebar.
- 4**: A red circle next to the 'EHR' menu item in the sidebar.
- 5**: A red circle next to the 'Smart Phrases' option in the right-hand settings pane.

The main content area is titled 'Personal - Patient' and contains the following settings:

- My Notes**: 1966
- My Preferences**: A dropdown menu with options: General, Favorites, **Patient** (highlighted with a red box), Drug Interaction, and Clinical Module Sorting. A red arrow points from this menu to the 'Smart Phrases' checkbox.
- Registration**:
- Provider Notes**:
- Enable Drag**:
- Provider Notes**: - Customize the provider notes section
- Default follow up Page**: Recall (dropdown menu)
- Clinical Overview**:
- Document Manager**:
- View Component Details in Tooltip**:
- Smart Phrases**:  (highlighted with a red box)

Additional settings visible at the bottom include:

- Append Note Auto-Task Assignment**:  Enable Task Assignment
- Note Sign Off Options**: A list of options, with the first one checked:  I was able to provide clinical guidance to the nurse while they rendered services



Patient - Provider Notes

jasmine.johnson@curemd.com Family - - Height 5' Extract

Search

Provider Notes Progress Note Deleted Notes Help

Save Sign Print Assign Send File Review Create Superbill Delete Switch Case

Arial 9 Black Bold Italic Underline Bulleted List Numbered List Indent Left Indent Right ABC

Family Planning Initial/ Annual Visit

Allergies

- Dust Mites (General)
- Ginkgo Biloba Extract (Drug) - Mild , Onset: 2015. Reactions: Swelling Eyes. only in pure form
- Ibuprofen (Drug)
- Latex (General)
- Mold (General)
- Penicillin (Drug)
- Sulfa Antibiotics (General) - Mild , Onset: 2001 Breaks out in hives and could die
- Tylenol (Drug) - Mild . Reactions: Head Pounding,Headache,Hives.
- Peas (Food)
- Beets (Food)
- Tilinol (Drug) - Mild . Reactions: Tearing.

Social History

- Tobacco: Never smoker
- Alcohol: Denies Usage
- Drug: Denies Usage

Overview History Alerts Phrases

Search Smart Phrases ...

All

Public

.ArrAche .ArrAgitation .ArrAnxiety  
 .ArrBurn .ArrCough .ArrCramps  
 .ArrDiarrhea .ArrDizzy .ArrFatigue  
 .ArrFever .ArrFrUrination  
 .ArrIrritation .ArrNausea .ArrNumb  
 .ArrOk .ArrPain .ArrPale  
 .ArrSleepy .ArrSore .ArrTender  
 .Ash .BCM .cbs .cfi  
 .ContinuePlan .cwa .cwb .cwbil  
 .cwc .cwcb .cwcs .cwd .cwdil  
 .cwdog .cwdrv .cwf .cwfil .cwh  
 .cwm .cwmil .cwp .cws .cwsil  
 .cwson .cwsonil .cwu .cww



# Smart Phrases: Most Common Uses

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- Coin Phrases
- Diagnosis Comments
- Physical Exam comments
- Labs





# What are Quick Links....





Shortcuts  
Accessible from any  
Module or Page  
Can Be Customized



# Quick Links

CureMD version 10g

Inbox Provider Note 1972 Today's Patients 1 Task Vaccine Administration

Personal - QuickLinks

my

My Notes 1972

My Preferences

General

Favorites

Patient

Drug Interaction

Clinical Module Sorting

Scan & Print

Quick Links

SOC Component Sorting

My Preferences-Quick Links

Save

Choose the order in which you wish to view the Quick Links

General

- Inbox
- Provider Note
- Today's Patients
- Lab
- Task
- Documents
- Reference Providers
- Billing Problem list
- Appointment Confirmation
- Procedure
- Radiology
- eFax
- Inbound Problem List
- Vaccine Administration
- Rx End Date Notification

Patient Portal

- Registration Request
- Update Request
- Appointment Request

Quick Links appear here

Tip: Hold and drag items to sort (Use mouse wheel to scroll)

# Dashboard Customization

## Individual User Preferences

The screenshot displays the 'My Preferences-General' settings page in the CureMD system. The interface includes a top navigation bar with links for 'Inbox', 'Provider Note', 'Today's Patients', 'Task', and 'Vaccine Administration'. A search bar is present with the text 'my'. The left sidebar shows 'My Notes 1972' and 'My Preferences' (with 'General' selected). The main content area is titled 'My Preferences-General' and features a 'Save' button. A red box highlights the following settings:

- Default Landing Page:** Personal
- Default Patient Page:** Demographics
- Default Personal Page:** Dashboard

Below these settings, there are additional options:

