How to set up visit types in eClinicalWorks

This guide explains how to set up visit types in eClinicalWorks (ECW). You will create and configure visit type codes, set how long each visit type blocks on a schedule, and manage visit status codes. You will then book an appointment that uses your new settings and check it on the provider's schedule.

Prerequisites

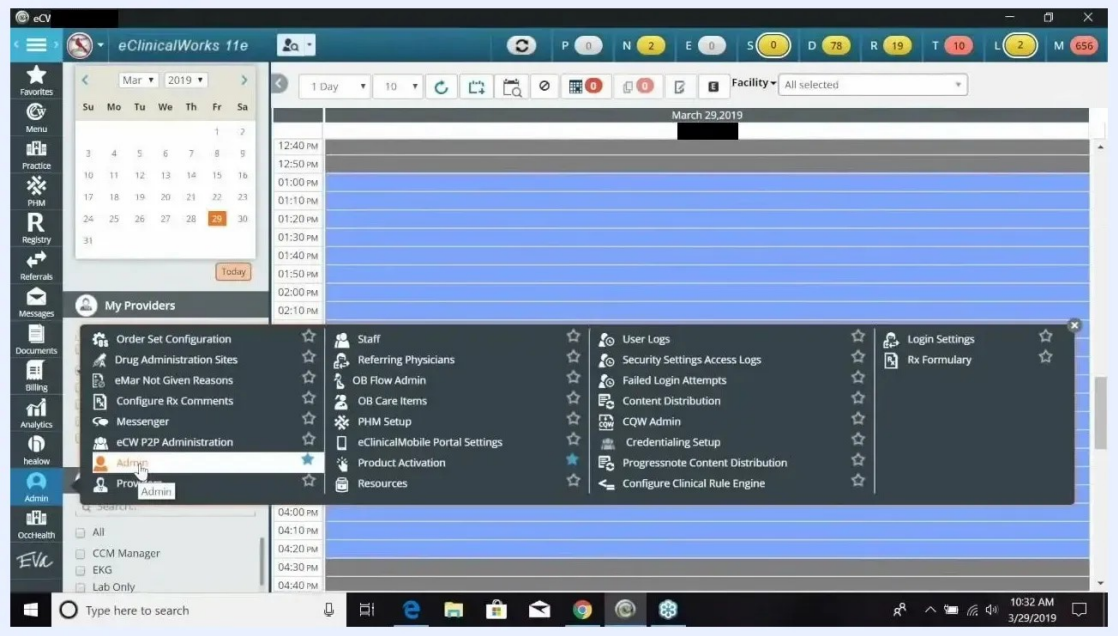
- You have administrator or co-administrator privileges. Other users do not see the **Admin** option.
- You have your administrator username and password. ECW may prompt you for them.

Open the visit type codes

Step 1: Go to the Admin section

1. On the left side of the ECW main screen, find the navigation band.
2. Scroll down and click the **Admin** icon, which shows a person with a gear.

3. In the menu that appears, select **Admin**.



ECW main screen with the navigation band, calendar, provider and resource lists, and the Admin icon highlighted

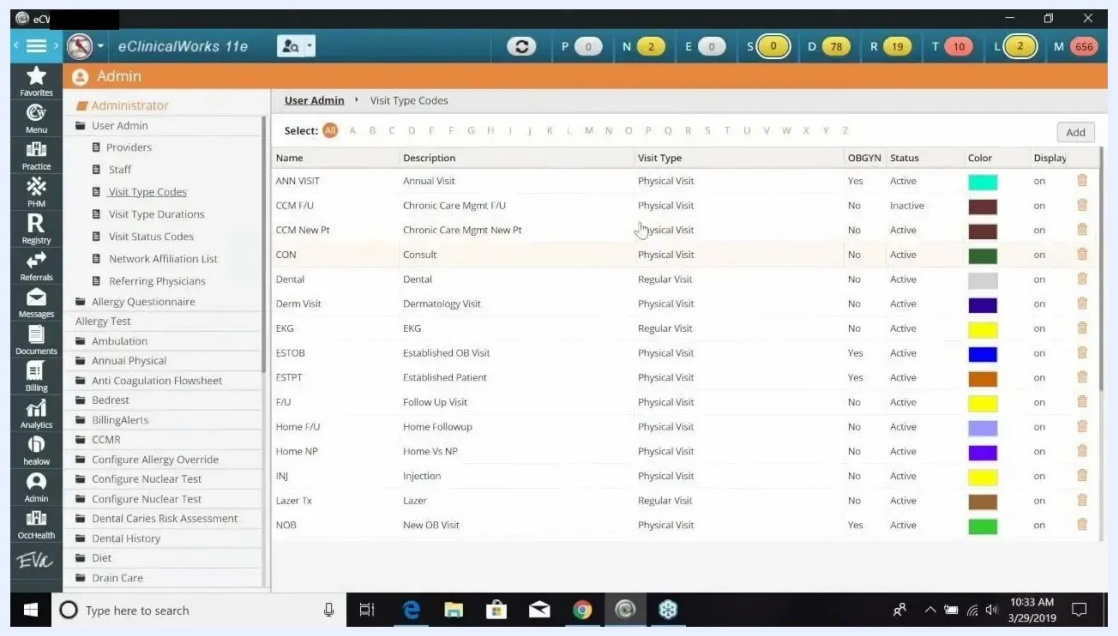
Step 2: Log in as administrator

Enter your administrator username and password if prompted. ECW then opens the full admin configuration list, which shows every configurable option.

Step 3: Open Visit Type Codes

1. In the Admin panel, find the **Administrator** section on the left.
2. Click **User Admin** to expand its options.

3. Click **Visit Type Codes**. This section manages the types of visits patients can be scheduled for.



Admin panel with User Admin expanded and Visit Type Codes selected, showing a list of visit types

Step 4: Review the preloaded visit type codes

ECW provides a preloaded list of visit type codes. Each entry shows:

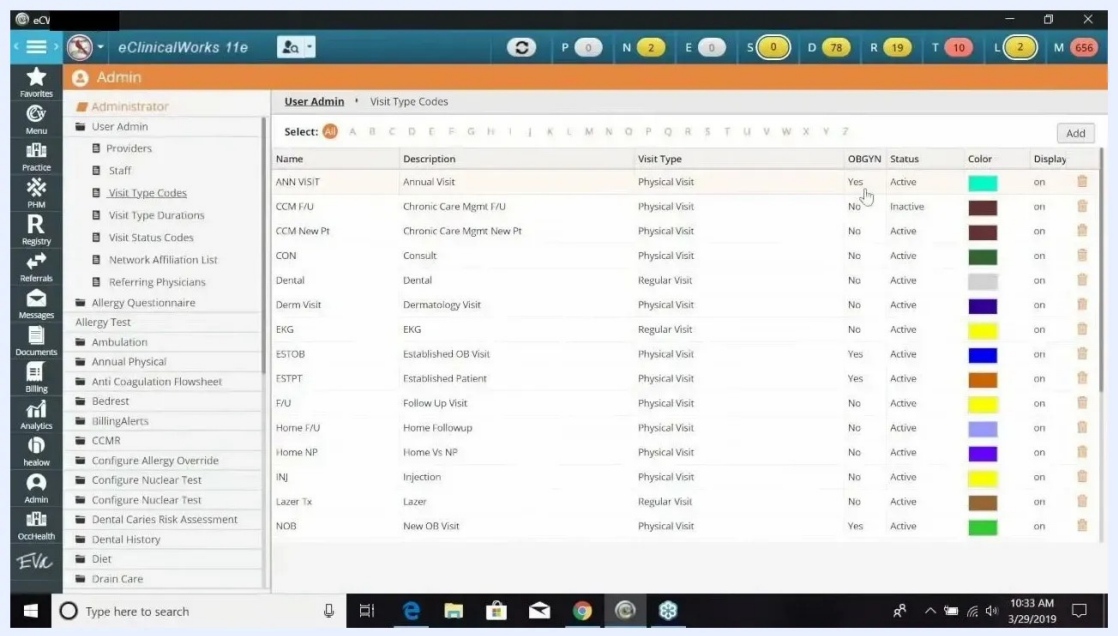
- Name (for example, ANN VISIT)
- Description (for example, Annual Visit)
- Visit Type (for example, Physical Visit)
- OBGYN (Yes or No)
- Status (Active or Inactive)
- Color, which is used for calendar display
- Display (on or off)

You can delete a visit type code with the trash icon, but it is better to mark it **Inactive** instead. To add a new code, click **Add** in the top right.

