Welcome to the
Best Practice Configuration & Automation 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.

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

eMedApps.com

eMedApps - About Us

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

Follow Us!

Be sure to follow us on Facebook, Instagram, Twitter and LinkedIn and Subscribe to our YouTube Channel! Just search eMedApps
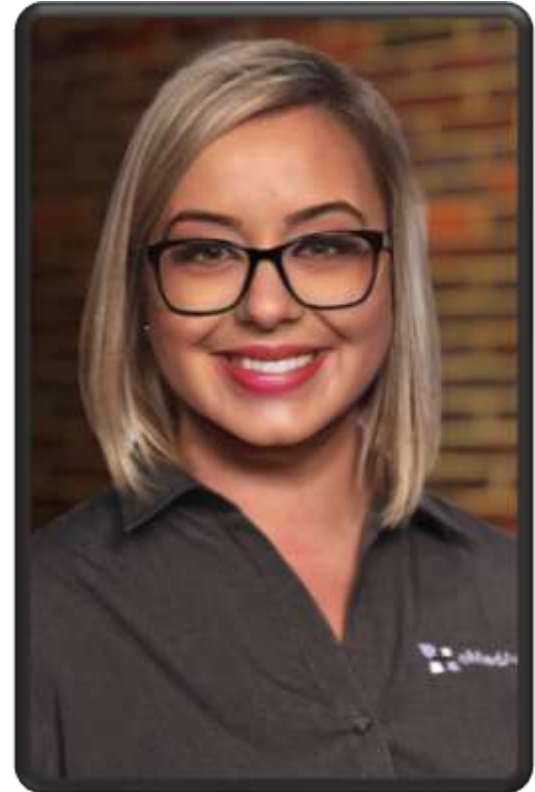
About Our Presenters

About our Presenter

Yvette Bujak

Yvette has 14 years of experience with the NextGen product and is NextGen certified in EPM, EMR, Patient Portal, and ICS. She has over 17 years of experience in the healthcare industry. She is typically responsible for implementation, project management, template development, workflow design, training and support of the NextGen EHR product.

Fun Fact! Yvette placed 1st in the 1999 Junior Olympics for Judo

About our Presenter

Fred Weinshenk

Fred has over 20 years of experience as a Systems & Infrastructure Engineer. He has a Bachelors in Computer Information Systems. He's been with eMedApps for almost 3 years and is typically responsible for our Hosting Platform Implementations & Server Migrations.

When he's outside of work, he enjoys reading and spending time with his two Dogs Micky and ManMan.

Best Practice Configuration & Automation

Agenda

- Review some tips and recommendations within NextGen that the Practice maybe completing manually. Items will include Background Business Processor (BBP), NextGen Commination Services (NCS), and Offline Document Processor (ODP). We will be reviewing application configuration as well as NextGen settings that can help achieve automation.

NextGen Communication Services (NCS)

What is NCS?

A practice's NextGen Enterprise applications exchange prescription information with NextGen servers and Surescripts through Nextgen Communication Services (NCS). The types of data include:

- Electronic prescriptions (retail and mail order)
- Pharmacy prescription requests
- Provider information
- Pharmacy details
- Pre Medfusion Portal messages (version 6.2020 and below)

How NCS work for ePrescribing

1. Based on the configurations each NCS processor for NextGen ePrescribing periodically processes and pulls data from respective ePrescribing tables for export to the NextGen Production eRx server. The NextGen Production eRx server then routes these ePrescribing messages to Surescripts.

2. Similarly, NCS periodically checks the NextGen eRx database and transfers any new data inbound. Items like prescription refills and eRx errors.

3. Additional processes handled by NCS include updating the client pharmacy file. Clients can import and download new or updated Surescripts participating pharmacies into the database.

4. For Supported patient savings programs, NCS processors are used to transmit eligibility requests to and retrieve response messages from external partners. If a patient is enrolled in a program or provided materials, NCS is used to transmit the enrollment and prescription information to the program pharmacy.
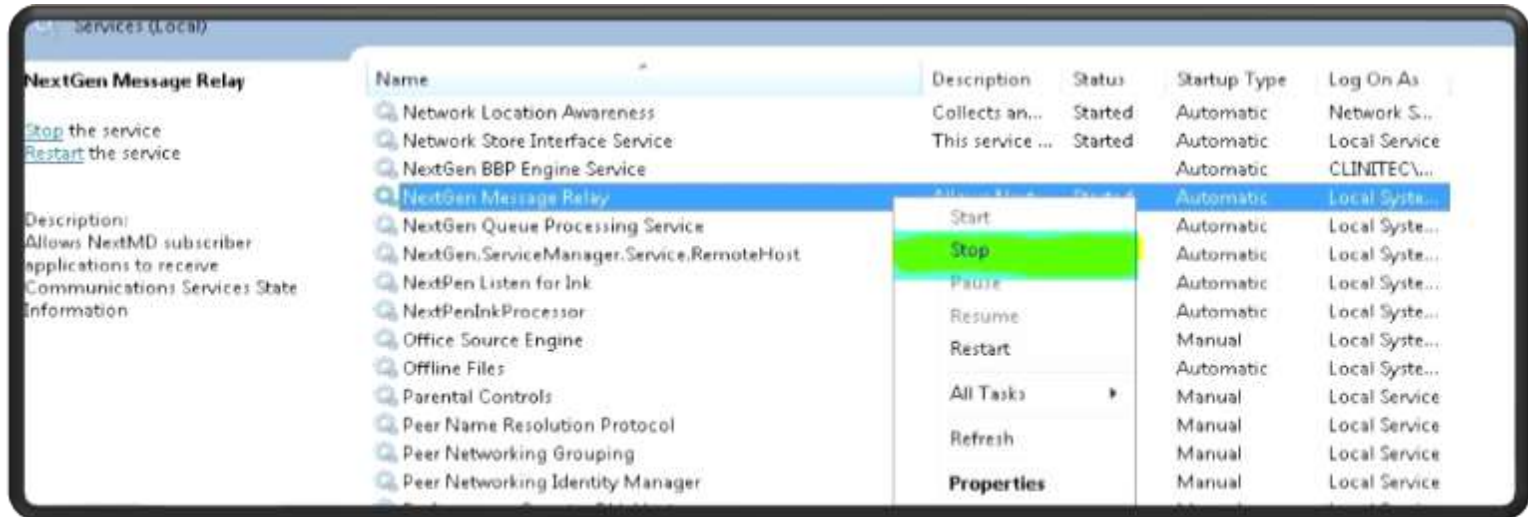
eMedApps.com

How to Restart NCS?

