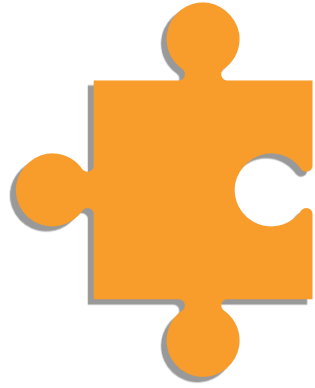




CureMD UC'24
Raleigh, North Carolina
Connecting Cure Communities





Mastering the Essentials

Presenter: Rocco Davis



**Scan QR Code
for Session
Attendance**

“Mastering the Essentials”



Agenda

- New 10g Layout
- ‘Walk Me’
- Release Notes
- Dashboard
- Today's Patients
- Customization Menu
- CureMD Library
- Patient Registration:
(Zip Code Shortcut)
- EHR Settings
- User Preferences
- Roles & Permissions
- Default Note Template

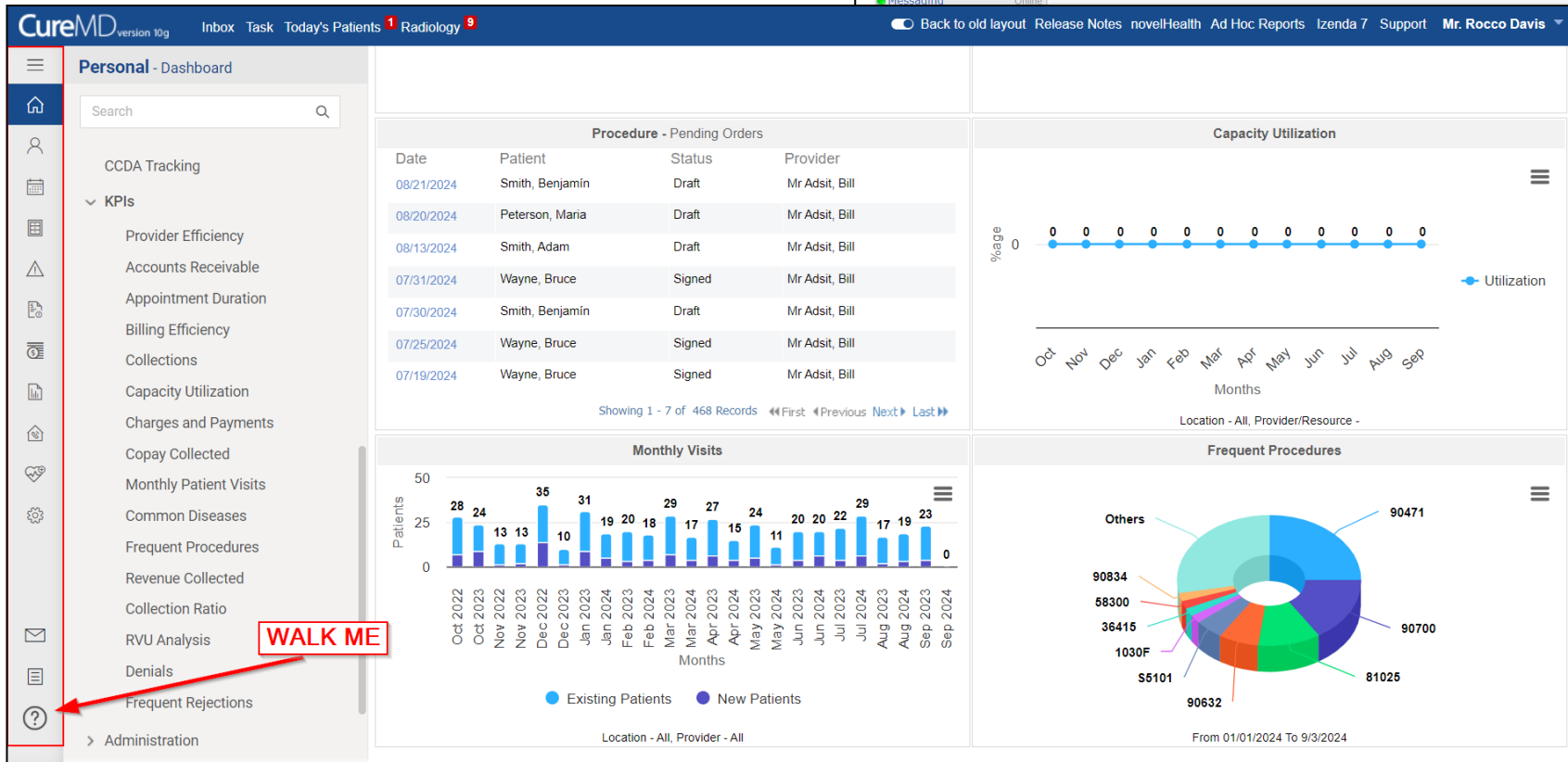


Try the 10g Layout (if you haven't already)!