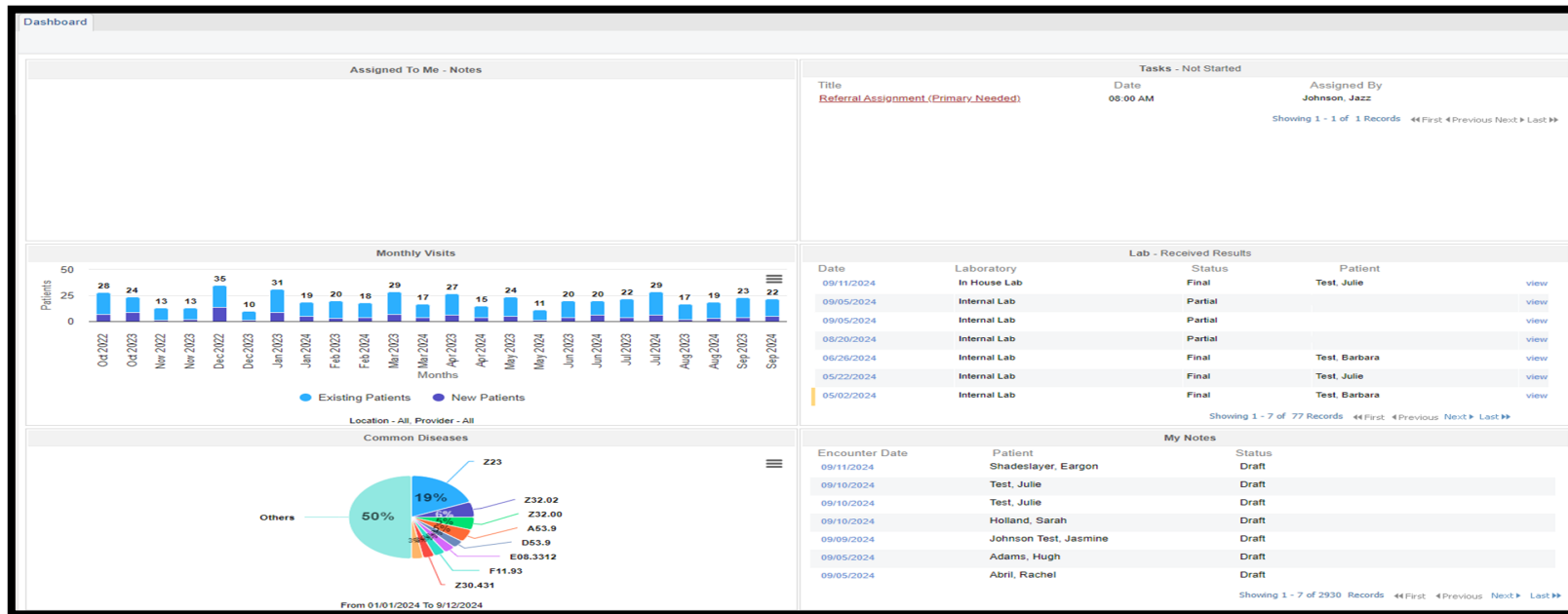
- Hotlist Items:** 10
- Sort by:** Most Frequently Used
- Items in Notes tree:** Radio buttons for 5 (selected), 10, 15, and 20.
- Schedule Multiple Views:** Radio buttons for 3, 4 (selected), and 5.



# Dashboard Customization

## Clerical User Preferences

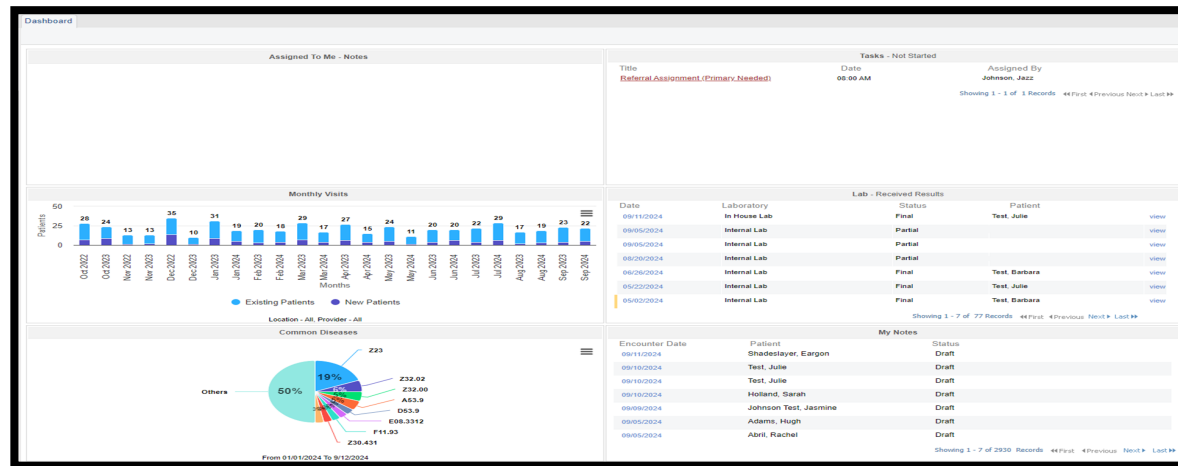
- Tasks not started
- Tasks in progress
- KPIs
- Documents (to be reviewed)