Configure a visit type code

Step 5: Open an existing visit type code

Click a visit type code, such as **ANN VISIT** for Annual Visit, to view or edit its setup.



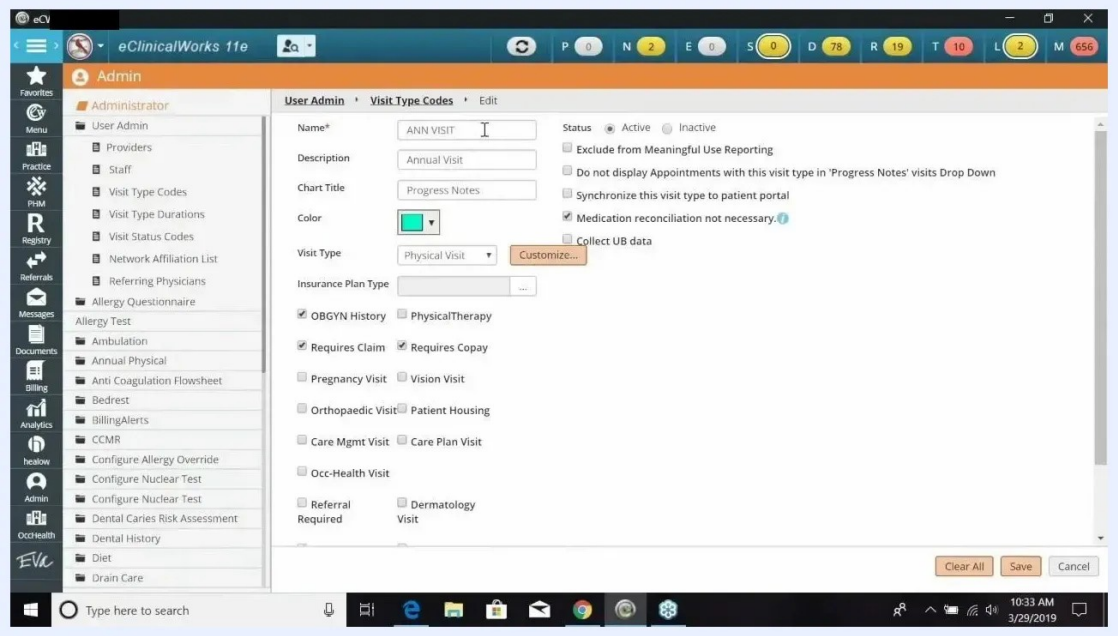
Visit Type Codes list with ANN VISIT selected, showing details such as Name, Description, Visit Type, Status, and Color

Step 6: Review the editable fields

The edit screen includes these fields:

- **Name:** ANN VISIT
- **Description:** Annual Visit
- **Chart Title:** Progress Notes
- **Color:** for example, teal
- **Visit Type:** Physical Visit
- **Status:** Active or Inactive
- **Insurance Plan Type:** if applicable
- **OBGYN History**, **Requires Claim**, and **Requires Copay** checkboxes
- Additional options such as Pregnancy Visit, Orthopaedic Visit, and Referral Required
- Other checkboxes for reporting, synchronization, and medication reconciliation

Click **Save** to apply changes or **Cancel** to discard them. The next steps cover each setting.



Edit Visit Type Code screen for ANN VISIT showing all editable fields, checkboxes, and dropdowns

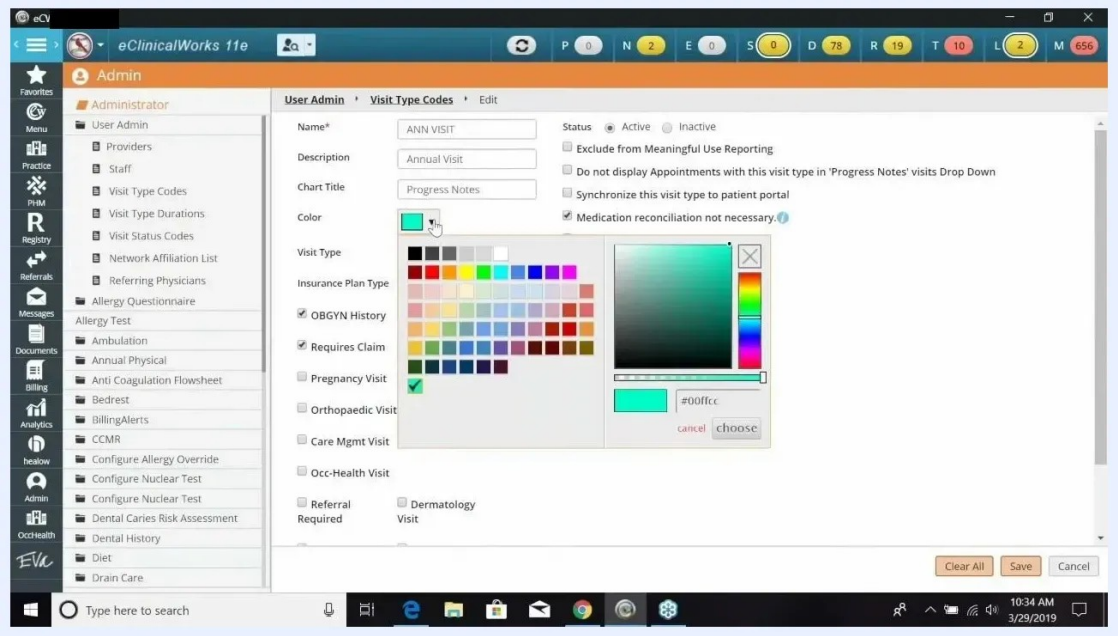
Step 7: Set the chart title

Make sure the **Chart Title** field is set to **Progress Notes**. Keep it as "Progress Notes" for consistency across visit types.

Step 8: Choose a calendar color

1. Click the **Color** box to open the color picker.
2. Select a light color, such as light teal (#00ffcc), so text stays visible against the background.
3. Avoid dark colors such as black, because they can obscure text.

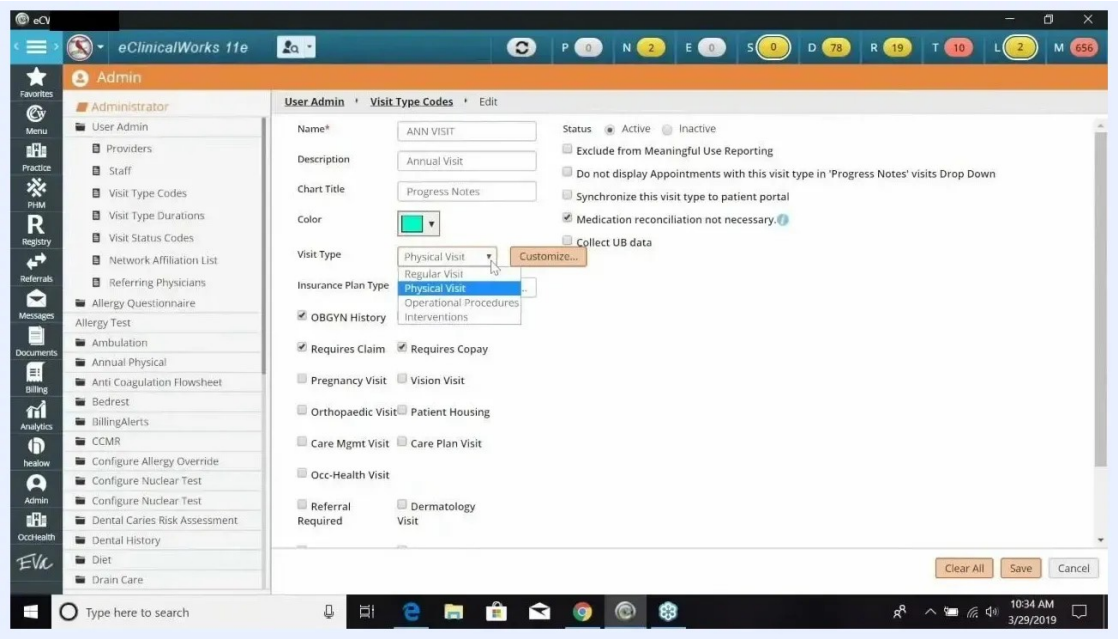
4. Click **Choose** to confirm.