 Try the new 10g layout

Old User Interface

NEW User Interface



Personal - Dashboard

Search

- CCDA Tracking
- KPIs
 - Provider Efficiency
 - Accounts Receivable
 - Appointment Duration
 - Billing Efficiency
 - Collections
 - Capacity Utilization
 - Charges and Payments
 - Copay Collected
 - Monthly Patient Visits
 - Common Diseases
 - Frequent Procedures
 - Revenue Collected
 - Collection Ratio
 - RVU Analysis
 - Denials
 - Frequent Rejections
- Administration

Procedure - Pending Orders

Date	Patient	Status	Provider
08/21/2024	Smith, Benjamin	Draft	Mr Adsit, Bill
08/20/2024	Peterson, Maria	Draft	Mr Adsit, Bill
08/13/2024	Smith, Adam	Draft	Mr Adsit, Bill
07/31/2024	Wayne, Bruce	Signed	Mr Adsit, Bill
07/30/2024	Smith, Benjamin	Draft	Mr Adsit, Bill
07/25/2024	Wayne, Bruce	Signed	Mr Adsit, Bill
07/19/2024	Wayne, Bruce	Signed	Mr Adsit, Bill

Showing 1 - 7 of 468 Records

Capacity Utilization

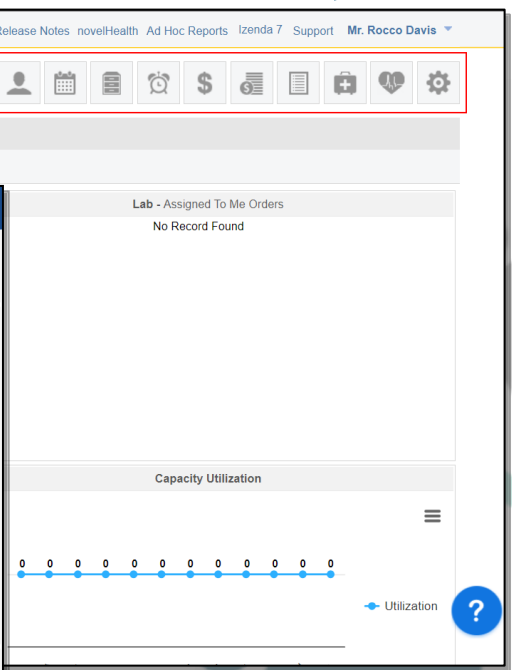
Line chart showing utilization percentage from Oct to Sep. All values are 0.

Monthly Visits

Month	Existing Patients	New Patients
Oct 2022	28	0
Nov 2022	24	0
Dec 2022	13	0
Jan 2023	13	0
Feb 2023	10	0
Mar 2023	35	0
Apr 2023	31	0
May 2023	19	0
Jun 2023	20	0
Jul 2023	18	0
Aug 2023	29	0
Sep 2023	17	0
Oct 2023	27	0
Nov 2023	15	0
Dec 2023	24	0
Jan 2024	20	0
Feb 2024	11	0
Mar 2024	20	0
Apr 2024	22	0
May 2024	29	0
Jun 2024	17	0
Jul 2024	19	0
Aug 2024	23	0
Sep 2024	0	0

