

# NEXTGEN ASSESSMENT, PLAN, DIAGNOSTICS, & REFERRALS DEMONSTRATION

This example illustrates the process of choosing assessments & documenting plans in NextGen. It also covers ordering diagnostic studies such as X-rays & requesting referrals.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Assessments  
My Plan  
A/P Details

When you've worked your way to the bottom of the **SOAP tab**, you might next perform any of several activities: Document assessments & plans, prescribe meds, order labs, plan X-rays, or request referrals. The order you do them will vary by clinic, the day's patient flow, & personal preference.

For this exercise, we'll first address Assessment/Plan. Begin by clicking the **Add/Update** button.

Resident-Attending discussion took place  Attending saw patient

Consent

Procedure Scheduling

Add/Update

Remove

✦ Consent



Provider  
Comm.



Meds



Procedures



Patient  
Plan

Visit Document

Document Library



EM Coding



Dictation

Today's Concerns/Reason for Visit:

I. Cough

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
Cough	786.2
Dysuria	788.1
Fever	780.60
Headache	784.0
Lethargy	780.79
Lipoma, unspecified site	214.9

Add Common Assessment | Diagnosis Code Lookup

Clinical Problems

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Osteoarthritis of knee	
Postmenopausal	01/29/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low Back Pain	724.2
Pharyngitis, Acute	462

Dx description: Code: Status: Site:

Impression: Differential Dx:

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites

Add/Update

Today's Assessments

A group of tabbed popups appears; let's call this the **Assessment-Plan Suite**. Here you have multiple ways to select diagnoses. The easiest involve picking something from the patient's previous **Diagnoses History**, the **Problems** list, or your **My Favorites** list.

Today's Concerns/Reason for Visit:

1. Cough

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
Cough	786.2
Dysuria	788.1
Fever	780.60
Headache	784.0
Lethargy	780.79
Lipoma, unspecified site	214.9

Clinical Problems

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Osteoarthritis of knee	
Postmenopausal	01/29/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low Back Pain	724.2
Pharyngitis, Acute	462

[Add Common Assessment](#) | [Diagnosis Code Lookup](#)

Dx description: Code: Status: Site:

Impression: Differential Dx:

Clicking the **Add Common Assessment** button will give you a superbill-like short list of common diagnoses.

Common Assessments: Adult Assessment Female

<b>Cardiovascular/Circulatory</b>	<b>Gastrointestinal</b>	<b>Health Maintenance</b>	<b>Neurologic</b>
Abnormal ECG 794.31	+ Abdominal pain	+ Exams 780.4	+ Migraine 346.90
+ Anemia 784.0	Abnormal transaminase/LDH 790.4	+ Long-term illness 784.0	+ Syncope 780.2
+ Arrhythmias	+ Bleeding	+ Screening codes	
Chest pain 786.50	Constipation 564.00	+ Vaccines/immunizations	
Coronary atherosclerosis 414.00	Diarrhea 787.91		
Edema, localized 782.3	+ Diverticular disease	<b>Immunologic</b>	<b>Personal &amp; Family History</b>
Elevated BP w/o HTN 796.2	+ Gastroenteritis	+ Allergy	
+ Heart Failure	Gastroesophageal reflux 530.81	+ Autoimmune disorders	<b>Psychiatric/Mental Disorders</b>
+ Hypertension	Hemorrhoids 455.6	Chronic fatigue syndrome 780.71	Anxiety state 300.00
Palpitations 785.1	Irritable bowel syndrome 564.1	<b>Infectious Disease</b>	Depression 311
	+ Nausea/vomiting	+ Exposure	Insomnia 780.52
<b>Dermatologic</b>	<b>Genitourinary</b>	+ Hepatitis	Tobacco use disorder 305.1
Acne 706.1	+ Calculus	Herpes zoster 053.9	
+ Cellulitis/abscess	Dysuria 788.1	+ Sexually Transmitted	<b>Respiratory</b>
+ Dermatitis/eczema	+ Hematuria	Viral infection 079.99	+ Asthma
Ingrown nail 703.0	+ Kidney Disease	<b>Metabolic/Endocrine</b>	Bronchitis, acute 466.0
+ Neoplasms of Skin	Urinary frequency 788.41	+ Diabetes Mellitus	COPD 496
Rash 782.1	+ Urinary Incontinence	+ Lipid disorders	Cough 786.2
Skin lesion 709.9	Urinary tract infection 599.0	Obesity 278.00	Dyspnea 786.05
Warts 078.10	<b>Head, Eyes, Ears, Nose, Throat</b>	+ Thyroid disorders	Upper Resp Infect, acute 465.9
		<b>Musculoskeletal</b>	<b>Signs &amp; Symptoms</b>
		Low back pain 780.4	
		Myalgia 372.30	
		Osteoarthritis 710.0	
		Osteoporosis 730.0	
		Pain, joint 780.0	
		Sciatica 368.9	
		Sprain/strain 860.0	
		Neoplasms of Soft Tissue	
		Benign 860.0	
		Malignant 860.0	

Click **COPD** to add it to Today's Assessments.

Clicking any item that is a bold heading or has a + sign will bring up a picklist of related diagnoses. Here we'll click **Lipid disorders** & pick **Mixed Hyperlipidemia 272.2**.

Ngkbn Get Common DbpickList

DESCRIPTION	Code
PURE HYPERCHOLESTEROLEMIA	272.0
PURE HYPERGLYCERIDEMIA	272.1
MIXED HYPERLIPIDEMIA	272.2
HYPERLIPIDEMIA NEC/NOS	272.4
LIPOPROTEIN DEFICIENCIES	272.5

