NEXTGEN
NEXTPEN
DEMONSTRATION

This demonstration reviews how to use the NextPen program to capture data from handwritten forms. Details of the workflow will likely vary somewhat, depending on practice policy & clinic layout, though this should give you a good idea of NextGen functionality.

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

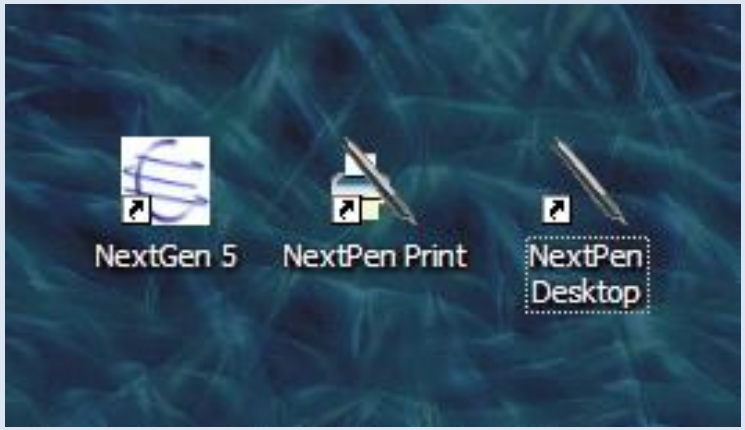
Use the keyboard or mouse to pause, review, & resume as necessary.

Introduction

NextPen is an optional NextGen system that combines a special pen & some additional programs to allow patients or users to capture data on handwritten forms, & to transfer at least some of that to the appropriate place within a NextGen chart.

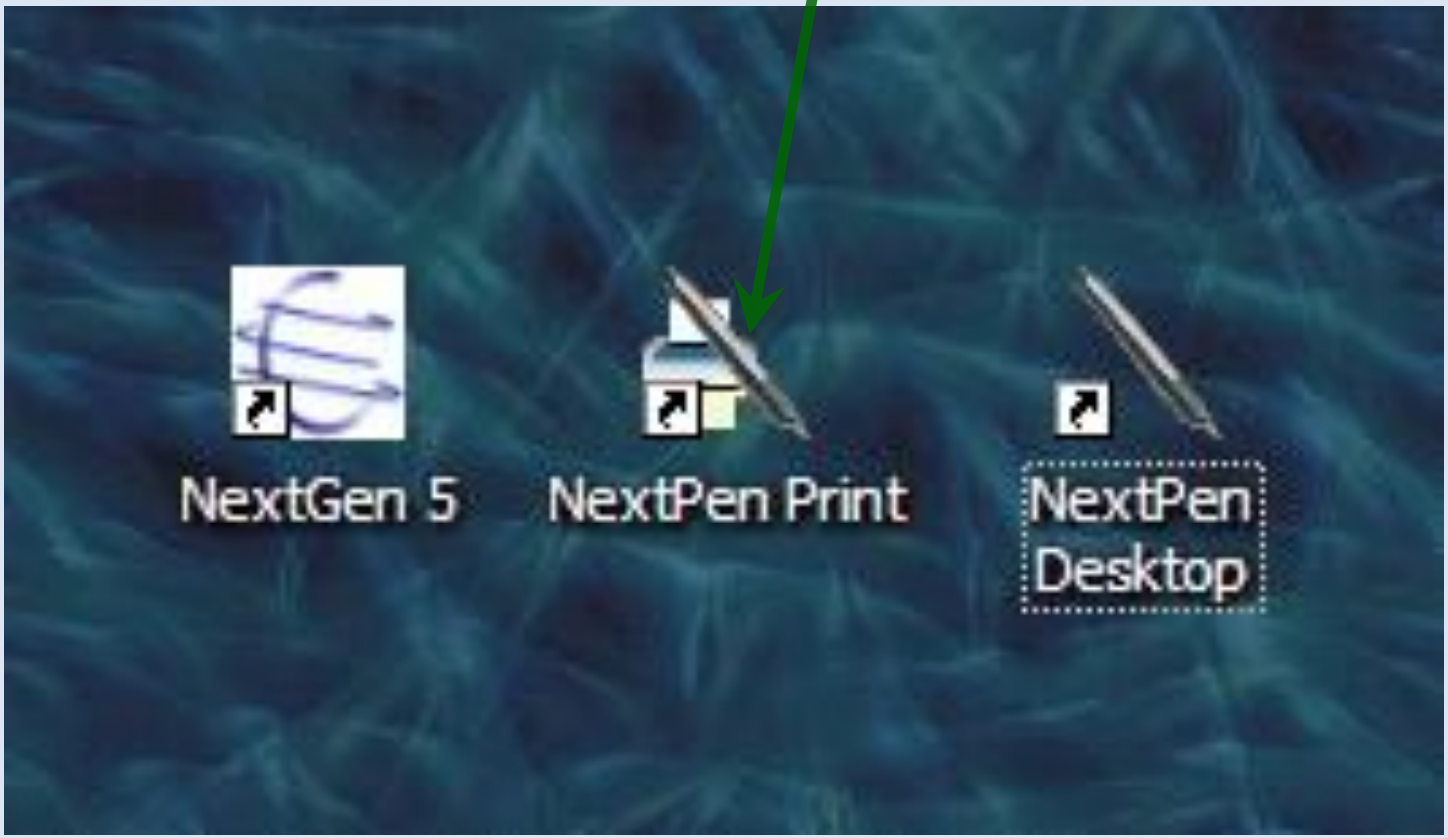
A common use for this would be to collect medical history information from new patients, so we'll use that as the example in this demonstration.

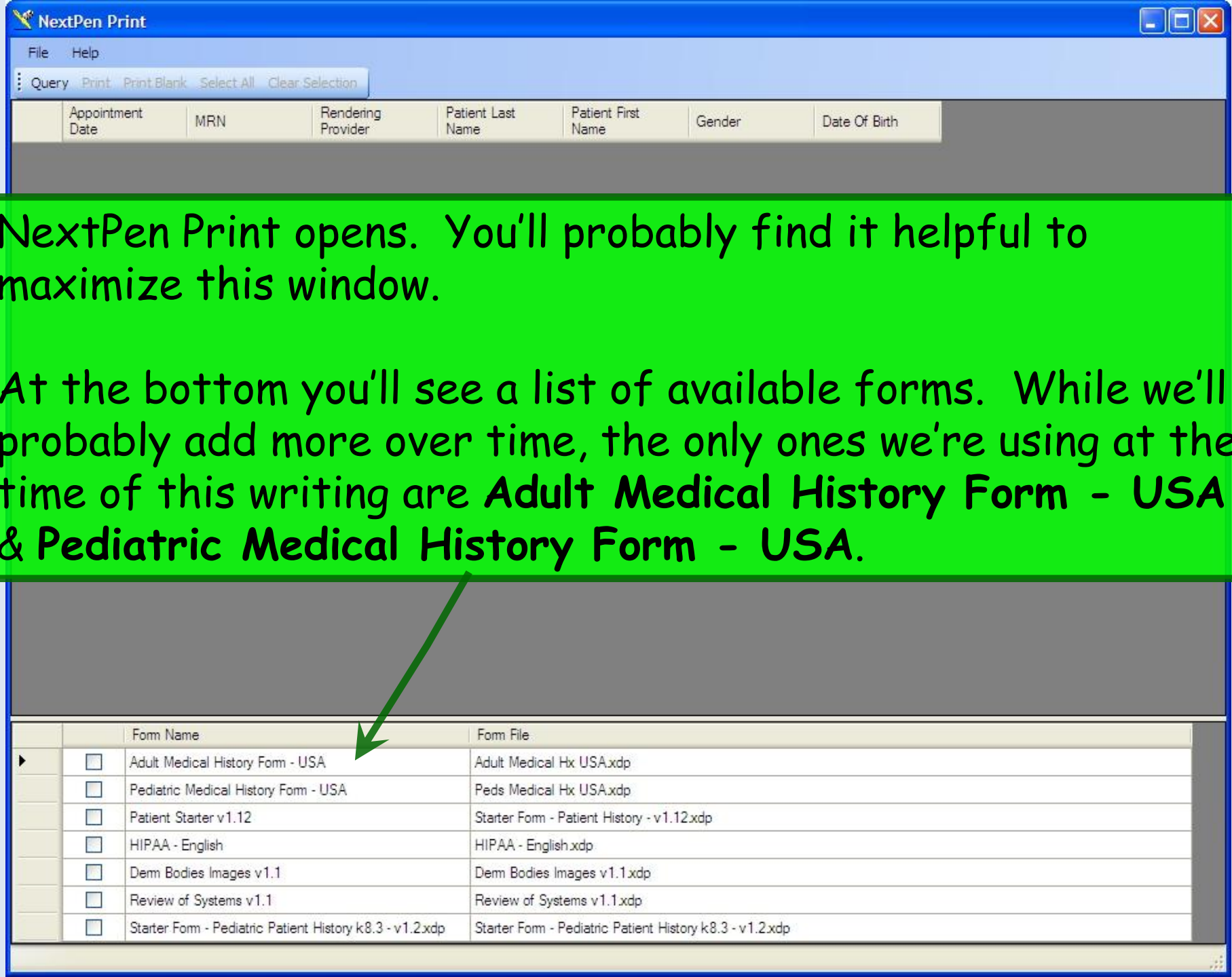
Users in clinics that have NextPen will see a couple additional program icons on the desktop: **NextPen Print** & **NextPen Desktop**.



First, we need to print a form; this will usually be done by someone in the front office. The best time to do this is at the end of the day, looking at tomorrow's appointments. In whatever fashion is easiest, print a list of tomorrow's new patient appointments. Make note of who are children & who are adults, since we have both pediatric & adult history forms. For NextPen purposes, you should use the **adult** medical history form for anyone beyond the 13th birthday.