Many times, issues can be resolved by restarting NCS.

1. Log into the server where NCS is installed

2. If the NCS interface window is open, close it

3. On the server Start > Run > Services.MSC
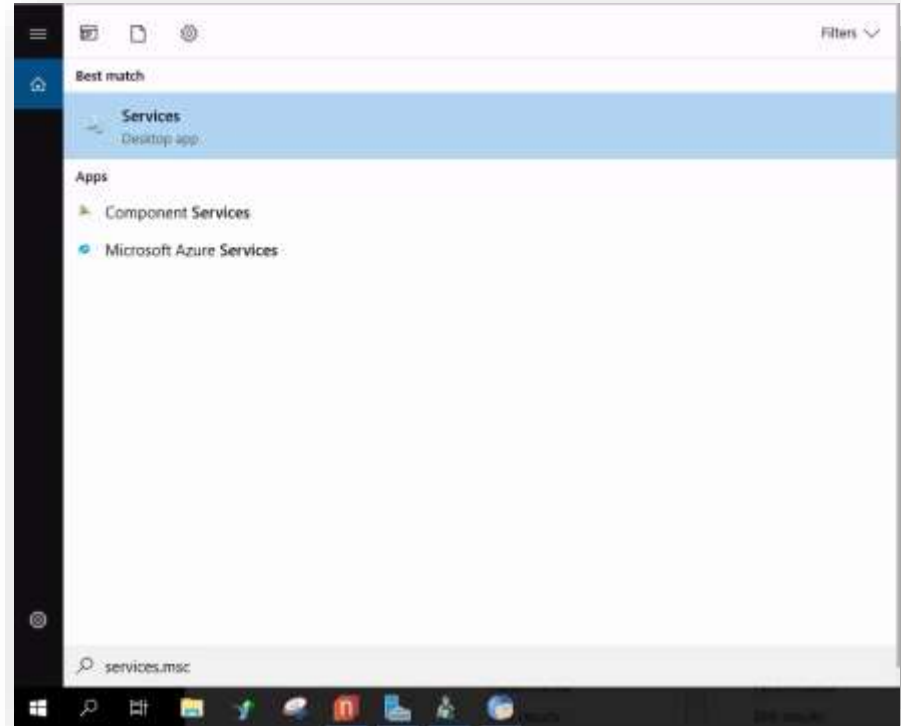
How to Restart NCS?

4. Right Click the NextGen Message Relay > Stop (this will also stop the NextGen Queue Processing Service)

How to Restart NCS?

5. Right Click the NextGen Queue Processing Service > START (This will also start the NextGen Message Relay)

How to Restart NCS?

6. Launch the NCS Application
7. Click on the "Poll Now" button
- When you click "Poll Now" You will see each Queue Processor begin connecting.
- You will see the number of completed transactions and failed. If transactions continue to fail further investigation may be required.
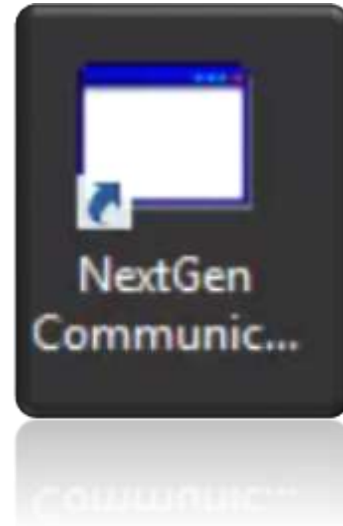

eMedApps.com

Automatic Pharmacy Download

- Within NCS NextGen has the ability to automatically download pharmacies into NextGen. To do so navigate to your server you have NCS installed. Usually your communication server.

- Available in versions 5.9 and up

NextGen
Communic...