Refresh OK Cancel

Common Assessments: Adult Assessment Female

<b>Cardiovascular/Circulatory</b>	<b>Gastrointestinal</b>	<b>Health Maintenance</b>	<b>Neurologic</b>
Abnormal ECG 794.31	+ Abdominal pain	+ Exams	Dizziness/vertigo 780.4
+ Anemia	Abnormal transaminase/LDH 790.4	+ Long-term Medication Use	Headache 784.0
+ Arrhythmias	+ Bleeding	+ Screening codes	Migraine 346.90
Chest pain 786.50	Constipation 564.00	+ Vaccines/immunizations	Syncope 780.2
Coronary atherosclerosis 414.00	Diarrhea 787.91	<b>Immunologic</b>	
Edema, localized 782.3	+ Diverticular disease	+ Allergy	<b>Personal &amp; Family History</b>
Elevated BP w/o HTN 796.2	+ Gastroenteritis	+ Autoimmunue disorders	
+ Heart Failure	Gastroesophageal reflux 530.81	Chronic fatigue syndrome 780.71	<b>Psychiatric/Mental Disorders</b>
+ Hypertension	Hemorrhoids 455.6	<b>Infectious Disease</b>	Anxiety state 300.00
Palpitations 785.1	Irritable bowel syndrome 564.1	+ Exposure	Depression 311
	+ Nausea/vomiting	+ Hepatitis	Insomnia 780.52
<b>Dermatologic</b>	<b>Genitourinary</b>	Herpes zoster 053.9	Tobacco use disorder 305.1
Acne 706.1	+ Calculus	+ Sexually Transmitted	<b>Respiratory</b>
+ Cellulitis		Viral infection 079.99	+ Asthma
+ Dermatitis		<b>Metabolic/Endocrine</b>	Bronchitis, acute 466.0
+ Inguinal hernia		+ Diabetes Mellitus	COPD 496
+ Neoplasm		+ Lipid disorders	Cough 786.2
Rash		Obesity 278.00	Dyspnea 786.05
Skin		+ Thyroid disorders	Upper Resp Infect, acute 465.9
Warts 078.10	<b>Head, Eyes, Ears, Nose, Throat</b>	<b>Musculoskeletal</b>	<b>Signs &amp; Symptoms</b>
	Allergic rhinitis 477.9	Low back pain 724.2	Fatigue/malaise 780.79
	Cerumen impaction 380.4	Myalgia/myositis 729.1	Fever 780.60
	Conjunctivitis 372.30	+ Osteoarthritis	Lymphadenopathy 785.6
	+ Otitis	Osteoporosis 733.00	<b>Women's Health</b>
	Pharyngitis, acute 462	+ Pain, joint/extremity	+ Abnormal pap test
	+ Sinusitis	Sciatica 724.3	Contraceptive management V25.9
	Visual disturbance 368.9	+ Sprain/strain	Irregular menstrual cycle 626.4

These diagnoses are added to Today's Assessments.

When done click Save & Close.

Today's Assessments

#	Diagnosis Description	Code	Status
1	COPD	496	
2	Mixed Hyperlipidemia	272.2	

Remove Save & Close

**Add or Update Assessment**

Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Concerns/Reason for Visit: 1. Cough

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postinfectious (acute or subacute) sinusitis (related) (natural)	V49.81
Chronic frontal sinusitis	401.1
Chronic rhinosinusitis	473.1
Cough	786.2
Fever	780.60

**Clinical Problems**

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Osteoarthritis of knee	
Postmenopausal	01/29/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low Back Pain	724.2
Pharyngitis, Acute	462

Dx description: COPD Code: 496 Status: Site:

Impression: Differential Dx:

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites **Add/Update**

Today's Assessments

	Description(code) Status Site	Impression/Differential Dx
1	COPD (496)	
2	Mixed Hyperlipidemia (272.2)	

Save & Close | Sort | Remove

Let's add COPD to the Problem list. Select COPD & click the Add assessment to Clinical problems checkbox.

You can also click Mark diagnosis as chronic, though that seems pretty much implied here.

Then click Add/Update.

**COPD is now on the Problem list. (I've added Mixed Hyperlipidemia as well in a similar fashion.)**

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
COPD	496
Cough	786.2
Dysuria	788.1
Fever	780.60
Headache	784.0
Lethargy	780.79

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Chronic obstructive lung disease	02/24/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low Back Pain	724.2
Pharyngitis, Acute	462

[Add Common Assessment](#) | [Diagnosis Code Lookup](#)

Dx description:  Code:  Status:  Site:

Impression:  Differential Dx:

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites

Add/Update

Today's Assessments

#	Description(code) Status Site	Impression/Differential Dx
1	COPD (496)	
2	Mixed Hyperlipidemia (272.2)	

**In a similar way, you can add diagnoses to your My Favorites list. Select Mixed Hyperlipidemia, then check the Add assessment to My favorites checkbox.**

Save & Close Sort Remove

You'll next see a field where you can type the name of the Favorites Category you would like to add it to.

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
COPD	496
Cough	786.2
Dysuria	788.1
Fever	780.60
Headache	784.0
Lethargy	780.79

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Chronic obstructive lung disease	02/24/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low back pain	724.2
Pharyngitis, Acute	462

Dx description:  Code:  Status:  Site:

Impression:  Differential Dx:

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites

Today's Assessments

#	Description(code) Status Site	Impression/Differential Dx
1	COPD (496)	
2	Mixed Hyperlipidemia (272.2)	

Alternately, you can click the dropdown arrow & select from categories you've already established. Here I'll pick **Metabolic**.

Ngkbn Diagnosis Favorite Mstr

Diag Favorite Name
CV
Metabolic
Misc
Pulmonary

# Add or Update Assessment

Assessments

My Plan

A/P Details

Labs

Diagnostics

Referrals

Office Procedures

Cosign Orders

## Today's Concerns/Reason for Visit:

1. Cough

When done, click **Add/Update**.

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
COPD	496
Cough	786.2
Dysuria	788.1
Fever	780.60
Headache	784.0
Lethargy	780.79

## Clinical Problems

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Chronic obstructive lung disease	02/24/2014

My Favorites Favorites Category: All Filter:

Description	Code
Cough	786.2
Lethargy	780.79
Low back pain	724.2
Pharyngitis, Acute	462

[Add Common Assessment](#) | [Diagnosis Code Lookup](#)

Dx description:

Code:

Status:

Site:

Impression:

Differential Dx:

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites

**Add/Update**

## Today's Assessments

#	Description(code) Status Site	Impression/Differential Dx
1	COPD (496)	
2	Mixed Hyperlipidemia (272.2)	

For the most thorough diagnosis search capability, click **Diagnosis Code Lookup**.

Save & Close

Sort

Remove

There are several ways to search here. You can select from the patient's prior diagnoses, chronic problems, your "My Favorites" list, & categorized lists of related diagnoses.

The screenshot shows a medical search interface. At the top, there is a search bar with the placeholder text "Enter search term" and a "Search" button. Below the search bar, the interface is divided into two main sections: a left sidebar and a main content area. The left sidebar is highlighted with a green rounded rectangle and contains the following items:

- All Diagnoses** (highlighted in blue)
- Patient's Diagnoses
- Patient's Chronic Diagno
- ▼ Favorites +
  - Metabolic
  - CV
  - Pulmonary
  - Misc
- ▼ Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis

The main content area has a header with two tabs: "Clinical Description and ICD Code" and "Billing Description". The main content area is currently empty. At the bottom of the interface, there are "Select" and "Cancel" buttons.

While those are all helpful, the raw search tool is now vastly improved. It is good at finding both medical & lay terms, & gives you alternate wordings of many codes. It also prioritizes results such that the patient's previous diagnoses, chronic problems, & your most commonly chosen terms appear at the top of the list, making it more likely that you'll find your desired diagnosis in the first few alternatives. Here I typed **bronchitis** then clicked **Search**.