Frequent Procedures

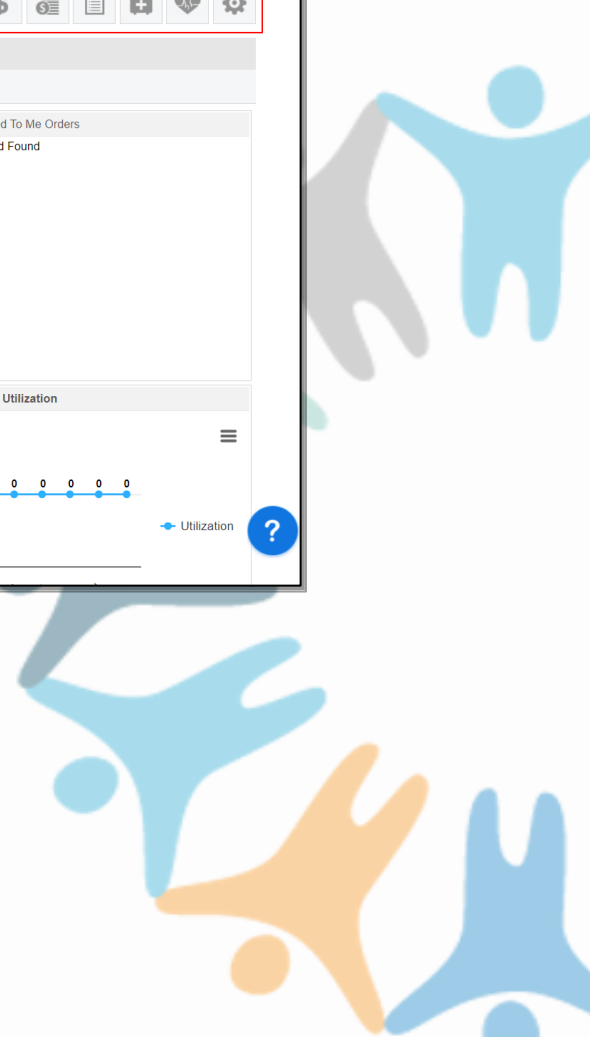
Donut chart showing procedure frequencies: 90471, 90700, 81025, 90632, 1030F, S5101, 36415, 58300, 90834.



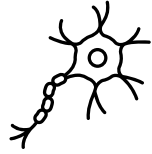
Lab - Assigned To Me Orders

No Record Found

WALK ME



Walk Me



Please enjoy this brief demonstration of Walk Me. This tool will continue to improve, and we cannot recommend it enough!

CureMD version 10g Inbox Today's Patients **19** Vaccine Administration Release Notes Support Mr. Rocco Davis

Personal - Dashboard Dashboard

Search

Dashboard

Messages

- Inbox
- Sent
- Draft
- Inbox Archive
- Sent Archive

Tasks

- Not Started
- In Progress
- Complete
- Other
- Allocated
- All

Vaccine Administration

Today's Patients

eRx

- Draft Prescription
- Refill Request
- Change Request
- PAN Request
- Prescriber Authorization
- Fill Response
- Cancel Request/Response
- NewRx Activity

Orders & Results

- Lab 34
- Procedure 1442
- Radiology

Assigned To Me - Notes

Encounter Date	Patient	Assigned By	Status
08/05/2024	Test, Jasmine	Johnson, Jas..	Signed

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

Tasks - In Progress

No Record Found

Common Diseases

Disease Code	Percentage
Z23	46%
Others	18%
Z11.1	10%
Z01.30	12%
110	5%
Z76.2	4%
E78.5	4%
Z11.3	4%
L60.1	4%
0000.00	4%

From 01/01/2024 To 9/26/2024

Accounts Receivable

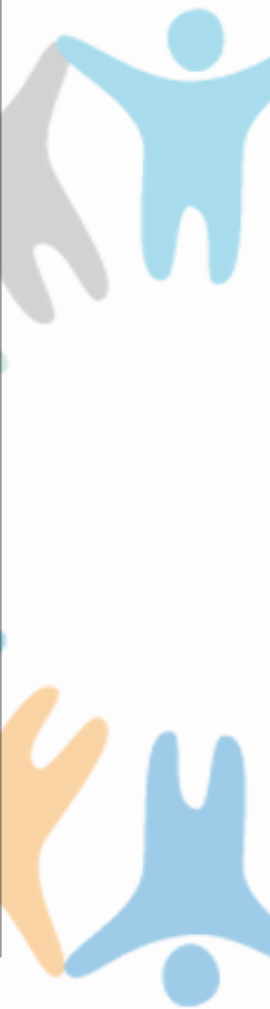
Days	Amount
Current	7.5k
30+	7.5k
60+	5k
90+	4k
120+	1.5k
150+	9k

Location - Pottawatomie County He... Provider - All, Aging By: Patient & Plan

Appointment Duration

Frequent Procedures

?



Release Notes



Back to old layout [Release Notes](#) [Support](#)

New Release Notes

New release notes are available. Would you like to review?

[Maybe later](#) [Review](#)

- Enhancements regularly occur, and this is how you can stay updated on anything that will impact your practice

CureWiki

[Release Notes](#) [Videos](#) [Announcements](#) [Support](#)

Home / [Release Notes](#)

How can we help you?