Automatic Pharmacy Download

Once NCS is launched

- Stop all services

- Select settings, if a password is set, please enter your password

- Click Next till you reach the configuration screen

eMedApps.com

Automatic Pharmacy Download
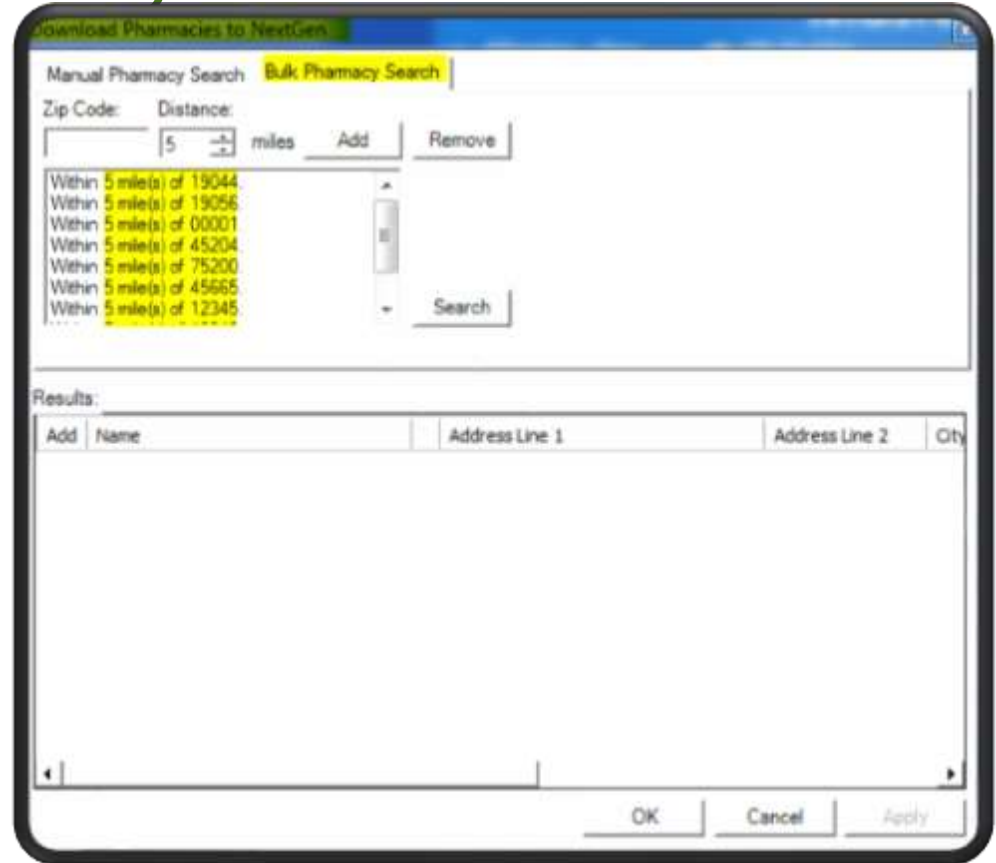
- Within the configuration screen expand ePrescribing – Retail
- Check ePrescribing Retail Pharmacy Download
- Under Retail Message Processing set the following to True:
  - AutoMatch
    - This will allow newly downloaded pharmacy's to be auto match to pharmacy that already exists in your system.
  - ImportNewPharmacy
    - This will allow new pharmacy to be downloaded when they become available
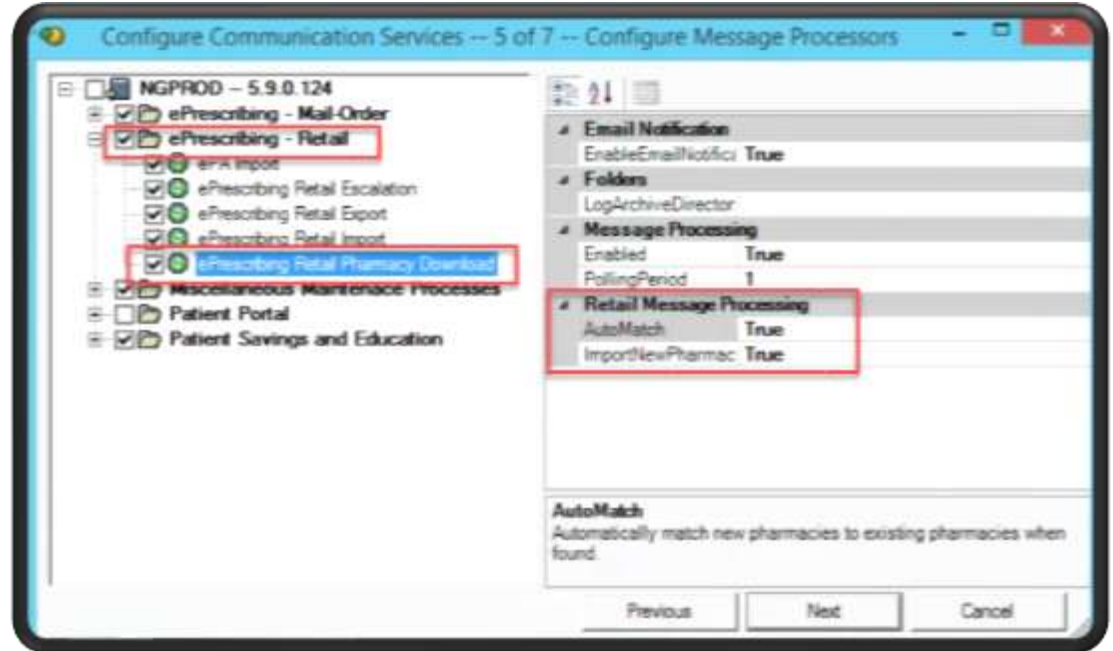
Automatic Pharmacy Download

When setting the ImportNewPharmacies = TRUE, all pharmacies searched in NextGen File Maintenance under the Bulk Pharmacy Search within the Pharmacy download will be downloaded. Every pharmacy within the selected zip code and radius will download.

File Maintenance > File > Download Pharmacy

Allow Users to Download Pharmacy

Save time and give your clinical staff access to download any missing pharmacies.
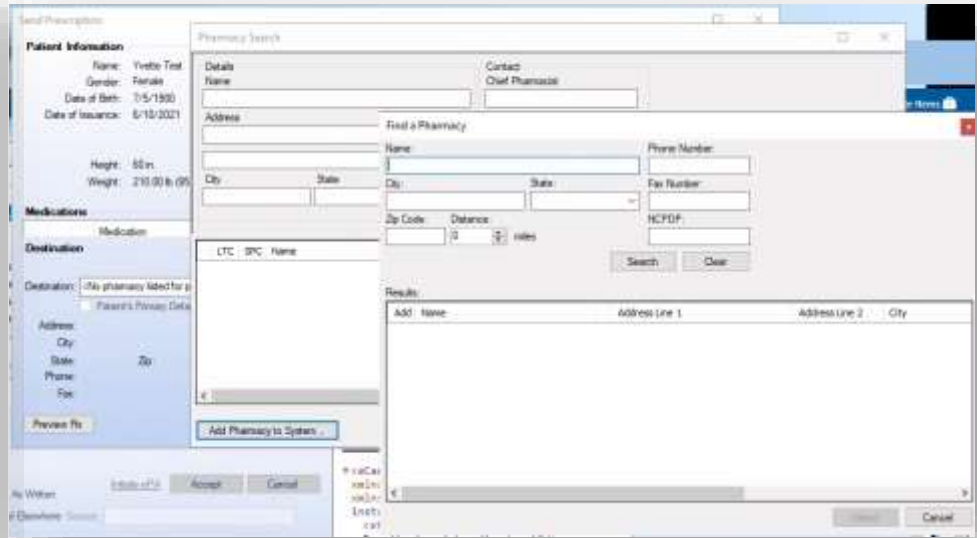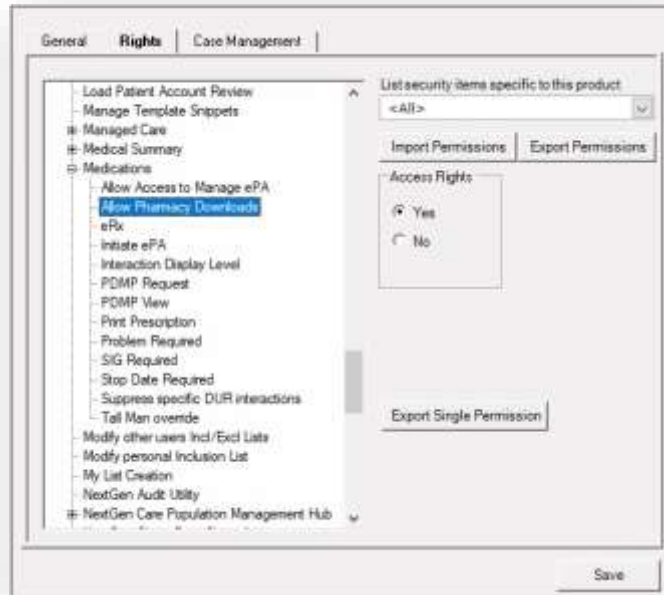
Background Business Processor (BBP)