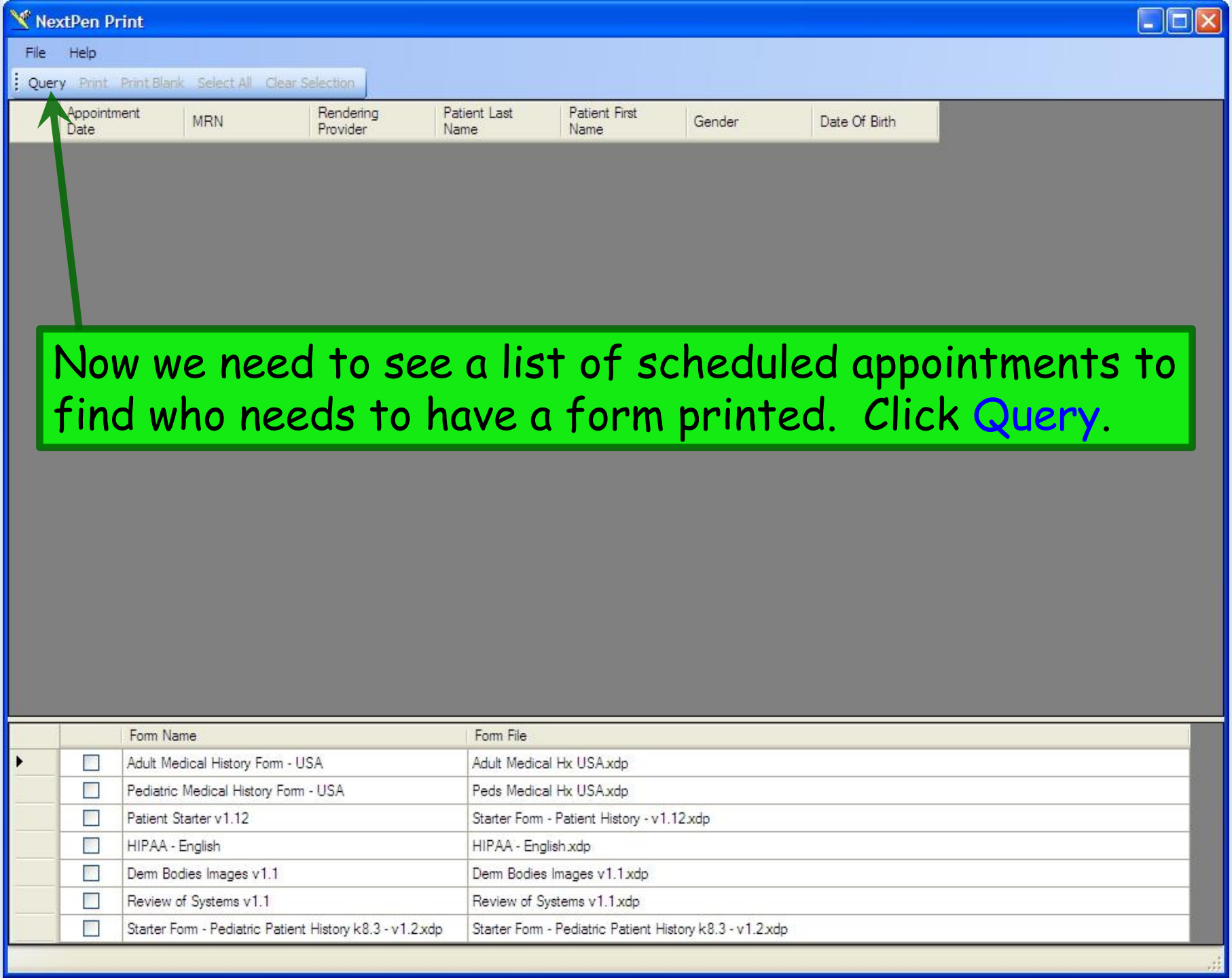
Then double-click NextPen Print. (If you're not already logged on to NextGen EHR or PM, you'll see a sign-on screen.)

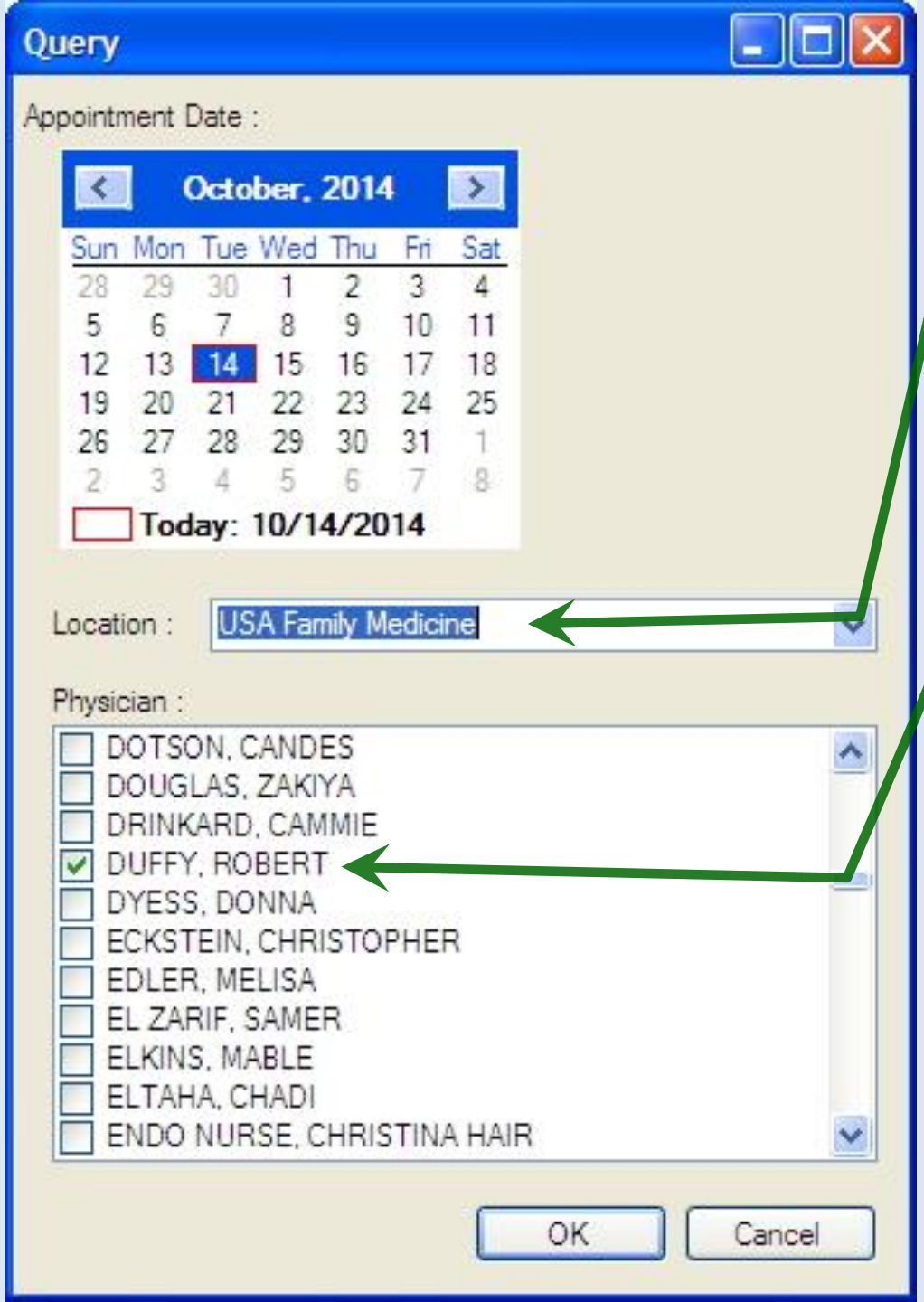




NextPen Print opens. You'll probably find it helpful to maximize this window.

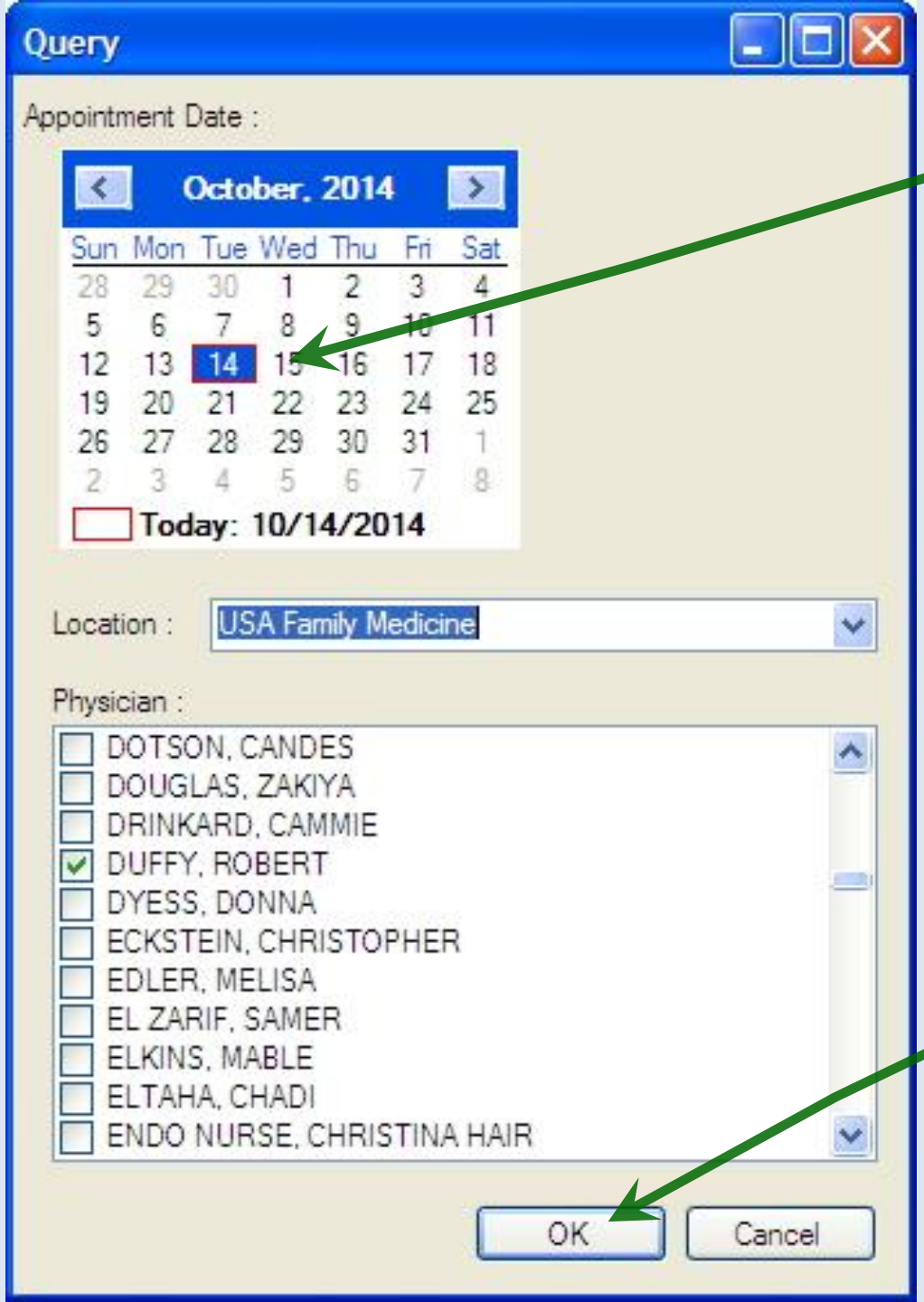
At the bottom you'll see a list of available forms. While we'll probably add more over time, the only ones we're using at the time of this writing are **Adult Medical History Form - USA** & **Pediatric Medical History Form - USA**.


