


NEXTGEN DOCUMENTS DEMONSTRATION

This demonstration reviews generation & usage of documents in NextGen. Details of the workflow will likely vary somewhat depending on practice policy & clinic layout, but this should give you a good idea of program functionality.

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

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

Navigation



Intake
History
Summary
SOAP
Guidelines
Finalize
Checkout

Order Management
> Orders/Plan
Standing Orders

Anticoagulation
Procedures
Tobacco Cessation
Tuberculin Skin Test
Nutrition

Chart Abstraction
Demographics
Document Library
Immunizations
Patient Comment
Provider Test Action
Vital Signs

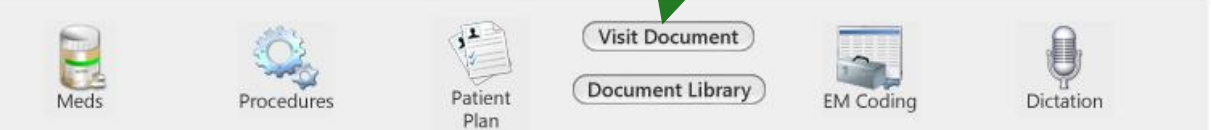
There are several places within NextGen where documents either generate automatically, or you're given the opportunity to generate a pertinent document directly from a template. Here we see buttons on the **Navigation Bar** to generate the visit note, or "master document," either immediately (**Preview**) or **Offline**.

Preview Offline

The bottom of the **SOAP Tab** also gives you the option to generate the visit note immediately by clicking the **Visit Document** button.

Consent Procedure Scheduling Add/Update Remove

Medication took place Attending saw patient



Meds Procedures Patient Plan Visit Document Document Library EM Coding Dictation

Navigation



- Intake
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- Order Management
- > Orders/Plan
- Standing Orders

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- Tobacco Cessation
- Tuberculin Skin Test
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Preview

Offline

Sometimes, however, you'll want to manually select & generate a document. The easiest way to do this is through the **Document Library**, which is also available on the **Navigation Bar** & the bottom of the **SOAP Tab** (& on the **Finalize Tab** as well).

ICD9	*	Description
485.0	A	Bronchitis
	I	
	P	
	D	Azithromycin 5 day course. Acetaminophen, fluids, rest, vaporizer/steamy showers, etc. Guaifenesin DM (generic o cough. Recheck if getting high/protracted fever, worsening cough/shortness of breath, or not resolving in 10-14 da may return earlier if feeling better sooner, cough is improving, and temperature has been under 100 for 24 hrs.
305.1	A	Tobacco Abuse
	I	
	P	
	D	Discussed importance of smoking cessation; it may be the single most important thing you can do for your health.

tion took place Attending saw patient

Consent

Procedure Scheduling

Add/Update

Remove



Meds



Procedures



Patient Plan

Visit Document

Document Library



EM Coding



Dictation

The Document Library provides links to a number of commonly used documents. And if there are other documents that are used frequently by a large number of users, we can add to this list, so send any requests you have to the EHR Team for consideration.

There are also some links to templates that are in turn used to generate documents like risk assessments, controlled substance contracts, etc.

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Many of these documents are simple & self-explanatory, like the various letters. For example, click [Letter To Patient](#).

05/28/2014 10:08 AM : "USA Document Library" ×

General

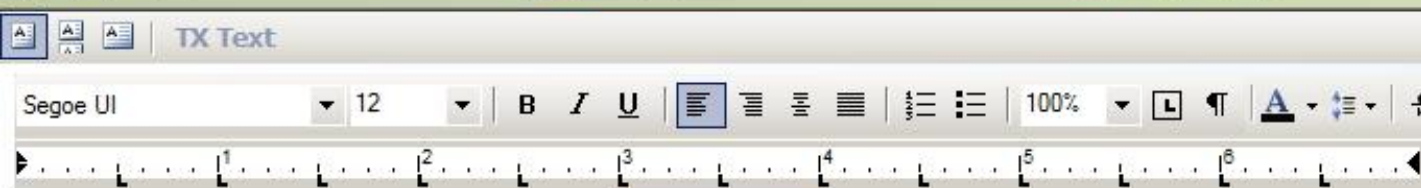
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USA Family Medicine
1504 Springhill Ave Ste 1800
Mobile, AL 366043273