Background Business Processor (BBP)

The NextGen BBP is intended to assist you in scheduling packages (tasks that require manual execution) for automatic completion. For example, you can create a package that automatically generates and prints the Daily Balance report at the end of each day. You can also configure the NextGen BBP to send a notification email after it completes an automated NextGen Enterprise PM process. You can automate the following NextGen Enterprise PM processes:

- Reports
- Statements
- Billing encounters
- Claims generation
- Collection and Recall letter generation
- Directory Import
- Stored procedures
- Person merge processing
- RTS eligibility and claim status requests
- RTS eligibility responses
- In addition, NextGen BBP can run NextGen Enterprise EHR and NextGen Enterprise PM memorized reports.
- Inbound Faxing

eMedApps.com

Background Business Processor (BBP)

The BBP can automate many daily tasks most common uses are:

- Exporting reports to a shared drive
  - Try to export reports to shared drives vs personal. Folders can be protected on shared drives.
- Emailing reports to specific users or groups
  - If emailing reports best practice is to use distribution lists to cut down on maintenance
- Printing specific reports, statements, recall letters, etc.. on a schedule so they are not missed.

Background Business Processor (BBP)

BBP setup and requirements are generally unique to the enterprise, the amount of data needed to be processed, the number of required BBP processes, and workflow that may be specific and unique to the individual practice utilizing the tools.

Background Business Processor (BBP)

BBP Packages can be classified into four district categories in terms of processing needs

Severity	Description
Severe	A package that results two or more hours of duration for the package.
Heavy	A package that results in less than two hours but greater than one hour of duration for the package.
Moderate	A package that results in less than one hour but greater than thirty minutes of execution for the package.
Light	A standard package that results in less than thirty minutes of processing time to complete

Background Business Processor (BBP)

How often the package is scheduled can also have an impact on processing load.

- A Statement job that is only scheduled once a month will have a much higher category than a Statement job that is scheduled every day due to package having to print/export 30 days of statements at one time.

- A package of memorized month end reports will have a higher category than a package of weekly reports.

Background Business Processor (BBP)

Below is a current list of BBP jobs and their typical processing load.

Job Type Name	Daily	Weekly	Monthly
997 Directory Import	Light	Moderate	Heavy
Account Collection Letters	Light	Moderate	Heavy
Batch Posting	Heavy	Severe	Severe
Bill Encounters	Heavy	Severe	Severe
ERA Directory Import	Heavy	Severe	Severe
Person Merge	Severe	Severe	Severe
RTS	Moderate	Heavy	Severe

Background Business Processor (BBP)

The following diagram provides an overview of how the NextGen Background Business Processor (BBP) components work together

eMedApps.com
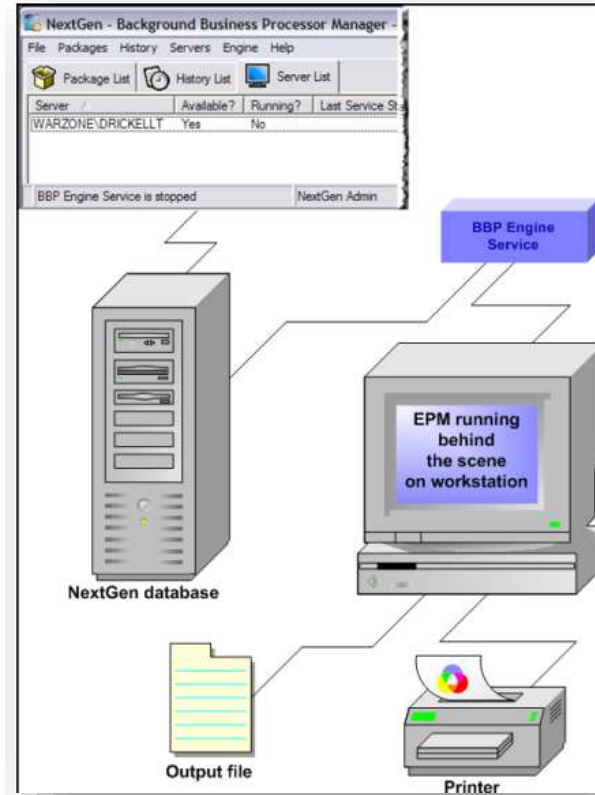
Background Business Processor (BBP)

BBP System Requirements

- BBP server process requirement are as follows:
  - For Light to Moderate process categories, and for packages that do not run on the Report Server process, the following hardware requirements apply:
    - Single Processor, 2GB Memory, and any supported operating system in Legacy Mode (x32 bit)
  - For processes categorized as Heavy or Severe, and for packages that target or require Report Server processes, the with the NextGen Application requirements:
    - Dual Core Processor, 4GB Memory, any supported operating system in Legacy Mode (x32 bit)
  - .NET Framework v4.6.2
- Additional Servers can be added as needed to handle the job loads

eMedApps.com

Background Business Processor (BBP)

Note: Nextgen requires that PM (and by extension BBP) run in 32-bit mode. This does not mean that you cannot install BBP on a 64-bit platform. However, when installed on a 64-but system, BBP runs in 32-bit legacy mode.

You can also run BBP server on virtual servers. If you have a machine running multiple virtual servers, then each instance of the virtual server must meet the preceding requirements.

eMedApps.com

Background Business Processor (BBP)

NOTE: The computer running the NextGen BBP Engine Service must stay on 24 hours a day – or, at least, it must be running during all times when NextGen Practice Management processes are scheduled to execute. If the BBP Engine Service is not active during a scheduled process execution, the process cannot run. If the computer onto which you install the BBP Engine Service regularly shuts down and reboots, set the service to start automatically.