Color picker dialog with a light teal color selected, showing the color palette and hex code #00ffcc

Step 9: Select the visit type

Open the **Visit Type** dropdown and choose the type for this code. The options are **Regular Visit**, **Physical Visit**, **Operational Procedures**, and **Interventions**. Select **Physical Visit** if the visit needs the most documentation in the progress note.



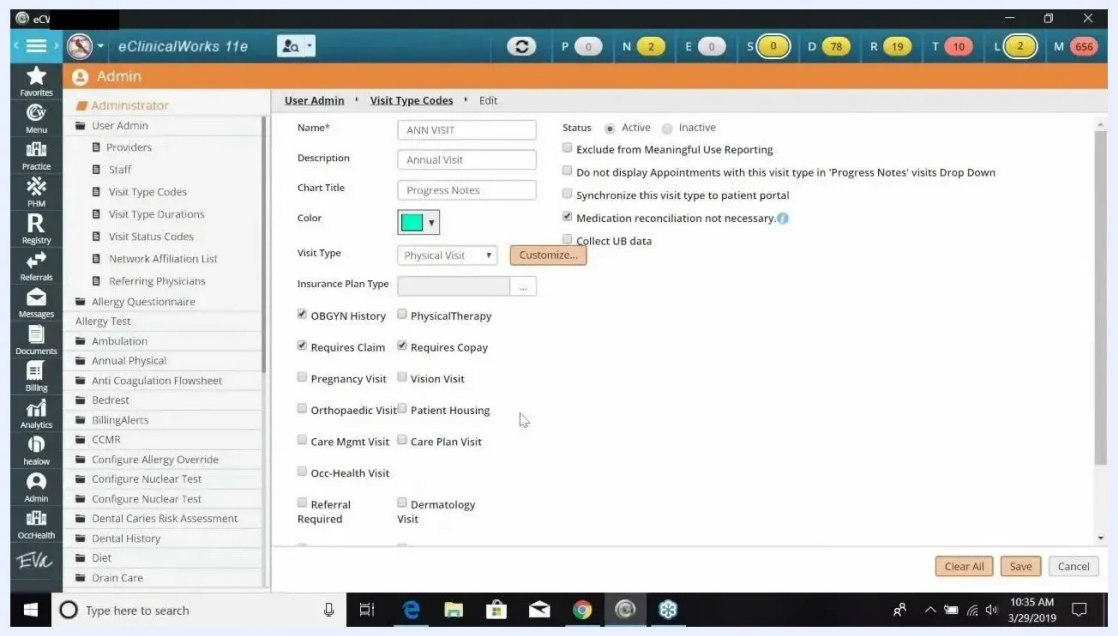
Visit Type dropdown expanded, showing Regular Visit, Physical Visit, Operational Procedures, and Interventions

Step 10: Configure additional visit options

Select the checkboxes that apply to this visit type:

- **OBGYN History:** shows OBGYN history in the progress note.
- **Requires Claim:** a claim is required for this visit.
- **Requires Copay:** a copay is required.
- **Pregnancy Visit:** marks a pregnancy visit and enables the OB flow sheet.
- **Orthopaedic Visit**, **Care Mgmt Visit**, **Occ-Health Visit**, **Referral Required**, **Dermatology Visit**, and similar options: select as appropriate.

Other options include **Physical Therapy**, **Vision Visit**, **Patient Housing**, and **Care Plan Visit**.



Visit Type Code configuration screen with checkboxes for OBGYN History, Requires Claim, Requires Copay, and other visit options

Step 11: Set the visit type status

At the top right, select **Active** to make this visit type available for scheduling. Select **Inactive** if you do not want it to appear in appointment dropdown lists.

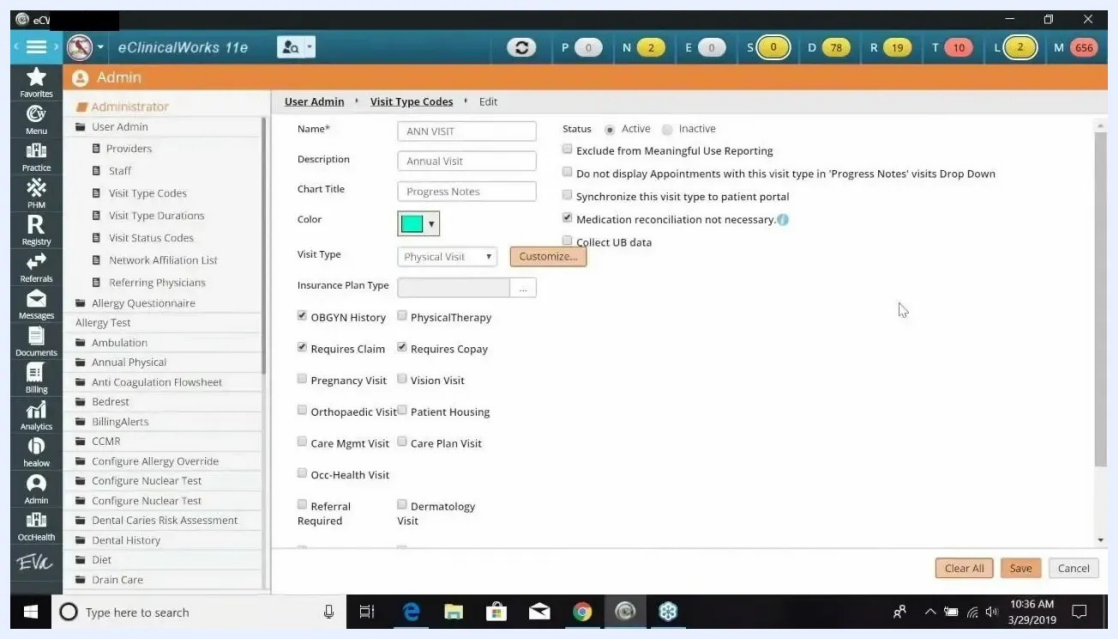
Step 12: Configure advanced options

Check or uncheck these options as needed:

- **Exclude from Meaningful Use Reporting**
- **Do not display Appointments with this visit type in 'Progress Notes' visits Drop Down**
- **Synchronize this visit type to patient portal**, if the patient portal is enabled
- **Medication reconciliation not necessary**
- **Collect UB data**

Step 13: Save the visit type code

Click **Save** at the bottom right to apply your changes.

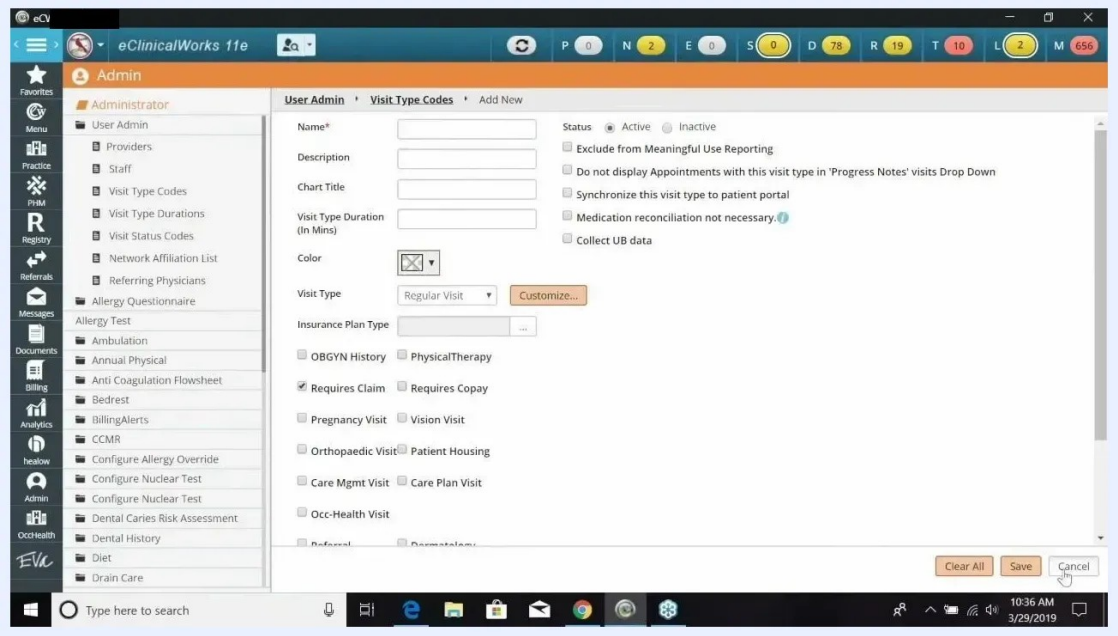


Visit Type Code configuration screen with all fields completed and the Save button highlighted

Step 14: Add a new visit type code (optional)

1. Click **Add** in the Visit Type Codes section.
2. Fill out the required fields: **Name**, **Description**, **Chart Title**, **Visit Type Duration (In Mins)**, **Color**, **Visit Type**, and any relevant checkboxes.

