

# Welcome to the **Closing the Order Loop and Other Hidden Gems in NextGen Webinar**

The presentation will begin shortly.  
Please note that all attendees are in listen only mode.  
Inquiries may be submitted using the **Questions** window.  
A recording of this webinar will be sent out to all attendees.

Presented by:





# About eMedApps

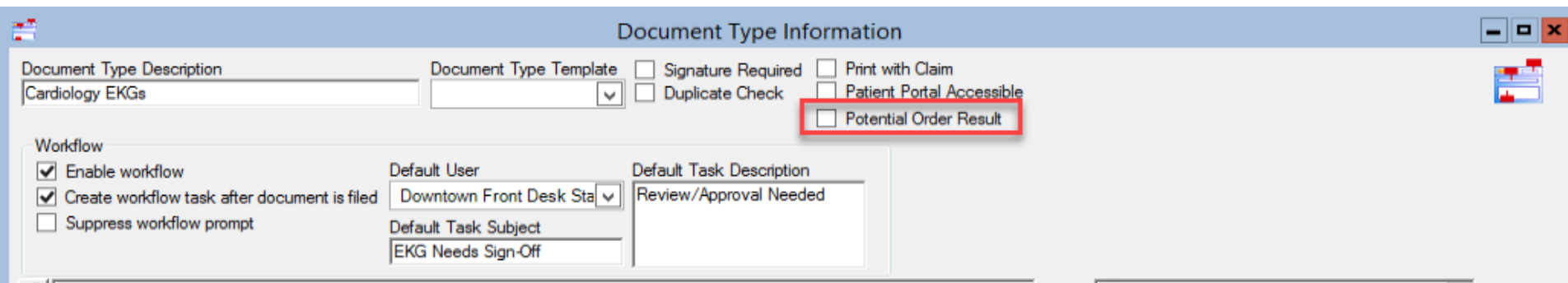
eMedApps is a Healthcare Information Technology Services company providing practices, clinics and hospitals with a full range of services, as well as a suite of products designed to increase efficiency and facilitate communication.

- Founded in 1999
- Working as partner with NextGen since 2001
- Worked as subcontractor for NextGen
- Serving healthcare clients across USA
- Services and Products for NextGen clients

# Closing the Order Loop

# Closing the Order Loop Configuration

- Step 1: Confirm the Document Type is configured to be a potential order result
  - File Maintenance – Master Files – System – Document Management – Document Types – Select the Document Type you plan to use: Potential Order Result check box



Document Type Information

Document Type Description: Cardiology EKGs

Document Type Template: [Dropdown]

Signature Required

Print with Claim

Duplicate Check

Patient Portal Accessible

Potential Order Result

Workflow

Enable workflow

Create workflow task after document is filed

Suppress workflow prompt

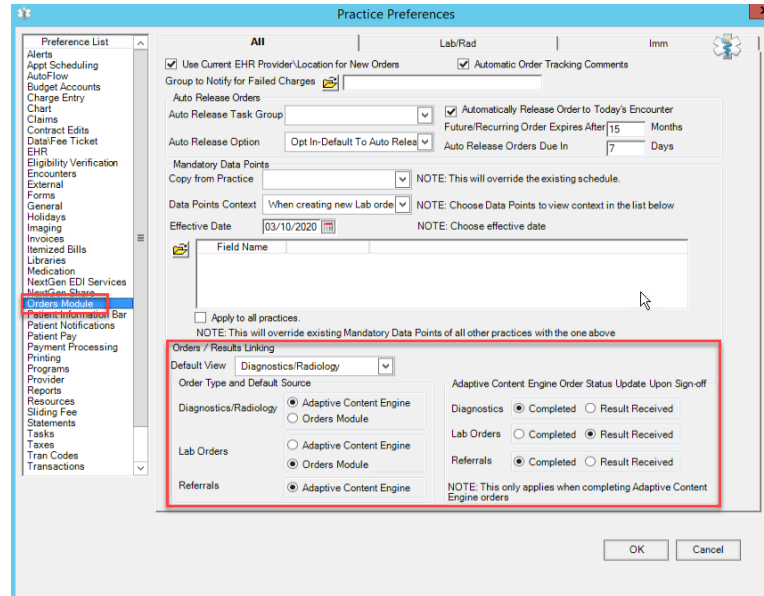
Default User: Downtown Front Desk Sta [Dropdown]