Recommendation: When installing the NextGen BBP Service Engine, be mindful of the user account with which the BBP Engine service logs on. If the password of the user account changes, then the BBP Engine service cannot function. NextGen recommends that you create a network "NextGen BBP User" account that has the appropriate permissions and a password that does not expire. This network "NextGen BBP User" must:

- Have rights to log on as a Windows service
- Have the same printers installed that the person who is setting up the NextGen BBP jobs has installed
- Have access to the network locations (if any) specified in the NextGen BBP Jobs.
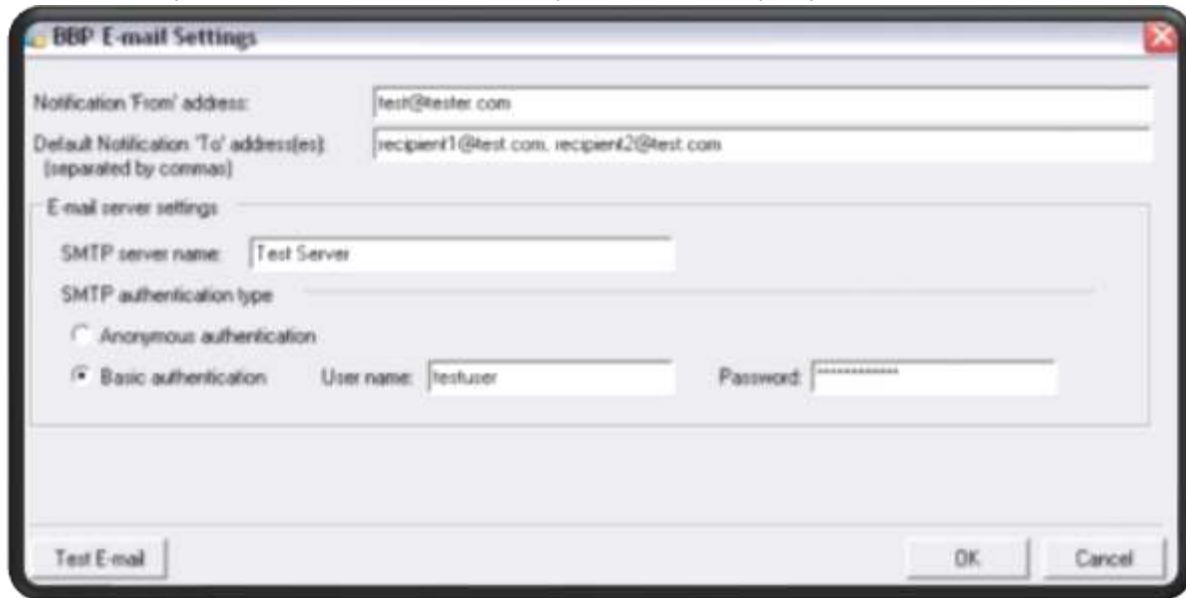
Background Business Processor (BBP)

You can configure BBP to send email notification when packages processing succeeds, fails, or completes. You can also set BBP to email exported files and reports as attachment to specified recipients.

The fails can be sent to the IT Department for troubleshooting. If you have a ticketing system where a ticket can be generated from an email this would be a great email to use.

Background Business Processor (BBP)

1. From the File menu, select E-Mail Setting
   – Notification 'From' address field, enter the email address from which NextGen BPP sends emails. This is a required but "dummy" address that indicates the sender of the email. Example: NextGenBBP@yourcomapny.com
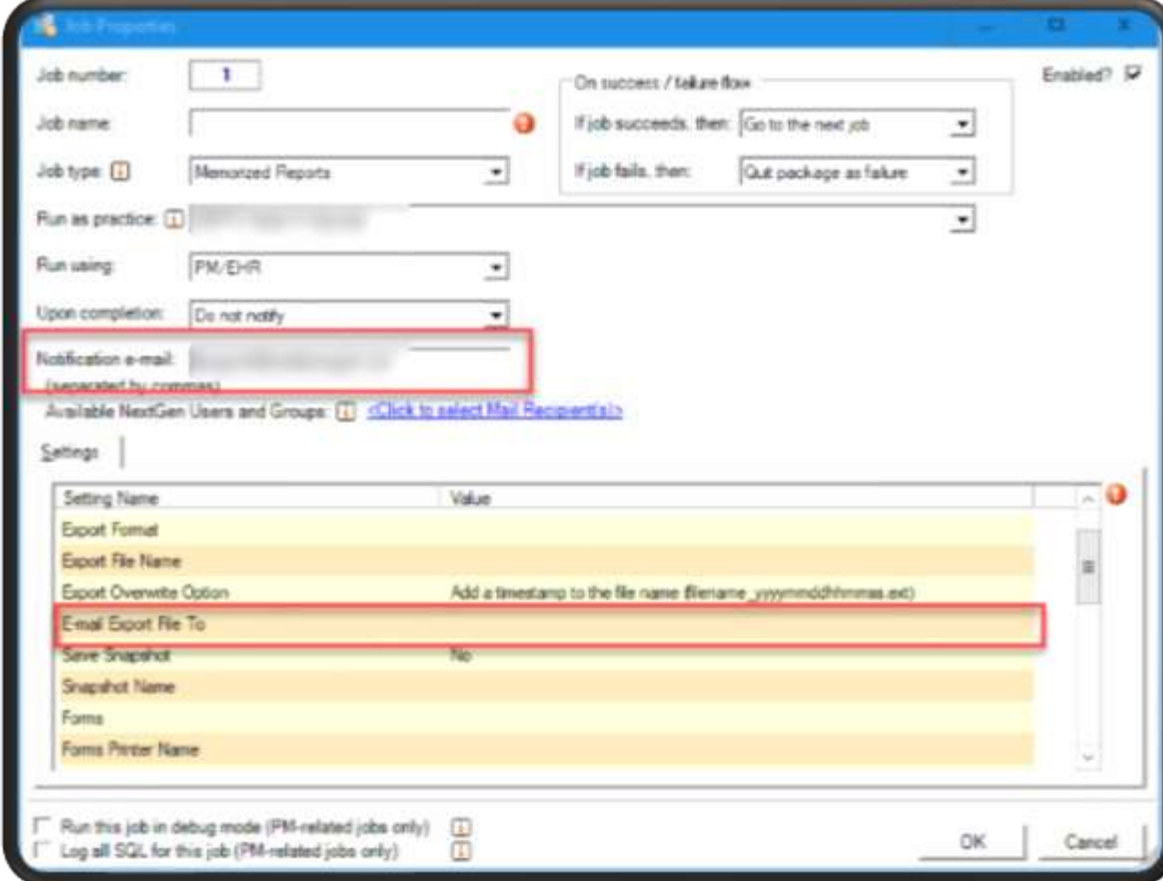

eMedApps.com

Background Business Processor (BBP)

Once email has been configured you can set notifications emails for each job and can also export and send memorized reports as attachments to email recipients

Background Business Processor (BBP)

Scheduling Requirement Recommendations

- Multiple jobs scheduled for each package always run sequentially and never overlap
- Package schedules are based on optimum network and database availability
- Scheduling guidelines are based on an operating schedule that runs during off business hours
- Optimum scheduling is unique and distinct to the practice. The use of BBP services is accounted for on a 24 hour or "during operational hours" schedule as negative impact to network and database performance can be impacted severely depending on a variety of factors.