3. Click **Save** to create the code.



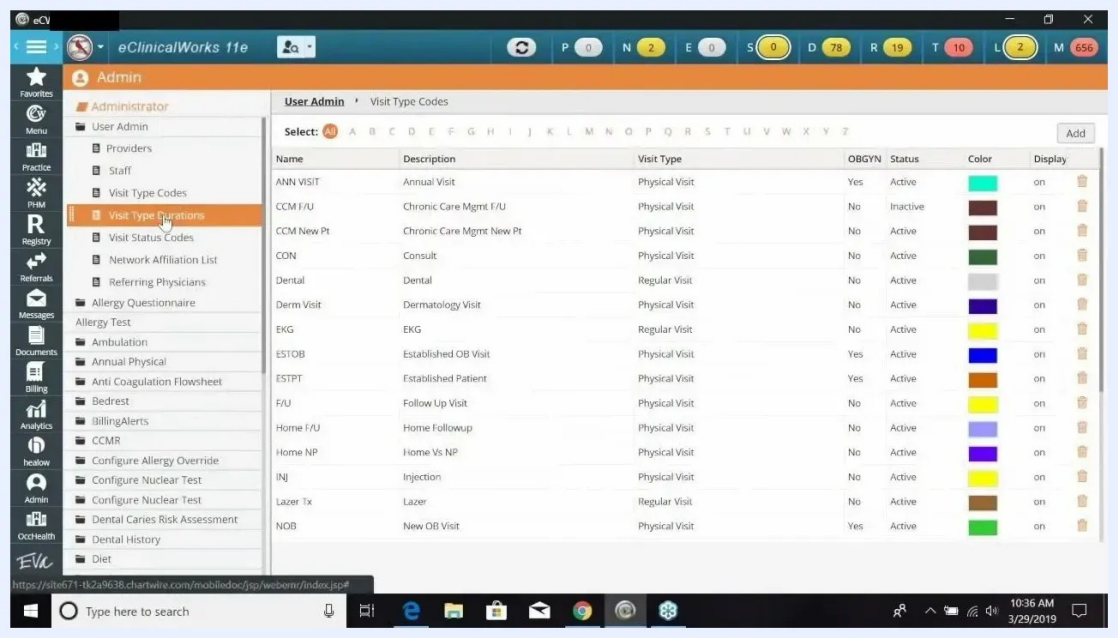
Blank Visit Type Code configuration screen with empty fields and the Save and Cancel buttons visible

Set visit type durations

After you save a visit type code, you can set how long each visit type occupies a time slot on the resource schedule. You can set this by provider or by resource.

Step 15: Open Visit Type Durations

In the left navigation panel, under **User Admin**, click **Visit Type Durations**. This section sets the default duration for each visit type.

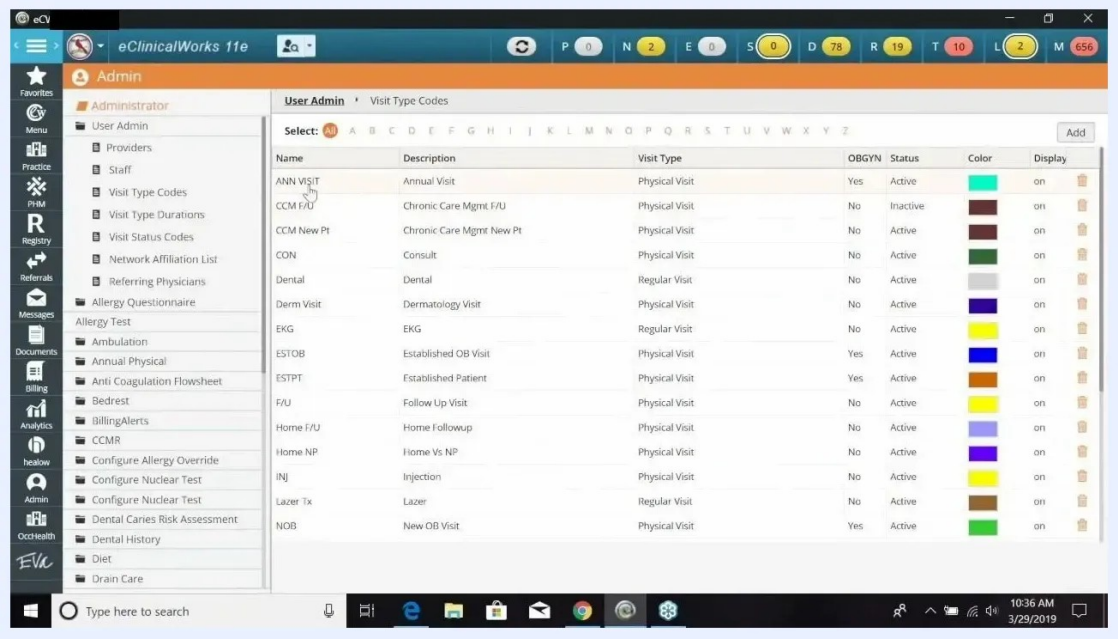


User Admin panel with Visit Type Durations highlighted, showing a list of visit type codes

Step 16: Select a provider or resource

1. At the top of the screen, choose **Provider Visit Type** to set durations by provider, or **Resource Visit Type** to set them by resource.

2. Use the **Select Provider** dropdown to choose the provider. Example providers include Willis, Sam; Jones, Mary; Smith, James; Smith, Raj; Smith, K. Ted; and Test, B. Jordan.



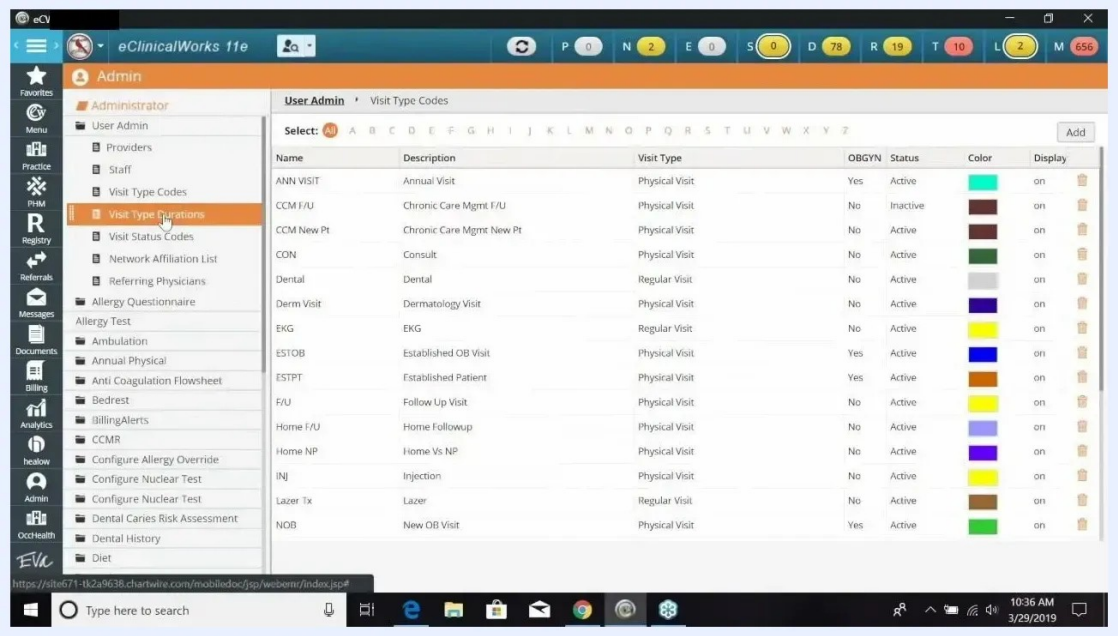
Visit Type Duration screen with the provider dropdown expanded, showing provider selection options

Step 17: Enter durations

For each visit type, enter the duration in minutes in the **Duration (Min)** column. For example:

- **ANN VISIT (Annual Visit):** 30 minutes
- **CCM New Pt (Chronic Care Mgmt New Pt):** 60 minutes
- **OV (Office Visit):** 15 minutes

