Welcome to the
Custom My Plan and Telephone Call Configuration and Utilization

The presentation will begin shortly.

Please note that all attendees are in listen only mode.

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

Presented by:

eMedApps™
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Inquiries may be submitted using the **Questions** window.

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

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eMedApps.com

About Our Presenter

Dwight Shuler has been with eMedApps for 4.5 years. He is an Application Specialist and has over 15 years of experience in healthcare. He enjoys being outdoors with his children, coaching their team sports, and working on home projects.

My Custom Plan Overview and Benefits

My Custom Plan Overview and Benefits

Highlights include:

- Reduction in the number of clicks needed to create and manage orders
- Unlimited number of orders for each order type
- Multiple order sets available for each Diagnosis Group
- Select order details before placing order
- Bypass Order Module Process
- Manage orders from the same template

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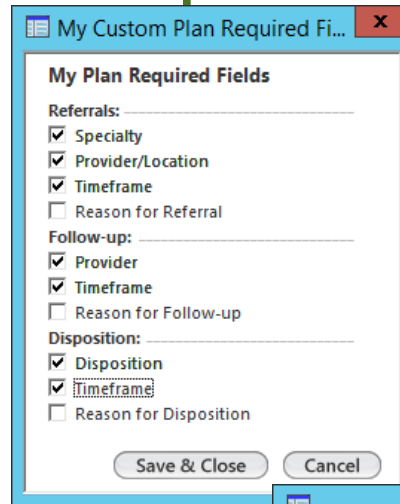
General Configuration My Custom Plan Setup

- My Custom Plan Setup
  - Select this template from System\Practice Templates
- Setting My Custom Plan to default
  - Select Launch My Custom Plan checkbox
- Setting to bypass Order Module Processing
  - Select Bypass Order Module Processing checkbox

Other Configuration Options

- Set My Custom Plan Required Fields
  - Allows user to select required fields
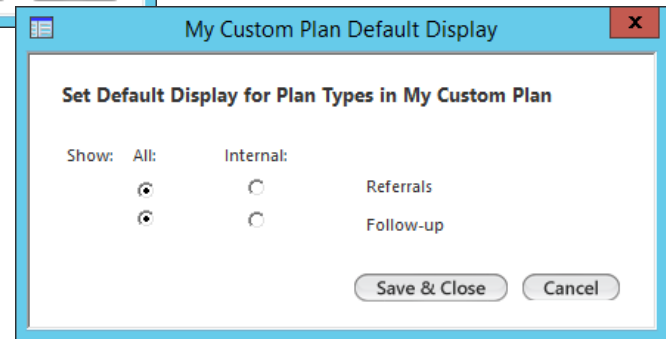
- Set Default Display for Plan Types
  - Allows user what plans show for Referrals and Follow-ups

- Allow user to create new Order Set
  - User can create new order sets from template

- Allow mapping of unmapped dx codes to dx
  - User can add diagnosis to a diagnosis group from the template

Order Set Configuration

- Creating an Order Set Name
    - Diagnosis Group
    - Dept (not necessary)
    - Provider (not necessary)
    - Set as Default for Dx Group
    - Class (Lab Orders, Diagnostics, Medications, Procedures, Supplies, Office Labs, Instructions)

- Filtering Items
    - Allows users to manipulate review orders in the order set
    - Update an order and see the results in the filter

