

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:





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

▼ Questions ✕

Show Answered Questions

X	Question ▲	Asker	Rec'd	🚩	Answer

Send Privately Send to All ⌵



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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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

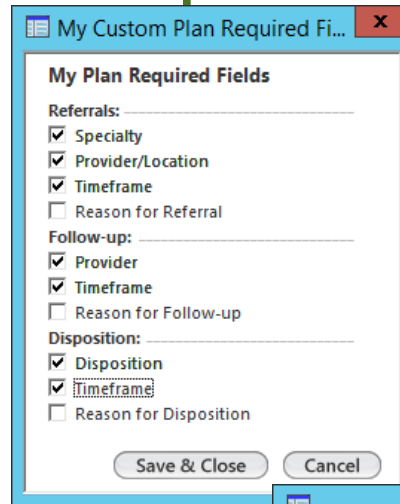
General Configuration My Custom Plan Setup

- 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

The image shows two overlapping windows from the 'My Plan Config' application. The background window is titled 'My Plan Config' and has a 'General Configuration' tab. It contains three main sections: 'My Plan', 'Bypass Order Module Processing', and 'Launch My Custom Plan'. The 'Launch My Custom Plan' section has a checkbox labeled 'Launch My Custom Plan (ord_my_custom_plan)' which is checked. The 'Bypass Order Module Processing' section has a checkbox labeled 'Bypass Order Module Processing' which is also checked. The foreground window is a 'Select Template' dialog box with a list of templates. The 'My Custom Plan Setup' template is selected and highlighted in blue. The dialog also has 'All' and 'Preferred' radio buttons under the 'Show' section, and 'OK' and 'Cancel' buttons at the bottom.

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



My Custom Plan Required Fields

Referrals: _____

- Specialty
- Provider/Location
- Timeframe
- Reason for Referral

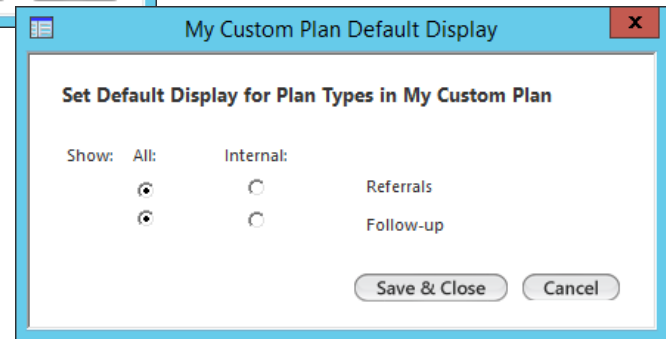
Follow-up: _____

- Provider
- Timeframe
- Reason for Follow-up

Disposition: _____

- Disposition
- Timeframe
- Reason for Disposition

Save & Close Cancel



My Custom Plan Default Display

Set Default Display for Plan Types in My Custom Plan

Show: All: Internal:

<input checked="" type="radio"/>	<input type="radio"/>	Referrals
<input checked="" type="radio"/>	<input type="radio"/>	Follow-up

Save & Close Cancel

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

The screenshot shows a web form for configuring an order set. It includes input fields for 'Order Set Name', 'Diagnosis Group', 'Dept', and 'Provider'. There is a checkbox labeled 'Set As Default For Dx Group'. Below these are fields for 'Class' and 'Reference'. A note states: 'Valid references are necessary in order to meet clinical decision support requirements for various regulatory programs.' At the bottom, there are fields for 'Developer', 'Funding Source', and 'Reference Updated' (with a date picker). Action buttons for 'Clear', 'Add', 'Update', 'Remove', and 'Remove All' are located at the bottom right.

The screenshot shows a table of filtered order sets. The table has columns for 'OrderSet Name', 'Default', 'Diagnosis Group', 'Dept', 'Provider', 'Order Type', 'Code', and 'Order'. The table is filtered by 'Diagnosis Group: ENT'. A 'Clear' button is visible in the top right corner of the table area.