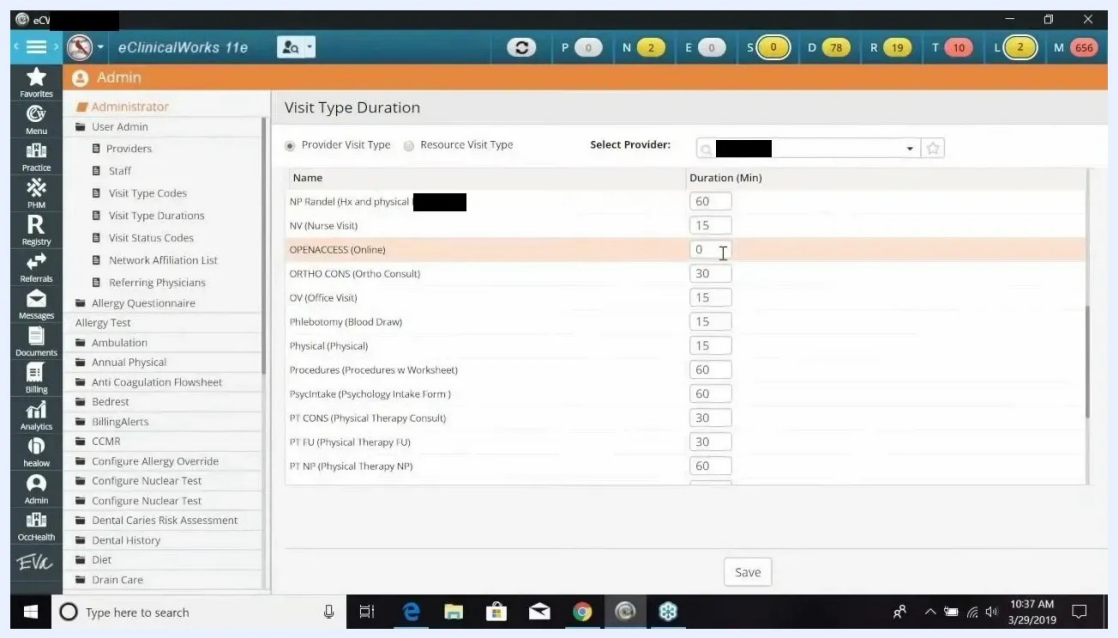
The duration determines how much time is blocked on the resource schedule when the visit type is selected.



Visit Type Duration screen with durations entered for each visit type, such as Annual Visit at 30 and Office Visit at 15

Step 18: Hide a visit type from scheduling without deleting it

Enter **0** in the **Duration (Min)** field for that visit type. For example, set **OPENACCESS (Online)** to **0** minutes to hide it from the resource schedule dropdown.



Visit Type Duration screen with OPENACCESS (Online) set to 0 minutes

Step 19: Save your changes

Click **Save** at the bottom of the screen to apply your durations.

Manage visit status codes

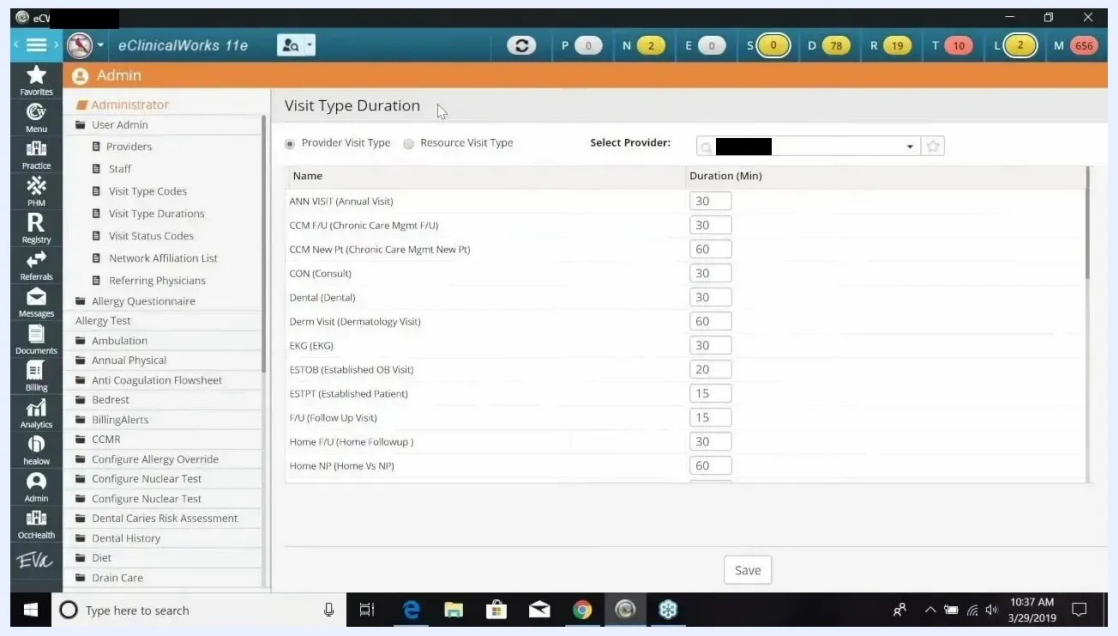
Step 20: Open the visit status list

1. In the Admin section, under **User Admin**, select **Visit Status Codes**.
2. Review the list. Each status has a Code, Status, Color, and Billable column.

Example entries:

- ANSPH: Voice, Purple, Billable: Yes
- APT CARDS: Voice, Black, Billable: No
- ARR: Check-In, Green, Billable: Yes
- CANC: Cancelled, Gray, Billable: No
- CHK: Check Out, Red, Billable: Yes

To create a new status, click **Add** in the top right.

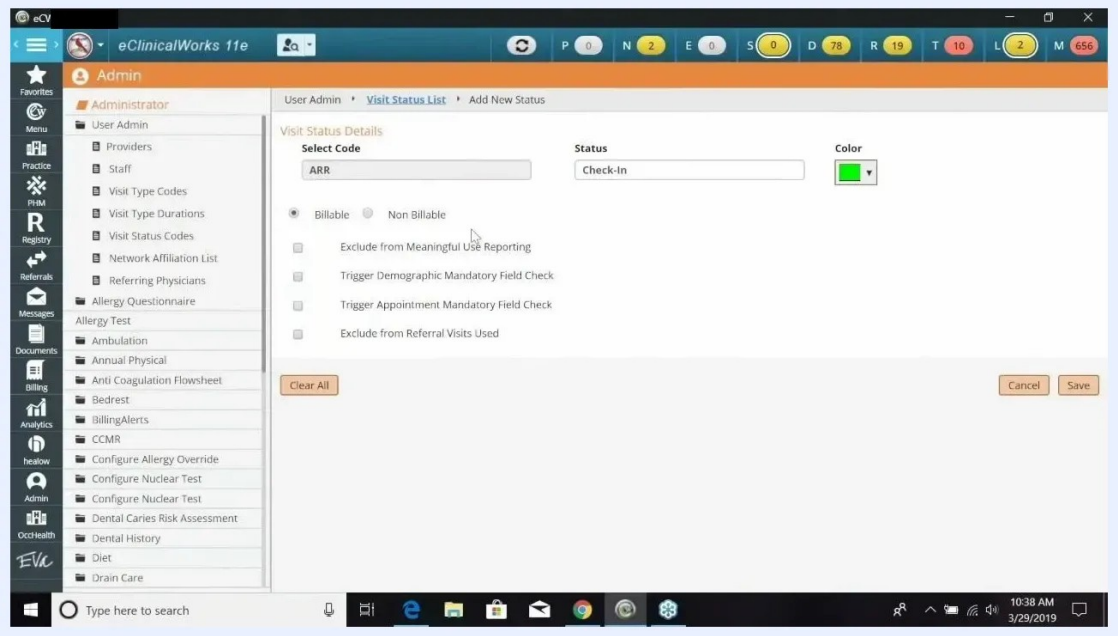


Visit Status List showing codes, statuses, colors, and billable options

Step 21: Edit an existing visit status

1. Click the pencil icon next to a status, such as ARR for Check-In. The **Visit Status Details** screen opens.
2. Update the available fields: **Select Code** (ARR), **Status** (Check-In), **Color** (Green), and the **Billable** or **Non Billable** radio buttons.