The screenshot shows a search interface with a search bar containing 'bronchitis' and a 'Search' button. A green arrow points from the text 'Here I typed bronchitis then clicked Search' to the search bar and button. The results are displayed in a table with two columns: 'Clinical Description and ICD Code' and 'Billing Description'. The table lists various bronchitis-related conditions and their corresponding ICD codes. A sidebar on the left shows a navigation menu with categories like 'All Diagnoses', 'Patient's Diagnoses', 'Patient's Chronic Diagnosis', 'Favorites', and 'Categories'. At the bottom, it indicates '96 rows returned' and has 'Select' and 'Cancel' buttons.

Clinical Description and ICD Code	Billing Description
Bronchitis w/ airway obstruction   491.20	OBSTRUCTIVE CHRONIC BRONCHITIS, WITHOUT EX
Bronchitis with airway obstruction   491.20	OBSTRUCTIVE CHRONIC BRONCHITIS, WITHOUT EX
Bronchitis due to chemical fumes   506.0	Bronchitis and pneumonitis due to fumes and vap
Bronchitis due to chemical vapors   506.0	Bronchitis and pneumonitis due to fumes and vap
Bronchitis due to fumes and vapors   506.0	Bronchitis and pneumonitis due to fumes and vap
Bronchitis due to fumes AND/OR vapors   506.0	Bronchitis and pneumonitis due to fumes and vap
Bronchitis due to fumes AND/OR vapours   506.0	Bronchitis and pneumonitis due to fumes and vap
Bronchitis and pneumonitis due to fumes and vapors   506.0	Bronchitis and pneumonitis due to fumes and vap
Acute bronchitis w/ obstructive chronic bronchitis   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis with obstructive chronic bronchitis   491.22	Obstructive chronic bronchitis with acute bronchi
Obstructive chronic bronchitis with acute bronchitis   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis w/ obstructive CB   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis with obstructive CB   491.22	Obstructive chronic bronchitis with acute bronchi

Sometimes, though, you might want to see the results alphabetized. Click on the **column header** to do this.

Search bronchitis Search

**All Diagnoses**

- Patient's Diagnoses
- Patient's Chronic Diagnosis
- Favorites
  - Metabolic
  - CV
  - Pulmonary
  - Misc
- Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis

Clinical Description and ICD Code	Billing Description
Acute (sudden onset) inflammation of the air passages in th...	Acute bronchitis
Acute bronchitis   466.0	Acute bronchitis
Acute bronchitis w/ obstructive CB   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis w/ obstructive chronic bronchitis   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis with obstructive CB   491.22	Obstructive chronic bronchitis with acute bronchi
Acute bronchitis with obstructive chronic bronchitis   491.22	Obstructive chronic bronchitis with acute bronchi
Acute exacerbation of chronic obstructive lung disease   4...	OBSTRUCTIVE CHRONIC BRONCHITIS, WITH (ACUTI
Acute exacerbation of chronic obstructive pulmonary diseas...	OBSTRUCTIVE CHRONIC BRONCHITIS, WITH (ACUTI
Acute exacerbation of COPD   491.21	OBSTRUCTIVE CHRONIC BRONCHITIS, WITH (ACUTI
Acute inflammation of the air passages in the lungs   466.0	Acute bronchitis
Acute wheezy bronchitis   466.0	Acute bronchitis
Asthma bronchitis   493.90	ASTHMA,UNSPECIFIED TYPE, UNSPECIFIED
Asthmatic bronchitis   493.90	ASTHMA,UNSPECIFIED TYPE, UNSPECIFIED

96 rows returned

Select Cancel

For the purposes of this example I'll select **Acute bronchitis**.

Q diabetes Search

**All Diagnoses**

- Patient's Diagnoses
- Patient's Chronic Diagnosis
- Favorites
  - Metabolic
  - CV
  - Pulmonary
  - Misc
- Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis

Clinical Description and ICD Code	Billing Description
Diabetes   250.00	Diabetes mellitus without r
Diabetes type 1   250.01	Diabetes mellitus without r
Diabetes type I   250.01	Diabetes mellitus without r
Type 1 diabetes   250.01	Diabetes mellitus without r
Type 2 diabetes   250.00	Diabetes mellitus without r
Type I diabetes   250.01	Diabetes mellitus without r
Type I diabetes (high blood sugar disease), also known as juvenile diabetes   250.01	Diabetes mellitus without r
Type 2b Fredrickson's hyperlipoproteinemia   E78.2	Mixed hyperlipidemia
Type 2B MEN   E31.23	Multiple endocrine neopla
Type 2B multiple endocrine neoplasia   E31.23	Multiple endocrine neopla
Type 1 pre-existing diabetes in pregnancy   O24.019	Pre-existing diabetes, type
Type 1 pre-existing diabetes in pregnancy, 1st trimester   O24.011	Pre-existing diabetes, type
Type 1 pre-existing diabetes in pregnancy, 2nd trimester   O24.012	Pre-exist diabetes, type 1, i

Results are limited to top 100. Consider refining search.

Select Cancel

Here's another search tip. The less you enter, the longer the search will take, & the more results you will have to wade through. Spending a couple extra seconds typing (for example **diabetes mellitus type 2** instead of **diabetes**) may speed you up in the long run.

Today's Concerns/Reason for Visit:

1. Cough

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute bronchitis	466.0
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
COPD	496
Cough	786.2
Dysuria	788.1
Fever	780.60

Clinical Problems

Show Chronic  Show My Tracked problems  No active problems

Description	Code
Allergic rhinitis	477.9
Benign essential hypertension	401.1
Chronic frontal sinusitis	473.1

My Favorites

Description	Code
Cough	786.2
Lethargy	780.79
Low back pain	724.2
Mixed Hyperlipidemia	272.2

Note that if you wanted to rearrange your diagnoses you could do so by clicking **Sort**.

Next you'd probably like to add some plans. Let's click **My Plan**.

Mark diagnosis as chronic Add assessment to:  Clinical problems  My tracked problems  My favorites

Add/Update

Today's Assessments

#	Description(code) Status Site	Impression/Differential Dx
1	COPD (496)	
2	Mixed Hyperlipidemia (272.2)	
3	Acute bronchitis (466.0)	

Save & Close

Sort

Remove

My Plan

Assessments My Plan A/P Details Labs Diagnostics Referrals Office Procedures Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

#	Description	Code
1	COPD	496
2	Mixed Hyperlipidemia	272.2
3	Acute bronchitis	466.0

Reference System:  
custom\_impression\_

Diagnosis Group:  
COPD

Use order set from:  My saved  Others saved -select a set to use

Display:  
 Order sets  Protocols

Protocols due in:

Save Order Set

Procedure/Test Instructions

Record Request

regnant:  
 No  Yes  Results  Not pertinent

Additional orders  
Select type (Required)  
click arrow to choose

visit/referral  
 is to schedule a follow-up visit  
 will be referred to

Disposition:  
 Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

The My Plan tab opens, initially focused on the My Plan Tab. This template has potential, but over the years it has been shackled with flaws & configuration issues that have impaired our ability to do much with it. As time allows, the EHR team will be evaluating the My Plan template more thoroughly, & we'll update you in the future if we feel we can incorporate this into our workflow.