Sorted: [Newest](#) [Default](#)

Categories

- [Avalon](#)
- [Billing](#) 2
- [CureMD KIOSK](#)
- [Document Manager](#)
- [EDI](#)
- [EHR](#) 1
- [Implementation Portal](#)

CureMD Patient - Chemo Flowchart

Henry, Richard 48Y BM Male DOB 12/12/1977 A/C 18957

Weight	150 lbs	68 kg
BSA	1.75	1.75
Chemo Flowchart		
Template	Colorectal Cancer	Custom
Wkts	9124	9224
Weight	150	150
BSA	1.75	1.75
CE	C101	C102
Citrate IV	✓ 75 mg	✓ 75 mg
Etoposide IV	✓ 202.5 mg	✓ 202.5 mg

Dashboard



CureMD version 10g [Inbox](#) [Task](#) [Today's Patients](#) [Radiology](#) ⁹ [Back to old layout](#) [Release Notes](#) [novelHealth](#) [Ad Hoc Reports](#) [Izenda 7](#) [Support](#) [Mr. Rocco Davis](#)

Personal - Dashboard 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 187
 - Procedure 452
 - Radiology 9
 - Consultation 5
 - Other 2
- Prior Authorization
- My Notes 1993
- Referrals
- Documents
- CCDA Tracking

CureMD
Invalid item.
Ok

Messages - Practice Inbox No Record Found	Messages - Practice Inbox No Record Found
Messages - Practice Inbox No Record Found	Messages - Practice Inbox No Record Found
Messages - Practice Inbox No Record Found	Messages - Practice Inbox No Record Found

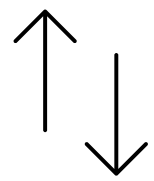
Today's Patients



- Narrow your scope
- Color coordinate for improved efficiency
- Keep track of patient location
- Ability to monitor & report on appointment time distribution
- Convenient area to start provider notes

The screenshot shows the CureMD 'Today's Patients' interface. At the top, there's a navigation bar with 'CureMD version 10g', 'Inbox', 'Today's Patients 1', and user information 'Mr. Rocco Davis'. A left sidebar contains navigation options like 'Dashboard', 'Messages', 'Tasks', and 'Orders & Results'. The main area features a search bar, filters for 'Location' (All selected) and 'Provider/Resource' ([Providers], [Resources]), and a row of checkboxes for patient status: Check-In (checked), Ready For Nurse, Intake Complete, With Nurse, With MA, Ready for Provider, With Provider, and Nurse Posting. Below this is a date selector for 'Friday, September 06, 2024'. A table lists patients with columns for Patient, Reason, Appointment, Check-In, Total Wait, Wait, Status, Room, and Action. One patient is highlighted: 'Jacobs, Jake - Male 36 Y' with a 'Child Speech Initial' appointment at '09:30 AM (60)' and a '10:52 AM' check-in time. Below the table are 'Televisit' and 'Walk-in Televisit' sections with their own status checkboxes.

Customization Menu



CureMD version 10g Inbox Today's Patients 4 Back to old layout Release Notes novellHealth Ad Hoc Reports Izenda 7 Support Mr. Rocco Davis

Patient - Provider Notes Wayne, Bruce 23Y 8M Female DOB 1/1/2001 A/C 1103 LEP Registration pending City Water Department Opioid Addiction

Mobile (111) 867-5309 Primary Plan BLUE CROSS BLUE SHIELD (CARE M) Plan Balance \$ 110 Notes See Notes ! Pharmacy Lab Radiology Allergies Aspirin, Grass, Pollen

Provider Notes Assigned to me Progress Note Clinical Overview Deleted Notes Save Sign Print Assign Send File Review Create Superbill Delete Switch Case

Medical History
Anxiety

Lab Order
08/08/2024
Chlamydia, gonorrhea, and syphilis not screened, reason not given(CPT-G9230) [No Specimen Selected]
Gonadotropin, chorionic (hCG); free beta chain(CPT-84704) [No Specimen Selected]
HIV-1 antibody testing of or(CPT-S3645) [No Specimen Selected]
Syphilis test, non-treponemal antibody; quantitative(CPT-86593) [No Specimen Selected]

Lab Result

Specimen	Result
08/08/2024 G9230 - Chlamydia, gonorrhea, and syphilis not screened, reason not given	0 0
08/08/2024 84704 - Gonadotropin, chorionic (hCG); free beta chain	0 0
08/08/2024 S3645 - HIV-1 antibody testing of or HIV	0 0
08/08/2024 86593 - Syphilis test, non-treponemal antibody; quantitative	0 0

Physical Exam
Neck: Normal
Respiratory: Normal
Cardiovascular: Normal
Abdominal: Normal
Female OB/GYN/GU: Normal