NextPen Print
File
Help
Query
Print
Print Blank
Select All
Clear Selection
Appointment Date
MRN
Rendering Provider
Patient Last Name
Patient First Name
Gender
Date Of Birth
Now we need to see a list of scheduled appointments to find who needs to have a form printed. Click Query.
Form Name
Form File
Adult Medical History Form - USA
Adult Medical Hx USA.xdp
Pediatric Medical History Form - USA
Peds Medical Hx USA.xdp
Patient Starter v1.12
Starter Form - Patient History - v1.12.xdp
HIPAA - English
HIPAA - English.xdp
Derm Bodies Images v1.1
Derm Bodies Images v1.1.xdp
Review of Systems v1.1
Review of Systems v1.1.xdp
Starter Form - Pediatric Patient History k8.3 - v1.2.xdp
Starter Form - Pediatric Patient History k8.3 - v1.2.xdp



Begin by selecting **Location** (though for providers who only work in one location this is not really necessary).

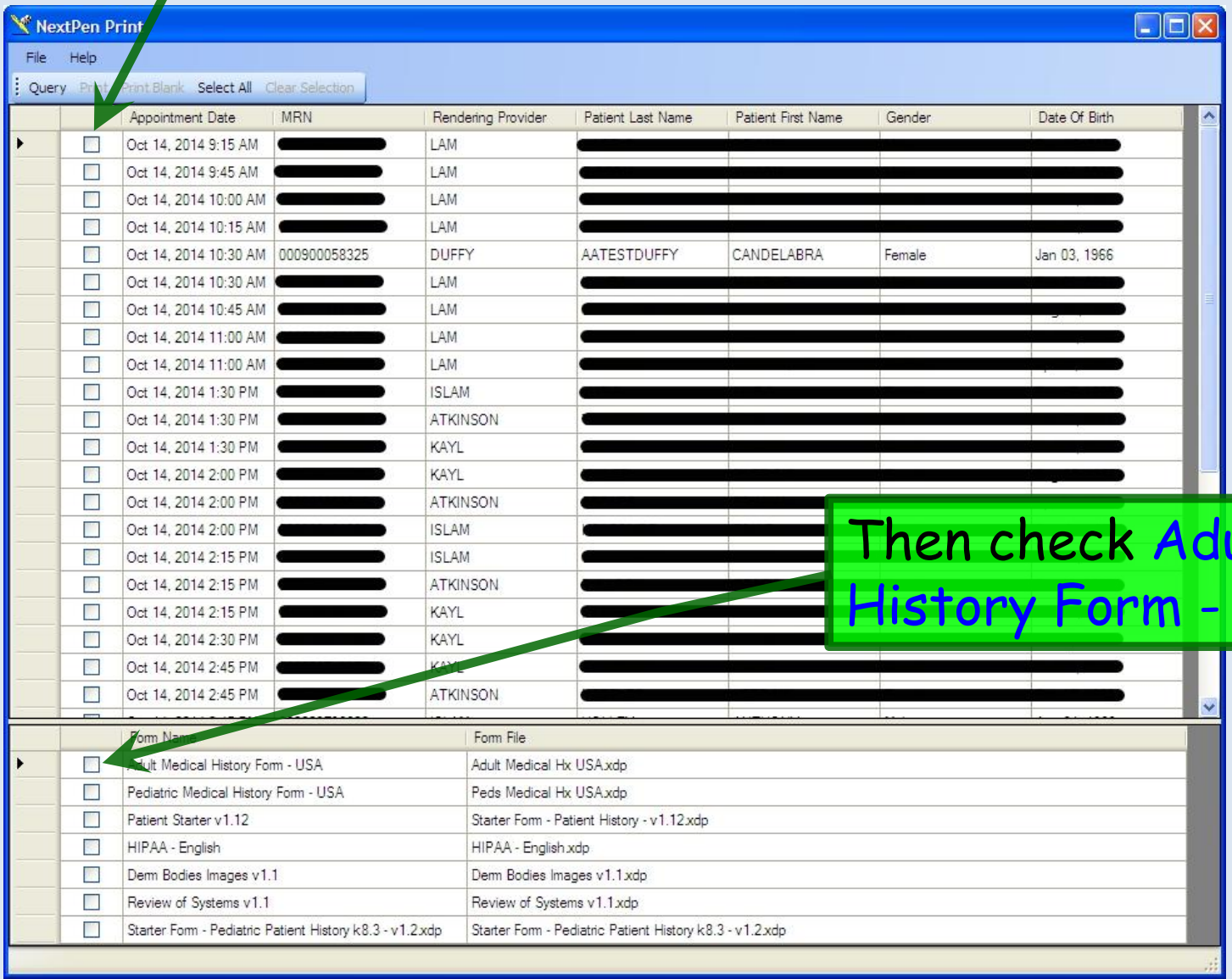
Then select **Providers**. Go ahead & check all providers in your clinic. This way from day-to-day you won't have to do this again unless a new provider is added.



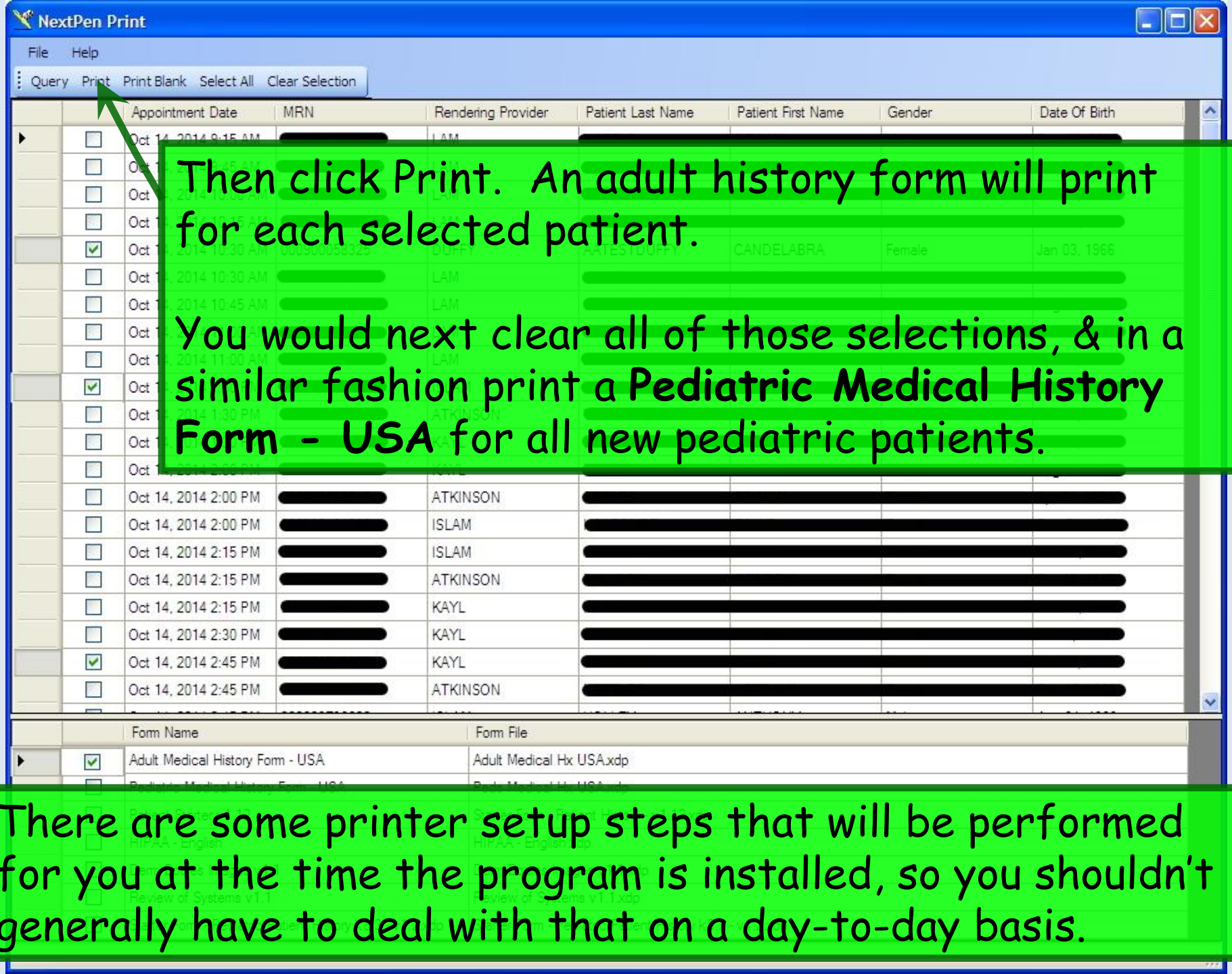
Then select the **Date**.
As mentioned above, most of the time you'll want to print a batch of these for tomorrow's new patients, but you can also print one at a time if a same-day appointment is made with a new patient.

When done, click OK.

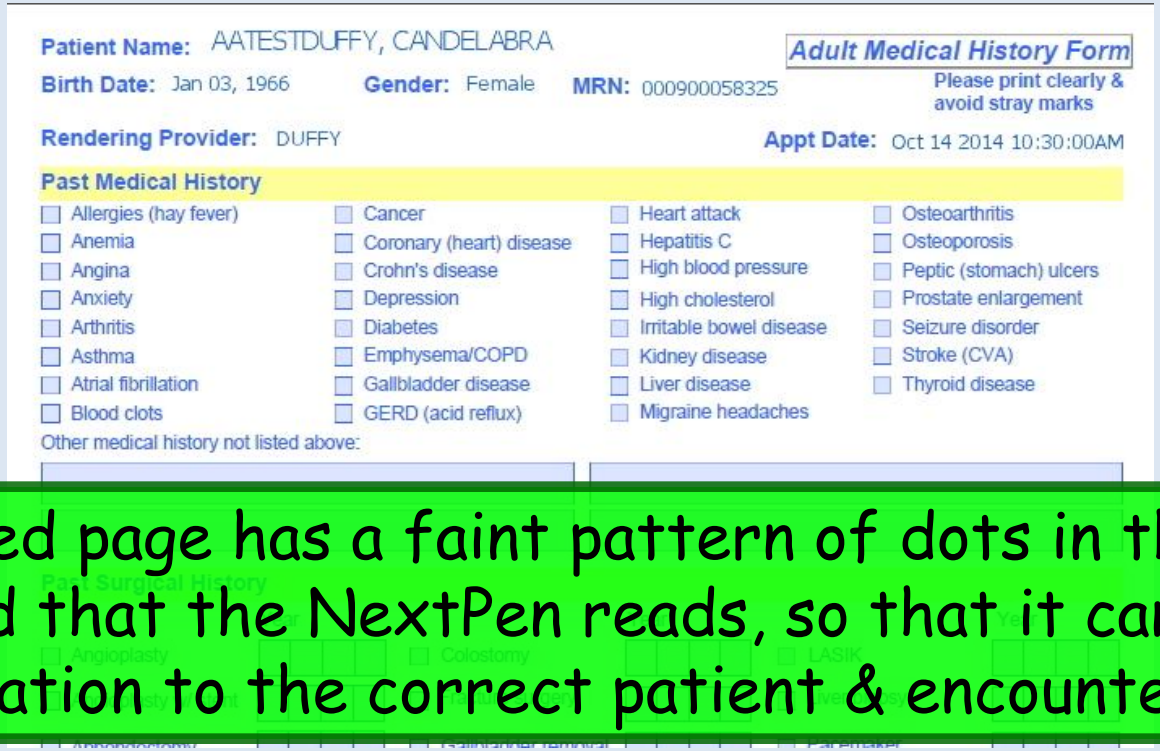
You'll see a list of all appointments for the selected day. Scroll through & check all of the **new adult patients** (age 13 & over).