However, for now I'd suggest moving to the next tab, A/P Details.

Today's Assessments: (Select an assessment and enter the details below)

#	Description
1	COPD
2	Mixed Hyperlipidemia
3	Acute bronchitis

You have a number of fields here, which you can use in a mix & match fashion for each diagnosis. You can type or use **My Phrases** to enter documentation.

Selected Assessment: Acute bronchitis

Add Edit Sort DX Remove

Impression/Comments: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Differential Diagnosis: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Empty text area for Impression/Comments with a microphone icon.

COPD exacerbation. Pneumonia. Ongoing tobacco abuse?

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Previous Patient Details | Previous Provider Details | Health Promotion Plan

Patient Details: Exclusions Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

Provider Details: Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

I think you're having a minor bout of bronchitis, but this could also be thought of as a flare-up of your chronic lung disease. It's great that you've quit smoking. Azithromycin 5 day course. Acetaminophen, fluids, rest, vaporizer/steamy showers, etc. Guaifenesin DM (generic over-the-counter) as needed for cough. Recheck if getting high/protracted fever, worsening cough/shortness of breath, or not resolving in 10-14 days. Work note for 3 days; may return earlier if feeling better sooner, cough is improving, and temperature has

Patient reports quitting smoking, but smelled strongly of smoke today, so I'm not sure about that. And I see an escalating number of Dx's of "bronchitis" etc in the last year, so I suspect the COPD is coming home to roost. After we've cleared her up w/ this course of antibiotics, plan recheck w/ spirometry at that time. I'm also having her get a CXR after she leaves the office.

(Provider details will not print on the patient plan.)

Today's Orders:

Empty text area for Today's Orders with a microphone icon.

Follow Up Counseling Details

Quick Task Save & Close Cancel

Today's Assessments: (Select an assessment and enter the details below.)

#	Description
1	COPD
2	Mixed Hyperlipidemia
3	Acute bronchitis

Impression/Comments would be a good place to put a rewording of a diagnosis. E.G., if the diagnosis read "varicella zoster," you could enter "shingles."

Selected Assessment: Acute bronchitis

Add Edit Sort DX Remove

Impression/Comments: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Differential Diagnosis: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Text area for Impression/Comments with a microphone icon.

COPD exacerbation. Pneumonia. Ongoing tobacco abuse?

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Previous Patient Details | Previous Provider Details | Health Promotion Plan

Patient Details: Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

Provider Details: Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

I think she's having a mild bout of bronchitis, but this could be... thought you've quit smoking. Azithromycin 5 day course. Acetaminophen, flu... vapor... need... cough... may...

Patient reports quitting smoking, but smelled strongly of smoke today, so I'm not sure about that. And I see an escalating number of Dx's of "bronchitis" etc in the last year, so I suspect the COPD is coming home to roost. After we've cleared her up w/ this course of antibiotics, plan recheck w/ spirometry at that time. I'm also having her get a CXR after she leaves the office.

(Provider details will not print on the patient plan.)

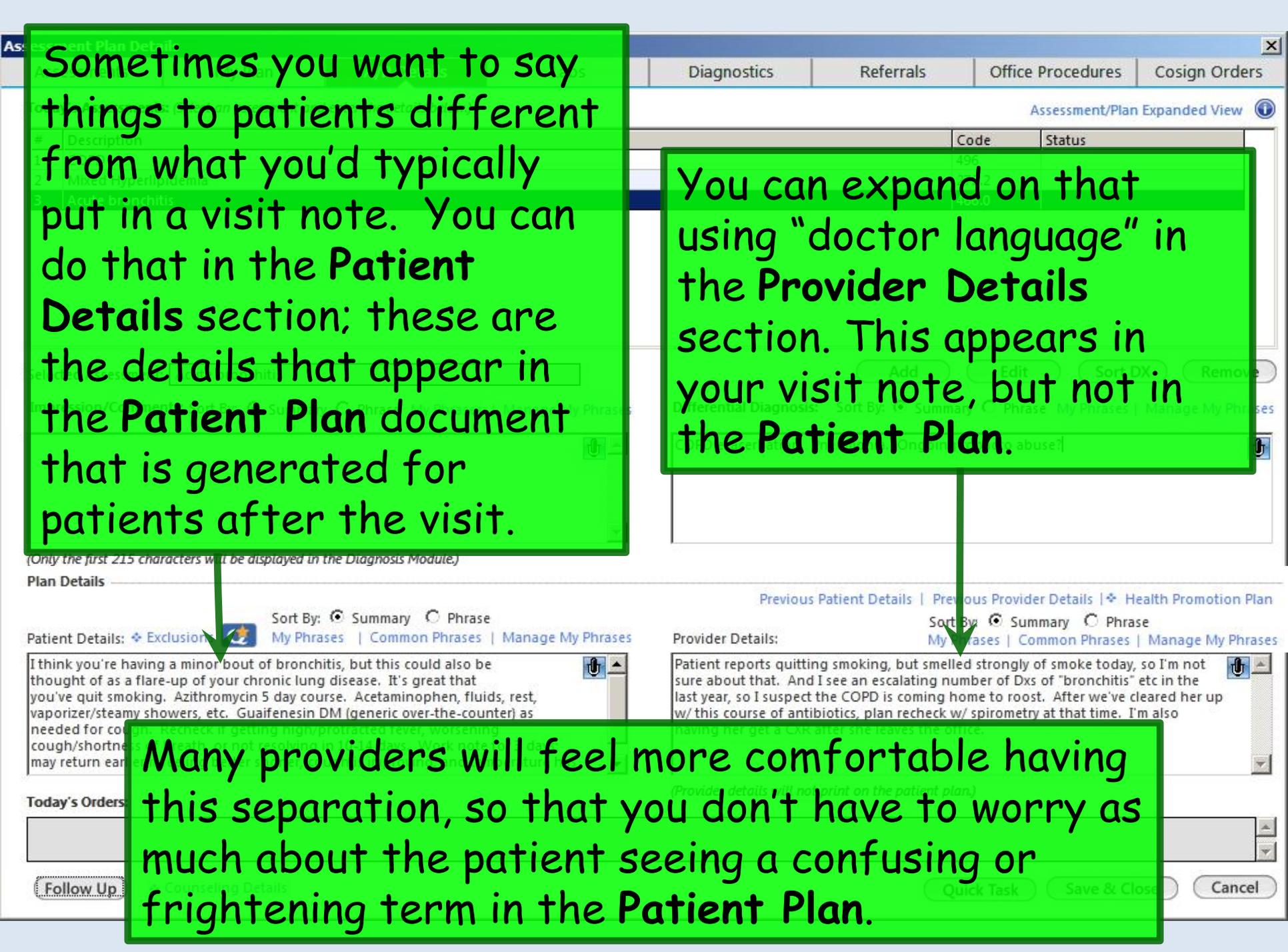
Today's Orders:

You can enter an "English language" Differential Diagnosis, rather than having to go on another code search.

