

Uniform Data System (UDS) Reporting Prep for 2022

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 Presenters

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**Understanding where your data
comes from**

Troubleshooting your results

**Preventative Measures and Best
Practices**



Where does your data come from?



Understanding Where Your Data Comes From

What Makes a Qualifying Encounter?

The Qualifying Encounter Flag is a set of 3 flags that are set in the SIM library to indicate if the procedure is typically reported as a qualifying encounter.

The screenshot shows the 'Service Item Library Maintenance' window. The 'Service Item Library' list on the left contains '99212' and '99213'. The '99212' item is selected, and its details are shown on the right. The 'Description' field contains 'Office/outpatient visit, est. amb fac'. The 'CPT4 Code' field contains '99212'. The 'General' tab is active, showing various settings. The 'Qualifying Encounter' section is expanded, showing three checkboxes: 'Self-pay Qualifying Encounter', 'Sliding Fee Qualifying Encounter', and 'Qualifying Encounter for all payers'. The 'Qualifying Encounter for all payers' checkbox is checked. The 'Qualifying Encounter' section also includes a 'Qualifying Encounter' dropdown menu and a 'Qualifying Encounter' button. The 'Qualifying Encounter' dropdown menu is open, showing three options: 'Self-pay Qualifying Encounter', 'Sliding Fee Qualifying Encounter', and 'Qualifying Encounter for all payers'. The 'Qualifying Encounter for all payers' option is selected. The 'Qualifying Encounter' button is also visible. The 'Qualifying Encounter' section also includes a 'Qualifying Encounter' dropdown menu and a 'Qualifying Encounter' button. The 'Qualifying Encounter' dropdown menu is open, showing three options: 'Self-pay Qualifying Encounter', 'Sliding Fee Qualifying Encounter', and 'Qualifying Encounter for all payers'. The 'Qualifying Encounter for all payers' option is selected. The 'Qualifying Encounter' button is also visible.



Understanding Where Your Data Comes From

What Makes a Qualifying Encounter?

Once the encounter is no longer unbilled the qualified encounter indicator is found on the claims tab in encounter maintenance.

Encounter Maintenance - Encounter: 1578 for - Test, Anita

Encounter Date: 04/26/2021 Encounter Time: 12:00 AM Occurrence Code: Illness State: Onset Date: Onset Time:

General | Clinical | Billing & Collections | Encounter Sp. | LBI | **Claims** | Marketing | Properties | History

Special Program: See Auth Except Code

EPSDT Referral Condition Code: EPSDT Referral Code

EPSDT Encounter Code - Paper:

Condition Code Category - WC: Demonstration Project ID:

Hearing/Vision Re: Claim Codes:

Vision Code Category: Vision Condition Indicator:

Vision Code Category: Vision Condition Indicator:

Vision Code Category: Vision Condition Indicator:

☒ FQHC Qualifying Encounter Not assigned provider sending electronic claim
Family Planning Encounter

OK Cancel

Understanding Where Your Data Comes From

Provider Type

- File Maintenance > Master Files > System > PM > Providers
- Provider type in the UDS tool is derived from the provider type field in the provider master file under the practice tab.

The screenshot shows a software window titled "Modify Provider Information - LCRRTS, LCRRTS" with a "Practice" tab selected. The form contains the following fields and options:

- Practice Provider Information:**
 - Rendering provider at this practice: ☒ (Supervising provider at this practice: ☐)
 - Signature on File: ☒ (Supervisor Required: ☐)
 - DEA Number: [] State License Number: 123456789 Tax ID Number/SSN: []
 - Provider Type: Family Practitioner Specialty: []
 - Zone 1: [] Zone 2: [] Zone 3: []
 - Service Location: <default> Contract Subgrouping: []
 - Enable Supervisor Billing: ☐ Bill as Non-Person: ☐
- Group Information:**

Payer Name	Provider Nbr	Eff Date	Exp Date	Group Name	Name/Org	Address
<default>	1144336181	07/12/2012	07/12/2112			

Understanding Where Your Data Comes From

How Do I Handle Non-Billable Providers?

In order to report non billable provider encounters to UDS it is necessary to have generic provider licenses. Creating the generic providers and identifying the appropriate provider type and setting proper supervisor billing is critical.

- For example, the doctor in the supervisor field has her name on the claim, but the nurse in the encounter rendering field gets credit for UDS Table 5 staffing.

Most clients only need up to 3 non billable generic providers. With recent changes to the UDS reporting, up to 5 non billable providers could be needed if the client has all of the following categories for non-billable activities.

Generic Provider Category	Excluding
Nurses	NP or PA or FNP
Dental Aides, Assistants and Techs	Hygienists
Other Mental Health Staff	Licensed personnel
Other Vision Care Staff	Optometrists and ophthalmologists
Enabling Services	

Understanding Where Your Data Comes From

Table 4 Principal Third-Party Medical Insurance

- This data is derived from the UDS tab in patient demographics Primary Medical Coverage Field

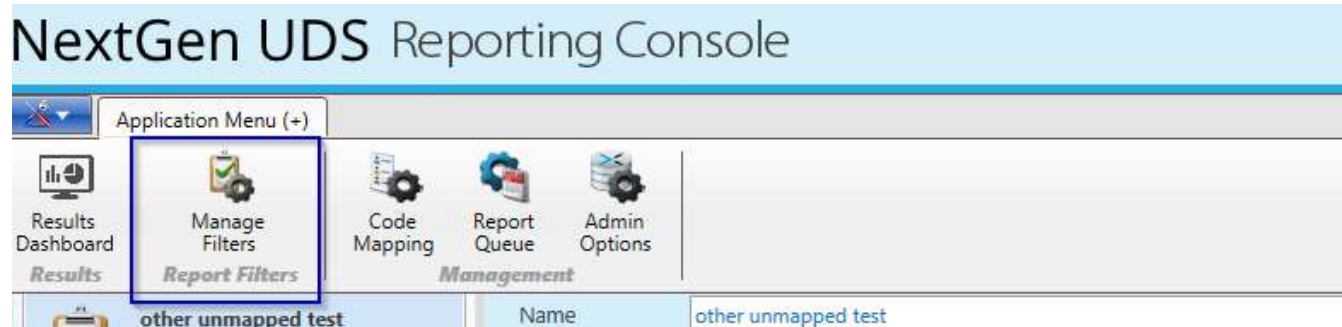
The screenshot shows the 'Modify Patient Information' form with the 'UDS' tab selected. The form is divided into several sections:

- Demographics:** Includes fields for Last Name (Test), First Name (Antia), Middle, Preferred Name, Medical Record (970138), Social Security (999-99-9999), Birth Date (01/01/1990), Age (71 yrs), Birth Sex (Male), Current Gender (Male), Gender Identity, Sexual Orientation, and Preferred Pronoun.
- UDS Section:**
 - Homeless Status:** Dropdown menu.
 - School Based Hth Center:** Dropdown menu.
 - Tribal Affiliation:** Dropdown menu.
 - Descendancy:** Dropdown menu.
 - Migrant Worker Status:** Dropdown menu.
 - Race:** Dropdown menu.
 - Blood Quantum:** Dropdown menu.
 - Primary Medical Coverage:** Dropdown menu (highlighted in blue).
 - Self Pay:** Checkbox.
 - Language Barrier:** Dropdown menu.
 - Ethnicity:** Dropdown menu (Not Hispanic or Latino).
 - IHS Eligibility Status:** Dropdown menu.
 - Consent to Treat Date:** Date field.
 - Consent To Treat:** Checkbox.
 - Public Housing Ps Care:** Dropdown menu.
 - Veteran Status:** Dropdown menu (Not Collected Yet).
 - Classification/Beneficiary:** Dropdown menu.
- Sliding Fee Schedule Verification:** Table with columns: Sliding Fee Sched, ER Date, Exp Date.
- Head of Household:** Table with columns: Family Size, Annual Income, Ref, Verify Date, ER Date, Exp Date.