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Telephone Call Configuration and Utilization
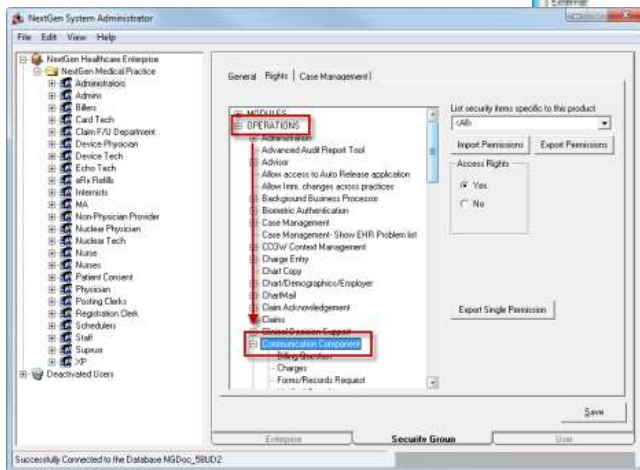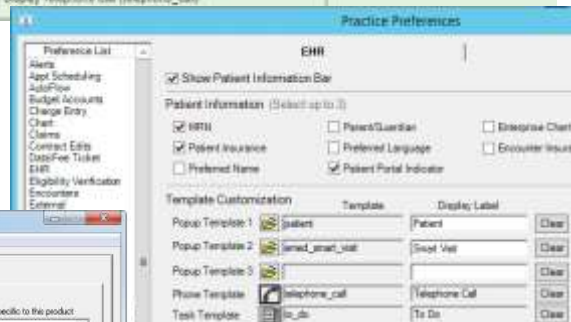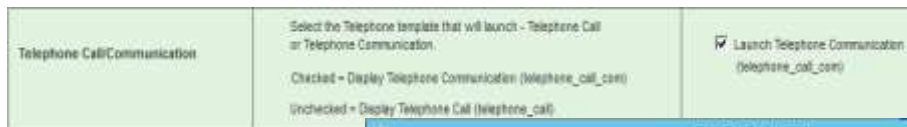
Telephone Communication Component

What is the Communication Component?

- The Communication Component allows the user to add or modify panels of default call types by creating different profiles
- Profiles are different versions of the Communication Component
- Profiles are comprised of panels which allow the user to add or update selections in the Communication Component
- Within each panel the user can add panel items that will perform different functions

Setting up Telephone Call Communication template

- Setting up the Telephone Call Comm Template as default
  - This is completed in the NGKBM config practice template
  - The telephone icon on the Patient Information Bar is setup in Practice Preferences
  - Phone Template popup

- To access the Communication Component in Template Editor a user needs permissions
  - This is setup in System Admin under Operations
    - Communication Component
   - Set Access Rights to each item

Communication Component

- Allows the user to add or modify panels of default call types by creating different profiles
  - Log into Template Editor
  - Open the Telephone_call_com template
  - Select the component under the Communication panel
  - Right click and select properties
  - The different profiles will be shown in the dropdown list
  - The Settings...button will display the Settings screen which is where you can edit profiles and panels
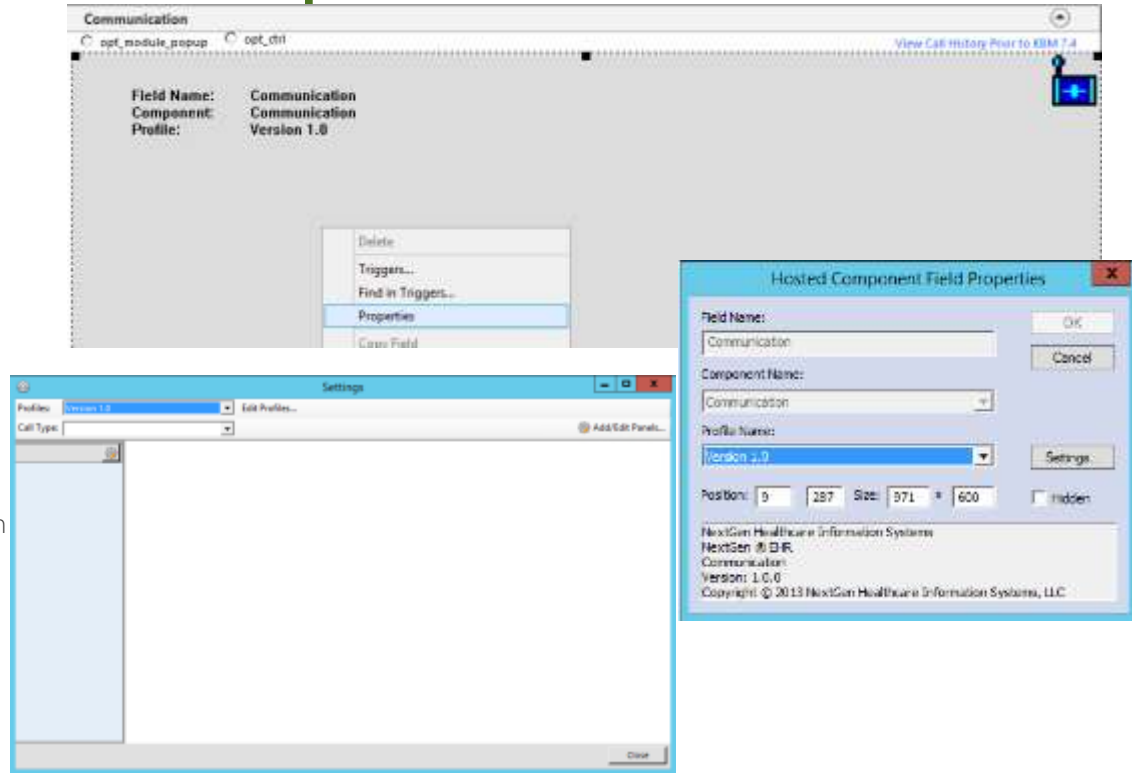
Profiles and Panels