Sometimes you want to say things to patients different from what you'd typically put in a visit note. You can do that in the **Patient Details** section; these are the details that appear in the **Patient Plan** document that is generated for patients after the visit.

You can expand on that using "doctor language" in the **Provider Details** section. This appears in your visit note, but not in the **Patient Plan**.

Many providers will feel more comfortable having this separation, so that you don't have to worry as much about the patient seeing a confusing or frightening term in the **Patient Plan**.



Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

You can also indicate follow-up plans here. Click the **Follow Up** button, & in the ensuing popup, select the desired details.

Selected Assessment: Acute bronchitis

Impression/Comments: Sort By:  Summary  Phrase My Phrases | M

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Patient Details:  Exclusions  My Phrases | Common Phrases | M

I think you're having a minor bout of bronchitis, but this could also be thought of as a flare-up of your chronic lung disease. It's great that you've quit smoking. Azithromycin 5 day course. Acetaminophen, fluids, vaporizer/steamy showers, etc. Guaifenesin DM generic over-the-counter needed for cough. Recheck if getting high/protracted fever, worsening cough/shortness of breath, or not resolving in 10-14 days. Work note for 3 days; may return earlier if feeling better sooner, cough is improving, and temperature has

Today's Orders:

**Follow Up**  Counseling Details

**Follow-up/Disposition**

Acute bronchitis

#	Description	Code
1	COPD	496
2	Mixed Hyperlipidemia	272.2
3	Acute bronchitis	466.0

Follow-up: follow-up visit with ROBERT DUFFY, MD 2-3 wks  
 follow up  
with: ROBERT DUFFY, MD Reason:   
Time limit:  Timeframe: 2-3 wks  
 or on this date: / /  Phone number: (251)434-3475

Disposition:  Reason:   
 refused Timeframe:

Place Order OK Cancel

Then click **Place Order, OK**.

Quick Task Save & Close Cancel

Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

#	Description	Code	Status
1	COPD	496	
2	Mixed Hyperlipidemia	272.2	
3	Acute bronchitis	466.0	

For this demonstration let's also order an X-ray. Move to the **Diagnostics** tab.

Selected Assessment: Acute bronchitis

Add    Edit    Sort DX    Remove

Impression/Comments: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

Differential Diagnosis: Sort By:  Summary  Phrase My Phrases | Manage My Phrases

*(Only the first 215 characters will be displayed in the Diagnosis Module.)*

COPD exacerbation. Pneumonia. Ongoing tobacco abuse?

Plan Details

[Previous Patient Details](#) | [Previous Provider Details](#) | [Health Promotion Plan](#)

Patient Details: [Exclusions](#) Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

Provider Details: Sort By:  Summary  Phrase My Phrases | Common Phrases | Manage My Phrases

I think you're having a minor bout of bronchitis, but this could also be thought of as a flare-up of your chronic lung disease. It's great that you've quit smoking. Azithromycin 5 day course. Acetaminophen, fluids, rest, vaporizer/steamy showers, etc. Guaifenesin DM (generic over-the-counter) as needed for cough. Recheck if getting high/protracted fever, worsening cough/shortness of breath, or not resolving in 10-14 days. Work note for 3 days; may return earlier if feeling better sooner, cough is improving, and temperature has

Patient reports quitting smoking, but smelled strongly of smoke today, so I'm not sure about that. And I see an escalating number of Dx's of "bronchitis" etc in the last year, so I suspect the COPD is coming home to roost. After we've cleared her up w/ this course of antibiotics, plan recheck w/ spirometry at that time. I'm also having her get a CXR after she leaves the office.

*(Provider details will not print on the patient plan.)*

Today's Orders:

Follow Up    [Counseling Details](#)

Quick Task    Save & Close    Cancel

Insurance name: AFLAC

Policy #: 123456789

Today's Assessments

Select a diagnosis to associate with the desired order(s) below.

Add Diagnosis Screening Assessment | Add Common Assessment

#	Diagnosis Description	Code
1	COPD	491.20
2	Diabetes Mellitus Type 2, Uncomplicated	250.00
3	Unspecified essential hypertension	401.0

Selected diagnosis: COPD

Add Edit Remove

We'll select the COPD diagnosis to associate with the X-ray.

Note, though, that if you didn't have an appropriate diagnosis, you could click Add Screening Assessment & pick one from this popup, such as Cough.

Currently pregnant No Yes Possible Not pertinent

Enter search term

- + X-ray Head/Spine
- + Mammography
- + MRI Body/Extremity
- + X-ray Upper Extremity
- + Nuclear Medicine
- + MRI (Vascular MR)

All Diagnoses	Clinical Description and ICD Code	Billing Description
Patient's Diagnoses	Abdominal pain, unspecified site   789.00	Abdominal pain, unspecified site
Patient's Chronic Diagnosis	Cervicalgia   723.1	Cervicalgia
Favorites	Backache, unspecified   724.5	Backache, unspecified
Metabolic	Acute pain due to trauma   338.11	ACUTE PAIN DUE TO TRAUMA
CV	Unspecified chest pain   786.50	Unspecified chest pain
Pulmonary	Aftercare for healing traumatic fracture of other bone   V54.19	Aftercare for healing traumatic fracture of other bone
Misc	Pain in limb   729.5	Pain in limb
Diagnostic Screening	Other chronic pain   638.29	CHRONIC PAIN NEC
Abnormal Tests/L	Cough   786.2	Cough
Accucheck	Tobacco use disorder   305.1	Tobacco use disorder
Acute Otitis	Palindromic rheumatism involving other specified sites   719.38	Palindromic rheumatism involving other specified sites
All FX	Symbolic dysfunction, unspecified   784.60	Symbolic dysfunction, unspecified
Arrhythmias		

12 rows returned

Select Cancel

Quick Task Save & Close Cancel

Click the **X-ray Body** link, & in the ensuing popup scroll down & double-click on **X-ray, chest, two views, frontal/lateral**.

Diagnosis Description

#	Description	Code
1	COPD	491.20
2	Diabetes Mellitus Type 2, Uncomplicated	
3	Unspecified essential hypertension	

Selected diagnosis: COPD

Orders

When ordering studies requiring contrast, enter the proposed contrast medium into the medication module to check for potency.