06/15/2013

BBBBB AATestRLDAdultFemale
555 Beehive Drive
Mobile, AL 36604-

Dear Ms. AATestRLDAdultFemale ,

Sincerely,

ROBERT L. DUFFY MD

A generic letter addressed to the patient is generated. Type **additional text** as desired, & print/fax as necessary. When you close the document you'll return to the **Document Library** or other template of your choosing.



You can generate a very comprehensive **Chart Summary**. Until the promise of electronic exchange of medical records is more fully-realized, this might be a good document to give someone who is moving out of town, instead of printing 100 pages of old notes.

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You can also generate a list of all lab results obtained in the last 30 days, or dating back as far as we've been able to get results in the EHR (June 2011).

Many documents that are available elsewhere, such as [Patient Plan](#) or [Visit Note](#), are listed here as well for your convenience.

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<u>General</u>	<u>Letters</u>	<u>Assessments and Tools</u>
After Hours Care Note	Letter About Patient	ACC/AHA ASCVD Risk Estimator
Chart Summary	Letter To Patient	Behavioral Assessments & Tools
Confidential Note	Letter From Consultant	Edinburgh Postnatal Depression Scale
Controlled Substance Agreement, Full	Letter To Consultant	Generate Report Scoring
Controlled Substance Contract, Brief	Work/School Excuse Note	Mini Mental Status Exam
Counseling Notepad	Work/School Excuse Note-FM	Pediatric Symptom Checklist
Discharge Summary-Preliminary	Work/School Excuse Note-Peds	St. Louis Univ Mental Status Exam (SLUMS)
Durable Medical Equipment Order	Work/School Status, Brief	SLUMS Diagram Generate Report
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You have a variety of options for generating documents for work excuses or work status/limitations.

Some links like [Telephone Notes/Clinic Memos](#) open templates that allow you to enter data & then generate a document. Click [Telephone Notes/Clinic Memos](#).

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Specialty Family Practice Visit Type Office Visit

Intake Histories SOAP Finalize Checkout

Care Guidelines Global Days Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: ROBERT PERKINS

Panel Control: Toggle Cycle

Important: Generate document after every entry Generate Document

Communication:

- Clinic Memos / Other Notes
- Medication Management
- Test Result Request
- Forms/Records
- Medical Question
- Referral Request
- Billing Question
- Outgoing Call

Communications: Display: Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason

Refresh Remove

This is our version of the Telephone Call template, which we've expanded to include the opportunity to use it for other brief clinic notes. Click [Clinic Notes / Other Memos](#).

We'll record a brief clinical note. When done, click **Save & Close**.

USA Telephoneother836

Call Information:

Contact type:
Urgency:
Date of call: Time of call:
 After hours

Spoke with: Patient
Name:
Relationship:
[HIPAA](#)

Communication:

Comment: Sort By: Summary Phrase [My Phrases](#) | [Manage My Phrases](#)

 [Review of Test\(s\)](#)

Contact Information:

Home: (251)555-1111 (251)555-2222 Other: (this call only) () -
Day: Ext:
Alternate: () -
Cell: (251)555-3333
Email: rlduffy@health.southalabama.e
* = Preferred contact

Actions:

Schedule appointment:
 Send referral:
 Place new medication order:
 Adjust medication:
 Send test result(s):
 Counsel patient:
 Other:

Details:

Completed:

Tasking:
Priority:

Status: Open Complete

The entry is added to the grid. Click **Generate Note**.