Understanding Where Your Data Comes From

Managing Your Filters

Navigate to your Manage Filters Tab: Inclusions and Exclusions



Understanding Where Your Data Comes From

Inclusion

Practices, Locations, Providers

Practices **Locations** Providers CPT Exclusions Person Exclusions Options Notifications

Choose the **Locations** to include in the Report Data.

INC	Location	Address 1	Address 2	City	State	Zip
<input checked="" type="checkbox"/>	CHC Behavioral Health	1111 Community Health Road		Denver	IL	802224567 ^
<input checked="" type="checkbox"/>	CHC Dental	1111 Community Health Road		Denver	CO	80222
<input checked="" type="checkbox"/>	CHC Medical	1111 Community Health Road		Denver	CO	80222
<input checked="" type="checkbox"/>	CHC Vision	1111 Community Health Road		Denver	CO	80222
<input type="checkbox"/>	Beach Optical	123 Madison		Virginia Beach	VA	23450
<input type="checkbox"/>	Cardiology Clinic	1897 Old Creek Road		Sedona	AZ	863400000
<input type="checkbox"/>	Coastal Internal Medicine	11231 Ocean Blvd	Suite 113	Los Angeles	CA	900031234
<input type="checkbox"/>	Desert Springs Physical Therapy	2075 E Flamingo Road		Las Vegas	NV	89119
<input type="checkbox"/>	Desert Springs Surgical Ctr	2076 E Flamingo Road		Las Vegas	NV	89119
<input type="checkbox"/>	Downtown Office	9123 Rancove Road		Redding	CA	96001 v

Understanding Where Your Data Comes From

Exclusions

CPT and Person Exclusions

Search for CPT Codes

☒ Match ANY word ☐ Match ALL word

1 **Find**

Found 813 Matches

Add	CPT	Description
<input checked="" type="checkbox"/>	0001A	PFIZER DOSE 1
<input checked="" type="checkbox"/>	0011A	MODERNA DOSE 1
<input checked="" type="checkbox"/>	0023T	Infct agent drug test, geno/phenotypic HIV 1
<input checked="" type="checkbox"/>	00320	Anes, esoph/thyroid/larynx/trachea, +1 yr
<input checked="" type="checkbox"/>	00322	Anesthesia, neck organ needle biopsy + 1 yr
<input checked="" type="checkbox"/>	00326	Anesth, larynx/trachea surgery, <1 yr
<input checked="" type="checkbox"/>	00529	ANES MEDSCPYP&THORSCPYP 1 LUNG
<input checked="" type="checkbox"/>	00541	Anesthesia, thoracotomy w/1 lung ventilation
<input checked="" type="checkbox"/>	00561	ANESTH HEART SURG <1 YR

Add to Exlude List **Check All** **Uncheck All**

Search for Persons

☒ Match ANY word ☐ Match ALL word

Test **Find**

Found 52 Matches

Add	First	Last	Sex	Age
<input checked="" type="checkbox"/>	Test	Kopp	F	121 yr
<input checked="" type="checkbox"/>	Test	Test	F	40 yr
<input checked="" type="checkbox"/>	Test	Patient	F	48 yr
<input type="checkbox"/>	Devtest	Testdev	M	22 yr
<input checked="" type="checkbox"/>	Test	Telephone	M	76 yr
<input checked="" type="checkbox"/>	Mydoccheckin2	Test	M	52 yr
<input checked="" type="checkbox"/>	Ryan	Test	M	36 yr
<input checked="" type="checkbox"/>	Yvette	Test	F	41 yr
<input checked="" type="checkbox"/>	Tina	Test	F	52 yr

Add to Exlude List **Check All** **Uncheck All**

Understanding Where Your Data Comes From

Exclusions

Once added they will appear in the list. Anything listed in the Exc list will not be included in the report.

Filter Identification

Name: UDS CY 2021
Description: UDS CY 2021

Filter Activity Controls

Default Export Path: \\w-ibsmg011\NextGen\root\UDSx
Is Active ☒
Auto Weekly Report ☒

Practices **Locations** **Providers** **CPT Exclusions** **Person Exclusions** **Options** **Notifications**

Exc	P NBR	Last	First	Sex	DoB	Age
<input checked="" type="checkbox"/>	0000000000	2403	Kopp	Test	F	11-Aug-1900 121 yr
<input checked="" type="checkbox"/>	0000000000	2364	Test	Test	F	10-Oct-1981 40 yr
<input checked="" type="checkbox"/>	0000000000	1	Patient	Test	F	15-Apr-1973 48 yr
<input checked="" type="checkbox"/>	0000000000	1128	Telephone	Test	M	22-Feb-1946 76 yr
<input checked="" type="checkbox"/>	0000000000	1671	Test	Ryan	M	05-Jan-1986 36 yr
<input checked="" type="checkbox"/>	0000000000	1668	Test	Yvette	F	05-Jul-1980 41 yr

Search for Persons

☒ Match ANY word ☐ Match ALL words

Text: **Find**

Found 32 Matches

Add	First	Last	Sex	Age
<input type="checkbox"/>	Devilst	Testdev	M	22 yr
<input type="checkbox"/>	Mydoccheckin2	Test	M	52 yr
<input type="checkbox"/>	Tina	Test	F	52 yr
<input type="checkbox"/>	NewPerson	Test	M	52 yr
<input type="checkbox"/>	PT	Test	M	16 yr
<input type="checkbox"/>	Frank	Test	M	21 yr
<input type="checkbox"/>	Infant	Test	F	4 yr
<input type="checkbox"/>	CCALAC Pediatric	Test	M	5 yr
<input type="checkbox"/>	Chenae	Test	F	17 yr

Add to Excluded List **Check All** **Uncheck All**

Table 6A – Selected Diagnoses and Services Rendered

- Table 6A – Code updates
 - ICD-10-CM and CPT/HCPCS are automatically updated by Nextgen's Cloud update for the UDSx Tool
 - Custom codes - these must be added to the UDSx tool or custom reporting tools.
 - These are for services rendered by the health center.

A screenshot of the 'Add Client Visit Codes' dialog box. It contains the following fields: 'Mapping Type' (set to 'CPT'), 'Category Name' (set to 'Had Mammogram'), 'Code Range Min' (empty), and 'Code Range Max' (empty). At the bottom, there are two buttons: 'Save Changes' (blue) and 'Cancel' (orange).