OrderSet Name	Default	Diagnosis Group	Dept	Provider	Order Type	Code	Order
		ENT			Diagnostics	70460	Brain/Head CT WITH Contrast
		ENT			Diagnostics	70466	Maxillofacial CT WITHOUT Contrast
		ENT			Diagnostics	70532	Brain (including Brainstem) MRW WITH Contrast
		ENT			Diagnostics	70220	Sinuses (Paranasal) X-ray; Complete (3-view)
		ENT			Lab Orders	NG322758	BMP
		ENT			Lab Orders	NG322000	CMP
		ENT			Lab Orders	NG005000	CBC w/diff
		ENT			Office Procedures	31231	Nasal endoscopy, diagnostic
		FP			Diagnostics	71046	X-ray (chest 2 views

DEMO

Telephone Call Configuration and Utilization



Telephone Communication Component

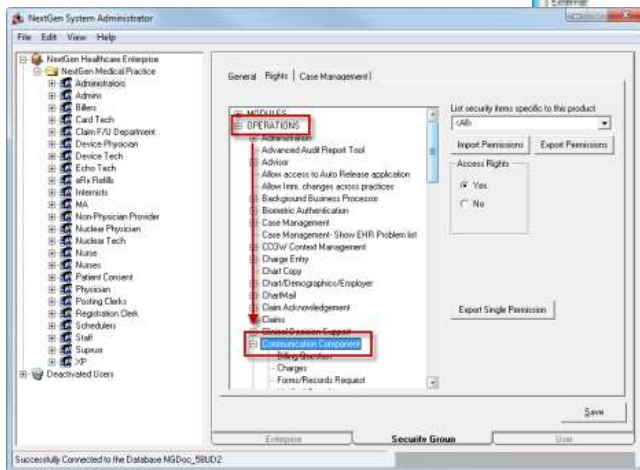
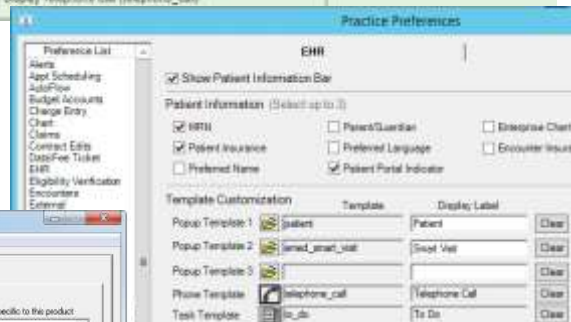
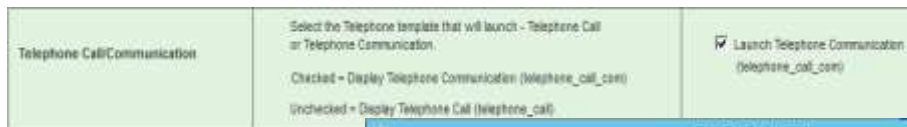
What is the Communication Component?

- 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



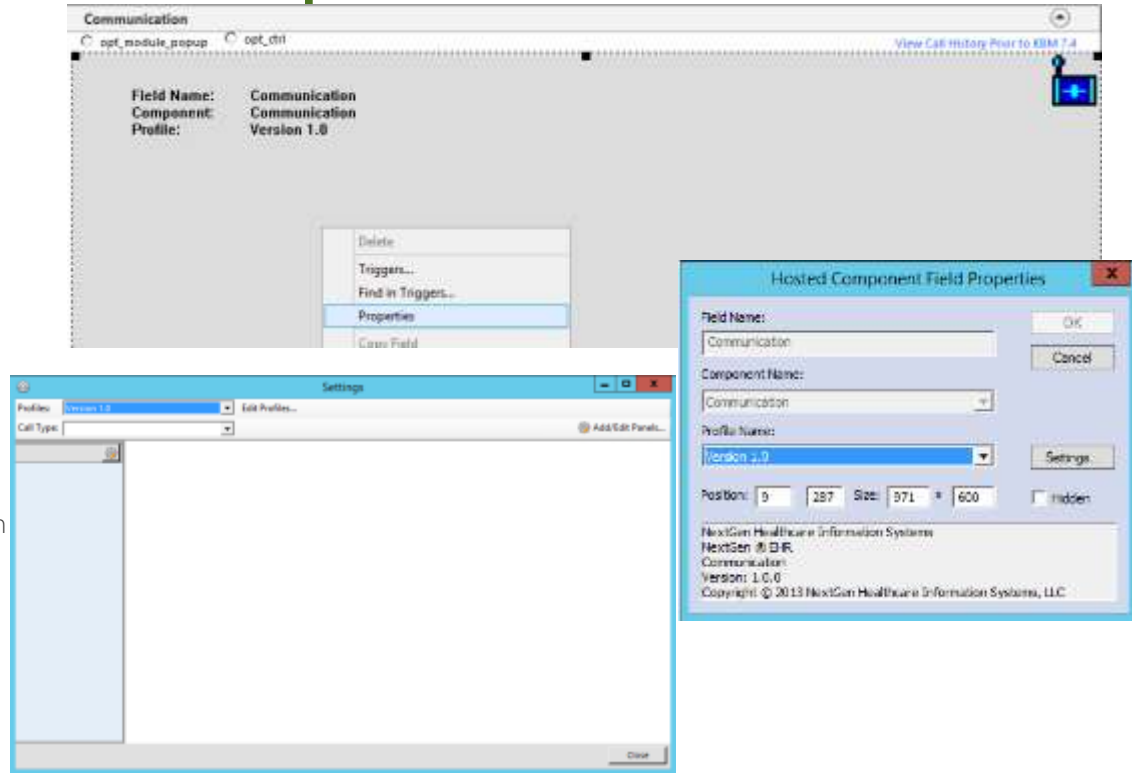
Setting up Telephone Call Communication template