Then check Adult Medical History Form - USA.


NextPen Print
File
Help
Query
Print
Print Blank
Select All
Clear Selection
Appointment Date
MRN
Rendering Provider
Patient Last Name
Patient First Name
Gender
Date Of Birth
Oct 14, 2014 2:00 PM
ATKINSON
Oct 14, 2014 2:00 PM
ISLAM
Oct 14, 2014 2:15 PM
ISLAM
Oct 14, 2014 2:15 PM
ATKINSON
Oct 14, 2014 2:15 PM
KAYL
Oct 14, 2014 2:30 PM
KAYL
Oct 14, 2014 2:45 PM
KAYL
Oct 14, 2014 2:45 PM
ATKINSON
Form Name
Form File
Adult Medical History Form - USA
Adult Medical Hx USA.xdp
Then click Print. An adult history form will print for each selected patient.
You would next clear all of those selections, & in a similar fashion print a Pediatric Medical History Form - USA for all new pediatric patients.
There are some printer setup steps that will be performed for you at the time the program is installed, so you shouldn't generally have to deal with that on a day-to-day basis.

A form resembling this will print. When patients arrive for their appointments, give them the form to fill out (front & back), using the special **NextPen**. When the patient is done, dock the NextPen in the cradle you'll have at your workstation. Send the paper copy back to the nurse who is rooming the patient; it will be convenient (though not necessary) to have on hand, & you DO NOT need to scan it into the chart.



Patient Name: AATESTDUFFY, CANDELABRA

Adult Medical History Form

Birth Date: Jan 03, 1966 **Gender:** Female **MRN:** 000900058325

Please print clearly & avoid stray marks

Rendering Provider: DUFFY **Appt Date:** Oct 14 2014 10:30:00AM

Past Medical History

☐ Allergies (hay fever)	☐ Cancer	☐ Heart attack	☐ Osteoarthritis
☐ Anemia	☐ Coronary (heart) disease	☐ Hepatitis C	☐ Osteoporosis
☐ Angina	☐ Crohn's disease	☐ High blood pressure	☐ Peptic (stomach) ulcers
☐ Anxiety	☐ Depression	☐ High cholesterol	☐ Prostate enlargement
☐ Arthritis	☐ Diabetes	☐ Irritable bowel disease	☐ Seizure disorder
☐ Asthma	☐ Emphysema/COPD	☐ Kidney disease	☐ Stroke (CVA)
☐ Atrial fibrillation	☐ Gallbladder disease	☐ Liver disease	☐ Thyroid disease
☐ Blood clots	☐ GERD (acid reflux)	☐ Migraine headaches	

Other medical history not listed above:

Each printed page has a faint pattern of dots in the background that the NextPen reads, so that it can transfer the information to the correct patient & encounter.

Patient Name: AATESTDUFFY, CANDELABRA

Birth Date: Jan 03, 1966 **Gender:** Female **MRN:** 000900058325

Adult Medical History Form

Please print clearly & avoid stray marks

Rendering Provider: DUFFY **Appt Date:** Oct 14 2014 10:30:00AM

If a patient no-shows or cancels, discard the paper form. A new form will need to be printed should the appointment be rescheduled later.

Past Medical History

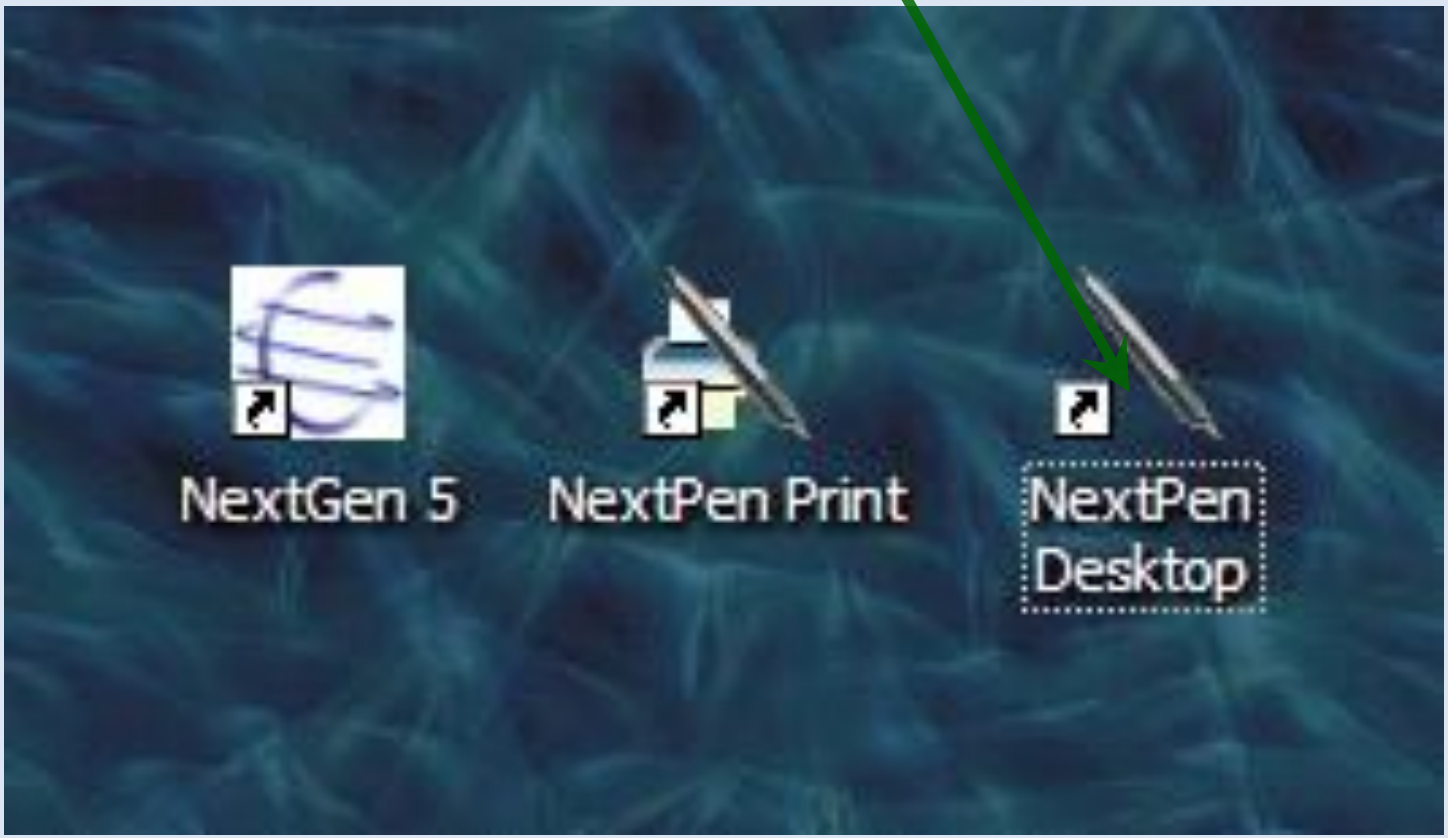
- ☐ Allergies (hay fever)
- ☐ Anemia
- ☐ Cancer
- ☐ Coronary (heart) disease
- ☐ Heart attack
- ☐ Hepatitis C
- ☐ Osteoarthritis
- ☐ Osteoporosis