Default Task Description: Review/Approval Needed

Default Task Subject: EKG Needs Sign-Off

# Closing the Order Loop Configuration

- Step 2: Confirm the Practice is configured for closing the order loop
  - File Maintenance – Master Files – System – EHR – Practices – Select the Practice to Configure – Preferences – Orders Module: Pick Radio buttons at the bottom

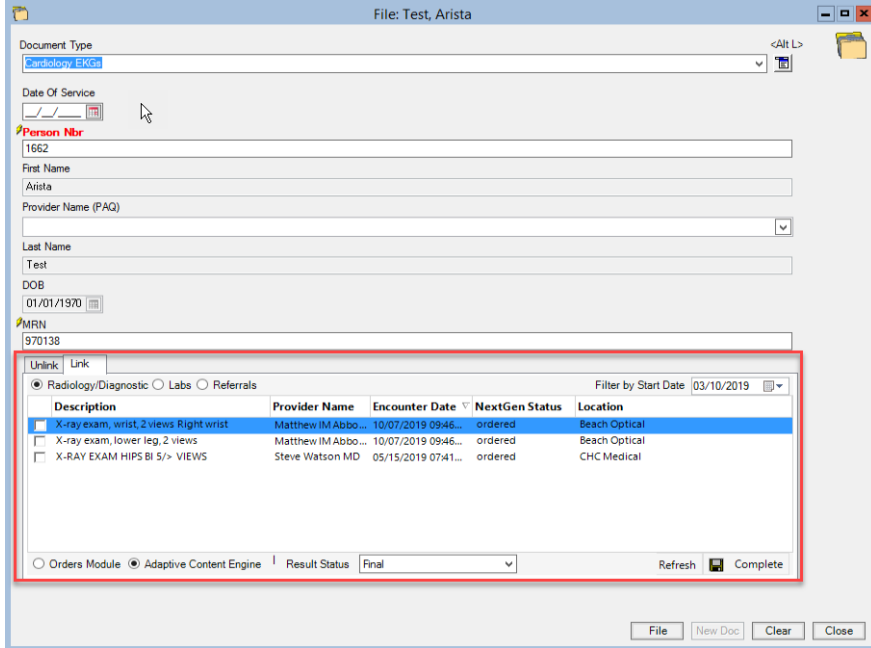


The screenshot shows the "Practice Preferences" dialog box with the "Orders / Results Linking" section highlighted. The dialog is titled "Practice Preferences" and has tabs for "All", "Lab/Rad", and "Imm". The "All" tab is selected. The "Orders / Results Linking" section is highlighted with a red box and contains the following options:

- Default View: Diagnostics/Radiology (dropdown)
- Order Type and Default Source: Diagnostics/Radiology (dropdown)
- Diagnostics/Radiology:  Adaptive Content Engine,  Orders Module
- Lab Orders:  Adaptive Content Engine,  Orders Module
- Referrals:  Adaptive Content Engine,  Orders Module
- Adaptive Content Engine Order Status Update Upon Sign-off:
  - Diagnostics:  Completed,  Result Received
  - Lab Orders:  Completed,  Result Received
  - Referrals:  Completed,  Result Received
- NOTE: This only applies when completing Adaptive Content Engine orders

# Closing the Order Loop Utilization

- When users are scanning documents into the system via Document Management, they will see an additional panel at the bottom of the filing window.
- Link the scan to the appropriate order by placing a check mark next to the order and click Complete.
- If the item that is being scanned is not related to an order, this section of the filing window back be left blank.



File: Test, Arista

Document Type:  <Alt L>

Date Of Service:

Person Nbr: 1662

First Name: Arista

Provider Name (PAQ):

Last Name:

Test: Test

DOB: 01/01/1970

MRN: 970138

Unlink Link

Radiology/Diagnostic  Labs  Referrals

Filter by Start Date: 03/10/2019

Description	Provider Name	Encounter Date	NextGen Status	Location
<input checked="" type="checkbox"/> X-ray exam, wrist, 2 views Right wrist	Matthew IM Abbo...	10/07/2019 09:46...	ordered	Beach Optical
<input type="checkbox"/> X-ray exam, lower leg, 2 views	Matthew IM Abbo...	10/07/2019 09:46...	ordered	Beach Optical
<input type="checkbox"/> X-RAY EXAM HIPS BI S/> VIEWS	Steve Watson MD	05/15/2019 07:41...	ordered	CHC Medical