- Profiles are different versions of the component that are created
  - To create a profile select the Add Profile link
  - Select OK to the copy default message
  - The new profile is name Profile by default
- Profiles are comprised of panels which allow the user to add or update selections in the Communication Component
  - There are several different panels in the component
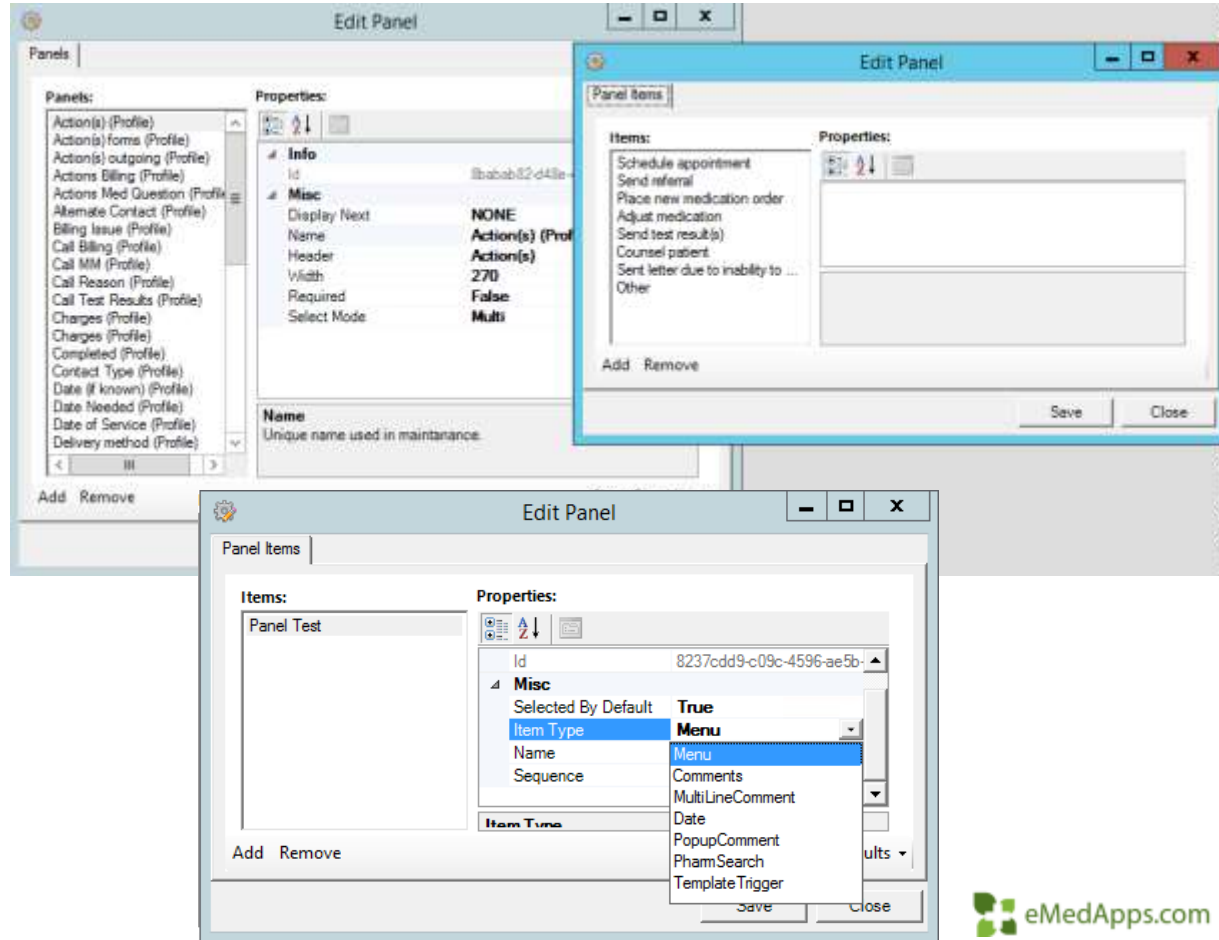 - Panels can be added and removed
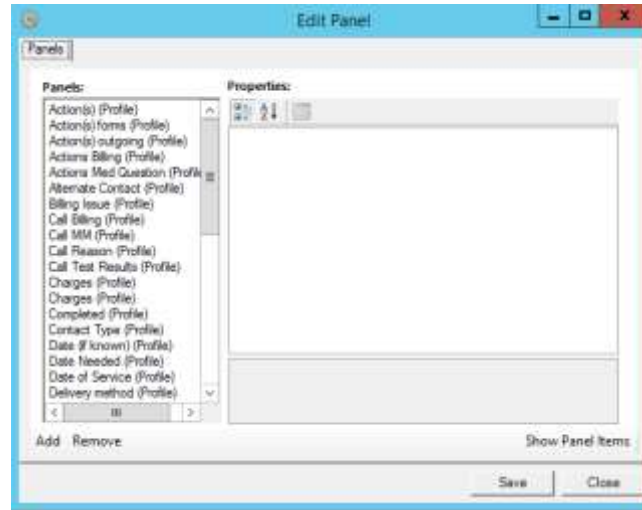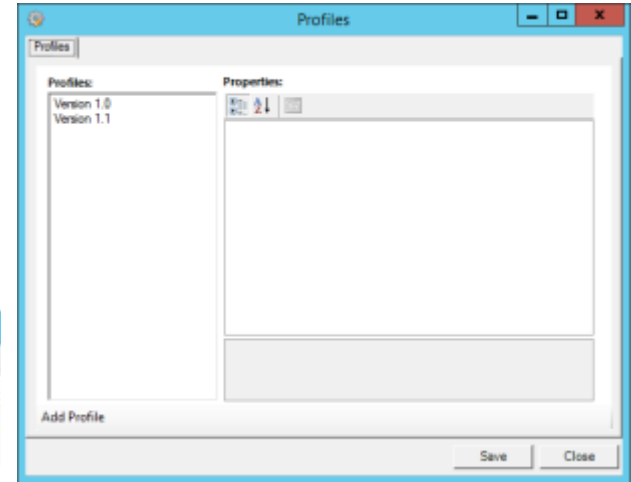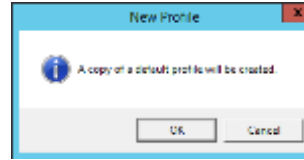
Panel Items

Within each panel the user can add panel items that will perform different functions

Panel items have 4 properties to adjust

1. Selected by default
2. Item Type
3. Name
4. Sequence

Item Type includes several different selections that direct that panel item's function

DEMO

Troubleshooting tips

Troubleshooting

NextGen Success Community weblinks:

My Custom Plan Template eLearning course

https://www.community.nextgen.com/nge/kADf3000000XZBt?srPos=15&srKp=kaD&lang=en_US

Telephone Communication Component User Guide

https://www.community.nextgen.com/nge/kACf3000000blOJ?srPos=2&srKp=kaC&lang=en_US

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Q&A

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