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.
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.

The bottom of the SOAP Tab also gives you the option to generate the visit note immediately by clicking the Visit Document button.
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).
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.
Many of these documents are simple & self-explanatory, like the various letters. For example, click **Letter To Patient**.
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.

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.

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

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 medications 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**.
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.
You can document a Cognitive Exam by clicking Mini Mental Status Exam.
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.
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.)
Scroll through the list & double-click on the document you wish to generate. Edit it as desired, & print or fax if necessary.
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.
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.
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.
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.
This concludes the NextGen Document demonstration.

He who dies with the most toys is nonetheless dead.

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