Table 6A Updates

2021 UDS Table 6A Code Changes

6a	Acute respiratory illness due to novel coronavirus (SARS-CoV-2) disease	J12.89, J20.8, J40, J22, J98.8, J80 (count only when code U07.1 is present)	J12.89, J20.8, J40 (count J40 only when code U07.1 is present), J22, J98.8, J80
14	Exposure to heat or cold	T33-, T34-, T67-, T68-, T69-, W92-, W93-	T33-, T34-, T67-, T68-, T69-, W92-, W93-, X30-, X31-, X32-
16	Selected perinatal/neonatal medical conditions	A33-, P19-, P22- through P29- (exclude P29.3), P35- through P96- (exclude P54-, P91.6-, P92-, P96.81), R78.81, R78.89	A33, P19-, P22- through P29- (exclude P29.3-), P35- through P96- (exclude P54-, P91.6-, P92-, P96.81), R78.81, R78.89
20f	Intimate partner violence	T74.11, T74.21, T74.31, Z69.11, Y07.0	T74.11, T74.21, T74.31, Z69.11, Y07.0-
21a	Hepatitis B test	CPT-4: 86704 through 86707, 87340, 87341, 87350	CPT-4: 80074, 86704 through 86707, 87340, 87341, 87350, 87912
21b	Hepatitis C test	CPT-4: 86803, 86804, 87520 through 87522	CPT-4: 80074, 86803, 86804, 87520 through 87522, 87902
21c	Novel coronavirus (SARS-CoV-2) diagnostic test	CPT-4: 87426, 87635 HCPCS: U0001, U0002, U0003, U0004 CPT PLA: 0202U, 0223U, 0225U	CPT-4: 87426, 87635, 87636, 87637 HCPCS: U0001, U0002, U0003, U0004 CPT PLA: 0202U, 0223U, 0225U, 0240U, 0241U
22	Mammogram	CPT-4: 77065, 77066, 77067 ICD-10: Z12.31	CPT-4: 77063, 77065, 77066, 77067 ICD-10: Z12.31 HCPCS: G0279
24b	Coronavirus (SARS-CoV-2) vaccine		CPT-4: 0001A-004A, 0011A-0014A, 0021A-0024A, 0031A-0034A, 0041A-0044A, 91300, 91301, 91302, 91303, 91304
26	Health supervision of infant or child (ages 0 through 11)	CPT-4: 99381 through 99383, 99391 through 99393 ICD-10: Z00.1-	CPT-4: 99381 through 99383, 99391 through 99393 ICD-10: Z00.1-, Z76.1, Z76.2

Tables 6b and 7 – Quality of Care Measures

- LOINC = Logical Observation Identifiers Names and Codes
 - Universal standard for identifying laboratory and clinical observations. Referred to as Tests and Components in NextGen
- SNOMED CT = Systematized Nomenclature of Medicine Clinical Terms
 - Consistent terminology for electronic interchange

LOINC

- Quality Measures Reporting
 - CMS requires specific Codified Data for Quality Measure reporting
 - LOINC is the only acceptable standard for Lab Result based data
 - Failing to map necessary Order Components to the corresponding LOINC may result in missing measure data

LOINC

Add Order Test Information

Test Details | Specimen Handling | Options

System
InHouseLab

Key
88141

Description
Cytopathology, cervical/vaginal, w/phy inten

Order Type
Lab

Code System
L

Cost: \$0.00 Days to expect results: 0

NextGen Compendium Test Key

Key	Description
<	>

Note

Orderable ☒

Next OK

CPT4 Codes

Code	Description
<	>

SIM Groups

< >

SIM Code

SIMCode	Description
<	>

Loinc Code

Code	Component	Clinical I
54239-9	Cytopathic	
<	>	>

Modify Order Test Information

Test Details | Specimen Handling | Options

System
InHouseLab

Key
45378

Description
Colonoscopy

Order Type
Radiology

Code System
R

Cost: \$0.00 Days to expect results: 0

Compendium Test Key

Key	Description
<	>

Note

OK Cancel

CPT4 Codes

Code	Description
45378	Colonoscopy, diagnostic
<	>

SIM Groups

< >

SIM Code

SIMCode	Description
<	>

Loinc Code

Code	Component	Clinical I
62959-2	PhenX - co	
<	>	>

Modify Order Component

System: InHouseLab

Component Key: 54239-9

Code System: L

Component Description: Cytopathic

OK Cancel

Quality Measures Data Tool

Used to update compendia, map data within NextGen Templates and Order Tests in File Maintenance.

Date range can be specified in the Historical Tab.

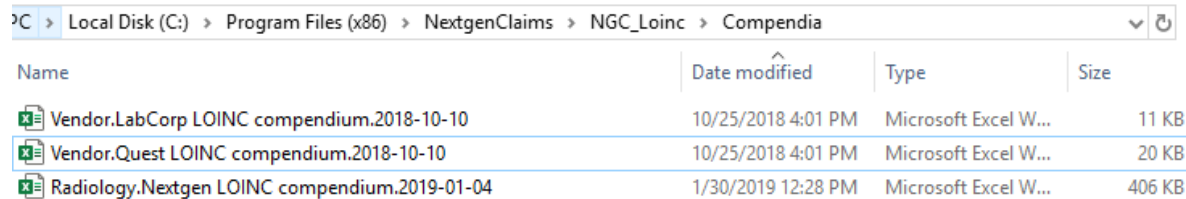
Should be ran after hours




Link [QMDT](#)

Lab Test Key	Result Description	LOINC	NG Labtest Key	Code System	Orderable
75557	Cardiac MRI WITHOUT Contrast	8811-2	75557	KBM	Y
75559	Cardiac MRI WITHOUT Contrast; with stress imaging	8811-2	75559	KBM	Y
75561	Cardiac MRI WITHOUT and WITH Contrast	8811-2	75561	KBM	Y
75563	Cardiac MRI WITHOUT and WITH Contrast; with stress imaging	8811-2	75563	KBM	Y
77057	Mammogram (Screening); Bilateral	26175-0	77057	KBM	Y
77065	Unilateral Diagnostic Mammogram	46350-5	77065	KBM	Y
77066	Bilateral diagnostic Mammogram	26346-7	77066	KBM	Y
77067	Bilateral screening Mammogram	26175-0	77067	KBM	Y
77081	DEXA scan	38266-9	77081	KBM	Y
78300	Nuclear scan of bones/joint; limited	39627-5	78300	KBM	Y
78305	Nuclear scans of bones/joints; multiple	39904-8	78305	KBM	Y
78306	Nuclear scans of bones/joints; whole body	39816-0	78306	KBM	Y
78315	Nuclear scans of bones/joints; 3-phase	39862-6	78315	KBM	Y
78320	Nuclear scan of bones/joint (SPECT)	39879-2	78320	KBM	Y

Quality Measures Data Tool

- Review spreadsheets located in the following path
 - C:\Program Files (x86)\NextgenClaims\NGC_Loinc\Compendia
 - Two vendors, LabCorp and Quest
 - One Radiology
 - Map to your vendor



C: > Local Disk (C:) > Program Files (x86) > NextgenClaims > NGC_Loinc > Compendia			
Name	Date modified	Type	Size
 Vendor.LabCorp LOINC compendium.2018-10-10	10/25/2018 4:01 PM	Microsoft Excel W...	11 KB
 Vendor.Quest LOINC compendium.2018-10-10	10/25/2018 4:01 PM	Microsoft Excel W...	20 KB
 Radiology.Nextgen LOINC compendium.2019-01-04	1/30/2019 12:28 PM	Microsoft Excel W...	406 KB

Quality Measures Data Tool

- Any changes or different lab vendor? Update spreadsheets to health center's specific lab, for example use either LabCorp or Quest sheet and map that to your lab (Orchard, SunQuest)



Quality Measures Data Tool

- Radiology updates

Applied	Drag a column header and drop it here to group by that column					
LabCorp IONC compendium	Lab Test Key	Result Description	ICD9IC	HC Labtest Key	Coding System	Orderable
LabCorp IONC compendium						
Quest IONC compendium						
	75357	Cardiac MR WITHOUT Contrast	8811-2	75357	8384	Y
	75358	Cardiac MR WITHOUT Contrast with stress imaging	8811-2	75358	8384	Y
	75361	Cardiac MR WITHOUT and WITH Contrast	8811-2	75361	8384	Y
	75365	Cardiac MR WITHOUT and WITH Contrast with stress imaging	8811-2	75365	8384	Y
	77051	Mammogram (Screening) Bilateral	88175-0	77051	8384	Y
	77065	Unilateral Diagnostic Mammogram	88250-8	77065	8384	Y
	77068	Bilateral diagnostic Mammogram	88248-7	77068	8384	Y
	77067	Bilateral screening Mammogram	88175-0	77067	8384	Y
	77061	IONC use	10240-6	77061	8384	Y