Diagnoses
Shortness of breath
Encounter for pregnancy test, result negative

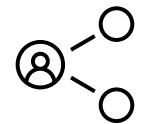
Allergy
Grass General
Aspirin Drug
Pollen General

Medications - Current
Loestrin 1.5/30 (21) 1.5-30 MG-MCG Oral Tablet
Ibuprofen 100 MG Oral Tablet

Consents
Consent
Consent

Immunizations
FLUZONE QUADRIVALENT SOUTHERN HEMISPHERE (influenza, Southern Hemisphere, preservative free) 09/24/2024
Sanofi Pasteur Inc. SYRINGE, 0.5 mL NDC: 49281-0323-50
Hep A 09/24/2024
FLUZONE QUADRIVALENT SOUTHERN HEMISPHERE (influenza, Southern Hemisphere, preservative free) 09/24/2024
Sanofi Pasteur Inc. SYRINGE, 0.5 mL NDC: 49281-0323-50
PEDIARIX (DTaP-HepB-IPV) GlaxoSmithKline 07/31/2024

CureMD Library



This feature allows you to have a central repository (Practice-wide) for your documents that are NOT related to patient charts.

Unique uses include:

- Standing Orders (Medical Director)
- Standard Operating Procedures (SOP)
- Workplace/Employer documents (Safety documents)

The screenshot shows the CureMD interface with the following elements:

- Navigation Bar:** Includes 'Back to old layout', 'Release Notes', 'novelHealth', 'Ad Hoc Reports', 'Izenda 7', 'Support', and 'Mr. Rocco Da...'.
- Library Section:**
 - Buttons: '+ Create Folder', '+ Add Library'
 - Table:

Library	Created On
Referral Forms	5/27/2014
testing	10/12/2017
West Nile Virus	9/5/2023
- Support Dropdown Menu:**
 - Status Center
 - Log a Ticket
 - My Tickets
 - Help
 - Library** (highlighted)
 - Knowledge Base
 - Blog
 - Contact Us

The background collage includes documents such as:

- World Health Organization STANDARD Waste management of...
- HEALTHCARE SAFETY: EMERGENCY FIRST AID, SAFE LIFTING PRACTICES, SLIPS, TRIPS AND FALLS.
- PATIENT LIFTING
- SYMPTOMS OF A LATEX ALLERGY, LATEX ALLERGY
- SAFE VEHICLE OPERATIONS
- WORKPLACE VIOLENCE
- NOTICE WASH YOUR HANDS
- Roane County Standing Orders Clinical Care Purpose
- CC.03.10 Clinical Standing

How your practice uses this is entirely up to you and can be a convenient location in lieu of a shared drive or word document that lives on someone's workstation

Patient Registration: Zip Code Shortcut



‘Simple’ zip code:
automatically fill in
city, state, county

Current Address

Address *

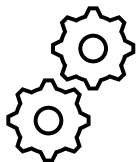
City * State * County

Zip * Country

‘Complex’ zip code:
choose from the
USPS results

Gender *	Female	Gender Identity	Identifies as Male	
Sexual Orientation	Heterosexual	Status	Single	
DOB *	01/01/2001	SSN	<input type="text"/>	
Previous	First Name <input type="text"/>	Last Name	<input type="text"/>	
Mother's Maiden	First Name <input type="text"/>	Last Name	<input type="text"/>	 DAISEY Enrollment
Current Address				
Address *	<input type="text"/>			
City *	<input type="text"/>	State *	<input type="text"/> County <input type="text"/>	
Zip *	<input type="text" value="27603"/> <input type="text"/>	Country	United States of America	

EHR Settings



Settings > Practice > My Practice Settings > EHR

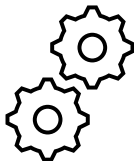
Adjust mandatory registration fields (Red Asterisk*)

Make Following fields Mandatory

Home Phone Race Ethnicity Preferred Language Email Mobile Gender Identity Sexual Orientation Religion County SSN

Preferred Pronoun Support Contact

EHR Settings (continued)



Settings > Practice > My **Practice** Settings > EHR

- Registration defaults

Defaults			
Title	Mx.	Suffix	--Select--
Ethnicity	Declined to Specify	Gender	Female
Language	English (US)	Race	Declined to Specify
Phone	Mobile	Religion	--Select--
Sexual Orientation	--Select--	Gender Identity	--Select--



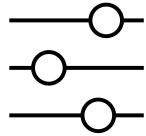
EHR Settings (continued)