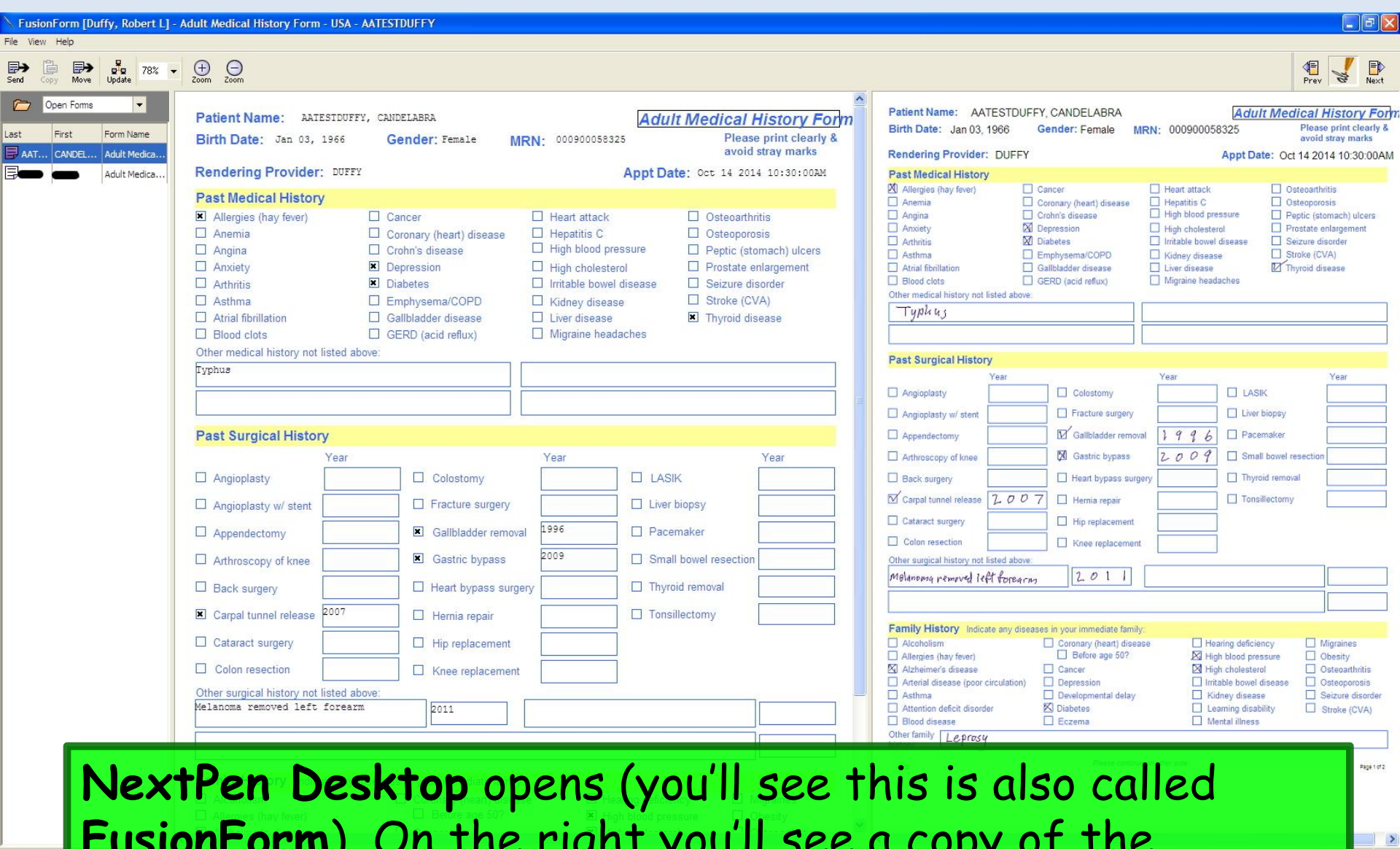
Past Surgical History

	Year		Year		Year
☐ Angioplasty		☐ Colostomy		☐ LASIK	
☐ Angioplasty w/ stent		☐ Fracture surgery		☐ Liver biopsy	
☐ Appendectomy		☐ Gallbladder removal		☐ Pacemaker	
☐ Arthroscopy of knee		☐ Gastric bypass		☐ Small bowel resection	
☐ Back surgery		☐ Heart bypass surgery		☐ Thyroid removal	
☐ Carpal tunnel release		☐ Hernia repair		☐ Tonsillectomy	
☐ Cataract surgery		☐ Hip replacement			
☐ Colon resection		☐ Knee replacement			

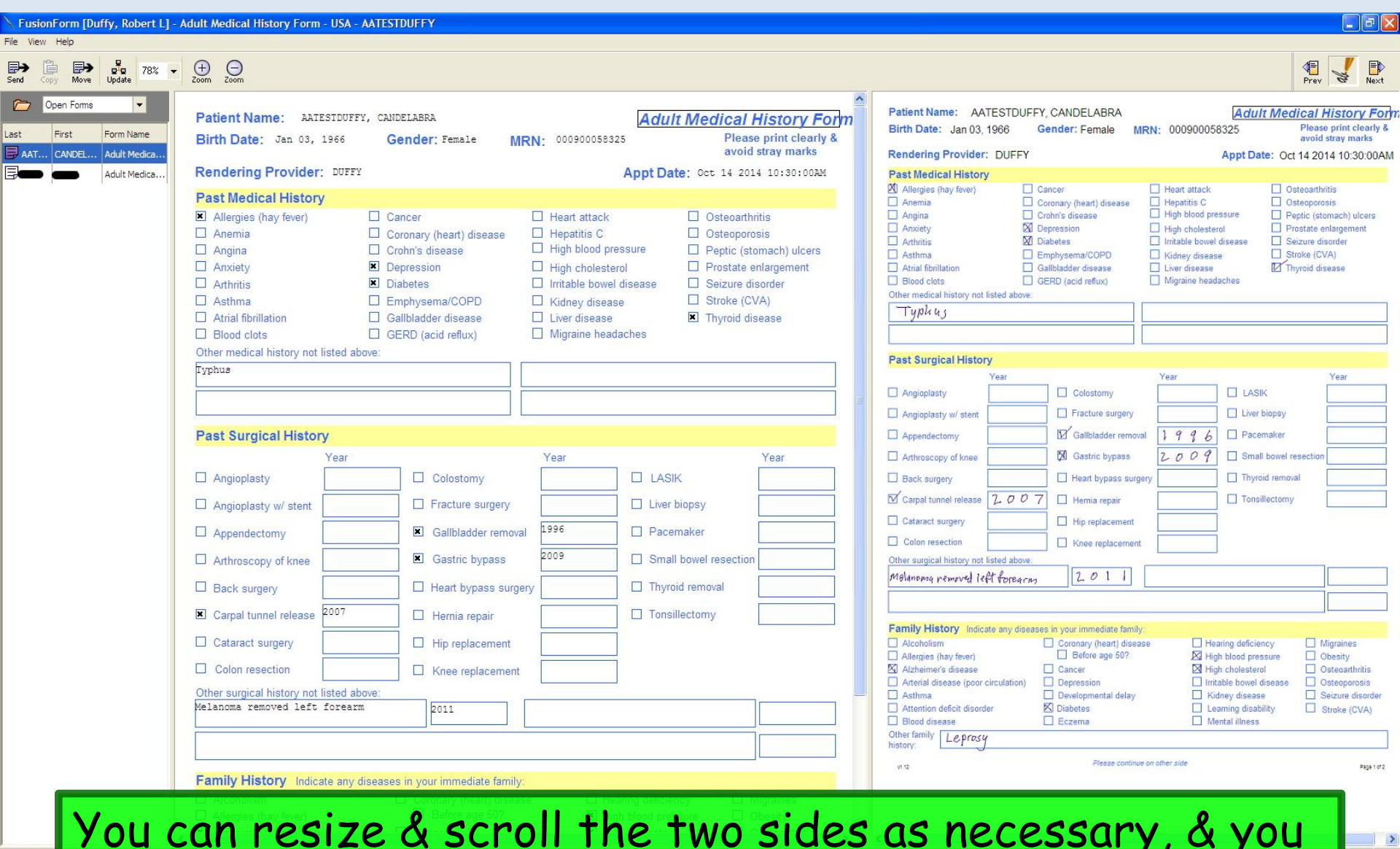
Other surgical history not listed above:

As the nurse is rooming the patient, in addition to having NextGen running, open NextPen Desktop.

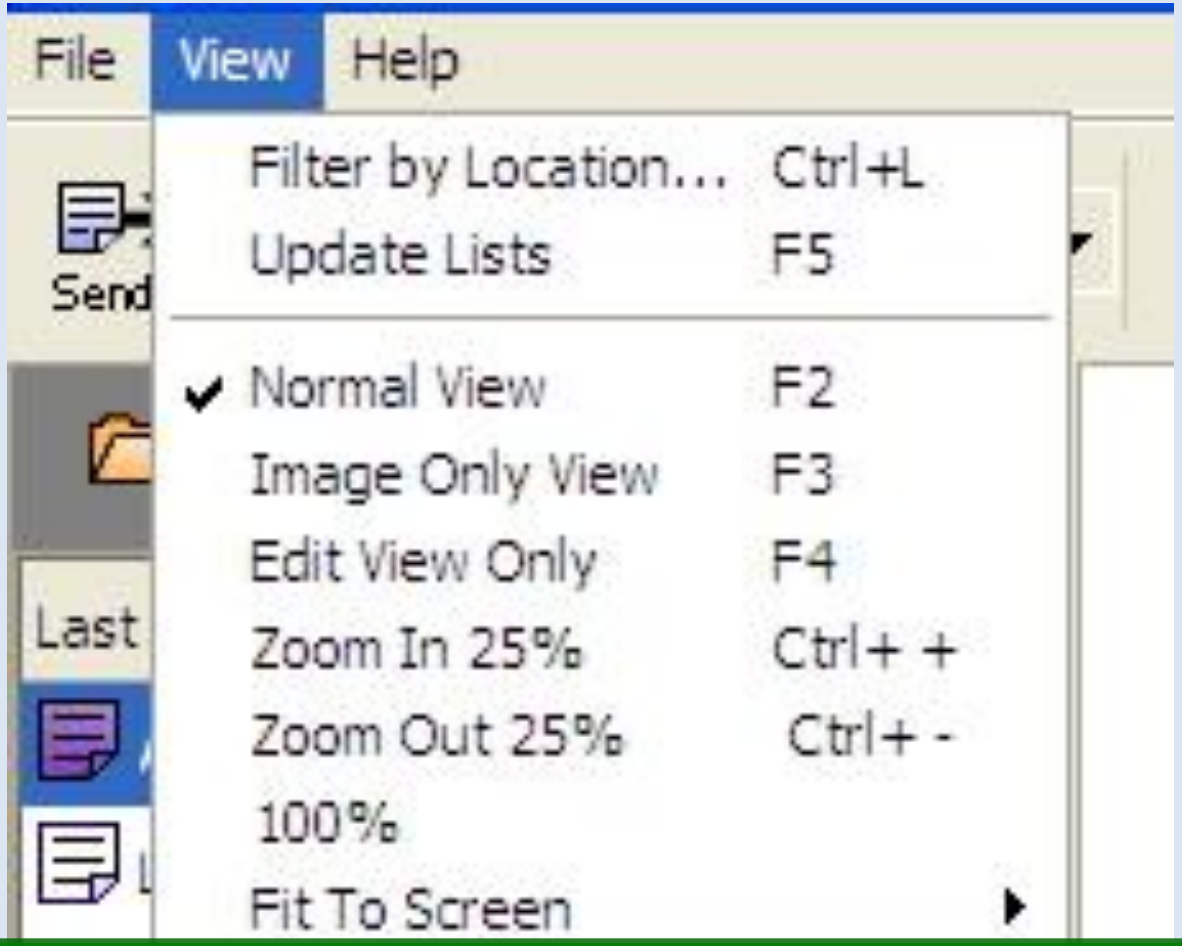




NextPen Desktop opens (you'll see this is also called **FusionForm**). On the right you'll see a copy of the handwritten form completed by the patient, & on the left you'll see the program's interpretation of the form after checkbox & handwriting recognition.



You can resize & scroll the two sides as necessary, & you may want to maximize this screen. But since you should also have the paper copy of the form on hand, you can focus on the left screen here.



In fact, you can change the view if desired through the **View Menu**. **Normal View** shows the two images side-by-side as above. **Image Only** shows only the handwritten version. **Edit View** shows only the converted digital version; since you have a paper copy of the handwritten version, you may prefer **Edit View**, especially on computers with smaller screens.