--Lab Components

```
select * from lab_components_mstr order by create_timestamp desc
```

--Radiology

```
select * from lab_tests_xref order by create_timestamp desc
```

The screenshot displays the 'Quality Measures Data Tool' interface. The main window is titled 'Test Details' and contains several tabs: 'Test Details', 'Specimen Handling', and 'Options'. The 'Test Details' tab is active, showing a list of tests with columns for 'Key', 'Description', 'Code', 'Component', and 'Clinical'. The 'Test Details' tab also includes a 'Test Details' section with fields for 'System', 'Test Name', 'Code', 'Description', 'Order Type', 'Prevalence', 'Code System', 'ICD9IC', 'Lab Code', and 'Description'. The 'MODIFICATION INFORMATION' panel is visible on the right, showing fields for 'Creation', 'Creation Date & Time', 'Last Modified By', and 'Modified Date & Time'. The 'Creation' field is populated with 'Admin, NextGen'. The 'Creation Date & Time' field is populated with '08/21/2021 3:25 P'. The 'Last Modified By' field is populated with 'Admin, NextGen'. The 'Modified Date & Time' field is populated with '08/21/2021 3:25 P'.

NCS LOINC Utility

Used to map data within
NextGen Results and
Components.

Date is by look back periods or
current year

Predefined or custom filter sets.

Should be ran after hours

Link [NCS LOINC Utility](#)

The screenshot shows the 'LOINC Mapping Utility' window. At the top, it says 'Updates lab result tables with LOINC codes in the NextGen database. For use with NextGen QOS, NextGen IDA (formerly DART) and NextGen KDW reporting systems.' Below this are filters for 'Enterprise' (NextGen Medical Enterprise), 'Practice' (The Community Health Clinic), and 'Date Range' (Last 5 Years). There are radio buttons for 'Predefined Filter' (selected) and 'Custom Filter'. A dropdown menu for 'Predefined Filter' is open, showing options: '-- ALL RECORDS --', '-- ALL RECORDS --', 'FOBT/HT', 'Hemoglobin A1c', 'Lipid Panel', and 'Rac-Screen'. A 'Refresh Lab Results' button is on the right. Below the filters are two tables: 'Lab Test Results Update' and 'Lab Component Results Update'. The 'Lab Test Results Update' table has columns: Rows, Lab Name, Result Desc, Result KEY, Current LOINC, and New LOINC Code. The 'Lab Component Results Update' table has columns: Rows, Lab Name, and Result Desc. A 'Date Range' dropdown is open, showing options: 'Last 5 Years', '-- ALL YEARS --', 'Last 5 Years', 'Last 2 Years', and 'Current Year'. At the bottom, there is a 'STORED CHANGES' section with buttons 'Load Changes', 'Save Changes', 'Clear Changes', and 'Clear All Changes'. A message says 'There are 0 Lab Result Code changes stored for this Practice'. On the right, there is an 'APPLY CURRENT CHANGES' section with buttons 'Codes' and 'Results', and a button 'Apply Current Changes'.

- Custom DB Picklist

Referrals Order

Assessments My Plan My Plan A/P Details Labs Diagnostics **Referrals** Medications | menu

Insurance name: Medicorp Policy #: 123456789

To:

- ☒ Specialty/specialist name/site
- ☐ Districts
- ☐ Therapies/Rehabilitation. [+ Exclusions](#)
- ☐ DME

Diagnostic:

Description:

1.

2.

Services requested:

☒ Consult ☐ Evaluate and treat ☐ Follow-up

Clinical Indications:

Reason for referral:

Clinical Information/Comments:

Orthopedic Surgery

Thoracic Surgery

Chiropractic Medicine

Nurse Practitioner

Psychiatry - Child and Adoles

Cardiothoracic Surgery

Neurology

Cardiology

Physical Medicine and Rehab

Critical Care Medicine - Pedia

Del

Specialty

Orthopedic Surgery

Thoracic Surgery

Chiropractic Medicine

Nurse Practitioner

Psychiatry - Child and Adoles

Cardiothoracic Surgery

Neurology

Cardiology

Physical Medicine and Rehab

Critical Care Medicine - Pedia

Del

Orthodontia

Orthopedic Surgery

Osteopathy

Otolaryngology

Pain Medicine

Pathology - Chemical

Pathology - Clinical

Pediatrics

Physiatry

Physical Medicine and Rehabilitation

Physicians Assistant

Plastic Surgery

Podiatry

Radiology

Add Asses

Add Common assessment Code:



Troubleshooting

Hardware Specifications

- Disk space at least 30% of NGProd database
- For Production Servers 500GB – 1TB
 - 8 Cores
 - 64GB of RAM
- For Production Servers 1TB – 2TB
 - 16 Cores
 - 128GB of RAM
 - Dedicated server for UDSx Data Warehouse
- For Production Servers 3TB – 4TB
 - 32 Cores
 - 264GB of RAM
 - Dedicated server for UDSx Data Warehouse

Table Clarifications

- 3A – This is unduplicated count of patients age and sex assigned at birth
- The patient's sex assigned at birth is listed as "Birth Sex" on the chart
- Anything other than Male or Female will not register

The screenshot displays the 'Modify Patient Information' form. A red box highlights the 'Birth Sex' dropdown menu, which is currently open, showing options: 'Female', 'Male', 'Undifferentiated', and 'Unknown'. The 'Female' option is selected. The form includes fields for Patient Name (Prefix, Last, First, Middle, Suffix), Social Security Number, Birth Date, Age, Gender, Gender Identity, Sexual Orientation, Preferred Pronoun, and Contact Information (Home, Day, Alternate Phone). The 'Demographics' tab is active on the left sidebar.

Contact Method	Number/Address	Notifications
1. Home Phone	(215) 657-7010	<input type="checkbox"/> N/A
2. Day Phone	(215) 657-7010	<input type="checkbox"/> N/A
3. Alternate Phone		

Table Clarifications

- Qualified Encounters- do not report encounters for screenings, tests, or vaccines only
- Virtual or Telehealth Visits – Local and state regulations do not apply to UDS reporting and HRSA guidelines should be followed.

Balancing Tables

- Patients by zip code, tables 3A, 3B and 4 are the same patients and should be equal.

TABLE 3A: PATIENTS BY AGE AND BY SEX ASSIGNED AT BIRTH
Calendar Year: January 1, 2021, through December 31, 2021

Line	Age Groups	Male Patients (n)	Female Patients (n)
1	Under age 1		
2	Age 1		
3	Age 2		
4	Age 3		
5	Age 4		
6	Age 5		
7	Age 6		
8	Age 7		
9	Age 8		
10	Age 9		
11	Age 10		
12	Age 11		
13	Age 12		
14	Age 13		
15	Age 14		
16	Age 15		
17	Age 16		
18	Age 17		
19	Age 18		
20	Age 19		
21	Age 20		
22	Age 21		
23	Age 22		
24	Age 23		
25	Age 24		
26	Age 25-29		
27	Age 30-34		
28	Age 35-39		
29	Age 40-44		
30	Age 45-49		
31	Age 50-54		
32	Age 55-59		
33	Age 60-64		
34	Age 65-69		
35	Age 70-74		
36	Age 75-79		
37	Age 80-84		
38	Age 85 and over		
39	Total Patients (Sum of Lines 1-38)		

TABLE 3B: DEMOGRAPHIC CHARACTERISTICS
Calendar Year: January 1, 2021, through December 31, 2021