Allergy: PENICILLINS

Medication: metformin 1,000 mg tablet, lisinopril 20 mg-hydrochlorothiazide 12.5 mg tablet

- + X-ray Head/Spine
- + X-ray Upper Extremity
- + X-ray Lower Extremity
- + X-ray Body
- + CT Head/Spine
- + CT Body/Extremities

Service Item Mstr

Description	Service Item Id
X-ray exam, abdomen, complete	74020
X-ray exam, abdomen, complete acute series	74022
X-ray exam, abdomen, single AP view	74000
X-ray exam, hip, complete, 2+ views	73510
X-ray exam, hips, 2+ views ea hip & AP pelvis	73520
X-ray exam, neck tissue	70360
X-ray exam, pelvis, 2 views	72170
X-ray exam, ribs, both sides, 3 views	71110
X-ray exam, ribs, chest, one side, 3+ views	71101
X-ray exam, ribs, chest, both sides, 4+ views	71111
X-ray exam, sacrum/coccyx, 2+ views	72220
X-ray exam, shoulder, complete, 2+ views	73030
X-ray exam, sternum, 2+ views	71120
X-ray upper GI tract w/small intest air contr	74249
X-ray, chest, single view, frontal	71010
X-ray, chest, special views	71035
X-ray, chest, two views, apical lordotic proc	71021
X-ray, chest, two views, frontal/lateral	71020
X-ray, chest, two views, oblique projections	71022

Currently pregnant:  No  Yes  Possible  Not pertinent

Qty: Diagnostic study:

Side:	Site:
1	

Refresh

Billing Diagnosis:  Do not add to Today's Assessments

Location: COPD 491.20

Phone number: ( ) -

Authorization required:  No  Yes

Order Module Processing

Place Order

Diagnostic Studies Ordered This Visit

Status	Order	Authorization	Date Completed	Diagnosis	Code	Comments
--------	-------	---------------	----------------	-----------	------	----------

Expand

Quick Task

Save & Close

Cancel

For some films you might need to enter more details, but not for a chest X-ray.

**Diagnostic Studies**

Assessments | My Plan | A/P Details | Labs | **Diagnostics** | Referrals | Office Procedures | Cosign Orders

Insurance name: AFLAC Policy #: 123456789

**Today's Assessments**  
 Select a diagnosis to associate with the desired order(s) below.

#	Diagnosis Description	Code
1	COPD	491.20
2	Diabetes Mellitus Type 2, Uncomplicated	250.00
3	Unspecified essential hypertension	401.9

Selected diagnosis: COPD

**Orders**  
 When ordering studies requiring contrast, enter the proposed contrast medium into the medication module to check for potential drug interactions before selecting the order below. MRI/MRA Questions

Allergy: PENICILLINS Medication: metformin 1,000 mg tablet, lisinopril 20 mg-hydrochlorothiazide 12.5 mg tablet

Currently pregnant:  No  Yes  Possible  Not pertinent

Qty: Diagnostic study: X-ray, chest, two views, frontal/lateral 71020 Side: Site: Modifier: Position: Orientation: Timeframe:

Billing Diagnosis:  Do not add to Today's Assessments Location: Phone number: Authorization required:  Order Module Processing  No  Yes

**Place Order**

**Diagnostic Studies Ordered This Visit**

Status	Order	Authorization	Date Completed	Diagnosis	Code	Comments
--------	-------	---------------	----------------	-----------	------	----------

Click Place Order.

**Select Task Recipients**

Available Users / Workgroups:

- Workgroups
  - EHR Core Group (Core Group)
  - FMC Attending Team (Attending Te
  - FMC Attendings (Physicians)
  - FMC Blue Team (Blue Team e-Rx R
  - FMC Front Office (Front Office)
  - FMC Green Team (Green Team e-R
  - FMC Medical Records (Medical Re
  - FMC Mid-Level (Mid-Level Provider
  - FMC Monitor Case Worker (Social
  - FMC Nursing (Nurses)
  - FMC Nursing Blue (Blue Nursing Te
  - FMC Nursing Red (Red Nursing Te
  - FMC Nursing White (White Nursing
  - FMC Red Team (Red Team e-Rx R
  - FMC Referral Department (Referral
  - FMC Residents

Priority: High

Task Recipients:

Name	Type
------	------

Buttons: Add User(s), Add Group(s), Remove, Clear, New Group, Delete, Modify, OK, Cancel

A tasking popup will appear, at least for the first study you order. Use this if you need to send a task about the study, e.g., if it were a CT scan your referrals staff needed to schedule. Otherwise, you can cancel out of it.

Your order appears on the grid.

Sometimes you might need to enter other details for the benefit of the radiologist—probably not necessary here, but we'll do it for demonstration purposes. Double-click on the **order**.

### Orders

When ordering studies requiring contrast, enter the proposed contrast medium into the medication module to check for potential drug interactions before selecting the order below. [MRI/MRA Questions](#)

**Allergy**

PENICILLINS

**Medication**

metformin 1,000 mg tablet  
lisinopril 20 mg-hydrochlorothiazide 12.5 mg tablet

- + X-ray Head/Spine
- + X-ray Upper Extremity
- + X-ray Lower Extremity
- + X-ray Body
- + CT Head/Spine
- + CT Body/Extremities
- + Mammography
- + Nuclear Medicine
- + PET
- + Ultrasound OBGYN
- + Ultrasound Vascular
- + Ultrasound Body
- + MRI Body/Extremity
- + MRA (Vascular MRI)
- + MRI Head/Spine
- + Cardiology Studies
- + GI Studies
- + Other Diagnostic Studies

**Currently pregnant**  No  Yes  Possible  Not pertinent

Qty:  Diagnostic study:  Side:  Site:  Modifier:  Position:  Orientation:  Timeframe:

Billing Diagnosis:  Do not add to Today's Assessments Location:  Phone number:  Authorization required:  No  Yes [Order Module Processing](#)

**Place Order**

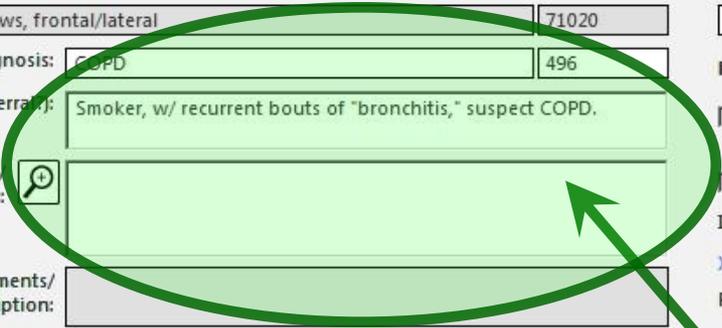
### Diagnostic Studies Ordered This Visit

Status	Order	Authorization	Date Completed	Diagnosis	Code	Comments
ordered	X-ray, chest, two views, frontal/lateral		//	COPD	491.20	

Expand

**Quick Task**  
**Save & Close** **Cancel**

Order: X-ray, chest, two views, frontal/lateral Code: 71020  
Diagnosis: COPD 496  
Reason (for referral): Smoker, w/ recurrent bouts of "bronchitis," suspect COPD.  
Clinical information, comments:  
Attachments/description:  
Authorization: Authorization req'd:  No  Yes  
Side: Site: Position: Orientation:  
Result/report:  
 Received: On: // Reason/comment:  
 Completed: On: // Reason/comment:  
Interpretation:  
X-Ray Interpretation Quick Findings  
Report details:



Use one or both of these two boxes to enter your info.