3. Click **Save** to apply changes.



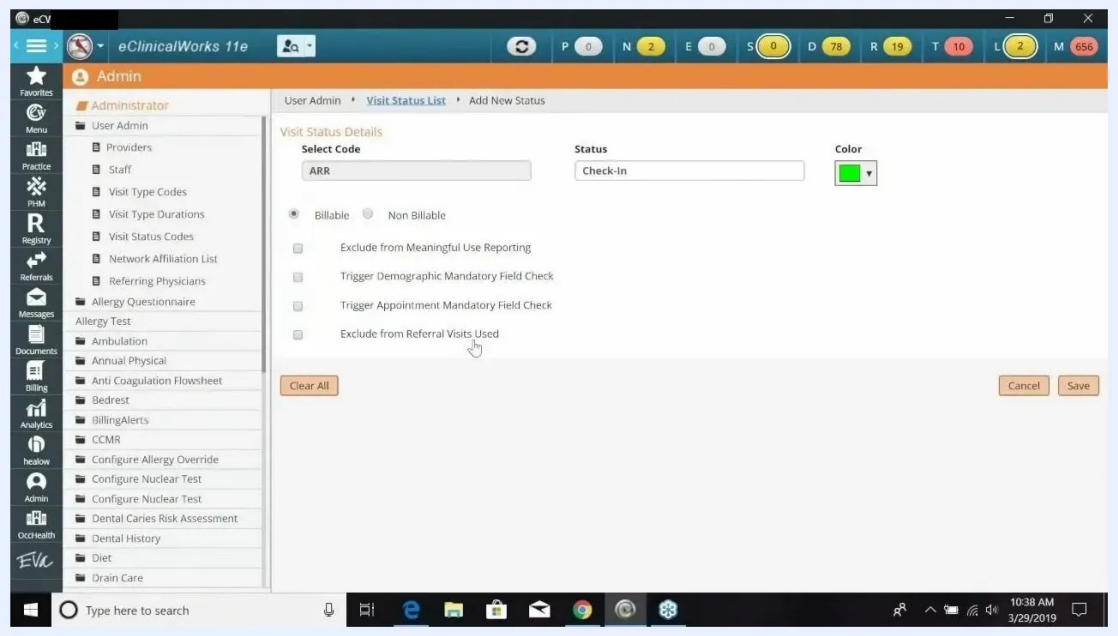
Visit Status Details screen for editing a status, showing all available options

Step 22: Configure reporting and field check options

On the **Visit Status Details** screen, you can also:

- Mark the status as **Billable** or **Non Billable**.
- Select **Exclude from Meaningful Use Reporting**.
- Select **Trigger Demographic Mandatory Field Check**.
- Select **Trigger Appointment Mandatory Field Check**.
- Select **Exclude from Referral Visits Used**.

Click **Clear All** to reset all checkboxes, then click **Save** to confirm your selections.

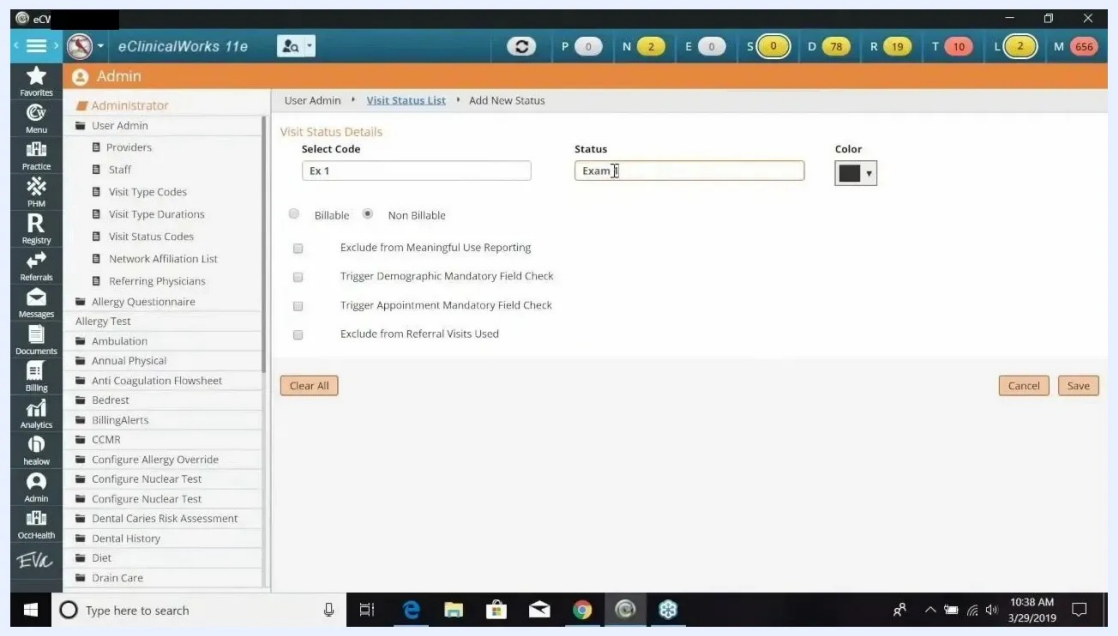


Visit Status Details screen with the reporting and field check options

Step 23: Add a new visit status

1. Click **Add** in the Visit Status List.
2. Enter a new code, such as Ex1.
3. Enter a status name, such as Exam 1.
4. Select **Billable** or **Non Billable**.

5. Check the color. The default may be black, which can obscure text. If you do not want black, click the color box to open the color picker.

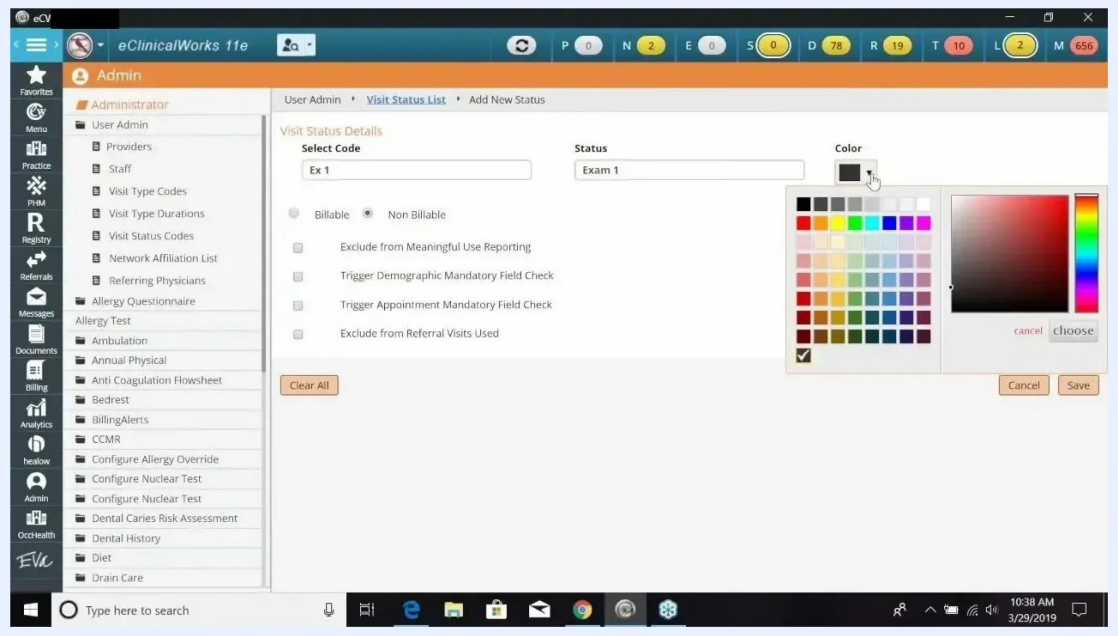


Adding a new visit status with a code and status entered and the default color set to black

Step 24: Change the status color

1. In the color picker, select a color that keeps the text and status visible. Avoid black if it hides text.
2. Click **choose** to confirm.