Settings > Practice > My **Practice** Settings > EHR

- Auto-population in Note

Auto-Population In Note	
<input checked="" type="checkbox"/> Current Medications	<input checked="" type="checkbox"/> Family History
<input type="checkbox"/> Past Medications	<input checked="" type="checkbox"/> Social History
<input type="checkbox"/> Inactive Allergies	<input checked="" type="checkbox"/> Medical History
<input checked="" type="checkbox"/> Active Allergies	<input checked="" type="checkbox"/> Surgical History
<input checked="" type="checkbox"/> Current Diagnosis	<input checked="" type="checkbox"/> Ob/Gyn History
<input type="checkbox"/> Past Diagnosis	<input type="checkbox"/> Precaution
<input type="checkbox"/> Estimated Due Date	<input type="checkbox"/> OB Lab Results
<input checked="" type="checkbox"/> Physical Exam	<input type="checkbox"/> Custom Forms
<input checked="" type="checkbox"/> Review of Systems	<input type="checkbox"/> Evaluations
<input type="checkbox"/> Implantable Devices	<input type="checkbox"/> Advance Forms





User Preferences

Personal Dashboard > My Preferences

OR

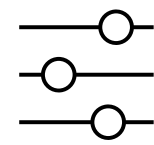
Using the Search Bar on the Left Side Menu

OR

User Dropdown > Preferences



User Preferences



What is the maximum number of items you can display on your "Hotlist"?

60

CureMD version 10g Inbox Task Today's Patients ¹ Radiology ⁹ Back to old layout Release Notes novelHealth Ad Hoc Reports Izenda 7 Support Mr. Rocco Davis

Patient Search My Preferences-General

Save

Default Landing Page: Personal

Hotlist Items: 10 (dropdown menu open with options: 10, 20, 30, 40, 50, 60)

Sort by: Most Frequently Used (dropdown menu open with options: Most Frequently Used, Most Recently Used, Alphabet)

Default Patient Page: Demographics (dropdown menu open with options: Demographics, Case Review, Clinical Overview)

Default Personal Page: Dashboard

Schedule Multiple Views: 3 4 5

Feature to Sign Education

Show Result Comments in SOAP

Forward Messages in Email

Auto delete files from Hard Drive

Messages Per Page: 10 15 20 25

Screen Resolution: 1280 1440

Source of KPIs: Clinical Module Billing Module

Lab Result View: Classic Beta

Default Acknowledged Bucket

Internal Comments on Provider Note

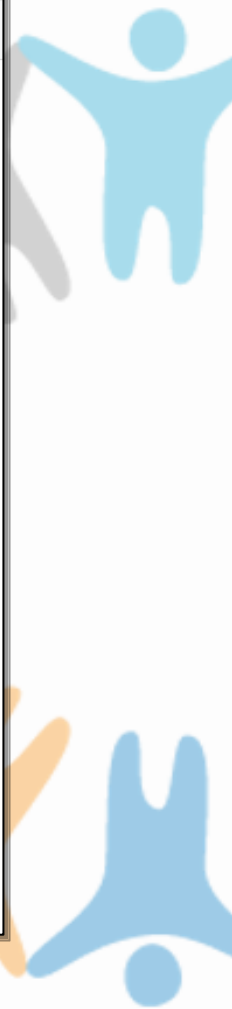
Patient Comments on Provider Note/Report

Auto-jump to Today's Date on Scheduler Views: Daily Weekly Multiple Enterprise

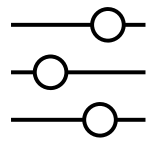
Appointment Tool-tip Delay: Short Normal Long

Rx End Date Frequency: 1

My Preferences: General (selected), Favorites, Patient, Drug Interaction, Clinical Module Sorting, Scan & Print, Quick Links, SOC Component Sorting



User Preferences



Some features will only be usable after being enabled:

- Smart Phrases (2 steps to enable)
- Drug Interactions
- Signature Fields in Letter Templates

My Preferences-Drug Interaction

Save

Drug Interactions

Interaction Mode: Basic Advance

Severity Level: Mild Moderate Severe

Clinical Module: Diagnosis Medications

Duplicate Therapy Drug To Medical Condition Drug To Allergy

My Preferences-Patient

Save

Expand Tree Menu & Drag - Customize the tree

Registration Provider Notes

Enable Drag

Provider Notes - Customize the provider notes section

Default follow up Page

Recall

If you want to learn more about Smart Phrases, check out the session: “Effortless Documentation: Boosting Efficiency” with Jasmine!