Zoom Zoom Prev Next

Past Medical History

☒ Allergies (hay fever)	☐ Cancer	☐ Heart attack	☐ Osteoarthritis
☐ Anemia	☐ Coronary (heart) disease	☐ Hepatitis C	☐ Osteoporosis
☐ Angina	☐ Crohn's disease	☐ High blood pressure	☐ Peptic (stomach) ulcers
☐ Anxiety	☒ Depression	☐ High cholesterol	☐ Prostate enlargement
☐ Arthritis	☒ Diabetes	☐ Irritable bowel disease	☐ Seizure disorder
☐ Asthma	☐ Emphysema/COPD	☐ Kidney disease	☐ Stroke (CVA)
☐ Atrial fibrillation	☐ Gallbladder disease	☐ Liver disease	☒ Thyroid disease
☐ Blood clots	☐ GERD (acid reflux)	☐ Migraine headaches	

Other medical history not listed above:

Typhus

Past Surgical History

	Year		Year		Year
☐ Angioplasty		☐ Colostomy		☐ LASIK	
☐ Angioplasty w/ stent		☐ Fracture surgery		☐ Liver biopsy	
☐ Appendectomy		☒ Gallbladder removal	1996	☐ Pacemaker	
☐ Arthroscopy of knee		☒ Gastric bypass	2009	☐ Small bowel resection	
☐ Back surgery		☐ Heart bypass surgery		☐ Thyroid removal	
☒ Carpal tunnel release	2007	☐ Hernia repair		☐ Tonsillectomy	
☐ Cataract surgery		☐ Hip replacement			
☐ Colon resection		☐ Knee replacement			

Other surgical history not listed above:

Melanoma removed left forearm — 2011

Family History

Indicate any diseases in your immediate family:

☐ Alcoholism	☐ Coronary (heart) disease	☐ Hearing deficiency	☐ Migraine
☐ Allergies (hay fever)	☐ Before age 50?	☒ High blood pressure	☐ Obesity
☒ Alzheimer's disease	☐ Cancer	☒ High cholesterol	☐ Osteoarthritis
☐ Arterial disease (poor circulation)	☐ Depression	☐ Irritable bowel disease	☐ Osteoporosis
☐ Asthma	☐ Developmental delay	☐ Kidney disease	☐ Seizure disorder
☐ Attention deficit disorder	☒ Diabetes	☐ Learning disability	☐ Stroke (CVA)
☐ Blood disease	☐ Eczema	☐ Mental illness	

Other family: Leprosy

Reviewing page 1, all marks & handwriting conversion on this page appear the same as the handwritten version. If there were something wrong or incomplete, the nurse would ask the patient to clarify, & enter changes here. But since things look good, just click Next to move on to page 2.

Social History

Marital status: ☒ Married ☐ Single ☐ Divorced ☐ Widowed ☐ Life partner

Race: ☒ White ☐ African-American ☐ Hispanic ☐ Asian Other:

Language: ☒ English ☐ Spanish ☐ Chinese ☐ French Other:

Ethnicity: ☐ Hispanic or Latino ☒ Not Hispanic or Latino

Hand dominance ☐ Left ☒ Right ☐ Ambidextrous

Exercise frequency: ☒ 2-3 times/week ☐ 3-4 times/week ☐ Daily ☐ Occasionally ☐ Never

Tobacco history — Have you ever used tobacco? ☐ No/Never ☒ Yes ☐ Unknown

Please check any of the below that you have ever used:		Use daily?	Amount per day:	Number of Years:	Age started:	Age stopped:
☒	Cigarettes	☒	45 Packs	31		
☐	Cigar	☐	Cigars			
☐	Pipe	☐	Pipes			
☐	Chewing	☐	Ounces			
☐	Snuff	☐	Ounces			
☐	Smokeless (Electronic)	☐	Units			

Second-hand smoke exposure: ☐ Yes ☐ No

Other substances

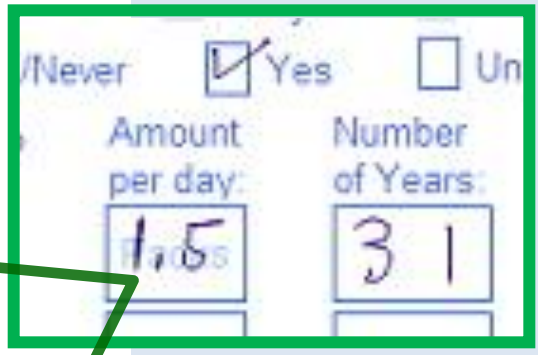
Do you drink caffeine? ☒ Yes ☐ No

Do you drink alcohol? ☒ Yes ☐ No ☐ Formerly

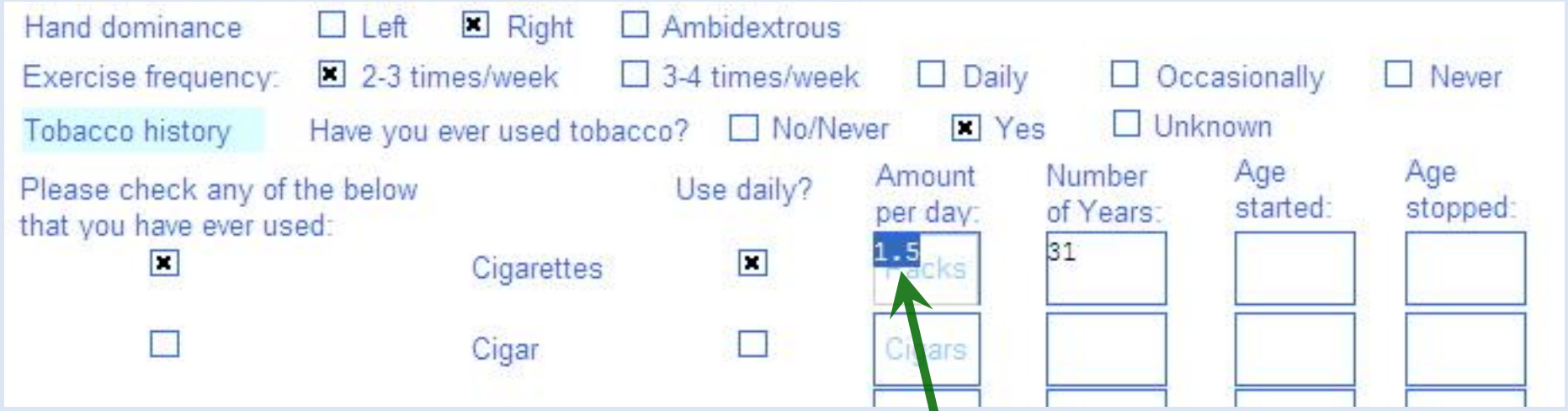
How often? ☐ Daily ☒ Weekly ☐ Monthly ☐ Occasionally ☐ Rarely

Do you use recreational or street drugs? ☐ Yes ☒ No ☐ Formerly

If so, what drugs?



Let's look at the **Social History** section first. Comparing the handwritten & digital versions, we see that the program erroneously interpreted **1.5** PPD as **45**.



Simply click in the box & type over **45** to change it to 1.5.
Do this for any other erroneous transcriptions you see.

Medications You Take (including doses if known)

Note: Meds must be manually reviewed & entered into EHR.

Flowage 1 spray each nostril daily

Fluoxetme 10mg daily

Synthrord 125 micrograms daily

Metformin wooing twice daily

Allergies (and reactions you had)

Note: Allergies must be manually reviewed entered into EHR.

Bactrrm-rasb

Social History

All of the data we've seen so far can be passed directly into the EHR. But look at the **Medications** & **Allergies** sections. Notice there are warnings that these entries must be manually entered into the EHR.

Please check any of the below that you have ever used:		Use daily?	Amount per day:	Number of Years:	Age started:	Age stopped:
☒	Cigarettes	☒	1.5 Packs	31		

Medications You Take (including doses if known)

Flowage 1 spray each nostril daily
Fluoxetme 10mg daily
Synthrord 125 micrograms daily
Metformin wooing twice daily

Allergies (and reactions you had)

Bactrrm-rasb

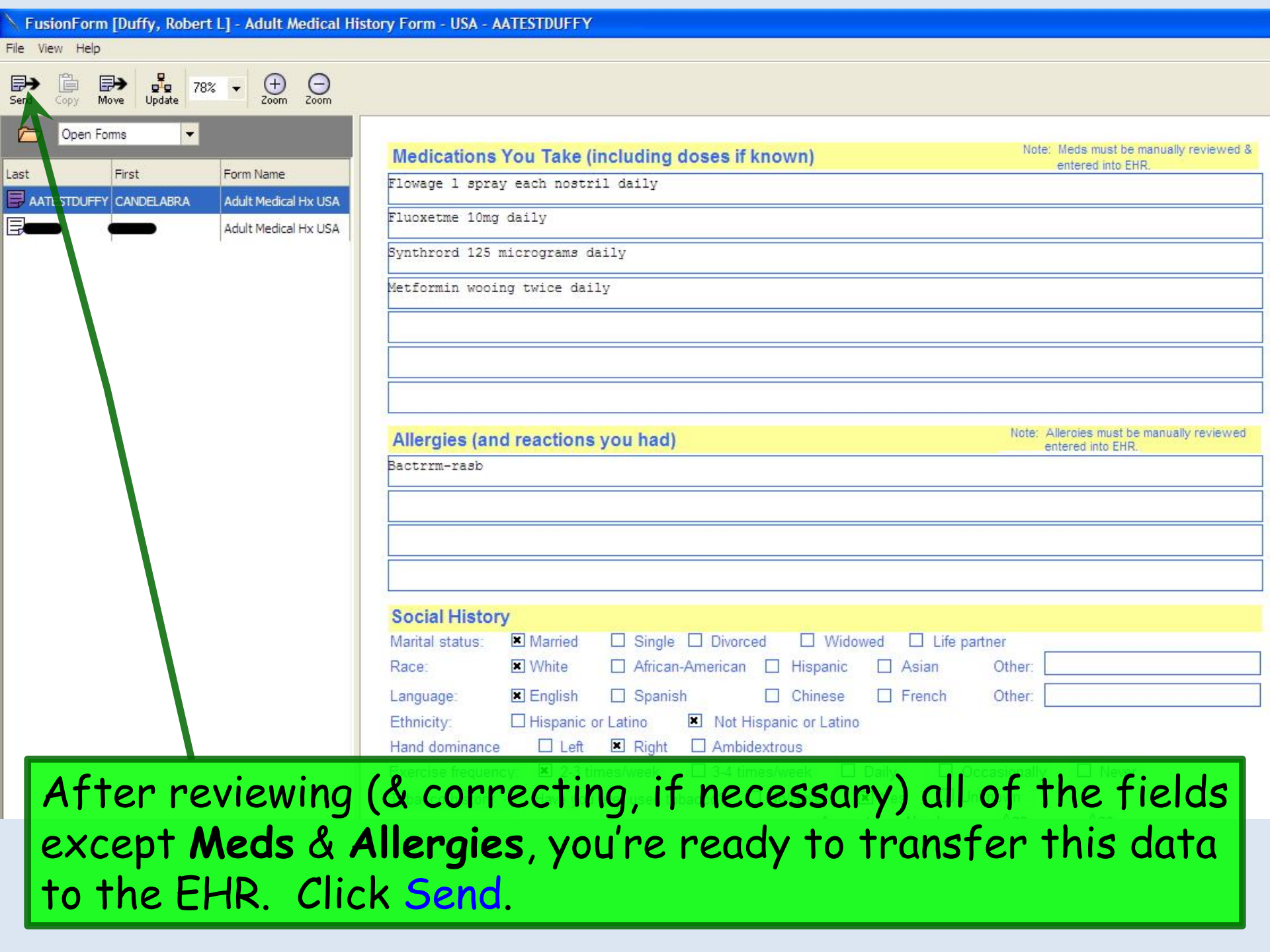
Medications You Take (including doses if known)