Background Business Processor (BBP)

The recommended schedule guideline requirements are:

- No more than two instances of EPM run at the same time on the same machine to prevent placing maximum load on processing capacity. This is based on the hardware guidelines outlined previously)

- No more the one BBP package schedule to run at a given time per BBP server available.

JUL 17

Background Business Processor (BBP)

- Troubleshoot / Monitor BBP Packages

- Can use to review how long Jobs are taking to Run

Background Business Processor (BBP)

Other Database activity

- Another factor in scheduling jobs is to ensure that hey also do not overlap with SQL Server jobs (Daily Maintenance, Weekly Maintenance, or Backups) which themselves are also database intensive. Your IT staff or DBA can give you the schedule that the SQL jobs run on.

Background Business Processor (BBP)

Report Server

- Using the Report Server to run memorized report jobs is a good option for reducing database activity on the production database. The Report Server users its own database, which – depending your setup – is usually updated each night from production. This can enable you to schedule some report jobs during peak business hours. You IT staff or DBA can give you the schedule that how when the production database gets copied to the report server database.

eMedApps.com

Offline Document Processor (ODP)

Offline Document Processor

Offline Document Processor

– Tool to assist with document generation from the EHR

- Decreases time spent in EHR per visit

- Increases speed at which clinical documents are generated

- A large practice can run multiple instances on a single server or multiple servers

eMedApps.com

Offline Document Processor

- Offline Document Processor
  - **What:** "Behind the scenes" document generator
  - **Who:** Used by end users completing typical workflow
  - **Where:** Kept running on a server or standalone workstation
  - **When:** Utilized to generate documents from the EHR from some templates or the Document Module
  - **How:** An administrator would set up the program and monitor it to ensure it is running during EHR visits.

Offline Document Processor

In the next couple of slides, we will go over two options of running the ODP on a server.

- The first option is setting up a task scheduler. This is recommended so you can ensure that the ODP is always running. There is no reason to start the ODP manually and if forgotten will not disrupt the clinic workflow.

- The second option is running it manually. With this option you will need to make sure to run the service each time the server is restarted.

Offline Document Processor

Below are detailed instructions for configuring the Offline Document Processor (ODP) to generate automatically on a workstation using the Task Scheduler.

Note: It is important to understand this does not mean "as a Windows service." The process is still configured to run in a locked Windows user session.

1. Create a dedicated "DocGen" Windows account.
   - Most organizations prefer to run the ODP within a Windows user session created specifically for the ODP, which makes auditing/troubleshooting easier. For example, an organization called NextGen Family Practice may create a Windows account in their domain called "DocGen_NFP ". If such an account does not exist, it is advised to create one.
   - Make sure whatever account will be used, has Local Administrator permissions, as well as read/write/modify permissions to C:\NextGen and \\NGRoot.

2. Determine the appropriate executable to run.
   - There are two Offline Document Processors, one for each of the document generators used within NextGen – High Edit (BatchDoc.exe), and TX Text (EMR DocProc.exe).
   - BatchDoc.exe is for High Edit documents (generally 7.X KBM)
   - EMR DocProc.exe is for TX Text documents (generally 8.X KBM and higher)
   - CAVEAT – it is possible to "convert" from High Edit to TX Text before upgrading to the latest 8.x-series KBM. If this applies, please be sure to run EMR DocProc.exe
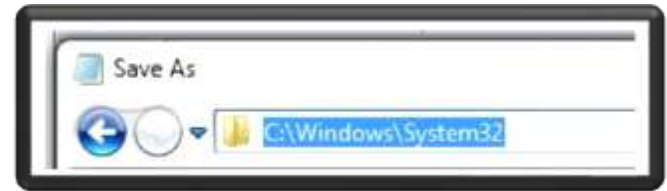
Offline Document Processor

3. Create a desktop shortcut to the ODP (optional; for quicker on-demand access).
    - Log on to the dedicated ODP workstation as the DocGen user from Step 1. (Note – the rest of this guide must be completed while logged in as the DocGen user).
    - Browse to the C:\NextGen folder.
    - Find the appropriate ODP executable (based on Step 2).
    - Right click on the executable and select Send to > Desktop (create shortcut).

Offline Document Processor

4. Create a batch file to stop/restart the executable
   - Open Notepad.
   - Copy and paste the below text based on the appropriate executable version.
   - For BatchDoc.exe (make sure to update the enterprise and practice IDs as needed)
     - @echo off
     - taskkill.exe /IM BatchDoc.exe /f
     - start c:\NextGen\BatchDoc.exe -enterprise 00001 -practice 0001 -user 0 -maxdocs 0
   - For EMR DocProc :
     - @echo off
     - taskkill.exe /IM "emr docproc.exe" /f
     - start c:\NextGen\"emr docproc.exe"
   - Go to File > Save As
   - Change the path in the Address Bar to the following: C:\Windows\system32
   - Expand the drop-down menu next to Save as type: and select All Files (*.*)
   - Name the batch file DocGen_Restart.bat (the ".bat " is important!) and save it.

eMedApps.com

Offline Document Processor

5. To test the batch file:
   – As with any software project, it is always a good idea to test the solution before setting it live.
   – Make sure the SetDB utility is configured for the appropriate database (e.g. NGProd).
   – Navigate to Start > Run
   – Type in C:\Windows\system32\DocGen_Restart.bat and click OK.
   – Make sure the applicable ODP program starts.
   – If so, continue to Step 6. Otherwise, troubleshoot why the ODP did not start.
   – If desired, leave the ODP running so it can process documents.