# Dashboard Customization

## Clinical User Preferences

- Tasks not started
- Tasks in progress
- Notes assigned to me
- Labs assigned to me





**Personal - Dashboard**

Search

- Inbox Archive
- Sent Archive
- eMessages
- Tasks
  - Not Started 1!
  - In Progress
  - Complete
  - Other
  - Allocated
  - All 1
- Vaccine Administration
- Today's Patients
- Orders & Results
  - Lab 182
  - Procedure 452
  - Radiology 9
  - Consultation 5
  - Other 2
- Prior Authorization
- My Notes 1972
- Referrals
- Documents
- CCDA Tracking
- KPIs
  - Provider Efficiency
  - Accounts Receivable
  - Appointment Duration
  - Billing Efficiency
  - Collections

Dashboard

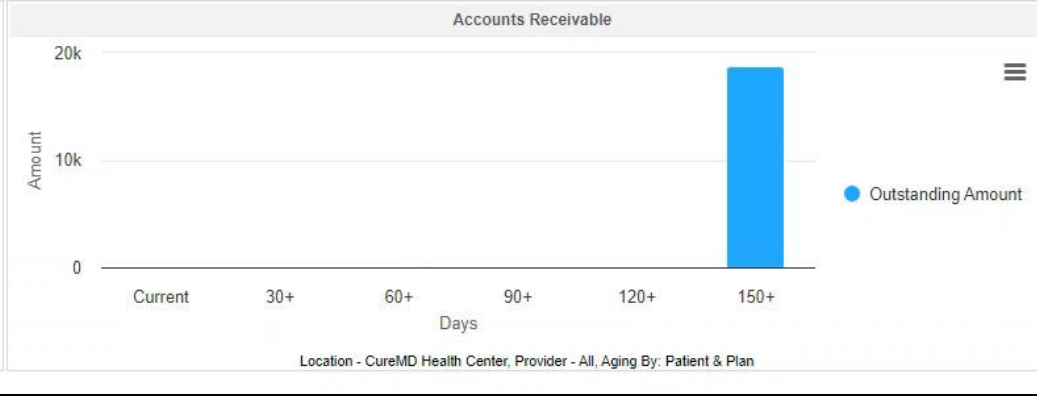
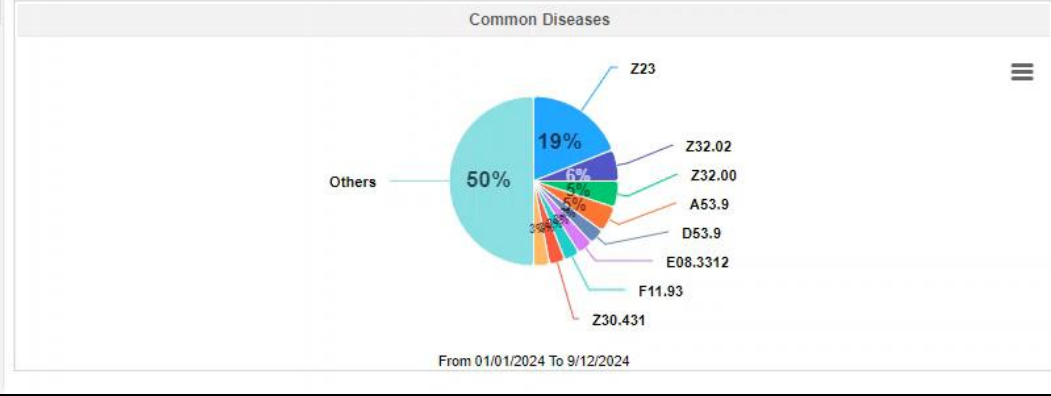
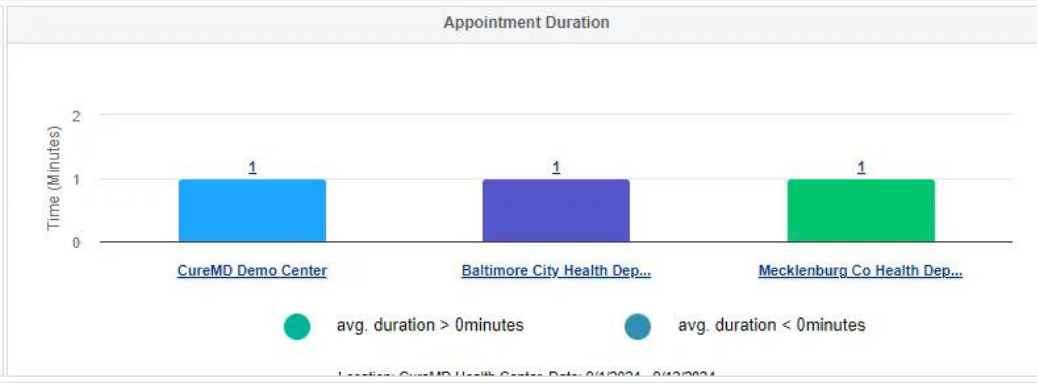
### Assigned To Me - Notes

Placeholder for notes assigned to the user.