3. Click **Save** to add the new status.



Color picker open for selecting a new status color, showing the color palette

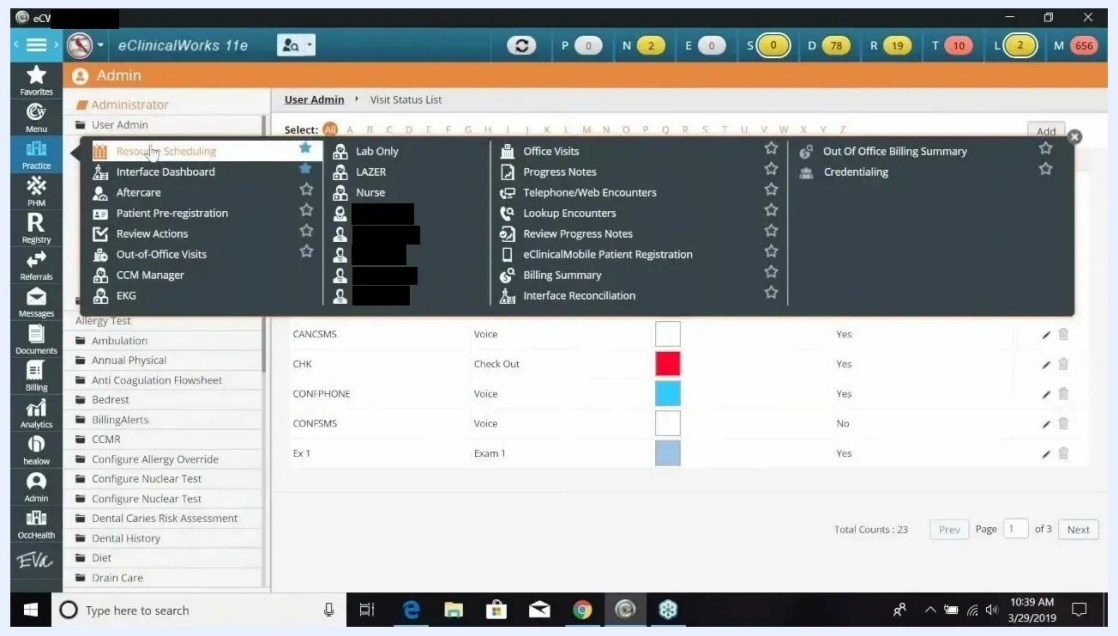
Book an appointment with your new settings

Next, schedule an appointment, apply a visit type and visit status, and confirm that your new status is selectable.

Step 25: Open Resource Scheduling

1. Open the main menu and select **Resource Scheduling**.
2. Review the categorized list of modules and users, which includes Lab Only, Nurse, and provider names such as Jones, Mary; Smith, James; and Willis, Sam.

3. Select the provider or resource for the appointment.



Resource Scheduling menu open, showing modules and provider names

Step 26: Open the provider's schedule and start an appointment

The provider's daily schedule appears as a time grid, for example Willis, Sam on March 29, 2019. Existing appointments are colored blocks, and available times are blue. You can use the calendar and the provider and resource filters on the left to adjust the view.

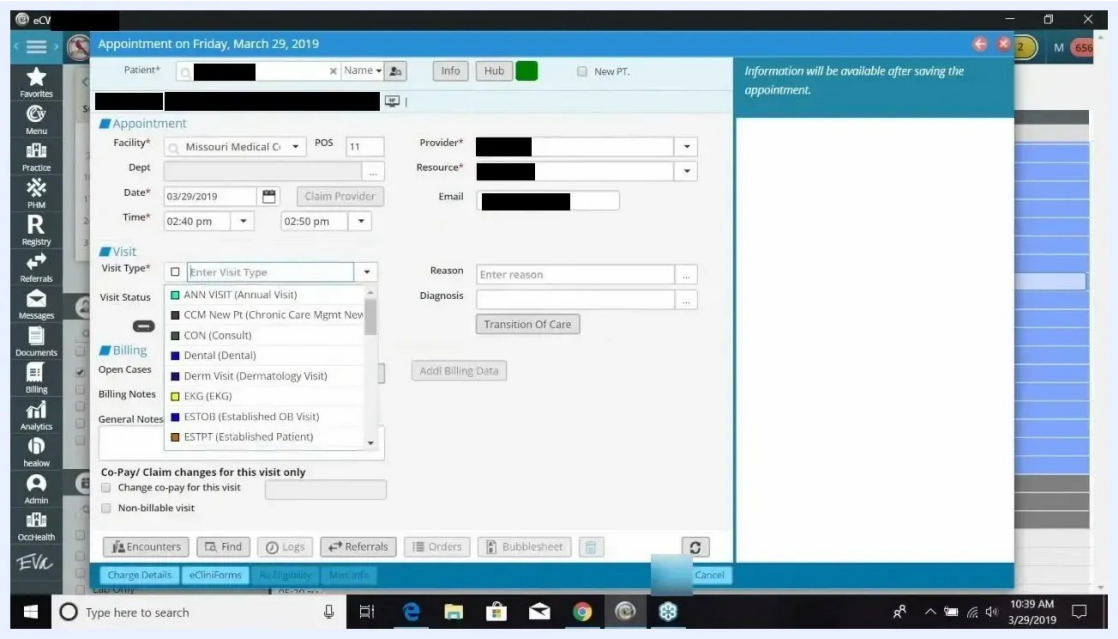
Click an available time slot to open the **Appointment** window, where you enter patient and visit details.

Step 27: Select the patient

1. In the **Appointment** window, type a patient name in the search field, such as "test".
2. Review the dropdown list of matching records, which shows name, age, gender, account number, and date of birth.
3. Click the patient you want, such as Test, Brian, 40Y, M.

Step 28: Choose the visit type

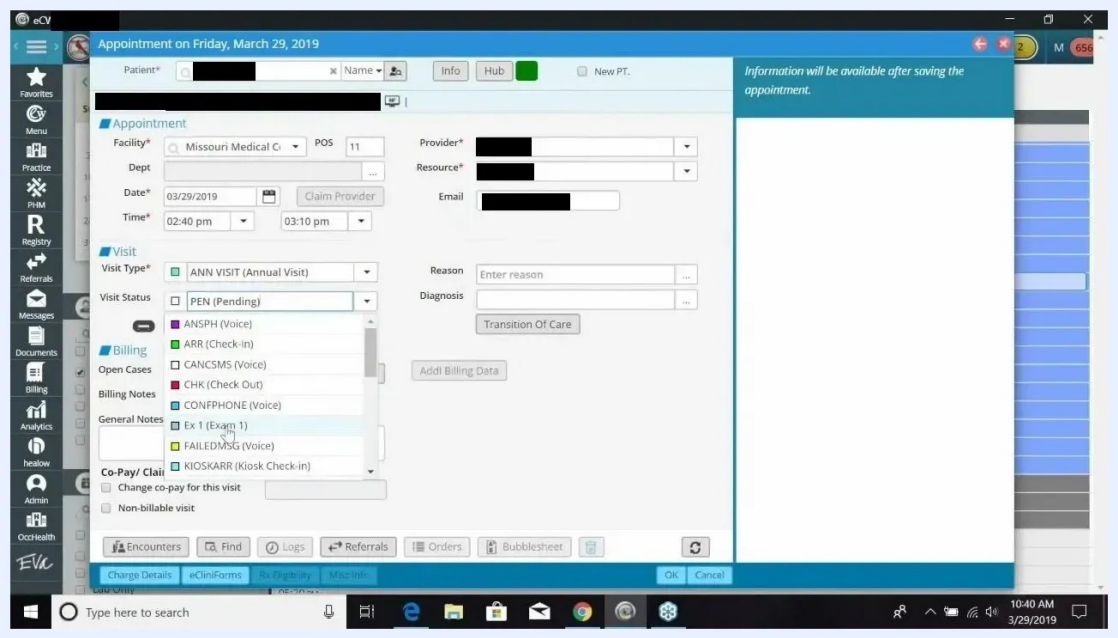
In the **Visit** section, click the **Visit Type** dropdown. The list shows all configured visit types with their colors and descriptions, such as ANN VISIT, CCM New Pt, Dental, Derm Visit, EKG, ESTOB, ESTPT, and F/U. Scroll to the visit type you need and select it.