06/03/2014 04:28 PM : "USA Phone & Clinic Memos 836" x


Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Care Guidelines | Global Days ✦ Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: ROBERT PERKINS

Panel Control: Toggle Cycle

Important: Generate document after every entry  **Generate Document**

Communication:

Clinic Memos / Other Notes Medication Management Test Result Request Forms/Records
Medical Question Referral Request Billing Question Outgoing Call

Communications: Display: Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/10/2014	1:57 PM	Received old records from out of town mentioning ASC-US pap last year. Will discuss at appt Tuesday.	Robert L. Duffy		Other

Refresh Remove

TX Text

Arial

12

B*I*U

100%

X₂X²**TELEPHONE NOTES & CLINIC MEMOS**

A log of phone & clinic notes is generated. You can close this & the phone template to return to the Document Library or other template of your choosing.

Patient Name Bessemer Quagmire
Date of Call 06/10/2014
Home phone (251)555-1111
Day phone (251)555-2222
Alternate phone

Telephone Note and Clinic Memo History (last 3 years)

Date	Time	Notes	Note By	Tasked To
06/10/2014	13:57:00	Received old records from out of town mentioning <u>ASC-US</u> pap last year. Will discuss at appt Tuesday.	Robert L. Duffy	
05/30/2014	10:54:00	Comment:This is a Medication Management Send & Close, w/ manual period at end, to see if the unnecessary Comment appears at start..	Robert L. Duffy	<u>Camela Means</u>
05/30/2014	10:50:00	Comment:This is a <u>MedicalQuestion</u> , w/ manual period at end, Send & Close, wo see if redundant Comment appears.	Robert L. Duffy	<u>Shyla Reddy</u>
05/30/2014	10:45:00	Comment:This is an <u>OtherMemo</u> , Send & Close, w/ manual period at end, <u>ona</u> new encounter, new patient, just to see if the redundant Comment still appears..	Robert L. Duffy	<u>Tangela Atkinson</u>

You can generate a brief **Controlled Substance Contract**, or open a template to create a more detailed **Controlled Substance Agreement**. Click **Controlled Substance Agreement, Full**.

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Controlled Substance Agreement

IMPORTANT:

Confirm pharmacy and make sure Active Medication List is complete and accurate before generating this document.

List diagnoses for which controlled substances are being prescribed.

Attention deficit disorder.

Indicate the class of controlled substance being prescribed. (Check all that apply.)

Pain/narcotics

Sedative/hypnotics

Stimulants/ADD meds

Add any additional restrictions or considerations you wish to include in addition to the standard agreement. (If none, leave blank.)

Generate Document

Save & Close

Fill in the requested details & click **Generate Document**.

A Controlled Substance Agreement is generated, which includes prescribing rules, indications for treatment, the med list, pharmacy, & risks/side effects of the class of drug being used. This can be printed for the patient's signature, then scanned back into the EHR.

Mobile, AL 366043273

CONTROLLED SUBSTANCE AGREEMENT

I. POLICIES AND STATEMENTS

A. Purpose

The purpose of this agreement is to protect your access to controlled substances and to protect our ability to prescribe to you. (Examples of controlled substances are narcotic pain medicines, tranquilizers, and stimulants.) Because of the potential for tolerance, dependence, and side effects, we need you to sign an informed consent when use of controlled substance is expected to be ongoing. Also, because these drugs have potential for abuse or diversion, prescribing of such medicines is tightly regulated, and we are strictly accountable for our prescribing policies. Thus, the following policies must be agreed to by you as a condition for our willingness to prescribe controlled substances to you.

B. Names

- 1) The terms "you," "your," and "patient" refer to the patient being treated, and/or the parent or guardian of a minor being treated.
- 2) The terms "we," "our," "us," "doctor," "provider," and "the practice" refer to the University of South Alabama Health Services Foundation medical clinic overseeing the patient's controlled substance prescribing, including its medical professionals and staff.

C. General Rules

- 1) These medication will be prescribed and managed only by the contracted provider, ROBERT L. DUFFY MD. In the event this provider is not available at a time when refills are appropriate, a clinical associate of this provider will address your refill requests.