Orders Module  Adaptive Content Engine

Result Status: Final

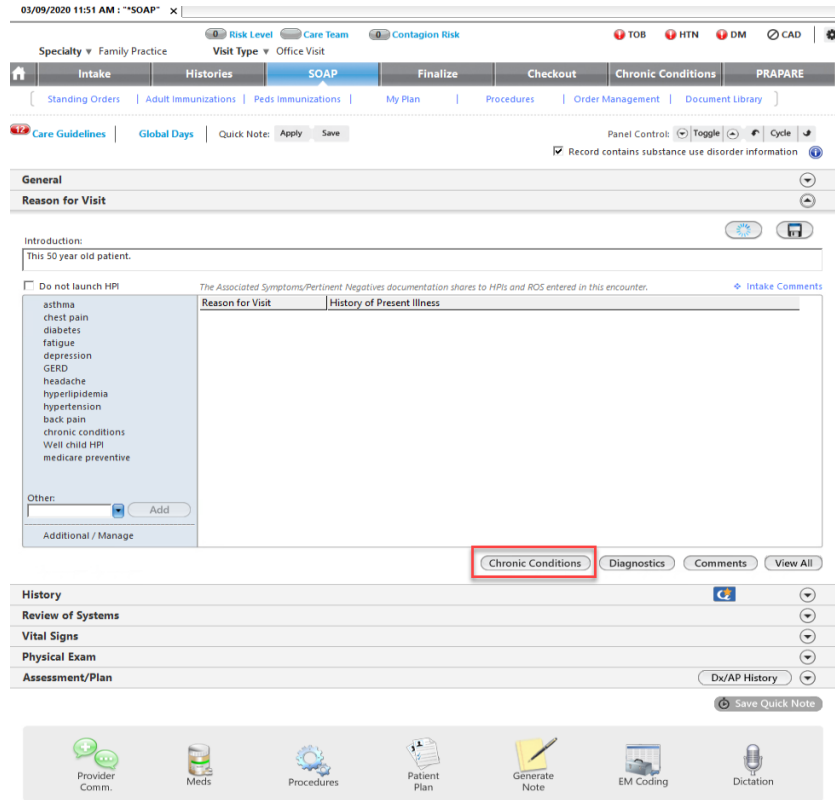
Refresh Complete

File New Doc Clear Close

# Chronic Conditions Workflow

# Chronic Conditions Workflow

- The Chronic Conditions template uses a problem based charting workflow.
- The Chronic Conditions Template is used to document the status, compliance, and any other issues with a chronic problem.
- This template is primarily used with FP and IM, but can be used with other specialties.



The screenshot displays the eMedApps SOAP charting interface. At the top, the patient information includes the date and time (03/09/2020 11:51 AM) and the template name ("SOAP"). The interface is organized into several sections:

- Navigation:** Includes tabs for Intake, Histories, SOAP (selected), Finalize, Checkout, Chronic Conditions, and PRAPARE. Below these are links for Standing Orders, Adult Immunizations, Peds Immunizations, My Plan, Procedures, Order Management, and Document Library.
- Tools:** A "Care Guidelines" section with "Global Days" and "Quick Note" options (Apply, Save). A "Panel Control" section with "Toggle", "Cycle", and "Info" icons.
- General Section:** Labeled "Reason for Visit", it contains an "Introduction" field with the text "This 50 year old patient." Below this is a list of conditions to select, including asthma, chest pain, diabetes, fatigue, depression, GERD, headache, hyperlipidemia, hypertension, back pain, chronic conditions, Well child HPI, and medicare preventive. An "Other:" field with an "Add" button and "Additional / Manage" link is also present.
- History Section:** A large text area for "Reason for Visit" and "History of Present Illness".
- Bottom Navigation:** A row of icons for Provider Comm., Meds, Procedures, Patient Plan, Generate Note, EM Coding, and Dictation.

A red box highlights the "Chronic Conditions" button in the bottom right of the main charting area.