Patients by Race and Ethnicity or Language Proficiency					
Line	Patient by Race	Hispanic or Latino (n)	Non-Hispanic or Latino (n)	Unspecified/Refused to Report Ethnicity (n)	Total (n) (Sum of Columns 2-5)
1	White				
2a	Native Hawaiian				
2b	Other Pacific Islander				
3	Total Native Hawaiian/Other Pacific Islander				
4	Pacific Islander				
5	Other (Lines 2a-7, 2b)				
6	Black/African American				
7	American Indian/Alaska Native				
8	White				
9	More than one race				
10	Unspecified/Refused to report race				
11	Total Patients (Sum of Lines 1-10)				
Patients Not Served at a Language Other Than English					
Line	Patient Not Served at a Language Other Than English	Number (n)			
12	Patient Not Served at a Language Other Than English				
Patients by Sexual Orientation					
Line	Patient by Sexual Orientation	Number (n)			
13	Lesbian or Gay				
14	Bisexual (or straight)				
15	Heterosexual				
16	Something else				
17	Don't know				
18	Choose not to disclose				
19	Total Patients (Sum of Lines 13-18)				
Patients by Gender Identity					
Line	Patient by Gender Identity	Number (n)			
20	Male				
21	Female				
22	Transgender Man/Transgender				
23	Transgender Woman/Transgender				
24	Other				
25	Choose not to disclose				
26	Total Patients (Sum of Lines 20-25)				

TABLE 4: SELECTED PATIENT CHARACTERISTICS (CONTINUED)
Calendar Year: January 1, 2021, through December 31, 2021

Line	Special Populations	Number of Patients (n)
14	Migratory (330g awardees only)	
15	Seasonal (330g awardees only)	
16	Total Agricultural Workers or Dependents (All health centers report this line)	
17	Homeless Shelter (330h awardees only)	
18	Transitional (330h awardees only)	
19	Doubling Up (330h awardees only)	
20	Street (330h awardees only)	
21a	Permanent Supportive Housing (330h awardees only)	
21	Other (330h awardees only)	
22	Unknown (330h awardees only)	
23	Total Homeless (All health centers report this line)	
24	Total School-Based Health Center Patients (All health centers report this line)	
25	Total Veterans (All health centers report this line)	
26	Total Patients Served at a Health Center Located In or Immediately Accessible to a Public Housing Site (All health centers report this line)	

Balancing Tables

- Table 4 Lines 7- 12 vs UDS output – This is the sum of your unduplicated patients

Line	Principal Third-Party Medical Insurance	0-17 years old (a)	18 and older (b)
7	None/Uninsured		
8a	Medicaid (Title XIX)		
8b	CHIP Medicaid		
8	Total Medicaid (Line 8a + 8b)		
9a	Dually Eligible (Medicare and Medicaid)		
9	Medicare (Inclusive of dually eligible and other Title XVIII beneficiaries)		
10a	Other Public Insurance (Non-CHIP) (specify _____)		
10b	Other Public Insurance CHIP		
10	Total Public Insurance (Line 10a + 10b)		
11	Private Insurance		
12	TOTAL (Sum of Lines 7 + 8 + 9 +10 +11)		

	A	B	C	D	E	F	G
1 Line	Patients by ZIP Code	None-Uninsured (b)	Medicaid - CHIP - Other Public (c)	Medicare (d)	Private (e)	Total Patients (f)	
17 4	Total	276	2378	1178	2540	6372	

Balancing Tables

- Table 4 Lines 13A-13C
 - This is the only reported data where a patient may not have been seen

Line	Managed Care Utilization	Medicaid (a)	Medicare (b)	Other Public Including Non-Medicaid CHIP (c)	Private (d)	TOTAL (e)
13a	Capitated Member Months					
13b	Fee-for-service Member Months					
13c	Total Member Months (Sum of Lines 13a + 13b)					

Note: It is possible for an individual to be enrolled in a managed care plan, assigned to a health center, and yet not be seen during the calendar year. The member months for such individuals are still to be reported in this section. **This is the only place on the UDS tables where an individual may be reported who is not being counted as a patient.**

Balancing Tables

- Table 5 – Total number of patient in table 5 should be greater than table 3A unless you only provide one type of service *patients will be duplicated in table 5 when they are treated by multiple provider types

TABLE 5: STAFFING AND UTILIZATION
Calendar Year: January 1, 2021, through December 31, 2021

Line	Personnel by Major Service Category	FTEs (a)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
1	Family Physicians				
2	General Practitioners				
3	Internists				
4	Obstetrician/Gynecologists				
5	Podiatrists				
7	Other Specialty Physicians				
8	Total Physicians (Lines 1–7)				
9a	Nurse Practitioners				
9b	Physician Assistants				
10	Certified Nurse Midwives				
10a	Total NPs, PAs, and CNMs (Lines 9a–10)				
11	Nurses				
12	Other Medical Personnel				
13	Laboratory Personnel				
14	X-ray Personnel				
15	Total Medical Care Services (Lines 8 + 10a through 14)				
16	Dentists				
17	Dental Hygienists				
17a	Dental Therapists				
18	Other Dental Personnel				
19	Total Dental Services (Lines 16–18)				
20a	Psychiatrists				
20a1	Licensed Clinical Psychologists				
20a2	Licensed Clinical Social Workers				
20b	Other Licensed Mental Health Providers				
20c	Other Mental Health Personnel				
20	Total Mental Health Services (Lines 20a–c)				
21	Substance Use Disorder Services				
22	Other Professional Services (specify _____)				

TABLE 3A: PATIENTS BY AGE AND BY SEX ASSIGNED AT BIRTH
Calendar Year: January 1, 2021, through December 31, 2021

Line	Age Groups	Male Patients (a)	Female Patients (b)
1	Under age 1		
2	Age 1		
3	Age 2		
4	Age 3		
5	Age 4		
6	Age 5		
7	Age 6		
8	Age 7		
9	Age 8		
10	Age 9		
11	Age 10		
12	Age 11		
13	Age 12		
14	Age 13		
15	Age 14		
16	Age 15		
17	Age 16		
18	Age 17		
19	Age 18		
20	Age 19		
21	Age 20		
22	Age 21		
23	Age 22		
24	Age 23		
25	Age 24		
26	Age 25–29		
27	Age 30–34		
28	Age 35–39		
29	Age 40–44		
30	Age 45–49		
31	Age 50–54		
32	Age 55–59		
33	Age 60–64		
34	Age 65–69		
35	Age 70–74		
36	Age 75–79		
37	Age 80–84		
38	Age 85 and over		
39	Total Patients (Sum of Lines 1–38)		

Balancing Tables

- Tables 6A and 6B/7 can not be compared.
 - Time period is different
 - Services Rendered vs Quality Measure
- Be observant - Ages are very specific
- Non-Prenatal age is calculated as of January 1st unless otherwise specified for tables 6B and 7
- Time periods, e.g., Preventive Care and Screening Tobacco Use, 24-to-12-month period

Table 6A Range Verification

- Be consistent
- Table 6A Code Ranges via tool export or SQL

Select reportingyear, CodeRangeMin, CodeRangeMax, Uds6aCategoryName
from [dbo].[Ncs_Udsx_Uds6aCategoryCode] where reportingyear = '2021'

Encounter Has Overweight and obesity		
ICD 10CM	E66	E66.zzz
ICD 10CM	O99.34	O99.34zzzz
ICD 10CM	Z68	Z68.0zzz
ICD 10CM	Z68.25	Z68.49zzz
ICD 10CM	Z68.50	Z68.50zzz
ICD 10CM	Z68.53	Z68.9zzz

Table 9d Activation

- Table 9D is unavailable by default for 2020
 - Force it available
 - Manual Export
 - May not be available at all for 2021
- `select` `IsAvailable`, * `from` `Ncs_Udsx_UdsTableSection` `WHERE`
`SectionId = 41 and TableId = 9`
- `Update` `Ncs_Udsx_UdsTableSection` `set` `IsAvailable = 1` `WHERE`
`SectionId = 41 and TableId = 9`