On: // Reason/comment:  
 Performed:  
Scheduling:  
 Performed:  
Timeframe: Appt: // Hr: Min: AM PM Location:  
Obtained/performed/placed:  
 Performed:  
Reaction:  
Education/instructions:  
 Performed:  
On: // Instruction(s) provided:  
Why do some fields appear to be locked?

Bill units: 1 Service date: ####/####  
Admin/other 1: Clear  
Admin/other 2: Clear  
Venipuncture: Clear  
Additional information:  
Ordering provider: ROBERT LAMAR DUFFY MD  
Ordered:  04/14/2013  
Verbal/standing order:   
Cosi gned/signed off:   
Canceled:

Task  
Submit to Superbill

When done click Save then Close.

Insurance name:  Policy #:

**Today's Assessments**

Select a diagnosis to associate with the desired order(s) below.

[Add Diagnosis Screening Assessment](#) | [Add Common Assessment](#)

#	Diagnosis Description	Code
1	COPD	491.20
2	Diabetes Mellitus Type 2, Uncomplicated	250.00
3	Unspecified essential hypertension	401.0

Selected diagnosis:

**Orders**

When ordering studies requiring contrast, enter the proposed contrast medium into the medication module to check for potential drug interactions before selecting the order below. [MRI/MRA Questions](#)

**Allergy**

**Medication**



- + X-ray Head/Spine
- + Mammography
- + MRI Body/Extremity
- + X-ray Upper Extremity
- + Nuclear Medicine
- + MRA (Vascular MRI)
- + X-ray Lower Extremity
- + PET
- + MRI Head/Spine
- + X-ray Body
- + Ultrasound OBGYN
- + Cardiology Studies
- + CT Head/Spine
- + Ultrasound Vascular
- + GI Studies

We'd often want to print an X-ray requisition at this point. Unfortunately, NextGen's workflow for this isn't very user-friendly. Click **Save & Close**.

**Diagnostic Studies Ordered This Visit**

Status	Order	Authorization	Date Completed	Diagnosis	Code	Comments
ordered	X-ray, chest, two views, frontal/lateral		//	COPD	491.20	

Expand

Go to the Checkout tab.

Ashleigh Quagmire (F)    DOB: 01/02/1957 (57 years)    Weight: 162.00 lb (73.48 Kg)    Allergies: (4)    Problems: (6)    Diagnoses: (22)    Medications: (4)

Address: 123 Toejam Trace    MRN: 000000007762    Emergency Relation:    PCP: ATKINSON, TANGELA C ...  
Mobile, AL 36604    Insurance: MEDICAID OF ALABAMA    Emergency Phone:    Referring:  
Contact: (251) 555-1234 (Home)    NextMD: No    Pharmacy 1: CAFFEYS PHARM...    Rendering: DUFFY, ROBERT LAMAR ...

Alerts    OBGYN Details    Patient    Lipid Clinic Data    Order Admin...    Sticky Note    Referring Provider    HIPAA    Advance Directives    Screening Summary



02/24/2014 10:21 AM : "\*Checkout" x

Specialty ▾ Family Practice    Visit Type ▾ Office Visit

Intake    Histories    SOAP    Finalize    **Checkout**

Care Guidelines    Global Days    Panel Control: Toggle    Cycle

Today's Orders

Lab/Radiology Order Processing    Task    Immunizations

Labs	Status	Order	Side	Site	Location	Timeframe
▶ Diagnostics (1)	ordered	X-ray, chest, two views, frontal/lateral				

Requisition    Add    Edit



Then click the Requisition button.

TX Text

Arial    12    B    I    U    [List icons]    100%    [Zoom icons]    [Print icon]    [Info icon]

  
**USA Family Medicine**  
1504 Springhill Ave Ste 1800  
Mobile, AL 366043273

Ashleigh Quagmire      DOB: 01/02/1957  
123 Toejam Trace      Phone: (251)555-1234  
Mobile, AL 36604

The requisition generates. Click the **Printer** icon to print it.

Order  
X-ray, chest, two views, frontal/lateral Code: 71020.

Now that that little side-trip is over, close the document & navigate back to the bottom of the **SOAP** tab.

Insurance: MEDICAID OF ALABAMA  
Date ordered: 02/24/2014  
Ordering Provider:  
ROBERT LAMAR DUFFY  
1504 Springhill Ave Ste 1800  
Mobile, AL 36604  
Phone: (251) 555-1234  
Fax: (251) 434-3985

PCP: TANGELA C ATKINSON MD

Requisition Information

Primary / Billing Diagnosis: COPD (496)

X-ray, chest, two views, frontal/lateral

## Assessment/Plan

Assessments  
My Plan  
A/P Details  
Labs  
Diagnostics  
Referrals  
Office Procedures  
Review/Consult Orders  
View Immunizations  
Office Diagnostics  
Physical Therapy Orders  
Health Promotion Plan

1.	Assessment	COPD (496).
	Plan Orders	Further diagnostic evaluations ordered today include X-ray, chest, two views, frontal/lateral to be performed.
2.	Assessment	Mixed Hyperlipidemia (272.2).
3.	Assessment	Acute bronchitis (466.0).
	Impression	Differential diagnosis - COPD exacerbation. Pneumonia. Ongoing tobacco abuse?
	Patient Plan	I think you're having a minor bout of bronchitis, but this could also be thought of as a flare-up of your chronic lung disease. It's great that you've quit smoking. Azithromycin 5 day course. Acetaminophen, fluids, rest, vaporizer/steamy showers, etc. Guaifenesin DM (generic over-the-counter) as needed for cough. Recheck if getting high/protracted fever, worsening cough/shortness of breath, or not resolving in 10-14 days. Work note for 3 days; may return earlier if feeling better sooner, cough is improving, and temperature has been under 100 for 24 hrs.
	Provider Plan	Patient reports quitting smoking, but smelled strongly of smoke today, so I'm not sure about that. And I see an escalating number of Dx's of "bronchitis" etc in the last year, so I suspect the COPD is coming home to roost. After we've cleared her up w/ this course of antibiotics, plan recheck w/ spirometry at that time. I'm also having her get a CXR after she leaves the office.