# Chronic Conditions Workflow

The following is a sample workflow for documentation:

1. Overall Chronic Conditions HPI: Document a general comment that applies to all chronic conditions for this patient (my phrases are available).
2. Review the flowsheet, if applicable.
3. Select the Problem desired to document first.
4. Add the assessment status for today's visit.
5. Document the note for today's visit. Entering a value into this field will add or update a note associated with the problem in the Problem Module.
6. Document the HPI for today's visit. Click the arrow to copy the data from the note to the HPI, if desired.
7. Click Lab Review to populate the HPI comment with recent lab results.
8. Click Screening Questions to document screening questions, if they are affiliated with the diagnosis selected.
9. Document Exclusions, if necessary.
10. Document the Patient Plan, if desired.
11. Document the Provider Plan, if desired.
12. Once Complete, click the Add/Update button.

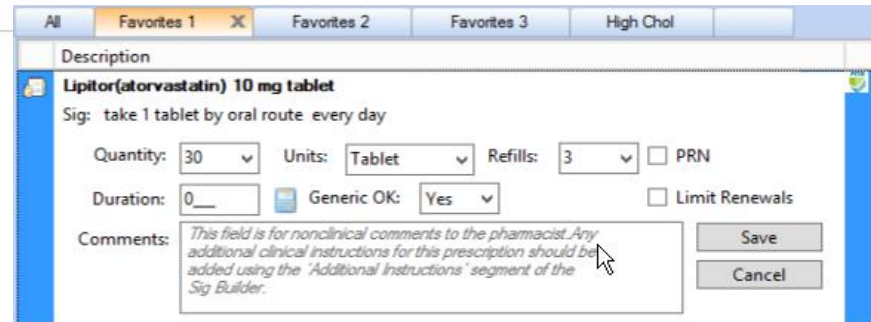
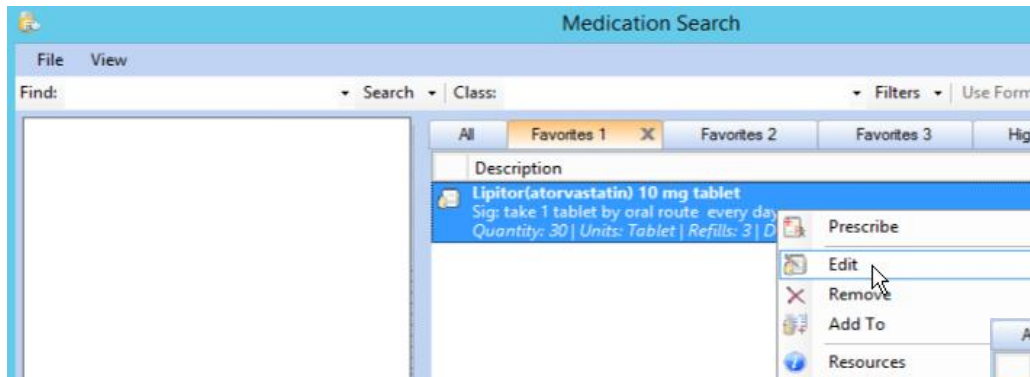
The screenshot shows the 'Chronic Conditions' workflow interface. At the top, there is a navigation bar with tabs for Intake, Histories, SOAP, Finalize, Checkout, Chronic Conditions (selected), and PRAPARE. Below the navigation bar, there are filters for Specialty (Family Practice), Visit Type (Office Visit), and Risk Level (Contagion Risk). The main content area is titled 'Overall chronic conditions HPI' and contains several sections: 1. Problem Description: A dropdown menu showing 'Hypertension' and 'Diabetes insipidus' (selected). 2. Problem description: A text field containing 'Diabetes insipidus'. 3. ICD description: A text field containing 'Diabetes insipidus'. 4. ICD code: A text field containing 'E23.2'. 5. Notes: A text area for entering notes. 6. HPI: A text area for entering the history of present illness. 7. Lab Review: A button to populate the HPI comment with recent lab results. 8. Screening Questions: A button to document screening questions. 9. Exclusions: A button to document exclusions. 10. Patient Plan: A text area for documenting the patient plan. 11. Provider Plan: A text area for documenting the provider plan. 12. Add/Update: A button to save the changes. At the bottom, there is a table for 'Today's Assessment' with columns for Diagnosis Description, Code, Status, and HPI Comments.

Repeat steps 3-12 for the next problem.