Flonase 1 spray each nostril daily
Fluoxetine 10mg daily
Synthroid 125 micrograms daily
Metformin 1000mg twice daily

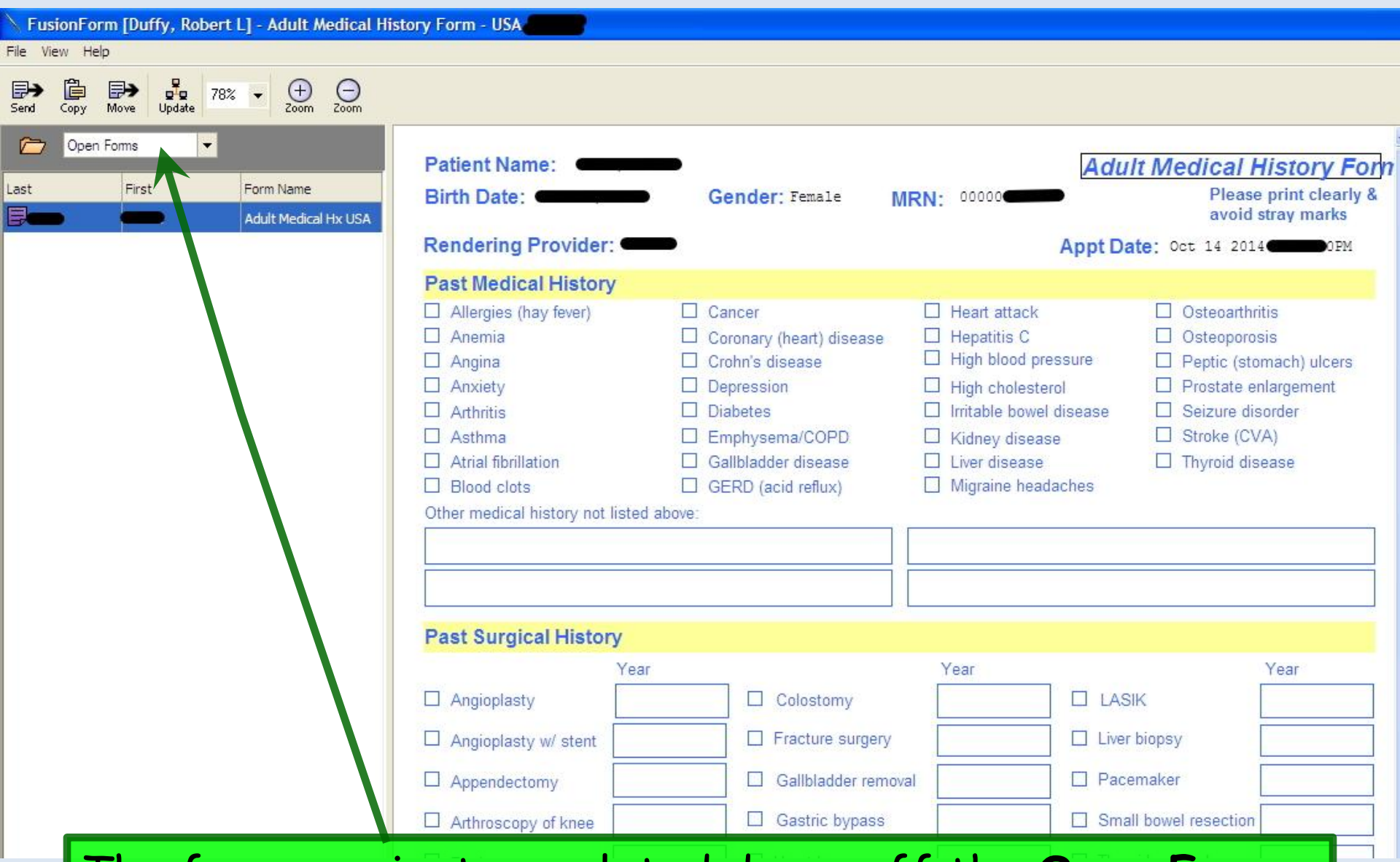
Allergies (and reactions you had)

Bactrim - rash

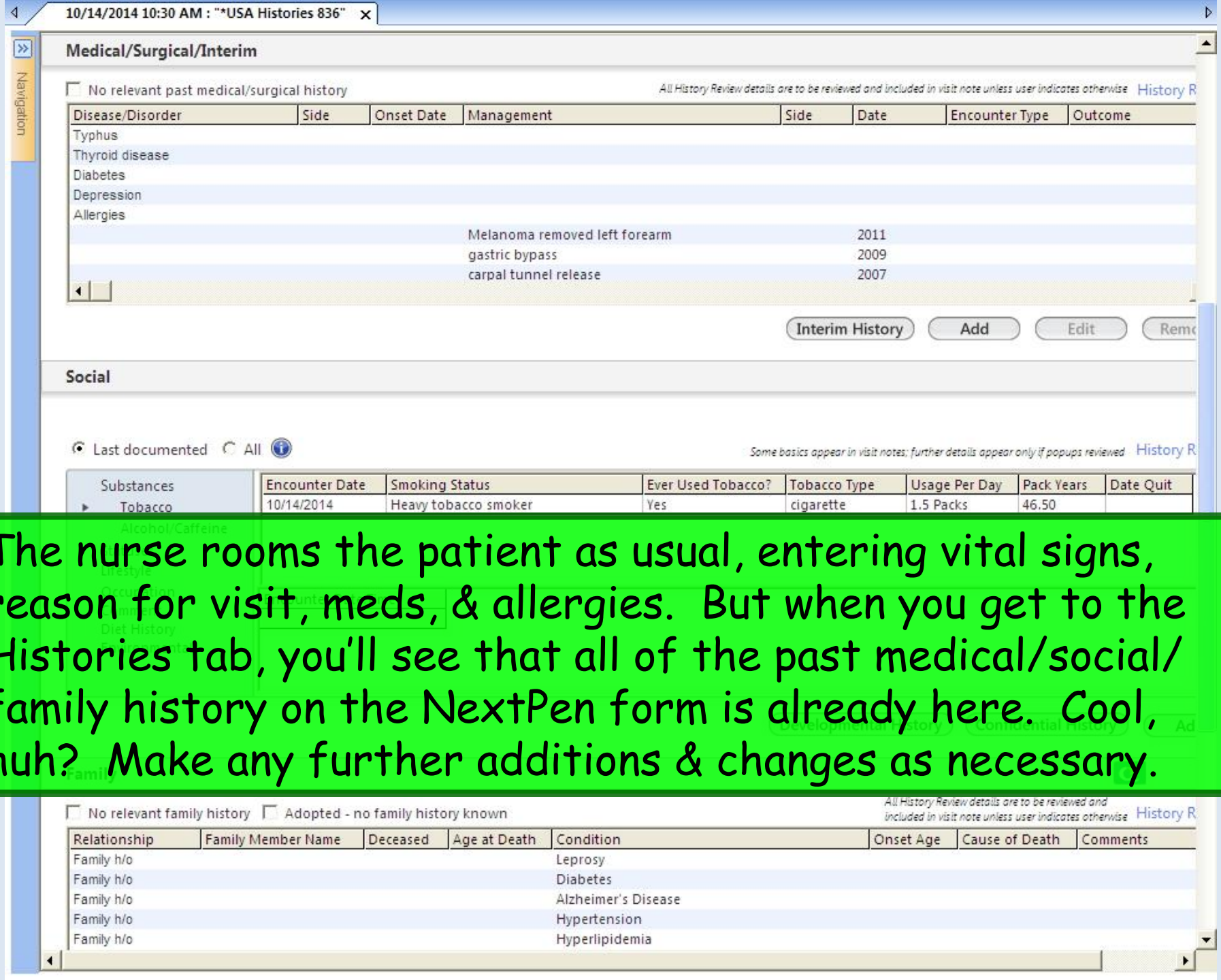
Clearly there are some pretty significant transcription errors here—which illustrates why there is no attempt to pass this data over to the EHR by default. You can click in the transcribed fields & type corrections if you like, but there isn't much reason to; when you're in the EHR you'll just make your entries there.



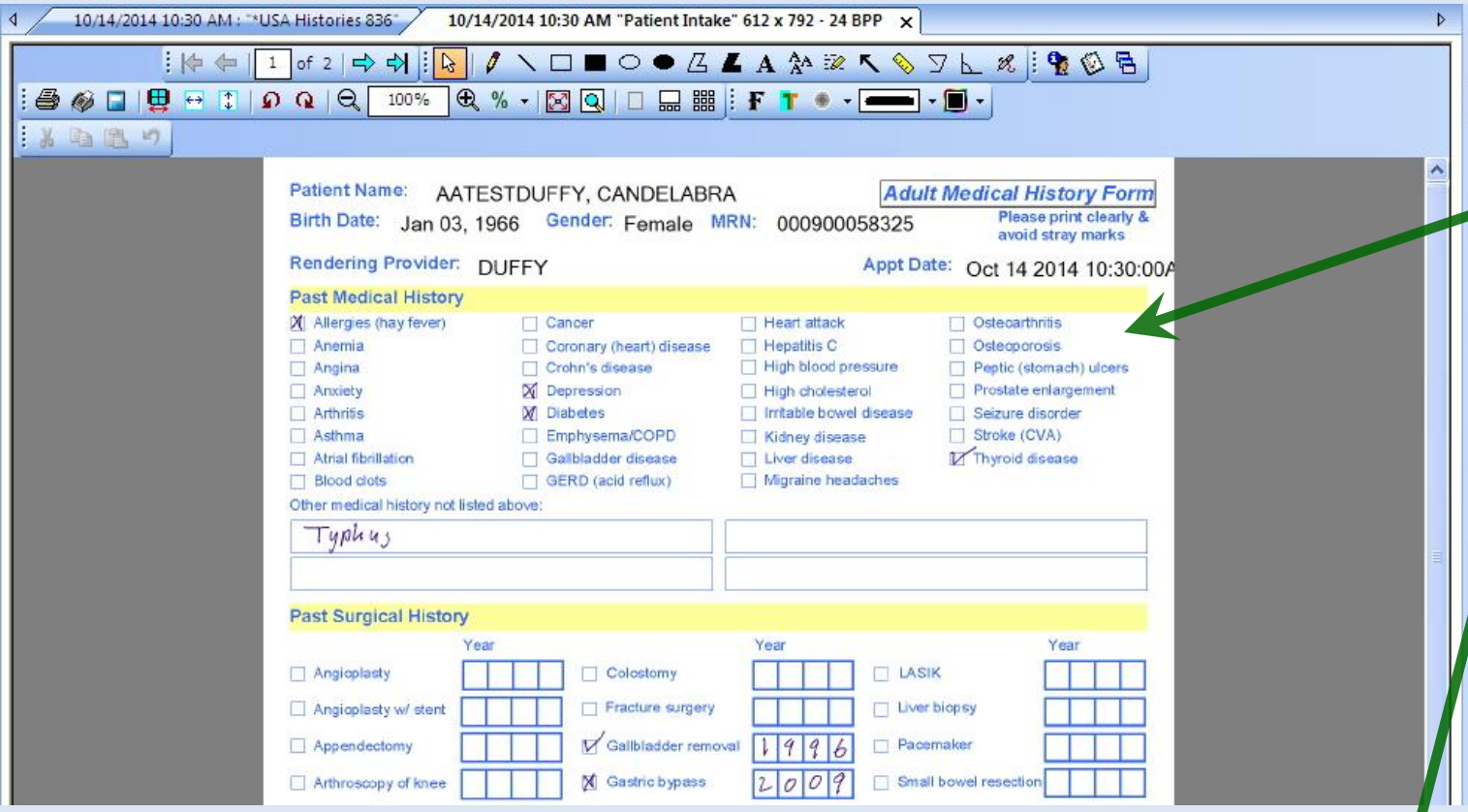
After reviewing (& correcting, if necessary) all of the fields except **Meds** & **Allergies**, you're ready to transfer this data to the EHR. Click Send.