Customizations

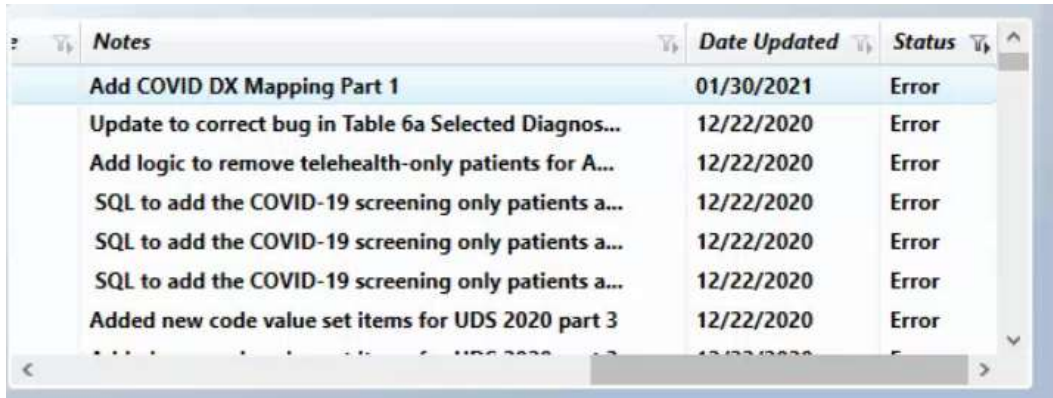
- Are all custom codes accounted for?
 - ICD-10-CM codes for some services (such as mammography and Pap tests) are listed to ensure capture of procedures that are done by the health center but may be coded with a different CPT code for state reimbursement under Title X or BCCCP*
 - Update any custom reporting
 - Data warehouses, value set tables, third party applications, e.g., i2i

Troubleshooting New CQMs

- Breast Cancer Screening numbers low
 - Values in CQM Value Set have been reduced to LOINC codes
 - Must run the Quality Measures Data Tool to address missing LOINC codes for historical mammograms
- HIV Screening numbers low
 - This is a lifetime screening, older lab results might exist without LOINC codes in early NextGen implementations
 - Use the LOINC utility to update past results
 - You can use a generic LOINC code for this – 75622-1 – HIV and 2 tests – Meaningful Use set

UDSx Tool Reset

- Missing Line Items
 - SQL Cloud update errors
 - Best practice to run a new report after or reset the warehouse



A screenshot of a software interface displaying a table with three columns: Notes, Date Updated, and Status. The table lists several updates, all of which are marked as 'Error'. The first row is highlighted in blue.

Notes	Date Updated	Status
Add COVID DX Mapping Part 1	01/30/2021	Error
Update to correct bug in Table 6a Selected Diagnos...	12/22/2020	Error
Add logic to remove telehealth-only patients for A...	12/22/2020	Error
SQL to add the COVID-19 screening only patients a...	12/22/2020	Error
SQL to add the COVID-19 screening only patients a...	12/22/2020	Error
SQL to add the COVID-19 screening only patients a...	12/22/2020	Error
Added new code value set items for UDS 2020 part 3	12/22/2020	Error

Validating Last Data Warehouse Refresh

- Finding your last refresh

```
SELECT runid, runname, RunStartDateTime,  
RunDetails, LastRepositoryRefreshDate FROM  
ncs_udsx_run
```

Results		Messages			
	runid	runname	RunStartDateTime	RunDetails	LastRepositoryRefreshDate
1	7	UDS CY 2021 - AdHoc (1/1/2021-12/31/2021) - 9/15/2021 - 5:09 PM	2021-09-15 22:09:58.067		2021-09-15 17:09:11.780
2	8	UDS CY 2021 - AdHoc (1/1/2021-12/31/2021) - 9/16/2021 - 12:07 PM	2021-09-16 17:07:33.900		2021-09-16 12:07:05.273

UDSx Tool Reset

- In the UDS Console you may need to check **Admin Options > Maintenance Tasks > Maintenance Tools** may need to be ran to clear the repository tables for the data to display correctly.

The screenshot displays the 'ADMINISTRATION' section of the UDS Console. The left sidebar contains a navigation menu with 'Maintenance Tools' highlighted. The main content area is titled 'MAINTENANCE TOOLS' and features a table of stored procedures. Numbered callouts (1-6) highlight specific tools and their descriptions. A 'Execute' button is visible below the table. Two warning boxes are present at the bottom: one for 'Restart Windows' and another for 'A4 should be done to reload sections and then run an update report'.

Stored Procedure Description	Stored Procedure Name
1 This will clear all old automation scheduled tasks	NciUdsx_spTaskDeleteAutomationData
2 This will clear all repository tables and force reload	NciUdsx_spForceReloadRepositoryData
3 This will upgrade UDS to run on NG 5.9 versions	NciUdsx_spTaskUpgradeFireMaster
4 This will downgrade UDS to work with NG versions < 5.9	NciUdsx_spTaskDowngradeFireMasterInChkFG
5 Force first time Automation tasks to run today	NciUdsx_spForceFirstTimeAutomationRun
6 Clear Historical Data (This will remove all detailed report data from past reports)	NciUdsx_spRemoveHistoricalData
Resets the UDS Table Sections QOSD version(s)	NciUdsx_spUdsSectionRefresh

Execute

Restart Windows (Server > JPS) and all may have to be reconnected to join the data into its context

A4 should be done to reload sections and then run an update report



Preventative Measures and Best Practices

Helpful Tips

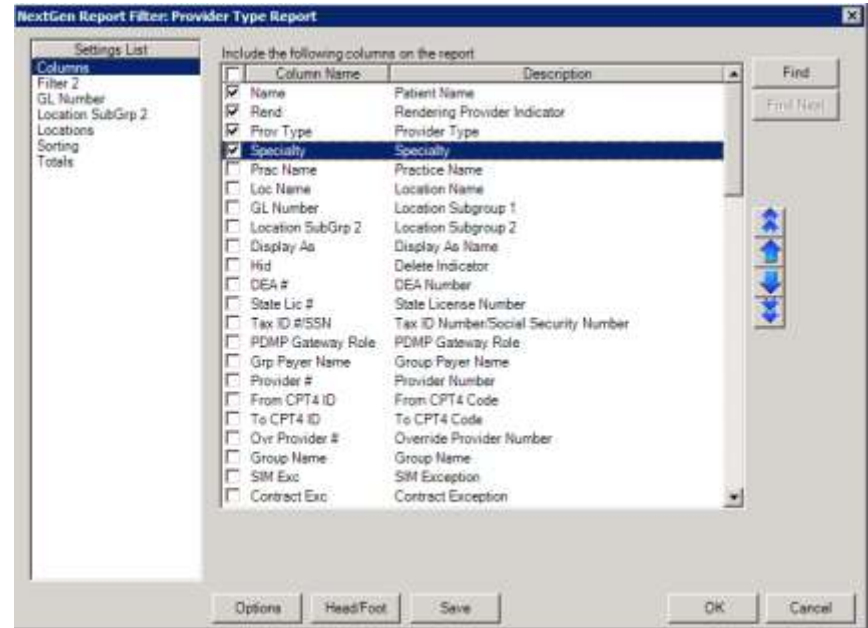
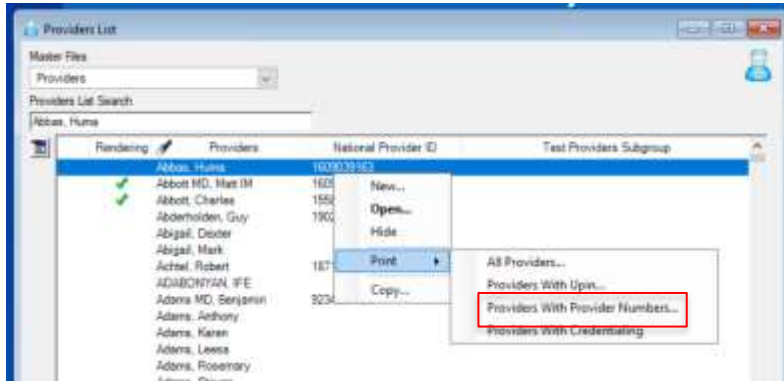
- Ensure the annual ICD-10 and CPTs are up to date.
 - ICD-10 Active October 1 and available now
 - CPTs Active January 1
- Create and run memorized reports for data mapping validation.
- Don't wait until year end to review your SIM Library. Review this at least quarterly to ensure that SIM Codes are marked as Qualifying Encounters.
- Review encounters billed at least quarterly to update any missing Service Items that may have not marked an encounter as a qualifying encounter.
- Put in a process for adding items to the SIM Library to ensure that SIMs are properly marked.