# **Editing Medication Favorites**

# Editing Medication Favorites

- From within the Medication Module, right click and choose edit on any saved favorite Medications.



# Configuring Blue Sub Navigation Links

# Configuring Blue Sub Navigation Links

File – System/Practice Template – \*Configuration Home – Framework Content

Specialty ▾ Family Practice

Visit Type ▾ Office Visit

Home | Intake | Histories | SOAP | Finalize | Checkout | Chronic Conditions | PRAPARE

[ Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library ]

1. Choose the Specialty desired
2. Pick the Visit Type desired
3. Pick the Tab to edit
4. Update the Sub Nav desired
5. Click the Update button

The screenshot shows the 'Framework Content' configuration window. It is set for 'Specialty: Family Practice' (marked with a '1') and 'Visit Type: Office Visit' (marked with a '2'). The 'Tabs and Subnavigation' section contains a table with 7 tabs. The 'Intake' tab (Tab 1) is selected (marked with a '3'). Within the 'Intake' tab, the 'Sub Navigation' section is being edited. The 'Standing Orders' sub-navigation link is highlighted (marked with a '4'). The 'Update' button in the bottom right of the sub-navigation section is also highlighted (marked with a '5').

Home Page	Tab 1	Tab 2	Tab 3	Tab 4	Tab 5	Tab 6	Tab 7
Template	Intake	Histories	SOAP	Finalize	Checkout	Chronic Conditions	PRAPARE
Template	Template	Template	Template	Template	Template	Template	Template
Visit Type	Office Visit	Office Visit	Office Visit	Office Visit	Office Visit	Office Visit	Office Visit
Inpatient Subsequent	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
Medical Clearance, Consult	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
Medical Clearance, Visit	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
Medicare Preventive	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
No-Show	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
Nurse Visit	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		
Order Action	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)	Chronic Conditions (fti_chronic_conditions)	PRAPARE (fti_prapare)
Patient Communication	Telephone Call (fti_telephone_call)	Provider Test Action (fti_provider_test_action)	Document Library (fti_document_library)	Order Management (fti_order_management)	Chart Abstraction (fti_chart_abstraction)		
Physician Supervision (patient not)	Intake (fti_intake)	Histories (fti_histories)	SOAP (fti_soap)	Finalize (fti_finalize)	Checkout (fti_checkout)		

Home Page	Sub Nav 1	Sub Nav 2	Sub Nav 3	Sub Nav 4	Sub Nav 5	Sub Nav 6	Sub Nav 7
Tab Name	Intake	Adult Immunizations	Peds Immunizations	My Plan	Procedures	Order Management	Document Library
Home Page	Demographics (patient)	Call/Communication (telephone_call)	Provider Test Action (provider_test_action)	Order Management (order_management)	Document Library (document_library)	Chart Abstraction (chart_abstraction)	Document Library (document_library)
Tab 1 (Intake)	Standing Orders (standing_orders)	Adult Immunizations (adult_immunizations)	Peds Immunizations (peds_immunizations)	My Plan (my_plan)	Procedures (procedures)	Order Management (order_management)	Document Library (document_library)
Tab 2 (Histories)	Demographics (patient)	Order Management (order_management)	Document Library (document_library)	Chart Abstraction (chart_abstraction)	Procedures (procedures)	Order Management (order_management)	Document Library (document_library)
Tab 3 (SOAP)	Standing Orders (standing_orders)	Adult Immunizations (adult_immunizations)	Peds Immunizations (peds_immunizations)	My Plan (my_plan)	Procedures (procedures)	Order Management (order_management)	Document Library (document_library)
Tab 4 (Finalize)	Order Management (order_management)	Document Library (document_library)	Procedures (procedures)	Tobacco Cessation (tobacco_cessation)			

# Configuring Procedures

# Configuring Procedures



File – System/Practice Template - \*Configuration Home – Framework Content

**Procedures**

Procedures  Change Order  Sort Alphabetically

Procedure	Template Name
Debridement/burn	Proc_Debridement
EKG	Proc_EKG
Foreign body	Proc_ForeignBody
Fracture/Cast/Strapping	proc_fx_cast_strapping
Generic	proc_generic
Incision & Drainage	Proc_IncDrain
IUD	Proc_IUD
Joint aspiration/injection	proc_joint_injections
Laceration	Proc_Laceration
Lesion/shaving	proc_shaving
Lesion/wart	Proc_LesionWart
Lumbar puncture	Proc_LumbarPuncture
Nail avulsion	Proc_NailAvul
Suture removal	Proc_Sut_Removal

# **My Phrase Management**



# Adding My Phrases

- Wherever you are at in the NextGen application, if My Phrases are available, you will see 2 links.