### Billing Efficiency

Location: CureMD Health Center. Date: 9/1/2024 - 9/12/2024

No Record Found



# Referrals: Monitoring and Tracking

Personal

Dashboard

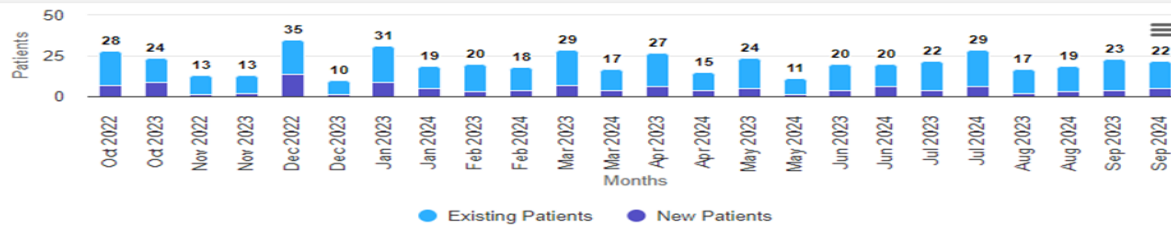
Assigned To Me - Notes

Tasks - Not Started

Title	Date	Assigned By
<a href="#">Referral Assignment (Primary Needed)</a>	08:00 AM	Johnson, Jazz

Showing 1 - 1 of 1 Records    << First   Previous   Next   Last >>

Monthly Visits



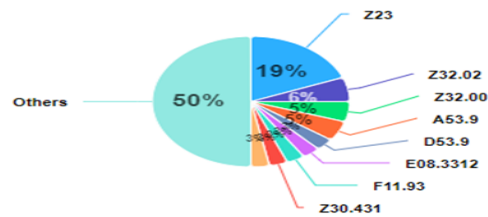
Lab - Received Results

Date	Laboratory	Status	Patient	
09/11/2024	In House Lab	Final	Test, Julie	<a href="#">view</a>
09/05/2024	Internal Lab	Partial		<a href="#">view</a>
09/05/2024	Internal Lab	Partial		<a href="#">view</a>
08/20/2024	Internal Lab	Partial		<a href="#">view</a>
06/26/2024	Internal Lab	Final	Test, Barbara	<a href="#">view</a>
05/22/2024	Internal Lab	Final	Test, Julie	<a href="#">view</a>
05/02/2024	Internal Lab	Final	Test, Barbara	<a href="#">view</a>

Showing 1 - 7 of 77 Records    << First   Previous   Next   Last >>

Location - All, Provider - All

Common Diseases



From 01/01/2024 To 09/12/2024

My Notes

Encounter Date	Patient	Status
09/11/2024	Shadeslayer, Eargon	Draft
09/10/2024	Test, Julie	Draft
09/10/2024	Test, Julie	Draft
09/10/2024	Holland, Sarah	Draft
09/09/2024	Johnson Test, Jasmine	Draft
09/05/2024	Adams, Hugh	Draft
09/05/2024	Abril, Rachel	Draft

Showing 1 - 7 of 2930 Records    << First   Previous   Next   Last >>

Draft

Custom Billing  
Views

# SHOW OF HANDS



**Billing**    Today'sUnbilled

Search    + Add Custom View    Edit This View    Add to Problem List

Group By: None

<input type="checkbox"/>	Patient	Appointment	Status	Provider/Resource	Plan	Plan Bal	Patient Bal		
<input type="checkbox"/>		09/12/2024 01:00 PM	Checked-In	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 01:00 PM	Checked-In	Clinic	MISSOURI HOME STATE HEALTH CARE	0.00	0.00		
<input type="checkbox"/>		09/12/2024 01:30 PM	Scheduled	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 01:30 PM	Scheduled	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 10:45 AM	Checked-Out	Clinic	MISSOURI HOME STATE HEALTH CARE	0.00	0.00		
<input type="checkbox"/>		09/12/2024 11:00 AM	Checked-Out	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 09:00 AM	Checked-Out	Clinic	MISSOURI HOME STATE HEALTH CARE	0.00	0.00		
<input type="checkbox"/>		09/12/2024 01:15 PM	Scheduled	Clinic	UNITED HEALTHCARE COMMUNITY PLAN MO	0.00	0.00		
<input type="checkbox"/>		09/12/2024 03:00 PM	Scheduled	Clinic	HEALTHY BLUE MISSOURI	0.00	0.00		
<input type="checkbox"/>		09/12/2024 03:00 PM	Scheduled	Clinic	MISSOURI HOME STATE HEALTH CARE	0.00	0.00		
<input type="checkbox"/>		09/12/2024 02:30 PM	Scheduled	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 02:30 PM	Scheduled	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 09:00 AM	Checked-Out	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 11:00 AM	Checked-Out	Clinic	(None)	0.00	0.00		
<input type="checkbox"/>		09/12/2024 01:15 PM	Checked-In	Clinic	MISSOURI HOME STATE HEALTH CARE	0.00	0.00		