You can generate a prescription for DME items.
Click [Durable Medical Equipment Order](#).

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TX Text

Times New Roman

12

B

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USA Family Medicine
1504 Springhill Ave Ste 1800
Mobile, AL 366043273
Durable Medical Equipment Order Form

Date of Service: May 28, 2014

Patient: EUGENIA QUAGMIRE

Address: 22 Two Tooth Trail
MOBILE, AL 36604-

Home Phone: (251)555-1111

Assessment/Plan

#	Detail Type	Description
1.	Assessment	URI, Acute (468.9).
	Patient Plan	Tylenol, chicken soup.
	Provider Plan	Off the record, turkey broth is almost as effective.

Type the item desired, then print. This is often far quicker than looking for these items in the Medication Module, & keeps you from littering the Med List with things that aren't medications.

Rx:

Nebulizer

Physician Signature: _____

Physician UPIN number:

Date: 05/28/2014

Document generated by: Robert L. Duffy 06/10/2014

You can document a Cognitive Exam by clicking [Mini Mental Status Exam](#).

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Mini Mental Status Exam

Orientation:

Correct Incorrect

All Correct Clear All

- 1. What year is this?
- 2. What season is this?
- 3. What month is this?
- 4. What day of the week is this?
- 5. What state are we in?
- 6. What city are we in?
- 7. What is the name of this place?
- 8. What year are we in?
- 9. What is the name of this place?
- 10. What floor are we on?

A template opens allowing you to document a Mini Mental Status Exam. At the bottom it tallies the score & gives you the opportunity to print a document summarizing the exam.

Immediate Recall:

Name 3 words, giving about 1 second each. Ask patient to repeat them. First repetition determines the score, but allow up to 6 tries until patient can repeat them all correctly.

All Correct Clear All

Correct Incorrect

- 11. Dog
 - 12. Book
 - 13. Grass
- # of tries:

Attention and Calculation:

Ask the patient to spell the word "WORLD" backwards. Score one correct answer for each letter in the correct position.

All Correct Clear All

Correct Incorrect

- 14. D
- 15. L
- 16. R
- 17. O
- 18. W

Or

Ask the patient to count backwards by 7, beginning at 100. Stop after 5 subtractions.

All Correct Clear All

Correct Incorrect

- 14. 93
- 15. 86
- 16. 79



EUGENIA QUAGMIRE (F) DOB: 01/03/1959 (55 years) Weight: 166.00 lb (75.30 Kg) Allergies: (2) Problems: (4) Diagnoses: (35) Medications: (2)
Address: 22 Two Tooth Trail MOBILE, AL 36604 MRN: 000900044677 Emergency Relation: Referring: DUFFY, ROBERT LAMAR ...
Contact: (251) 555-1111 (Home) Insurance: Aetna Emergency Phone: Rendering: MORGAN, AARON M MD
NextMD: Yes Pharmacy 1: CAFFEYS PHARM...
Advance Directive Screening Summary

Of course, there will be times you need to generate documents that are not in the Document Library. For those occasions, open the full Document Module by clicking the Document Module button. (Many users will want to add this to the Menu Bar as well.)

05/28/2014 10:08 AM

Specialty

Care Guide

General

Established

Reason for Visit

Introduction:

This 55 year old

Do not launch HPI

Reason for Visit	History of Present Illness
sore throat	Onset: 3 Days. The severity of the problem is moderate. Pain scale: 5/10. The problem has not changed. The symptoms are persistent. Symptoms are associated with exposure to strep, history of allergies, recent cold and sick family member. Symptoms are not associated with dental infection, history of asthma, recent travel and smoker. Associated symptoms include chills/rigors, cough, fatigue, nasal congestion, pharyngitis and rhinitis. Pertinent negatives include dyspnea or fever.

Document Library

Toggle Cycle

Intake Comments

Patient History

New Lock Search

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- *USA Che
- *USA Clin
- *USA Fine
- *USA Hist
- *USA Hon
- *USA Intal
- *USA SOA
- Cardiac St
- Order Mar
- Telephone
- USA Phor
- USA Docu

Custom

Select a NextGen Document Format to Generate.