[My Phrases](#) | [Manage My Phrases](#)

- To add a My Phrase:
  - Click the Manage My Phrases link
  - 1. Document a My Phrase Summary or Title for your Phrase
  - 2. Document the phrase
  - 3. Click Add

*\*Tip\** Don't change the phrase type, as wherever you are at in the system, it will default appropriately.

Manage My Phrases

My phrase type: Plan - Patient  List only these phrase types My phrase summary:   Copy phrase

My phrase:

Characters left: 1000

View deleted records

Phrase Type	Phrase Summary	Phrase
Advice	Lab test	Testing lab comments
Diagnostics History	test	Testing my phrases
Enrollment Manager - VM	Comments	Left voicemail for the patient. Requested they call the main number and make an appointment.
Lab - Comments	Testing	Testing my phrases.
Notes	Testing	testing my phrases
Notes	Testing	Testing

# Updating My Phrases

- Click the Manage My Phrases link

[My Phrases](#) | [Manage My Phrases](#)

- To edit/update a My Phrase:
  - Click the Manage My Phrases link
  - Select the phrase to be updated
  - Make the edits desired
  - Click Update

The screenshot shows the 'Manage My Phrases' window. At the top, there are input fields for 'My phrase type:' (set to 'Enrollment Manager - Comments') and 'My phrase summary:' (set to 'VM'). There are checkboxes for 'List only these phrase types' and 'Copy phrase'. Below this is a large text area for 'My phrase:' containing the text 'Left voicemail for the patient. Requested they call the main number and make an appointment.' with a character count of 907. A table below lists various phrase types and their summaries. The row for 'Enrollment Manager - Comments' is highlighted in blue. At the bottom, there are buttons for 'Add', 'Update', 'Save & Close', and 'Remove', along with a checkbox for 'View deleted records'.

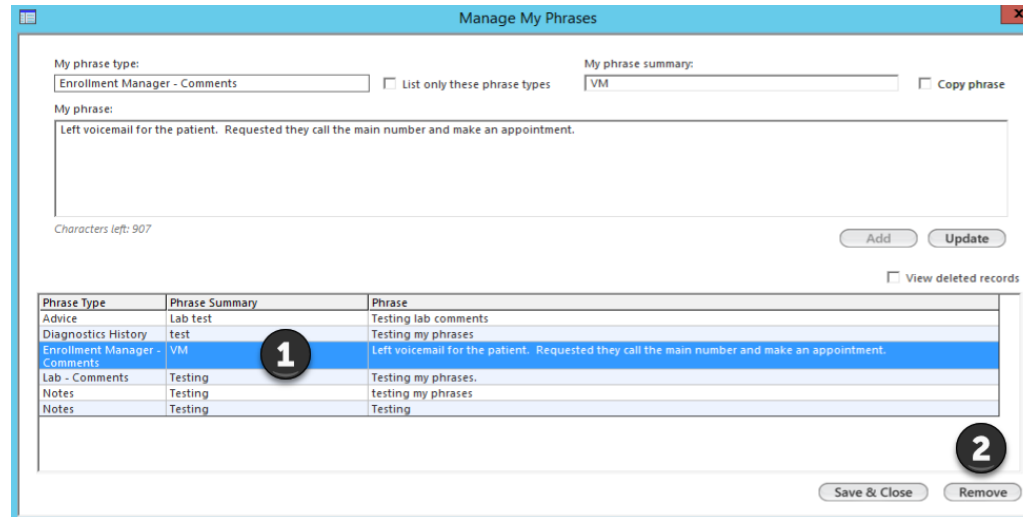
Phrase Type	Phrase Summary	Phrase
Advice	Lab test	Testing lab comments
Diagnostics History	test	Testing my phrases
Enrollment Manager - Comments	VM	Left voicemail for the patient. Requested they call the main number and make an appointment.
Lab - Comments	Testing	Testing my phrases.
Notes	Testing	testing my phrases
Notes	Testing	Testing