Helpful Tips

- Validate your UDS Tool Mapping and Filters in the beginning of the year
- All new lab orders need to have a LOINC code attached
- Balance your results to system reports and address any inconsistencies
- Review last years HRSA results

Provider Type Report

Verify all providers are marked with the correct Provider Type (new providers sometimes get missed)



SIM Qualifying Encounter Report

Verify that all appropriate SIM codes have all three options checked (This only affects encounters moving forward and will not correct historic data) Self Pay Qualifying Encounter, Sliding Fee Qualifying Encounter and FQHC Qualifying Encounter

The image displays three overlapping screenshots from the NextGen software interface, illustrating the steps to configure the SIM Qualifying Encounter Report.

Top Screenshot: NextGen Report Filter: SIM Qual Enc Review

- Settings List:** Filter 1, Filter 2, Libraries, Sorting, Totals.
- Include the following columns on the report:**

Column Name	Description
<input checked="" type="checkbox"/> Lib Name	Library Name
<input checked="" type="checkbox"/> Sv It	Service Item ID
<input checked="" type="checkbox"/> Sv It Desc	Service Item Description
<input checked="" type="checkbox"/> CPT4	To CPT4 Code
<input checked="" type="checkbox"/> Eff Dt	Effective Date
<input checked="" type="checkbox"/> Exp Dt	Expiration Date
<input checked="" type="checkbox"/> Non-Fac UP	
<input checked="" type="checkbox"/> Self Pay Qualifying E.	
<input checked="" type="checkbox"/> Sliding Fee Qualifyin.	
<input checked="" type="checkbox"/> General Qualifying E.	FQHC Qualifying Encounter Indicator
<input type="checkbox"/> Form	
<input type="checkbox"/> Mod1	Modifier 1
<input type="checkbox"/> Mod2	Modifier 2
<input type="checkbox"/> CPT4 Desc	CPT4 Description
<input type="checkbox"/> Place Of Serv	
<input type="checkbox"/> Department	Service Item Department
<input type="checkbox"/> Modality	Service Item Modality
<input type="checkbox"/> Component	Service Item Component
<input type="checkbox"/> Fac UP	
<input type="checkbox"/> RVU 1	RVU 1
<input type="checkbox"/> RVU 2	RVU 2
<input type="checkbox"/> RVU 3	RVU 3

Bottom Left Screenshot: Service Items List

- Service Items List Search: CHC SIM Library
- Practice Default: CHC SIM Library
- Service Items: CHC SIM Library
- Right-click context menu: **Print** (highlighted with a red box), Service Item Library Listing...

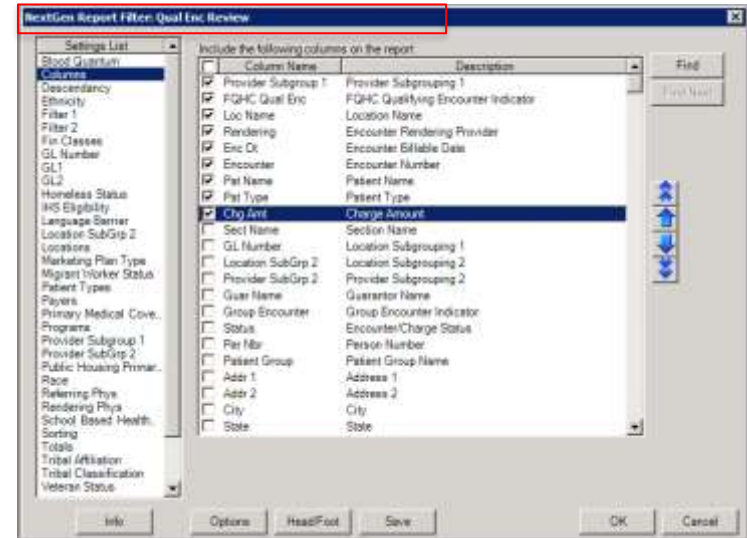
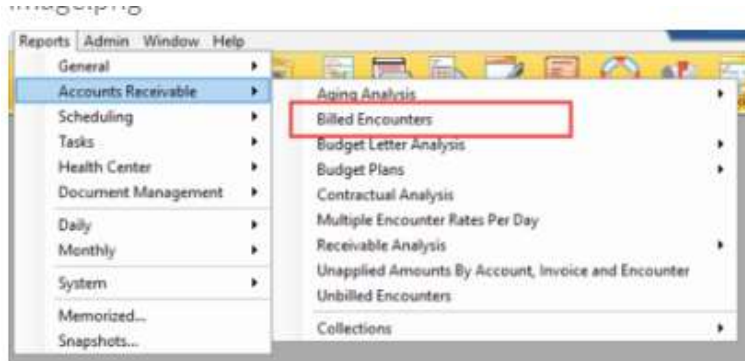
Bottom Right Screenshot: Service Item Detail

- Service Item ID: 00012
- Description: Office outpatient visit, est. prod fee
- CPT4 Code: 00012
- General tab: **Qualifying Encounter** (highlighted with a red box)

<input checked="" type="checkbox"/> Qualifying Encounter for all payers
<input checked="" type="checkbox"/> Self pay Qualifying Encounter
<input checked="" type="checkbox"/> Sliding Fee Qualifying Encounter
<input checked="" type="checkbox"/> Qualifying Encounter for all payers
<input checked="" type="checkbox"/> FQHC Qualifying Encounter

Qualifying Encounter Report

Look at all encounters at least quarterly and verify they are accurately Qualified or Non-Qualified. This can be found in the Reports> Accounts Receivable> Billed Encounters



Qualifying Encounter Review

- Any inaccurate encounters showing on this report will require manual correction or SQL update

Encounter Maintenance - Encounter: 10 for - Adler, Grace

Billable Date: 01/12/2021 Billable Time: 12:00 AM Occurrence Code: Wellness State: Onset Date: Onset Time:

General | Clinical | Billing & Code | Encounter Sp. | **Claims** | Marketing | Properties | History

Special Program: Serv Auth Except Code:

EPSTD Referral Condition Code: EPSTD Referral Code:

EPSTD Encounter Code - Paper:

Condition Code Category - WC: Demonstration Project ID:

Hearing/Vision Rx: Claim Codes:

Vision Code Category: Vision Condition Indicator:

Vision Code Category: Vision Condition Indicator:

Vision Code Category: Vision Condition Indicator:

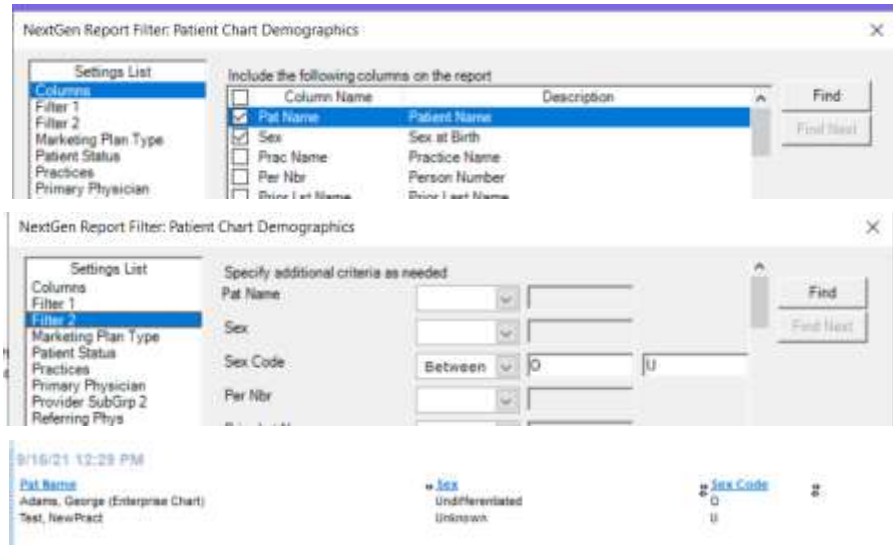
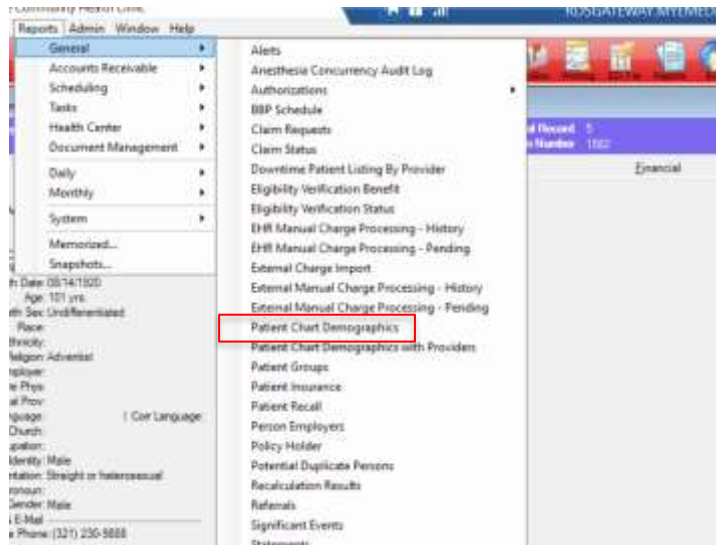
☒ **Qualifying Encounter** ☐ Not assigned provider sending electronic claim

☐ Family Planning Encounter

OK Cancel

Birth Sex Report

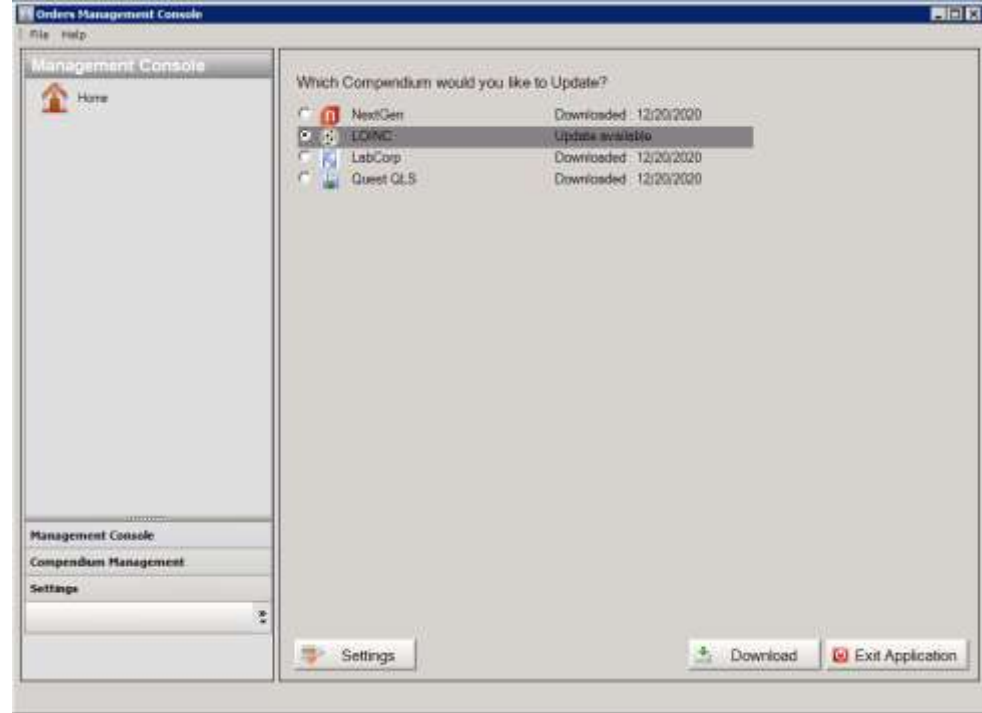
- Review and update any patients listed with Unknown or Undifferentiated birth sex. This can be filtered by selecting Sex Code between O and U in filter 2 of the report



Orders Management Console

Missing a LOINC code?

Make sure you are routinely updating your compendiums.



Additional Prevention

- Medications, maintain updates
 - RX Norm and NDCs
- TRAINING, TRAINING AND MORE TRAINING
 - Best Practice workflow
 - [eCOM NextGen Workflows Part A](#)
 - [eCOM NextGen Workflows Part B](#)
- Be proactive not reactive

Proposed Changes and Resources

2021 NextGen Tool Updates

- November Release
- May be a cloud update, however a full install could be necessary
- Table 6b and 7 fixes
- Naming conventions aligned with HRSA/UDS
- Hospice exclusions enacted
- HIV Linkage to care updated from 90 to 30 days
- SDOH loading of PRAPARE Assessment
- Table 9D will be removed entirely, no flag to 'show' it

2022 Proposed Changes – 6B & 7

- 2022 UDS eCQMs Changes
 - Childhood Immunizations – CMS117v10
 - Cervical Cancer Screening – CMS124v10
 - Breast Cancer Screening – CMS125v10
 - Weight Assessment and Counseling for Nutrition and Physical Activity for children and Adolescents – CMS155v10
 - Preventative Care and Screening: BMI Screening and Follow-Up Plan – CMS69v10
 - Preventative Care and Screening: Tobacco Use: Screening and Cessation Intervention – CMS138v10
 - Statin Therapy for the Prevention and Treatment of Cardiovascular Disease – CMS347v5
 - Colorectal Cancer Screening – CMS130v10
 - HIV Screening – CMS349v4
 - Preventative Care and Screening: Screening for Depression and Follow-Up Plan – CMS2v11
 - Depression Remission at Twelve Months – CMS159v10
 - Controlling High Blood Pressure – CMS165v10
 - Diabetes: Hemoglobin A1c (HbA1c) Poor Control (>9%) – CMS122v10

[PAL 2022 Changes](#)

Resources

- UDS Website: <http://bphc.hrsa.gov/datareporting/reporting/index.html>
- UDS Webinars:
- <https://bphc.hrsa.gov/sites/default/files/bphc/datareporting/reporting/2021-uds-webinar-flyers.pdf>
- UDS Mappings: <https://bphcdata.net/wp-content/uploads/2020/06/Table6AChanges.pdf>
- NextGen UDS Website: https://www.community.nextgen.com/articles/Hot_Topic/NextGen-UDS-Reporting-Product-Page
- Value Sets: <https://vsac.nlm.nih.gov/download/ecqm?rel=20200507>

Q&A

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