Scroll through the list & double-click on the document you wish to generate. Edit it as desired, & print or fax if necessary.

- Categories
- Template Sets
 - ABIM
 - Advanced Template
 - BH
 - Cardiology
 - Core KBM
 - Correctional Health Medicine
 - Dental
 - Dermatology
 - Disease Management
 - EDS
 - Endocrinology
 - General Surgery
 - GI
 - Nephrology
 - Neurology
 - Neurosurgery
 - NextMD
 - Oncology
 - Ophthalmology
 - Orthopedics
 - Pediatrics
 - PQRI
 - Proto
 - PT
 - Rheumatology
 - Urology
- Document Folders
 - SubDocuments

Document	Owner	Date	Time	Categories
MG a_chm_addendum		4/29/2013	3:18:52 PM	
MG a_chm_provider_order_signature	Admin, NEX...	4/29/2013	3:18:54 PM	
MG ABN	Admin, NEX...	4/29/2013	3:18:55 PM	
MG addendum	Admin, NEX...	4/29/2013	3:18:56 PM	
MG AfterHoursCareNote	System, Nex...	5/22/2013	2:32:18 PM	
MG antenatal_consult_itr	Admin, NEX...	4/29/2013	3:18:57 PM	
MG anticoagulation_master	Admin, NEX...	4/29/2013	3:19:01 PM	
MG Asthma_Action_Plan	Admin, NEX...	4/29/2013	3:19:08 PM	
MG bh_aims	Admin, NEX...	4/29/2013	3:19:13 PM	
MG bh_asi	Admin, NEX...	4/29/2013	3:19:17 PM	
MG bh_chm_screening	Admin, NEX...	4/29/2013	3:19:20 PM	
MG bh_chm_seg_review	Admin, NEX...	4/29/2013	3:19:22 PM	
MG bh_contract_safety	Admin, NEX...	4/29/2013	3:19:23 PM	
MG bh_crisis_treatment_plan	Admin, NEX...	4/29/2013	3:19:25 PM	
MG bh_eval_admit_refer	Admin, NEX...	4/29/2013	3:19:26 PM	
MG bh_eval_suicide_risk	Admin, NEX...	4/29/2013	3:19:27 PM	
MG bh_master	Admin, NEX...	4/30/2013	4:00:21 AM	
MG bh_outcome_measures	Admin, NEX...	4/29/2013	3:19:46 PM	
MG bh_seg_rounds	Admin, NEX...	4/29/2013	3:19:50 PM	
MG bh_testing_results	Admin, NEX...	4/29/2013	3:19:52 PM	
MG bh_transfer_discharge	Admin, NEX...	4/29/2013	3:19:54 PM	
MG bh treatment plan review	Admin, NEX...	4/29/2013	3:20:00 PM	

- After Hours Document
- Allergy & Immunology
- Authorizations
- Categorized-Documents
- Categorized-Templates
- Consents & Forms
- Correspondence
- Diagnostic Test
- HIE Documents
- HIE Documents (Sent)
- Hospital Records
- Lab Reports
- Med Rec Release & Leg
- OBGYN
- Patient Hx & Outside Re
- Pediatrics
- Prescriptions
- Radiology Results
- Referrals
- Telephone Notes
- Visit Notes & Dictation

Description:

Owner: Create Date:

Locked By: Modified Date:

- Offline
- Save
- Patient Portal
- Print

Generate

Cancel

Sometimes it can be difficult later to find documents that have been generated in the EHR or scanned into it. No one wants to have to hunt & peck through a dozen encounters looking for something. To make finding documents simpler, click on the **Categories Tab** on the **History Bar**.

Categories

- Patie...
- Patie...
- Cate...
- Categorized Documents
- Categorized Templates
- Consents & Forms
- Correspondence
- Diagnostic Test
- Telephone Notes
- Visit Notes & Dictation

Reason for Visit | History of Present Illness | More

cough

cough (comments) 3 days of gradually progressive cough, productive of green sputum. No measured fever. Mild sore throat, head congestion. No N/V/D.