# Custom Billing Views

**Charges - Custom Views**

Search

- Professional
  - Charges
    - Custom Views
      - Today's Unbilled
      - This Week Unbilled
      - All unbilled
      - Action Needed
      - Create These Charges
- Search
  - Appointment
  - eSuperBill
  - Quick Charge
- Payments
  - Custom Views
    - Today's Unpaid
    - Payment Needed

Create These Charges | Edit Custom View

Save Delete

Name	Category	Type	Encounter	
Create These Charge	<input type="radio"/> Appointment <input checked="" type="radio"/> eSuperbill	<input type="radio"/> Private <input checked="" type="radio"/> Public	Last Six Months <input type="text"/>	<input type="checkbox"/> Include No-Charge Appointments <input type="checkbox"/> Include No-Charge Encounters
Location		Signed By		
Bates County Health Center	(All)	Knox, Jordan Stark, Gayle Still, Renaye Brubaker, Kim	(All)	
Status		Rendering Provider		
(All) Charged Unsigned Not Created	Signed	Brubaker, Kim Gladden, Jenny Knox, Jordan Lancaster, Melissa	(All)	
Program		Note Type *		
(None) AV IM LP	(All)	(None) Admit Note Case Investigation Consultation Report	(All)	

# Custom Billing Views



## Custom Lists: Creation

**Toggle Menu**

custom

- > Practice
- 2** EHR
  - > **Custom Forms**
    - 3** **Custom Lists**
      - Allergy
      - Complaints
      - Consultations
      - Diagnosis
      - Disease
      - Education
      - Evaluation
      - Labs - LabCodes
      - Labs - CPT
      - Medications
      - Precautions
      - Other Orders
      - Procedures
      - Radiology - CPT
      - Radiology - Radiology Codes
      - Surgery

**1** [Settings Icon]



Settings

custom

- > Practice
- ▼ EHR
  - > Custom Forms
  - ▼ Custom Lists
    - Allergy
    - Complaints
    - Consultations
    - Diagnosis
    - Disease
    - Education
    - Evaluation
    - Labs - LabCodes
    - Labs - CPT
    - Medications
    - Precautions
    - Other Orders
    - Procedures
    - Radiology - CPT
    - Radiology - Radiology Codes
    - Surgery
- > Reports

✉

☰

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## CureMD Version 10g Settings

CureMD's settings module provides you with the ability to comprehensively customize your application enabling you to make the most of your software. To learn more about how you can customize your solution, please contact the CureMD support team at [support@curemd.com](mailto:support@curemd.com) or call (718) 684-9298.



### Practice

Manage business locations, providers, users, clearing houses, appointment reasons and schedules



### Billing

Manage insurance plans, fee schedules, procedures, diagnosis and modifiers



### EHR

Create and manage custom lists and libraries for allergies, complaints, medications, physical exams, review of systems, flow sheets, pharmacies, patient education, laboratories, medical tests and vaccinations.