eMedApps.com

Offline Document Processor

6.   To Create a Scheduled Task to run the batch file automatically follow the steps below:
   – Open the Start menu and navigate to All Programs > Accessories > System Tools > Task Scheduler
   – In the Actions pane on the right, click Create Basic Task...
      • Name = DocGen Restart
      • Description = Stops and restarts the ODP
      • Click Next.
      • Select the Daily radio button.
      • Click Next.
      • Set the start time to 5:00AM, Recur every: 1 day. This start time should be relatively close to the office's opening time, so as to avoid stopping the ODP while yesterday's documents are still processing.
      • NOTE - this should not occur anymore frequently than once daily! If the task is killed during the day, any documents that are in progress will fail to complete and will not appear in the patient's chart.
      • Click Next.
      • Select the Start a program radio button.
      • Click Next.
      • Type the following in the Program/script field – C:\Windows\system32\DocGen_Restart.bat
      • Click Next.
      • Check the box to Open the Properties dialog box.
      • Select Finish.
      • NOTE - On the General tab, make sure Security option is set to "Run only when user is logged on." This will not work properly otherwise!
      • Click Ok.
   • You have successfully created a scheduled task that will stop and restart the Offline Document Processor.
   • Note: Do not log off from the DocGen user Windows session. Disconnect the RDP session (if accessed remotely) or lock the workstation.

Offline Document Processor

7. Configure the DocGen Windows Account to Autologon on Reboot, and launch EMR DocProc automatically:
    – To start EMR DocProc on login
        • Copy the Shortcut from (From Step 3) and paste it in the DocGen user's startup folder.
        • The startup folder is user specific, so while logged as the DocGen paste the below path in the run promtp"%appdata%\Microsoft\Windows\Start Menu\Programs\Startup"
    – To Auto Login on Reboot
        • Download Autologon from Microsoft Sysinternals
        • Extract the zip file
        • Double Click autologon.exe
        • Enter the DocGen Users credentials
        • Select "Enable"
        • A Message will pop up stating "Auto login successfully configured"

Offline Document Processor

To run the ODP manually:

1. Log into server or workstation
2. Go to C:\NextGen
3. Launch EMR Docproc

Note: The server must be running, and you cannot logout of the account that the ODP is running on. If the account is logged off or the server is restarted, then the ODP must be restarted.
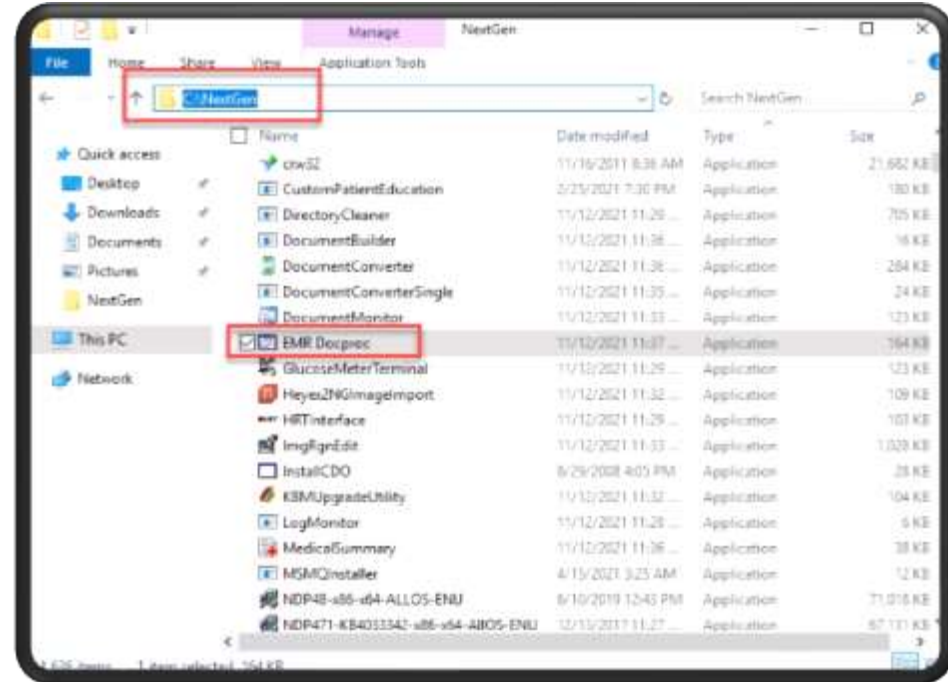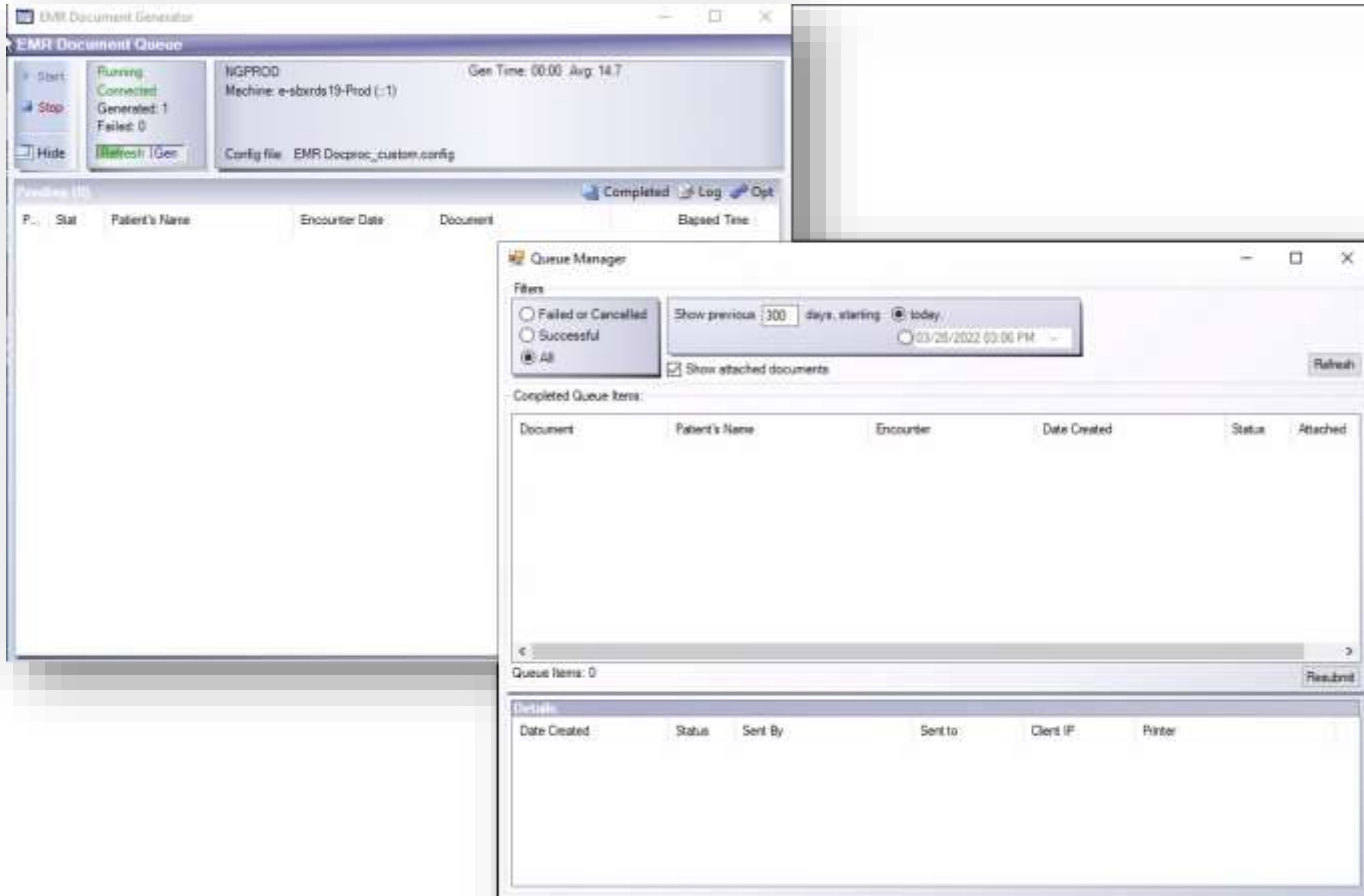
Offline Document Processor