Here we're back at the bottom of the **SOAP** tab. For demonstration purposes, let's also place a referral to pulmonology on this patient. Click **Referrals**.

Resident-Attending discussion took place  Attending saw patient

Consent

Procedure Scheduling

Add/Update

Remove

✦ Consent

Provider  
Comm.

Meds



Procedures

Patient  
Plan

Visit Document

Document Library



EM Coding



Dictation

We're back on the Assessment-Plan Suite, on the Referrals tab. Click the Specialty/specialist name/site bullet, then click in the Specialty box.

**Referrals Order**

Assessments | My Plan | A/P Details

Insurance name:  Policy #:

To:

Obstetrics  
 Therapies/Rehabilitation [Exclusions](#)  
 DME

Specialty:  Provider name:  Location:   Internal referral

Authorization required:  No  Yes

**Diagnosis:**

Description:	Code:
1. <input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>

**Services requested:**  
 Consult  Evaluate and treat  Follow-up and treat  Assume care  Su

**Clinical indications:**  
Reason for referral:  Time limit:  Timeframe:

**Clinical information/Comments:**

**Instructions:**  
 Patient referral/instructions given [Instructions Detail](#)

**Attachments:**

Continuity of Care Document/Record sent

**Referrals ordered this encounter:**

**Ngkbm Dbp Speciality**

Description

- Otolaryngology
- Pain Medicine
- Pathology - Chemical
- Pathology - Clinical
- Pediatrics
- Physiatrist
- Physical Medicine and Rehabilitation
- Physicians Assistant
- Plastic Surgery
- Podiatry
- Psychiatry
- Psychiatry - Child and Adolescent
- Psychiatry - Geriatric
- Public Health and General Preventive Medicine
- Pulmonology
- Pulmonology - Pediatric
- Radiotherapy
- Rheumatology
- Social Work

Scroll down the list in the popup & double-click on Pulmonology.

**Referrals Order**

Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Design Orders

Insurance name:

To:

- Specialty/specialist name/site
- Obstetrics
- Therapies/Rehabilitation [Exclusions](#)
- DME

Specialty:  Internal referral

**Diagnosis:**

Add or Update Assessment | Add Common assessment

Description:	Code:	Description:	Code:
1. <input type="text"/>	<input type="text"/>	3. <input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	4. <input type="text"/>	<input type="text"/>

**Services requested:**

Consult  Evaluate and treat  Follow-up and treat  Assume care

**Clinical indications:**

Reason for referral:  Time limit:  Timeframe:

**Clinical information/Comments:**

**Instructions:**

Patient referral/instructions given [Instructions Detail](#)

**Attachments:**

Click the 1st **Diagnosis** box. You'll see a list of today's assessments & the patient's chronic problems. Double-click on **COPD**.

**Ngkbn Get Current Diagnoses**

Description	Item
Mixed Hyperlipidemia	272.2
Benign essential hypertension	401.1
Acute bronchitis	466.0
COPD	496

Refresh OK Cancel

You can add up to 4 diagnoses if necessary.

**Referrals Order**

Assessments | My Plan | A/P Details | Labs | Diagnostics | **Referrals** | Office Procedures | Cosign Orders

Insurance name:  Policy:

To:  Specialty/specialist name/site  
 Obstetrics  
 Therapies/Rehabilitation  Exclusions  
 DME

Diagnosis:

Description:	Code:
1. COPD	491.20
2. <input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>

Services requested:  
 Consult  Evaluate and treat  Follow-up and treat  Assume care  Surgery

Clinical indications:  
Reason for referral:  Time limit:  Timeframe:

Clinical information/Comments:

Instructions:  
 Patient referral/instructions given  Instructions Detail

Attachments:

Click Evaluate and treat, then click in the Reason for referral box.

**Clinical Indications / Reason for Referral**

- Cardiac catheterization
- Echocardiogram
- EEG
- Fracture care
- Nerve conduction study
- PFTS
- Stress testing
- Total Obstetric care

Close

There may be something on the ensuing popup you can use, but most of the time you'll just close out of it & type something like Smoker with recurrent bouts of bronchitis. Please evaluate & treat further. CXR available in USA system. You could also add info about a specific doctor, such as He requests Dr. Beringer.



Insurance name:  Policy #:

To:   
 Specialty/specialist name/site   
 Obstetrics   
 Therapies/Rehabilitation   
 DME   
Specialty:  Provider name:  Location:   Internal referral   
Authorization required:  No  Yes

Diagnosis:   
Add or Update Assessment | Add Common assessment   
Description: Code: Description: Code:   
1.   3.     
2.   4.

Services requested:   
 Consult  Evaluate and treat  Follow-up and treat  Assume care  Surgery  Diagnostic testing

Clinical indications:   
Reason for referral:  Time limit:  Timeframe:

Clinical information/Comments:

Instructions:   
 Patient referral/instructions given  Continuity of Care Document/Record sent   
 Referrals ordered this encounter:   
 Attachments:

When done click Save & Close.

Code	Diagnosis	Order	Order Comments	Comments
491.20	COPD	Referrals: Pulmonology. Evaluate and treat		

Quick Task Edit   
Save & Close Cancel

## Assessment/Plan

## Assessments

My Plan

A/P Details

Labs

Diagnostics

Referrals

Office Procedures

Review/Cosign Orders

View Immunizations

Office Diagnostics

Physical Therapy Orders

Health Promotion Plan

1.	Assessment	COPD (496).
	Plan Orders	Further diagnostic evaluations ordered today include X-ray, chest, two views, frontal/lateral to be performed. Referrals: Pulmonology. Evaluate and treat.
2.	Assessment	Mixed Hyperlipidemia (272.2).
3.	Assessment	Acute bronchitis (466.0).
	Impression	Differential diagnosis - COPD exacerbation. Pneumonia. Ongoing tobacco abuse?
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	Provider Plan	Patient reports quitting smoking, but smelled strongly of smoke today, so I'm not sure about that. And I see an escalating number of Dx's of "bronchitis" etc in the last year, so I suspect the COPD is coming home to roost. After we've cleared her up w/ this course of antibiotics, plan recheck w/ spirometry at that time. I'm also having her get a CXR after she leaves the office.

You're returned to the **SOAP Tab**, where you can finish your documentation. Note that the plans, X-rays, & referrals you entered display above.

Resident-Attending discussion took place  Attending saw patient

Consent

Procedure Scheduling

Add/Update

Remove

↕ Consent



Provider  
Comm.



Meds



Procedures



Patient  
Plan

Visit Document

Document Library



EM Coding



Dictation

This concludes the NextGen  
Assessment, Plan, Diagnostics, & Referrals  
demonstration.

I feel like I'm diagonally parked  
in a parallel universe.