(Settings > Practice > My practice settings > EHR)

Provider Notes / Case/ Letter

Signature on Signed Note / Letter

Include Provider-Specific Clinical Information in Follow Up

Automatically Fax Provider Note Upon Signing

Automatically Fax Letter Upon Signing Note

Print Patient Race, Ethnicity and Language on Report Header

Restrict Access to Currently Open Provider Notes

Follow up on Existing Complaints

Clinical Summaries Reminder

Populate both Date and time span of follow up on the Provider note

Show Visit Reason as Text Field

Enable IMO Search for Diseases

Enable Smart Phrases

Case Billing Diagnoses

My Preferences-Scan & Print

Save

Some of these settings are only available in the EHR

Label Printer: --Select--

OCR: Auto Check-In using card scanning

Card scanning – Sequence: License then Insurance Card

Card scanning – Processing: Single Side Double Side

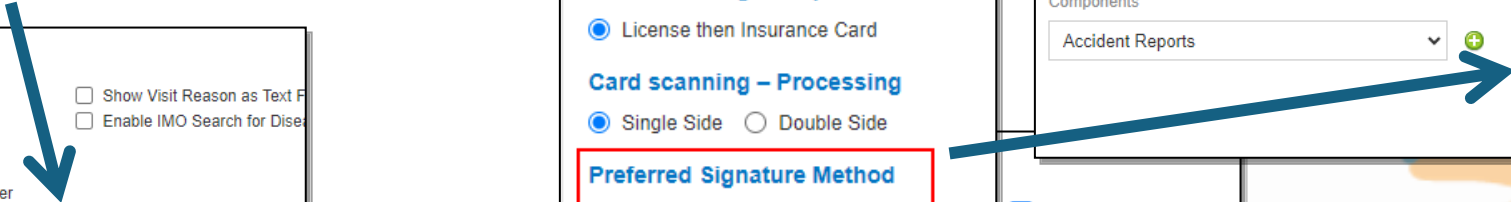
Preferred Signature Method: ePad Topaz Scriptel

Components

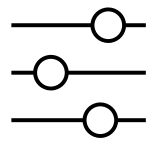
Accident Reports

Signature

Touch Screen



User Preferences



- Quick Links

The screenshot shows the CureMD software interface. The top navigation bar includes the CureMD logo, version 10g, and the user's name 'Inbox'. The main dashboard is titled 'Personal - Dashboard' and features a search bar and a sidebar with navigation options like Dashboard, Messages, Tasks, and Orders & Results. The central area contains three main sections: 'Tasks - In Progress', 'Procedure - Pending Orders', and 'Relative Value Unit Analysis'.

Tasks - In Progress

Title	Date	Assigned By	Date
Example A	09/26/2024	Davis, Rocco	09/24/2024
			09/19/2024
			09/05/2024
			09/05/2024
			08/21/2024
			08/20/2024
			07/30/2024

Showing 1 - 1 of 1 Records

Procedure - Pending Orders

Date	Patient	Status	Provider	Encounter Date
08/21/2024	Smith, Benjamin	Draft	Mr Adsit, Bill	09/26/2024
08/20/2024	Peterson, Maria	Draft	Mr Adsit, Bill	09/25/2024
08/13/2024	Smith, Adam	Draft	Mr Adsit, Bill	09/24/2024
07/31/2024	Wayne, Bruce	Signed	Mr Adsit, Bill	09/24/2024
07/30/2024	Smith, Benjamin	Draft	Mr Adsit, Bill	09/19/2024
07/25/2024	Wayne, Bruce	Signed	Mr Adsit, Bill	09/19/2024
07/19/2024	Wayne, Bruce	Signed	Mr Adsit, Bill	09/19/2024

Showing 1 - 7 of 468 Records

Relative Value Unit Analysis

The chart displays the Relative Value Unit (RVU) for 2023 (blue line) and 2024 (purple line) from January to December. The y-axis represents the Relative Value Unit, ranging from 0 to 30. The x-axis represents the months. The 2024 data shows a significant peak in July, reaching approximately 22 RVU, while the 2023 data remains relatively low, mostly below 10 RVU.