- Document Queue uses basically the same software as a real-time document generation and has similar requirements to NextGen Enterprise EHR.

- You should not run multiple instances of EMR DocProc.exe on the same machine

- If a single instance of the Document Queue is not sufficient to handle practice typical offline document volume, it is acceptable to launch additional instance on separate workstations, if each workstation only has a single instance running.

eMedApps.com

Offline Document Processor

eMedApps.com

Offline Document Processor

- Set up must be done in the EHRR on the Document Configuration System Template and an instance of ODP must be running on a server.

- In NextGen go to File > System / Practice Template > Framework Content > Document Configuration

eMedApps.com
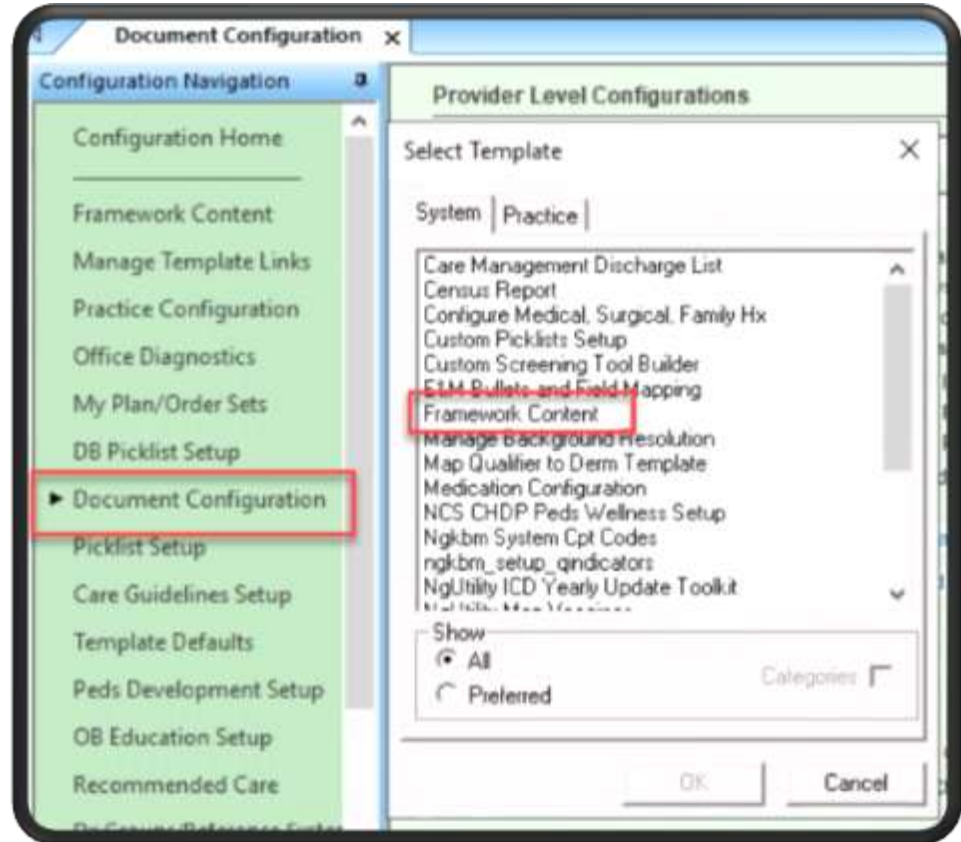
Offline Document Processor

- **Set Chart Note to Offline document generation** – Configures the option to generate the Chart Note offline. If you clear this option, the Chart Note document gets generated normally. This check box is disabled if you select **Disable Chart Note** generation option.

- **Set Master document to Offline document generation** – Configures the option to generate the master document offline. If you clear this option, the mater document gets generated normally. Offline generation can save the time of the provider that would have been spent waiting for the document to produce a copy in NextGen. The Master document cannot be disabled.

- **Set template other than the Master document and Chart Note to Offline document generation** – Sets the document generation offline on the respective templates. By selecting this check box, you can also configure the **Generate Document** button in the **Communication** panel to submit the telephone_call_communication document for offline generation.

Offline Document Processor

eMedApps.com

Offline Document Processor

Custom Trigger for sending a document to the ODP

Q&A

eMedApps™
Smarter. Faster. Easier.

847-490-6869
info@emedapps.com

THANK YOU!