This demonstration reviews usage of the Emdat transcription service in NextGen. Details of the workflow will likely vary somewhat, depending on practice policy & clinic layout, though this should give you a good idea of the 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.
Introduction

• Emdat (by Nuance) is a transcription option we have incorporated into NextGen.

• It will be available for departments to license for any providers for who they feel it will improve workflow & efficiency. If you don’t have it & are interested, please discuss with your clinic manager and/or the EHR Team.
Introduction

• Emdat is not meant to replace the usage of NextGen as you’ve been taught.

• Emdat should complement your current usage of NextGen by allowing you to more easily “tell the story” in sections like the HPI or Plan, while continuing to do structured data entry in areas where that is important, such as the Med List, Allergies, Problem List, & Past Medical History.
Introduction

• Users are strongly encouraged to continue to make robust use of Quick Saves (for areas like ROS & Physical Exam) & My Phrases (available in many areas, but especially the Plan section). You’ll probably find that most of the time these meet your needs, & you can reserve dictation for those times that are exceptional or out of the ordinary.

• This will save you the time of dictating (& your department the cost of the transcription).
• Keep in mind the more you dictate & forgo structured data entry, the more likely that the NextGen coding assistant will not be helpful, so you’ll need to manually select billing codes based upon your evaluation of your documentation.

• You will also be able to use Emdat to dictate up to 3 letters per encounter.
Basic Workflow

• The general workflow will begin with the nurse rooming the patient & entering data into NextGen.

• The provider will perform the encounter, entering as much data as possible into NextGen. This will include at least any modifications of the PMSF history, Problem List, Med List, Allergies, & Assessments. Physical exam entry in this manner is encouraged, using saved presets.
Basic Workflow

• The provider will dictate remaining content into a smartphone or iPad app. Most often this will be HPI & Plan details, ± a few physical exam findings.

• The provider uploads this dictation from the device.
Basic Workflow

- The next day the provider will receive a task notification that the dictation is back; the provider goes to the encounter & generates the visit note.

- The things you’ve dictated will appear in the appropriate sections of the visit note, alongside the information entered directly into NextGen.

- Review the note, make any changes desired, then E-sign it.
How does it work?

• Full manuals for the Emdat smartphone apps are available at: https://kb.emdat.com/wiki/Manuals_and_Documentation

(However, keep in mind there are features described in the manual that we do not use, or use in a different manner.)

• But what follows should get you up to speed.
To get started, go to the app store for your iPhone, iPad, or Android device & search for the free Emdat Mobile app. Download & install.
You’ll be given credentials for logging on to the app the first time.

For patient privacy/HIPAA concerns, do not select Save Password.
There is a **Settings** screen that you may wish to visit before you go further. A lot of these are just personal preferences or don’t really matter much. But if you’d like some suggestions:

- **Recording Screen:** Templates
- **Document Type:** Visit Note
- **Location:** Default Location
- **Silence Detection:** 30 seconds
- **Transcription Text Size:** Small
Suggested Defaults, continued

Custom Encounter Field: None
Document Types: All
Locations: All
Confirm Uploads: On
Confirm Logout: On

Now let’s look at the basic workflow. Tap Patients.
Select the date via the calendar icon.

With **Patients** selected at the bottom, you'll see your appointment list for the day.
Tap one of the patients.
This takes you to the recording screen, with transport controls that will be familiar to anyone who has used other dictation systems. Simply tap the red Record Button & start dictating.

As an extra confirmation, begin your dictation by saying at least the patient’s name & document type. Any other demographics you wish to add, such as medical record number or date of birth, could also prove helpful in the event of a technical problem.
After you've dictated something, you can use the slider to move back & forth throughout the dictation if you need to review what you've said, change something, or insert something new.

Notice the Record Mode button. Tap this.
You can choose among 3 options:

**Overwrite** will replace everything after the point at which you start dictating.

**Insert** will insert what you say at that point in the dictation, preserving everything after it.

**Append** jumps to the end & adds anything new you say to the end of the existing dictation. This can be particularly helpful right after using **Insert**.
When you’re done, tap the **Upload Icon** to send the dictation to the transcriptionist.

Tap **Schedule** to return to your appointment list.
When a dictation is in progress, you’ll see the microphone icon.

When it has been uploaded, you’ll see a check mark. Let’s tap one of these.
Notice the History icon. The red number tells you how many notes have been done on the patient. Tap History.
Here you see existing dictations. Tap one...
If the transcription has been completed & returned, you’ll see it here.

Most of the time you won’t review dictations this way—but it’s nice to know that, even if there is some glitch in getting it back to NextGen, you can still see & hear your dictation from your smartphone.
What if you remember something you need to add after you’ve uploaded the dictation, or you need to dictate a letter? Tap the patient from your schedule.
Tap the Folder Icon.
Then tap **New dictation**.
Tap the Document Type arrow.
Select the document type. Here we want to add something to the *Visit Note*, so tap that.
Dictate your additions.
When done, click the Upload icon.
You’ll be prompted to **Append to Dictation**, **Prepend to Dictation**, or **Upload as New Dictation**. In this example we want to **Append**, so tap that.
Notice that you can also dictate letters. After going through the steps to create a new dictation, just select a letter document type. (In actual usage, you may see a slightly different list, such as Letter1, Letter2, & Letter3.)