Visit Type dropdown open, showing visit types with color codes

Step 29: Verify the new visit status is available

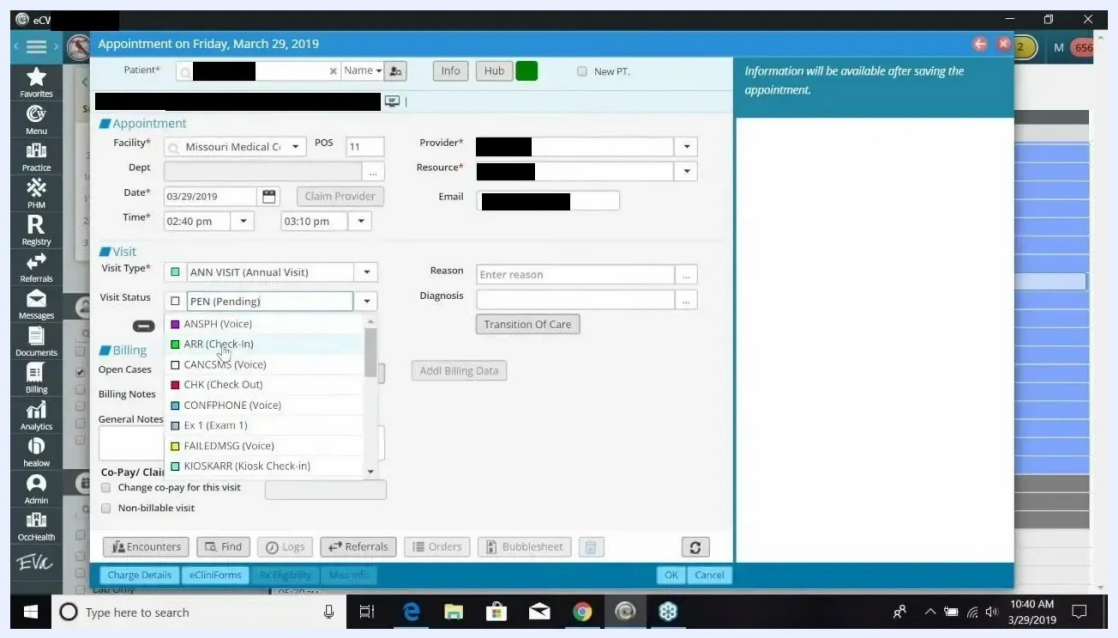
Open the **Visit Status** dropdown and confirm that your new status appears, for example "Ex 1 (Exam 1)" in light blue. This confirms that the status is saved and selectable for appointments.



Visit Status dropdown open, showing Ex 1 (Exam 1) in the list in light blue

Step 30: Select the visit status

From the **Visit Status** dropdown, select the status for the appointment. For example, select **ARR (Check-In)**, shown in green, to indicate that the patient has arrived and checked in.

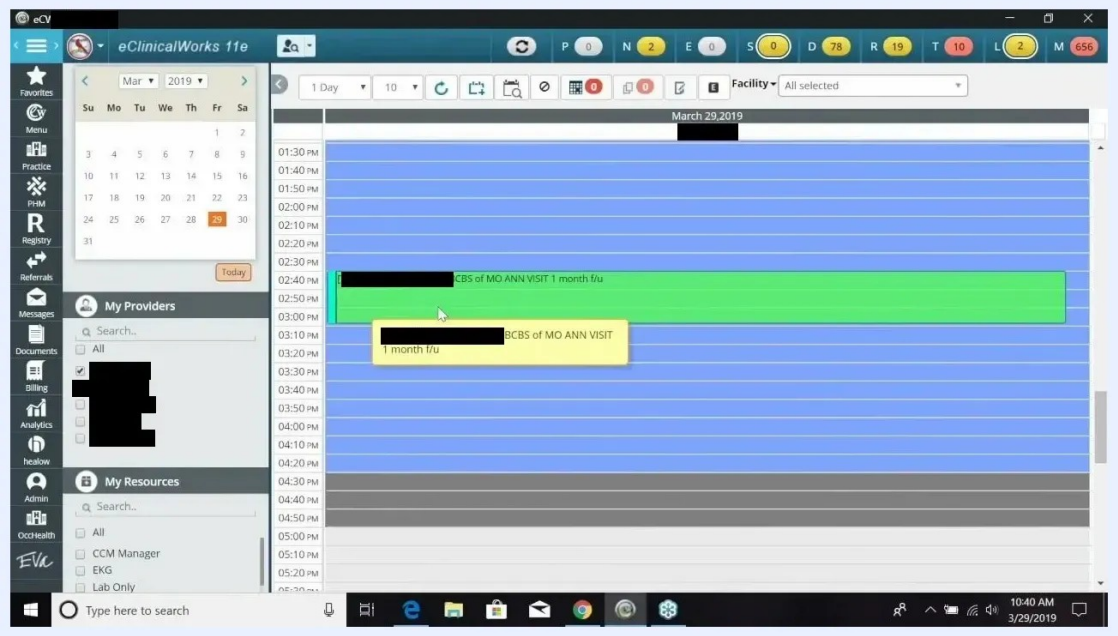


Visit Status dropdown with ARR (Check-In) highlighted and ready to select

Step 31: Save and confirm the appointment

1. Complete any other required fields, such as reason, diagnosis, and billing notes.
2. Click **OK** or **Save** to finalize the appointment.

The appointment appears on the provider's schedule, color-coded by its visit status. For example, it is green for ARR (Check-In).



Provider schedule showing the new appointment block in green for ARR (Check-In) status

Review the appointment on the provider's schedule

Step 32: Check the filters and date

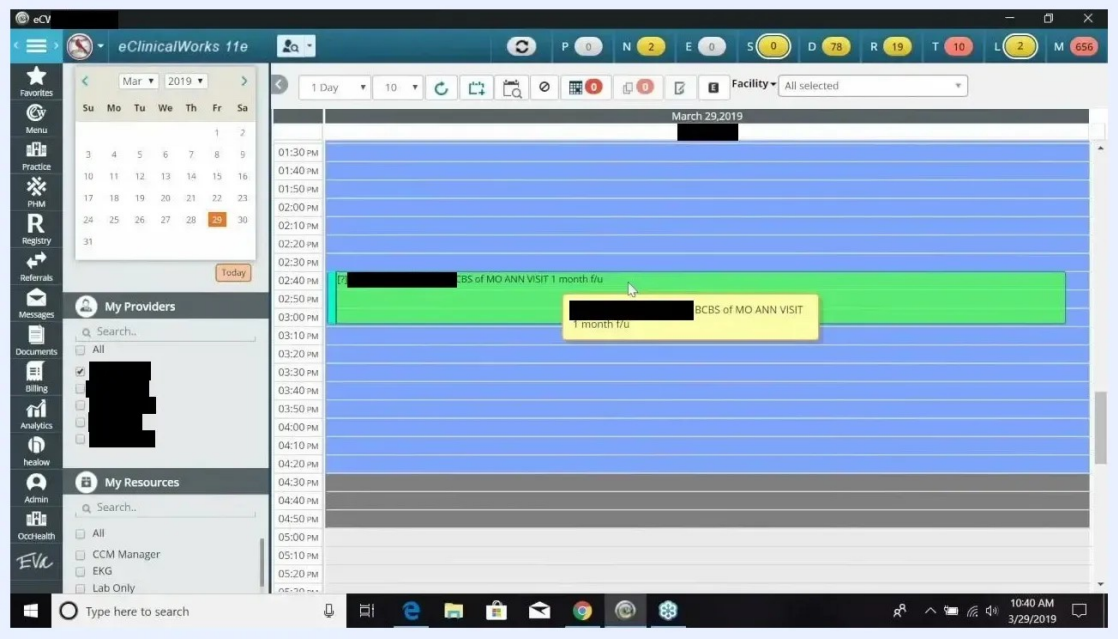
1. On the left panel, use **My Providers** and **My Resources** to filter the schedule. Make sure the correct provider, such as Willis, Sam, is checked.
2. Use the calendar widget in the upper left to confirm or change the date. The current date, such as March 29, 2019, is highlighted.

Step 33: Find the appointment block and view its details

Find the patient's block on the schedule grid, for example Test, Brian. The block shows:

- Patient name: Test, Brian
- Date of birth: 11/14/1978
- Insurance: BCBS of MO
- Visit type: ANN VISIT
- Notes: 1 month f/u

Move your mouse over the block to see a tooltip with the patient details, insurance information, visit type, and notes. You can use this to check appointment specifics without opening the appointment window.



Provider schedule with the appointment block for Test, Brian highlighted in green and a tooltip showing patient and visit details

Step 34: Confirm the status color

Check that the block color matches the visit status you selected, such as green for ARR (Check-In). This color cue helps you identify the status of each appointment at a glance.

Summary

You now know how to set up visit types in eClinicalWorks, from creating and configuring visit type codes to setting durations by provider or resource. You also created visit statuses and checked them on a booked appointment. Together, these settings control how visits are labeled, how much time they take, and how they look on the schedule.

What's next

- Add or modify more visit type codes as your practice needs them.
- Mark visit types **Inactive**, or set their duration to **0**, instead of deleting them.
- Create more visit status codes and check that they appear in the **Visit Status** dropdown.