- abdominal pain
- back pain
- chronic conditions
- cold symptoms
- cough
- diabetes (follow up)
- earache
- fever
- headache
- hypertension (follow up)
- musculoskeletal pain
- PAP test
- rash

Additional / Manage

All

Here you can browse for the type of document you're looking for. The list is far from perfect, but it's still very helpful. Click on the + sign to expand your selection.

- Categories
- Patie...
 - Patie...
 - Cate...
 - + Categorized-Documents
 - + Categorized-Templates
 - + Consents & Forms
 - + Correspondence
 - Letter_ToPatient
 - Enc Date: 06/1
 - + Diagnostic Test
 - + Telephone Notes
 - + Visit Notes & Dictation

Reason for visit

Introduction:

The patient is a 49 year old female who presents with cough.

Do not launch HPI

If "More" appears in the column, launch the popup from the line item to view the complete HPI description.

Reason for Visit	History of Present Illness	More
abdominal pain		
back pain		
chronic conditions		
cold symptoms		
● cough	cough (comments) 3 days of gradually progressive cough, productive of green sputum. No measured fever. Mild sore throat, head congestion. No N/V/D.	
diabetes (follow up)		
earache		
fever		
headache		
hypertension (follow up)		
musculoskeletal pain		
PAP test		
rash		
● Additional / Manage		

Sometimes documents may appear under more than one heading. And if you still can't find what you're looking for, open the **Categorized-Documents** listing. It will have a list of all documents, even if they're not assigned to another specific heading.

Categories

- Patie...
- Patie...
- Cate...
- Categorized-Documents
 - bh_contract_safety
 - ChartSummaryUSA
 - Controlled_subs_agi
 - GYN_Master
 - intake_note
 - Letter_ToPatient
 - master_im
 - MedListUSA
 - ort_OutsideDMEord
 - Patient Plan
 - preceptor_note
 - PUL_Spirometry
 - TelephoneNotesAnd
- Categorized-Templates**
- Consents & Forms
- Correspondence
- Diagnostic Test
- Telephone Notes
- Visit Notes & Dictation

All

Do not launch HPI

If "More" appears in the column, launch the popup from the line item to view the complete HPI description.

- abdominal pain
 - back pain
 - chronic conditions
 - cold symptoms
 - cough
 - diabetes (follow up)
 - earache
 - fever
 - headache
 - hypertension (follow up)
 - musculoskeletal pain
 - PAP test
 - rash
- Additional / Manage

Reason for Visit	History of Present Illness	More
cough		
cough (comments)	3 days of gradually progressive cough, productive of green sputum. No measured fever. Mild sore throat, head congestion. No N/V/D.	

Maintaining this list in a way that satisfies all clinics is very challenging. As reorganizations occur, you may find some changes in some of these headings. Also, you may discover scanned documents that appear under the wrong category. If this happens, ask a clinic superuser or the EHR Team to re-file them.

- Patie...
- Patie...
- Cate...
- Categorized-Documents
 - bh_contract_safety
 - ChartSummaryUSA
 - Controlled_subs_agi
 - GYN_Master
 - intake_note
 - Letter_ToPatient
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- Categorized-Templates
- Consents & Forms
- Correspondence
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- Visit Notes & Dictation

Reason for Visit	History of Present Illness	More
cough		
cough (comments)	3 days of gradually progressive cough, productive of green sputum. No measured fever. Mild sore throat, head congestion. No N/V/D.	

- abdominal pain
- back pain
- chronic conditions
- cold symptoms
- cough
- diabetes (follow up)
- earache
- fever
- headache
- hypertension (follow up)
- musculoskeletal pain
- PAP test
- rash

Additional / Manage

This concludes the
NextGen Document demonstration.

He who dies with the most toys is nonetheless dead.