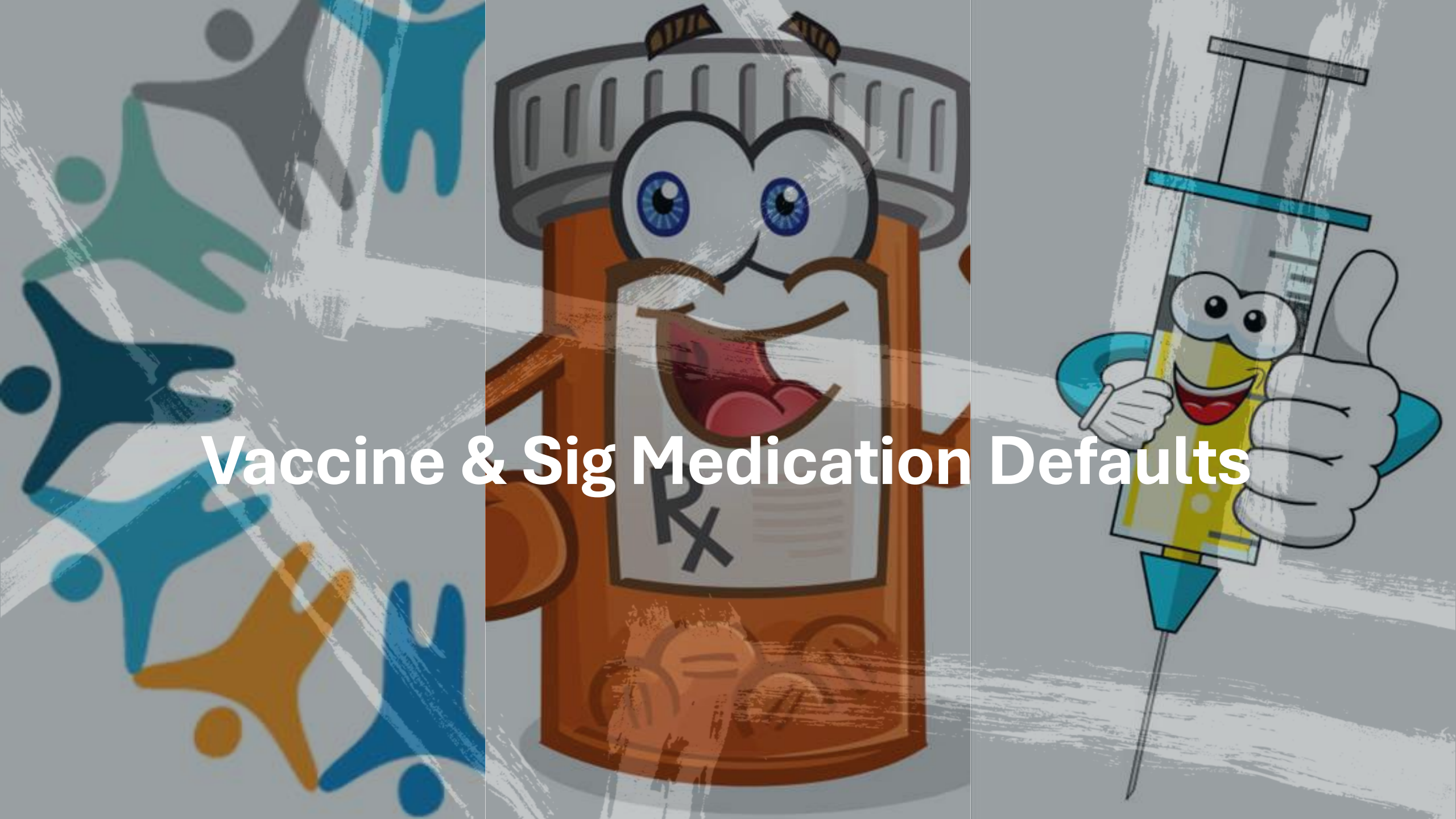
### Reports

Manage report formats and headers including superbills, patient statements, letter templates and forms for HCFA and NF3

**Warning:** Changing application settings without proper training can cause undesired results

# Custom Lists: Demonstration

# Vaccine & Sig Medication Defaults





**Administer Vaccine** ✕

Save Save & Send Delete Assign

Adacel (Tdap) SYRINGE 🔍

Date *	Time *	<b>Dose *</b>	Lot * Click to Select	Expires on
09/12/2024 📅	10:45 AM 🕒	.5 ml ▾	test lot	
<b>Route *</b>		<b>Site *</b>		Reaction
Intramuscular ▾		Left Arm ▾		-Select- ⚡
Ordering Provider *		Administered by *		Eligibility *
Mouse, Mickey ▾		Johnson, Jasmine 📍 ▾		Insured ▾
VIS Presented *		VIS Edition		<input type="checkbox"/> Counseling Given
09/12/2024 📅		08/06/2021 📅		
<b>VIS Documentation</b> 🖨️		Registry		Location
Tdap (Tetanus, Diphtheria, Per... ⚡		NCIR - Testing ▾		South Tx Family Planning and... ▾
Comments				
<div style="border: 1px solid #ccc; height: 40px;"></div>				

What Vaccine Defaults Can We Set?