Month	2023 RVU	2024 RVU
Jan	3	3
Feb	7	2
Mar	0	0
Apr	1	9
May	0	6
Jun	4	5
Jul	8	22
Aug	5	5
Sep	5	5
Oct	0	0
Nov	4	0
Dec	4	0

Location - All, Provider/Resource - All

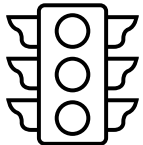


Roles and Permissions

Settings > Practice > Role > Choose Role to Edit
Settings > Practice > Practice Users > Permissions



Roles



- Roles act as a 'standard' set of permissions
- Promote continuity and consistency
- Eliminate the tedium of editing users individually

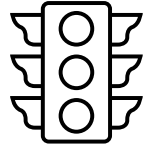
The screenshot shows the 'Settings - Practice User' page in the CureMD system. The 'User Profile' tab is active, displaying fields for personal information and user details. The 'User Role*' dropdown is set to 'Test' and is highlighted with a red box. Below the profile information, a list of checkboxes is shown, with 'Use my location as default for patient registration' also highlighted by a red box and pointed to by a blue arrow.

Setting	Status
Active	<input checked="" type="checkbox"/>
Support	<input type="checkbox"/>
Child Welfare Services	<input type="checkbox"/>
Use my location as default for patient registration	<input type="checkbox"/>
Read-Only Access	<input type="checkbox"/>
Service User	<input type="checkbox"/>

This setting can save time and effort for registration staff



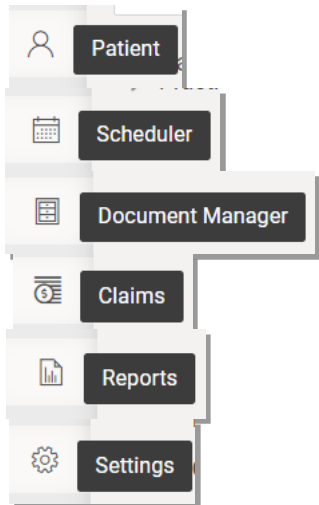
Permissions



Role* User Type* Enforce Permissions

Permissions

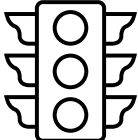
<input type="checkbox"/> All	<input checked="" type="checkbox"/> Personal	<input checked="" type="checkbox"/> Patient	<input checked="" type="checkbox"/> Scheduler	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> CheckIn
<input checked="" type="checkbox"/> Charges	<input checked="" type="checkbox"/> Claims	<input checked="" type="checkbox"/> Payments	<input checked="" type="checkbox"/> Document Manager	<input type="checkbox"/> eRx	<input checked="" type="checkbox"/> Messages
<input checked="" type="checkbox"/> Notes/Recalls	<input checked="" type="checkbox"/> Libraries	<input checked="" type="checkbox"/> Settings	<input type="checkbox"/> EHR Settings	<input checked="" type="checkbox"/> Reports	<input type="checkbox"/> Pharmacy
<input type="checkbox"/> Case Management	<input type="checkbox"/> Care Programs	<input type="checkbox"/> Quality Programs	<input type="checkbox"/> SMART Apps		



- Here, a few checkboxes unlock modules from the left-side menu.
- Exercise caution with “Settings”, as this grants access to the entire back-end of configuration
 - Access to “EHR settings” will restrict back-end access to only EHR related items.
- “Enforce Permissions” prevents any further adjustment to permissions *individually*



Permissions (continued)



CureMD

Recommended Roles and Permissions

Roles and Permissions

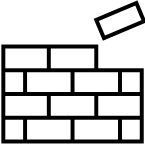
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Personal> Provider Notes.....	Page 7
Personal> Reminders.....	Page 8
Personal> Patient Responses.....	Page 9
Personal> Eligibility; HIS Batch.....	Page 10
Personal> eRX.....	Page 11
Personal> Orders & Results; Labs.....	Page 12
Personal> Orders & Results> Procedures.....	Page 13
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Default Note Template



CureMD version 10g Inbox Task Today's Patients 4 Radiology 9 Back to old

Settings - Appt. Reason

Appointment Reason List Edit

Save Print Delete

Reason *
Adult Immunizations Display in Patient Portal Te

Duration Patients/Day Patients/Hour
30 Mins

Description
To schedule adult immunization

Note Template
None

Available Specialties Selected Specialties
Acupuncturist
Addiction Medicine
Addiction Psychiatry
Aerospace Medicine
Allergy & Immunology

Available Providers Selected Providers

Provider Notes Assigned to me Add Deleted Notes

Create

Date* 09/27/2024 12 21 PM

Provider* --Select--

Note Template* Adult Health Visit

Visit Reason* Adult Flu Shot

Location* Raleigh Health Center

Case Test Case

User Role Security Administrator

Transmit to Daisey

Daisey Service Type* --Select--





Thank you!

Questions?

If you have any questions but need to go,
feel free to email me at your leisure:

rocco.davis@curemd.com