You can dictate up to 3 letters per encounter.
Dictate your additions. When done, tap the **Upload** icon.

This time, when prompted tap **Upload as New Dictation**.
What if you need to dictate on a patient that hasn’t been on your schedule recently? On today’s date, tap the + at the top.
Under Patient Demographics, tap the Patient Name & Person Number > line.

Pick the appropriate Document Type, e.g., Letter, as shown above.
Enter the patient’s Medical Record Number, then tap Back.
Perform your dictation. Include in the dictation as much other demographic information as you can—at least name & date of birth. Then upload as previously illustrated.
When you return to your schedule, you’ll see the new dictation listed.

This will be transcribed & matched up with the demographic information you’ve provided.
Some tips on dictation:
• Obviously, the less background noise the better, but absolute silence is not necessary. Listen to a little of your dictation to make sure background noise isn’t a problem.
• If you stumble over your words, or want to say something differently or more clearly, you can re-do the dictation. But remember you’ll also have the opportunity to edit the text when you generate your note.
Hold the phone so you can see it when dictating, instead of up to your head like a telephone. This way you can see the difference between whether you are in record or pause mode. It’s easy for your finger to inadvertently tap something, & it’s pretty frustrating to waste time dictating & then discover it was on pause. This can also happen if you’ve enabled silence detection—especially if you set it to the very short 10 second option.
• Remember to hedge your bets for getting your dictation back quickly & accurately. The more information you say in the dictation (patient name, DOB, medical record number, encounter date, your name, etc), the more info there is to match the dictation, patient, & encounter if there is a glitch. You don’t necessarily have to do all this, but you know the saying about belt & suspenders....

• Spell things that you think the transcriptionist might have trouble with. They’re good with medical terminology, but names are always challenging, especially if spoken too quickly.
You don’t have to “navigate” to sections of your dictation on the smartphone. Just say things like “HPI,” “Review of Systems,” “Plan,” etc. Your words will go to the appropriate place in the visit note.

To the extent that is possible. Many people jump around & mix content while dictating, & that’s actually accommodated pretty well. You just may see elements of HPI, ROS, past history, social history, etc., all lumped together in the HPI if you lump them together as you speak. And that’s not the end of the world—the information at least gets into the note in the narrative fashion you intended.
If you haven’t already done it, after finishing your dictation, remember to complete other elements of the encounter in NextGen. In particular, add Today’s Assessments, as well as update & send prescriptions. Update the Problem & Allergy Lists. While you can dictate your ROS & Physical Exam, it is almost always faster to use Presets (Quick Saves) in NextGen for this, perhaps dictating anything that is particularly atypical & wordy.

Bill for your encounter, either today or after dictation is back. Remember that the more elements you dictate without documenting in NextGen, the more likely the coding assistant in NextGen will either undercode, or not work at all, so you’ll have to manually select your billing code.
By the next business day* you’ll get a task telling you the dictation has returned. Respond to the task & go to the chart.

* Friday dictations appear on Monday. Dictations you do over the weekend may not appear until Tuesday. Dictations on patients who have not been on your schedule recently may take an additional day to return.
Generate the visit note. One way is to open the SOAP template, then click Visit Document. You could also do this through the Document Library.
You’ll see your dictated comments placed at the appropriate location in the visit note, inline with directly-entered information. Review note & edit as desired. In particular, if you used a Quick Note/Preset in NextGen to enter your standard verbiage, make sure to change anything you’ve contradicted in your dictation.

When done, click the Check Mark to sign it off, & you’re done.
If you've dictated a letter, open the Document Library. One way is through the Template Module in one of these 2 locations.

Double-click USA Document Library, which you should configure as one of your Favorite Templates.
Click Emdat Letter 1. (If you’ve done a 2nd or 3rd letter, use the other two options as well.)
USA Family Medicine
1504 Springhill Ave Ste 1800
Mobile, AL 366043273
01/28/2015

Re: QUINTON AATESTDUFFY, D OB 01/02/1960

January 26, 2015
Re: Quinton AATESTDuffy
Roger Goodell
280 Park Avenue
Culver City, CA 90232

Dear Commissioner Goodell:

My patient, Quinton AATESTDuffy, requested that I send you this letter to establish his whereabouts on the weekend of 01/18/2015. He was in Mobile, Alabama and was nowhere near any NFL game and, thus, could not have possibly influenced the air pressure in any footballs.

If I can be of further assistance, please let me know.

Sincerely,

R. Lamar Duffy

Sincerely,

ROBERT L. DUFFY MD
Your **Return Address** will appear automatically, so you don’t have to dictate that. Do include the date, though.

Dictate the **Inside Address** (the To address), if you know it at the time. If you don’t, it may be easier to add it at this time, or send a task to one of your assistants to do so.

Letters sometimes have an excessive number of blank lines, so you may wish to delete those to taste.
A Re line with patient name & DOB will appear automatically, so you don’t have to dictate that. But if you did, it may appear twice, so delete whichever version you don’t want.

Similarly, a Closing will appear automatically, so you don’t have to dictate that. But if you did, it may appear twice, so delete whichever version you don’t want.
This concludes the NextGen Emdat Transcription demonstration.

Be a role model, not a poster child.

R. Lamar Duffy, M.D.
Associate Professor
University of South Alabama
College of Medicine
Department of Family Medicine