Settings - Vaccine

Home

EHR

- Vaccine
- Vaccine Lot
- Vaccine Manufacturer
- VaccineTracker

> Billing

Vaccines

Search + Add

Category: -select- Search by Vaccine name, Product name, CVX or NDC

Vaccine	Category	Code	CPT	Reportable	Status
Adenovirus, NOS <span style="color: red;">!</span>	Other	82		Yes	DISCONTINUED
Adenovirus, type 4 <span style="color: red;">!</span>	Other	54	90476	Yes	DISCONTINUED
Adenovirus, type 4 <span style="color: red;">!</span>	Other	143	90476	Yes	ACTIVE
Adenovirus, type 4 <span style="color: red;">!</span>	Other	143	90476	Yes	ACTIVE
Adenovirus, type 4 and type 7 <span style="color: red;">!</span>	Other	143	90476 90477	Yes	INACTIVE
Adenovirus, type 4 and type 7	Other	143	90460	Yes	ACTIVE
Adenovirus, type 7 <span style="color: red;">!</span>	Other	55	90477	Yes	DISCONTINUED
Adenovirus, type 7 <span style="color: red;">!</span>	Other	143	90477	Yes	ACTIVE
Adenovirus, type 7 <span style="color: red;">!</span>	Other	143	90477	Yes	ACTIVE
Afluria Quadrivalent <span style="color: red;">!</span>	Influenza	161	000	Yes	INACTIVE
Afluria Quadrivalent	Influenza	158	90687	Yes	ACTIVE
Afluria Quadrivalent	Influenza	158	90688	Yes	ACTIVE
Afluria Quadrivalent <span style="color: red;">!</span>	Influenza	161	90685	Yes	ACTIVE
Afluria Quadrivalent	Influenza	150	90686	Yes	ACTIVE
Anthrax	Other	24	90581	Yes	ACTIVE





How Do We Set  
Medication Sig  
Defaults?

Settings - Vaccine

medication

2

3

1

The screenshot shows a software interface with a sidebar on the left containing various icons. A search bar at the top right contains the text 'medication'. Below the search bar, a dropdown menu is open, showing 'EHR' with a red callout box containing the number '2'. Under 'EHR', there is a sub-menu 'Custom Lists' with a right-pointing arrow. Below 'Custom Lists', the word 'Medications' is displayed in bold, with a red callout box containing the number '3'. At the bottom of the sidebar, there is a gear icon for settings, with a red callout box containing the number '1'.

Settings - Medications

medication

EHR

Custom Lists

**Medications**

Home

Person

Calendar

Tasks

Alerts

Documents

Reports

Home

Heart

Settings

Mail

Menu

Help

Medications

Search  Add  Delete

Medication  Generic Name  NDC   Generic  High Risk

<input type="checkbox"/>	Medication ▲	Generic Name	Code
<input type="checkbox"/>	▶		
<input type="checkbox"/>	▶ 1,4-Benzoquinone Crystals	Para-Benzoquinone	172792
<input type="checkbox"/>	▶ 12 Hour Allergy-D 5-120 MG Oral Tablet Extended Release 12 Hour		201358
<input type="checkbox"/>	▶ 12 Hour Decongestant 0.05 % Nasal Solution		205651
<input type="checkbox"/>	▶ 12 Hour Decongestant 120 MG Oral Tablet Extended Release 12 Hour	Pseudoephedrine	88412
<input type="checkbox"/>	▶ 12 Hour Nasal Decongestant 0.05 % Nasal Solution		204403
<input type="checkbox"/>	▶ 12 Hour Nasal Decongestant 120 MG Oral Tablet Extended Release 12 Hour	Pseudoephedrine	199287
<input type="checkbox"/>	▶ 12 Hour Nasal Relief Spray 0.05 % Nasal Solution	Oxymetazoline	31935
<input type="checkbox"/>	▶ 12 Hour Nasal Spray 0.05 % Nasal Solution		8
<input type="checkbox"/>	▶ 12 HR Mucus Relief Max 1200 MG Oral Tablet Extended Release 12 Hour		219760
<input type="checkbox"/>	▶ 12-Panel POC Toxicology System In Vitro Kit		197486
<input type="checkbox"/>	▶ 12HR Allergy Relief 60 MG Oral Tablet	Fexofenadine	219402
<input type="checkbox"/>	▶ 14-Count Warmer Miscellaneous		152418
<input type="checkbox"/>	▶ 1st Base External Cream		187467
<input type="checkbox"/>	▶ 1st Medx-Patch/ Lidocaine 4-0.025-5-20 % External Patch		203298

# How Do We Set & Use the Defaults?



Personal - Dashboard

Search

- Dashboard
- Messages
  - Inbox
  - Sent
  - Draft
  - Inbox Archive
  - Sent Archive
- eMessages
- Tasks
  - Not Started
  - In Progress
  - Complete
  - Other
  - Allocated
  - All
- Vaccine Administration
- Today's Patients
- Orders & Results
  - Lab 182
  - Procedure 452
  - Radiology 9
  - Consultation 5
  - Other 2
- Prior Authorization
- My Notes 1974
- Referrals
- Documents
- CCDA Tracking

Dashboard

### Assigned To Me - Notes

Empty list area for notes assigned to the user.