- 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



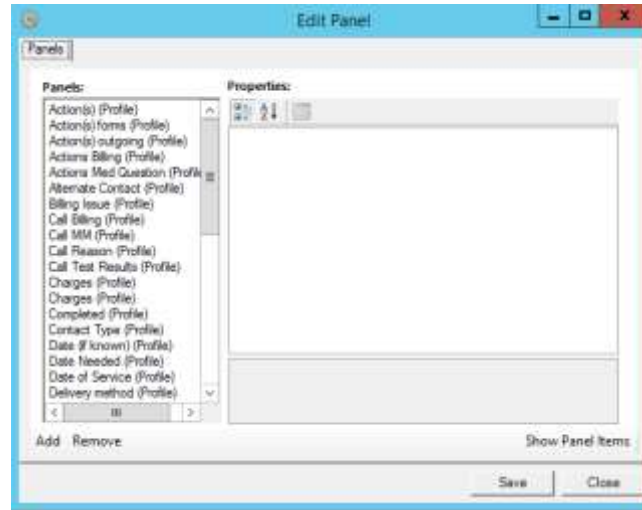
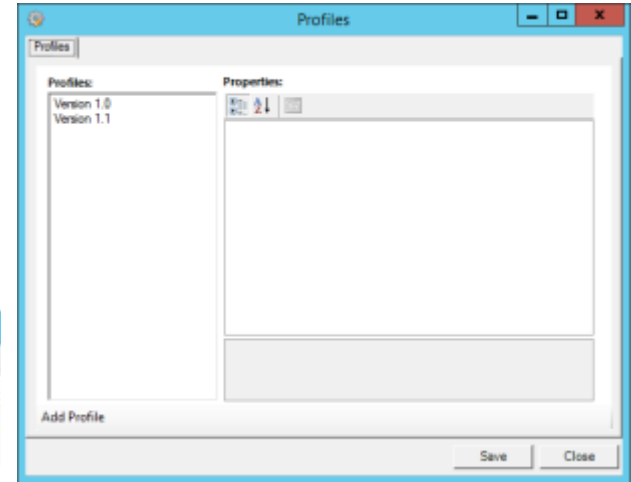
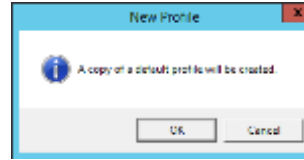
Communication Component