# Deleting My Phrases

- Click the Manage My Phrases link

[My Phrases](#) | [Manage My Phrases](#)

- To Delete a My Phrase:
  - Click the Manage My Phrases link
  - 1. Select the phrase to be deleted
  - 2. Click Remove

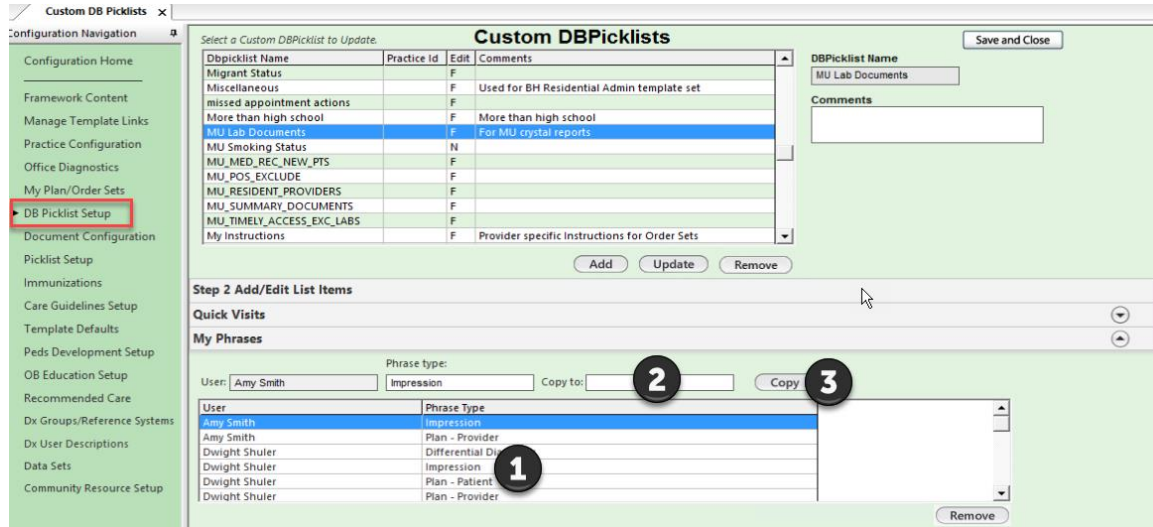


Phrase Type	Phrase Summary	Phrase
Advice	Lab test	Testing lab comments
Diagnostics History	test	Testing my phrases
Enrollment Manager - Comments	VM	Left voicemail for the patient. Requested they call the main number and make an appointment.
Lab - Comments	Testing	Testing my phrases.
Notes	Testing	testing my phrases
Notes	Testing	Testing

# Copying My Phrases

File – System/Practice Template – \*Configuration Home – DB Picklist Setup

- To Copy a My Phrase Type:
  1. Select the user and phrase type or all to be copied from
  2. Select the user to be copied to
  3. Click Copy
- Tips to copying My Phrases:
  - If a name of a users doesn't show as an option to copy to, that means they already have that phrase type.



Custom DBPicklists

Select a Custom DBPicklist to Update.

Dbpicklist Name	Practice Id	Edit	Comments
Migrant Status		F	
Miscellaneous		F	Used for BH Residential Admin template set
missed appointment actions		F	
More than high school		F	More than high school
MU Lab Documents		F	For MU crystal reports
MU Smoking Status		N	
MU_MED_REC_NEW_PTS		F	
MU_POS_EXCLUDE		F	
MU_RESIDENT_PROVIDERS		F	
MU_SUMMARY_DOCUMENTS		F	
MU_TIMELY_ACCESS_EXC_LABS		F	
My Instructions		F	Provider specific instructions for Order Sets

DBPicklist Name: MU Lab Documents

Comments:

Step 2 Add/Edit List Items

Quick Visits

My Phrases

User: Amy Smith    Phrase type: Impression    Copy to:     Copy

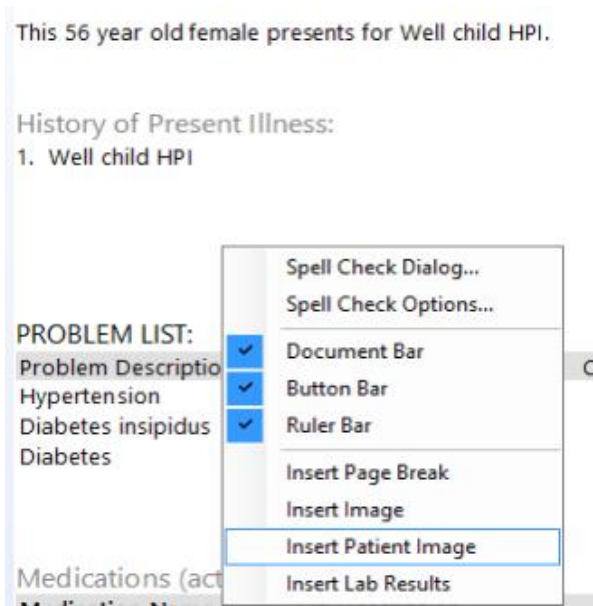
User	Phrase Type
Amy Smith	Impression
Amy Smith	Plan - Provider
Dwight Shuler	Differential Diagnosis
Dwight Shuler	Impression
Dwight Shuler	Plan - Patient
Dwight Shuler	Plan - Provider

Remove

# **Adding Labs to a Document**

# Adding Labs to a Document

- From any document in NextGen, the user can right click and add a patient image or lab results to the document.



This 56 year old female presents for Well child HPI.

History of Present Illness:  
1. Well child HPI

**PROBLEM LIST:**  
Problem Description  
Hypertension  
Diabetes insipidus  
Diabetes

Medications (act

Medication M

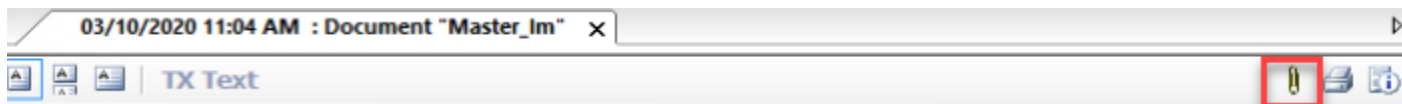
Context menu options:

- Spell Check Dialog...
- Spell Check Options...
- Document Bar
- Button Bar
- Ruler Bar
- Insert Page Break
- Insert Image
- Insert Patient Image**
- Insert Lab Results

# Understanding Addendums

# Document Addendums

- Document Addendums can be used while the encounter is unlocked and the document is signed.



- The blue check in the top right corner of the document will change to a paperclip, once signed. If a document addendum is needed, click the paperclip icon.

- Tips for Document Addendums:
  - If the document is regenerated, the addendum will be lost
  - The addendum does not go to the PAQ for signature

*Provider:*

Watson MD, Steve 03/11/2020 10:22 AM

Document generated by: Shawwna Wilburn 03/11/2020 10:21 AM

NextGen HealthCare Information Systems  
795 Horsham Road | Horsham, PA 19044

Electronically signed by Shawwna Wilburn on 03/11/2020 10:22 AM on behalf of Steve Watson MD  
ADDENDUMS APPEAR ON FOLLOWING PAGE

**Addendum(Wilburn, Shawwna)**  
3/11/2020 10:23:36 AM

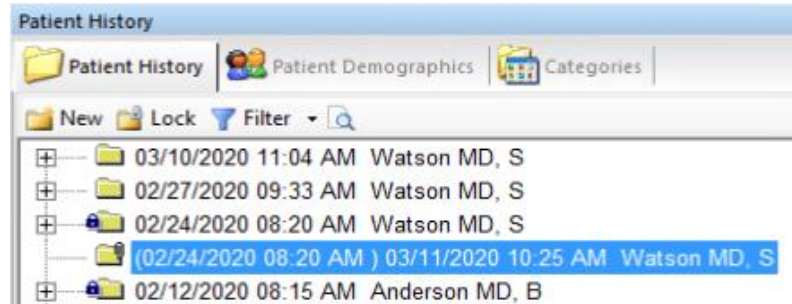
Adding an Addendum to today's visit.



# Encounter Addendums

- Encounter Addendums can be used when the encounter is locked.
- To create an Encounter Addendum:
  - Highlight the locked encounter desired
  - File – New – Addendum

You should now see the addendum added to the patient chart



- Encounter Addendums are limited to documents and patient images only.



# Q&A

A recording of this webinar will be sent out to all attendees.