### Tasks - Not Started

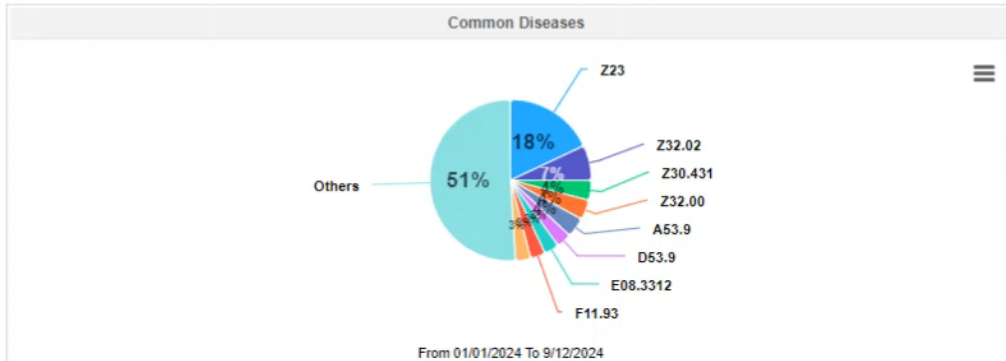
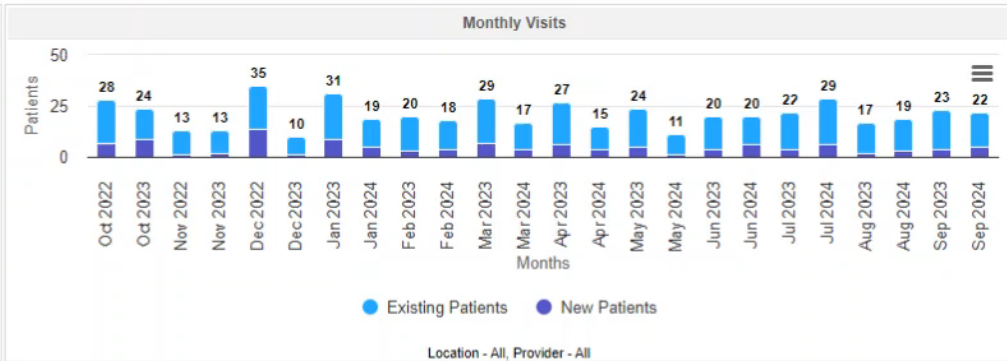
Title	Date	Assigned By
<a href="#">Referral Assignment (Primary Needed)</a>	08:00 AM	Johnson, Jazz

Showing 1 - 1 of 1 Records

### Lab - Received Results

Date	Laboratory	Status	Patient	
09/11/2024	In House Lab	Final	Test, Julie	<a href="#">view</a>
09/05/2024	Internal Lab	Partial	Abril, Rachel	<a href="#">view</a>
09/05/2024	Internal Lab	Partial	Lamb, Abigail	<a href="#">view</a>
08/20/2024	Internal Lab	Partial	Peterson, Maria	<a href="#">view</a>
06/26/2024	Internal Lab	Final	Test, Barbara	<a href="#">view</a>
05/22/2024	Internal Lab	Final	Test, Julie	<a href="#">view</a>
05/02/2024	Internal Lab	Final	Test, Barbara	<a href="#">view</a>

Showing 1 - 7 of 77 Records



### Tasks - In Progress

No Record Found



**Settings**

Search

- > Practice
- > EHR
- > Billing
- ▼ Reports **2**
  - > HCFA
    - Letter Templates **3**
    - NF3
    - Patient Statements
    - Reports Header Customization
    - Superbill

**1**

## Consent Combination: Navigating to Consents

CureMD version 10g    Inbox    Provider Note 1974    Today's Patients    Task    Vaccine Administration    Back to old layout    Release Notes    novelHealth    Inventory    Ad Hoc Reports    Izenda 7    Support    Ms. Jazz Johnson

Template Library - Letters    Templates    Letter Template

Save    Report    Delete

Letter Name \*    Letter Type \*    Consents    Description    Assignment of Benefits; Release of Medical Information and Authorization to Use Social Security Number     Default

Form 150.11.3     Active

Tags    Associate Tags

Template Fields

Type    Patient    Fields    --Select--    Components    Accident Reports    Practice logo    --Select--     Full logo

Letter Heading    Blank    Enter Text

Styles    Format    Font    Size    A    abx    x<sup>2</sup>

**Florida Parishes Human Services Authority**  
Assignment of Benefits; Release of Medical Information; and Authorization to Use Social Security Number

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**Assignment of Benefits**

I understand that in order for anyone to bill Medicare, Medicaid, or other insurance carriers for any inpatient/outpatient medical care, I must give permission.

I hereby assign, transfer, and set over unto Louisiana Department Health/Florida Parishes Human Services Authority, as its interest may appear, all medical benefits now due or becoming due to me under the terms of any third party insurance coverage that I currently am entitled to or that I become entitled to in the future under the terms of the described policy. I hereby direct any third party insurance entity whose benefits are now due or become due to me, including Medicare, Medicaid, or commercial insurance companies, to pay such benefits directly to the above-named agency for services provided by the facility.

I understand that I am responsible for payment of any services provided that are not covered by my insurance carrier(s) (amount

body

# Consent Combination

Thank you.