The form you just completed drops off the **Open Forms list**. You can minimize **NextPen Desktop (FusionForm)**, & go to the EHR.

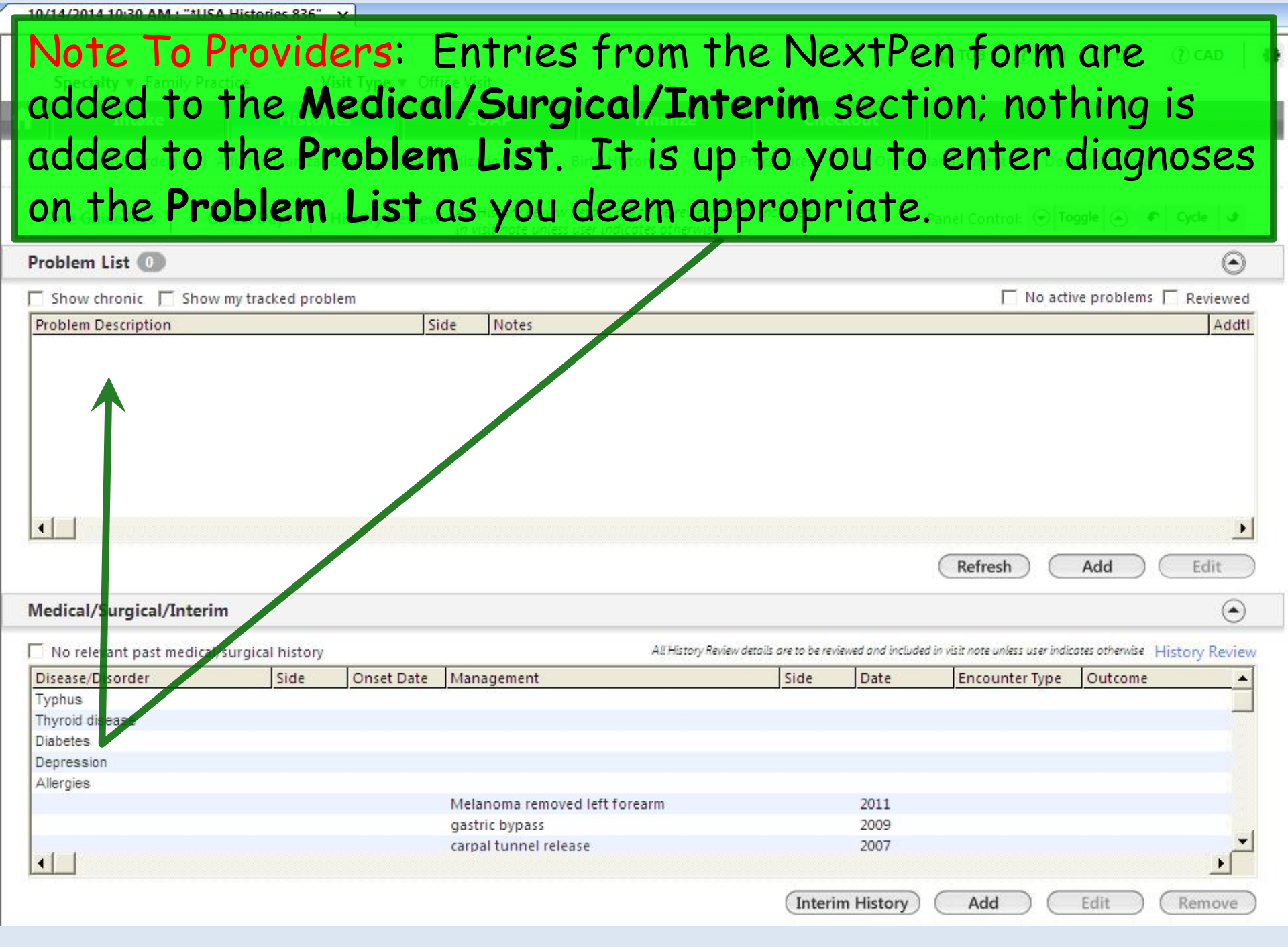


The nurse rooms the patient as usual, entering vital signs, reason for visit, meds, & allergies. But when you get to the Histories tab, you'll see that all of the past medical/social/family history on the NextPen form is already here. Cool, huh? Make any further additions & changes as necessary.

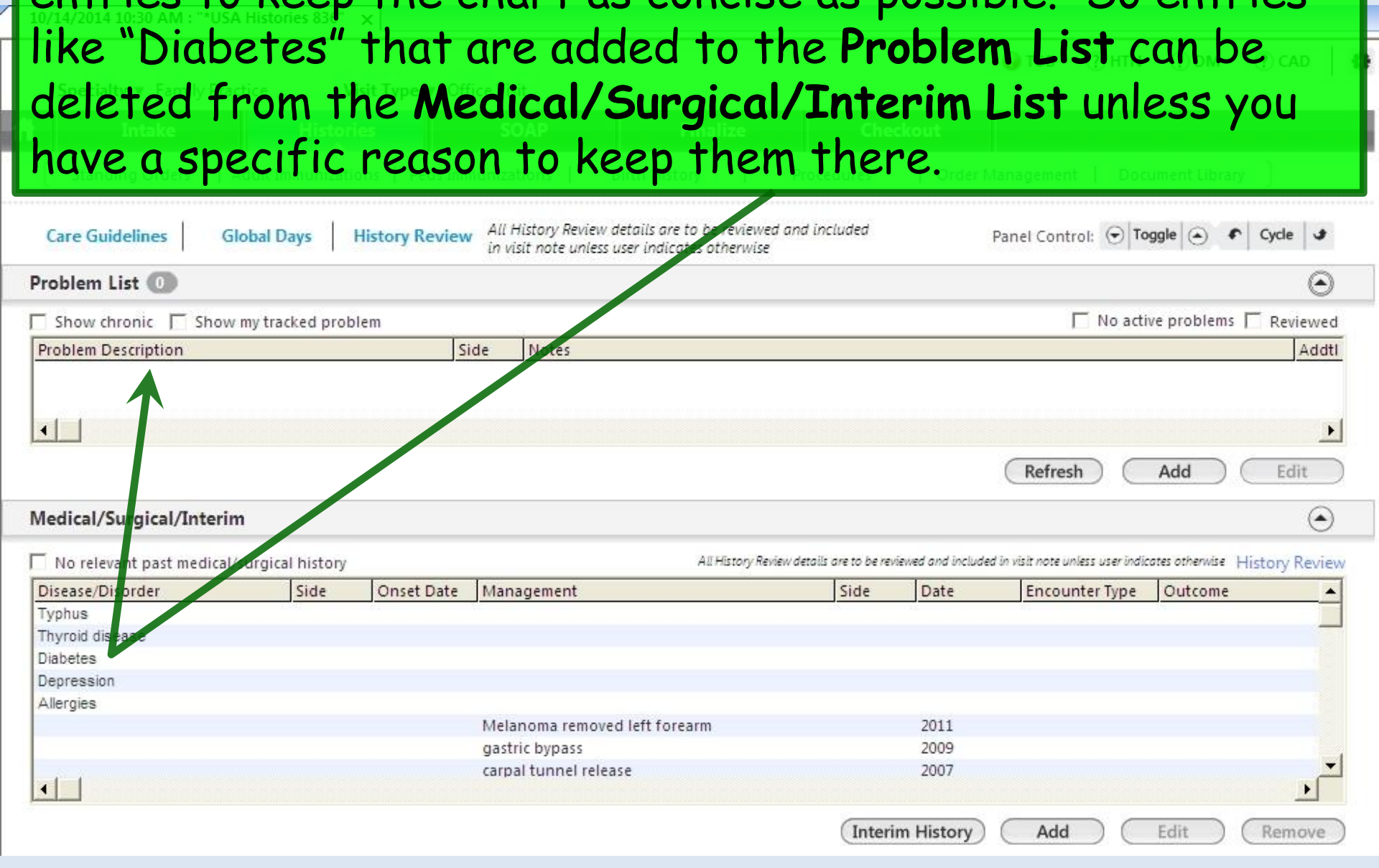


Notice that a copy of the handwritten form is saved to the encounter in case you need to refer to it later. So again, there is no need to scan the paper forms, & they can be discarded after the visit.

Note To Providers: Entries from the NextPen form are added to the **Medical/Surgical/Interim** section; nothing is added to the **Problem List**. It is up to you to enter diagnoses on the **Problem List** as you deem appropriate.



There is no harm leaving all entries on the **Medical/Surgical/Interim List** as well, but we suggest avoiding redundant entries to keep the chart as concise as possible. So entries like "Diabetes" that are added to the **Problem List** can be deleted from the **Medical/Surgical/Interim List** unless you have a specific reason to keep them there.



This concludes the NextGen NextPen demonstration.

"Meaningful Use" sometimes feels like a paradigm shifting without a clutch.

R. Lamar Duffy, M.D.
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College of Medicine
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