- 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



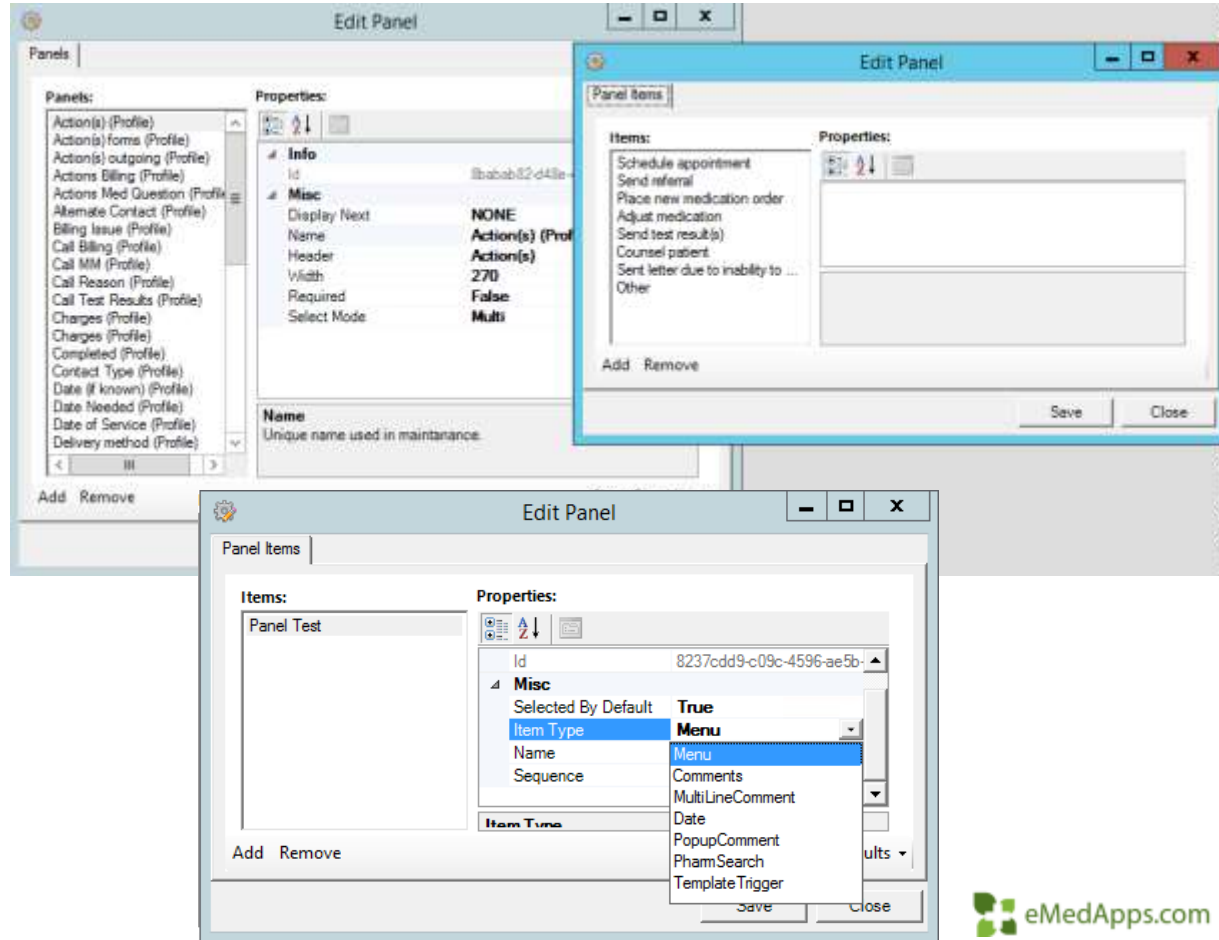
Panel Items

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



The screenshot displays the 'Edit Panel' application interface. It features a main window with a 'Panels' list on the left and a 'Properties' section on the right. A 'Panel Items' dialog box is open, showing a list of items and their properties. The 'Items' list includes actions such as 'Schedule appointment', 'Send referral', 'Place new medication order', 'Adjust medication', 'Send test result(s)', 'Counsel patient', 'Sent letter due to inability to ...', and 'Other'. The 'Properties' section for a selected item shows fields for 'Id', 'Misc', 'Name', and 'Sequence'. A dropdown menu for 'Item Type' is open, showing options like 'Menu', 'Comments', 'MultiLineComment', 'Date', 'PopupComment', 'PhamSearch', and 'Template Trigger'.

DEMO

Troubleshooting tips



Troubleshooting

NextGen Success Community weblinks:

My Custom Plan Template eLearning course

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

Telephone Communication Component User Guide

https://www.community.nextgen.com/ngc/kACf3000000bI0J?srPos=2&srKp=kaC&lang=en_US

Q&A

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