NEXTGEN PROCEDURE TEMPLATE DEMONSTRATION

This demonstration reviews usage of the Procedure Template & related popups. Details of the workflow will likely vary somewhat from clinic to clinic, but this should give you a good idea of NextGen functionality.

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.

Before We Start

• There are a number of different procedure popups, but most providers will only use a handful of them.

• There are a lot of similarities in how you use the various templates & popups, but also some differences. I'll present some representative examples, but it is impractical to review them all in detail here.

• There are also a handful of flaws in the procedure templates. To avoid interrupting the flow of this presentation, I have given you some tips on these in another lesson.

• The best strategy is to become familiar with the procedure templates you'll use frequently, perhaps by experimenting on a practice patient.









Pre-procedure care:

Procedure/Risks were explained 🔲 Quest

Here you see a number of procedures, divided into several (mostly) logical headings. A few quick pointers here:

consent

Note

* Ear * Catheterization/Intravesical Treatment * Bone Marrow BX/Asj * Endoscopy/Laryngoscopy * Colposcopy Images: Cervix / Vagina / Vulva * Core Needle Breast B * Epistaxis/Turbinate Reduction * Cystourethroscopy * Joint Aspiration/Inje * Head/Neck * Circumcision * Lymph Node Biopsy * Myringotomy/Tympanostomy * Endometrial Biopsy * Percutaneous Biopsy * Nasal/Sinus * Hysteroscopy/ablation/sterilization * Thyroid Nodule Biopsy * Oral Cavity * IUD/Diaphragm * Conscious Sedation * Pulse Ox * Pensary Insertion * Conscious Sedation * Spirometry * Testosterone Pellets * EkG * Thoracentesis * Urodynamics * Foreign Body Remov * Anoscopy * Vasectomy * Lumbar * Golonoscopy * Botox * Procenteric * * EiG * Botox * Procenteric * * Colonoscopy * Botox * Procenteric * * Golonoscopy * Debridement/Burn/Wound * Procenteric * * Fiex Sigmoidoscopy * Incision & Drainage * Procenteric * * Hemorrhoidectomy * Incision & Drainage * Lorein Ericine * <th>w BX/Asp e Breast Biopsy/Aspiration tion/Injection</th>	w BX/Asp e Breast Biopsy/Aspiration tion/Injection
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Incision & Drainage - Procedure	×
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Comments: After prep w/ chlorhexidene & local anesthesia, a stab wound was made w/ #11 blade, expressing ~3 ml of pus. Culture obtained. Packed w/ iodoform guaze & covered w/ bulky gauze dressing.	Submit to Superbill Save & Close Cancel

Incision & Drainage - Procedure		×
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Pre-procedure care:	Duestions were answered Consent was obtained	
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◆ Ear	Catheterization/Intravesical Treatment	Bone Marrow BX/Asp
Endoscopy/Laryngoscopy	Colposcopy Images: Cervix / Vagina / Vulva	Core Needle Breast Biopsy/Aspiration
Epistaxis/Turbinate Reduction	Cystourethroscopy	✤ Joint Aspiration/Injection
♦ Head/Neck	♦ Circumcision	💠 Lymph Node Biopsy
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Thoracentesis	Testosterone Pellets	A Endural Injection
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Chemodenervation w/Botox	Nail Avulsion/Hematoma/Removal	Procedure
♦ EEG	Wound Care/Suture Removal	
♦ EMG		
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Offline Proc Note)

Preview Proc Note

.esion/Wart/Punch/Other - Procedure	On some popups you can document severa different procedures. This can be conve but also confusing. The important things	ıl nient to
Pre-procedure care: ✓ Consent was obtained ✓ Procedure/risks were explained ✓ Questions were answered Area v Punch biopsy: Location: ✓ Single lesion ● RT ○ LT arm ● Each additional lesion trunk Destruction premalignant lesion(s): ○ 14 or less ○ □ First Lesion ○ RT ○ LT	remember are: 1) Document ALL your procedures before clicking Submit to Superbill; you can't add another one on this popup after submittin 2) Use the Comments box to clarify anyth that gets confusing as you document mult procedures.	d ng. hing tiple
Skin tag: Location: □ Removal 15 or less lesions	Qty: Assessment: Method: Electrocautery Scissors Liquid nitrogen Silver nitrate Suture: docaine 2% w/epinephrine: C C C C Dermalon (nylon) C C C C Devon <	

Procedure/Risks were explained 🔲 Q	uestions were answered 🔲 Consent was obtained 🔹 Consent	Alerts Consent
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 Ear Endoscopy/Laryngoscopy Epistaxis/Turbinate Reduction Head/Neck Myringotomy/Tympanostomy Nasal/Sinus Oral Cavity Pulmonary: Pulse Ox Spirometry Thoracentesis Xolair Injection Gastrointestinal: 	 Catheterization/Intravesical Treatment Colposcopy Images: Cervix / Vagina / Vulva Cystourethroscopy Circumcision Endometrial Biopsy Hysteroscopy/ablation/sterilization IUD/Diaphragm Pessary Insertion Penile Injection Prostate Ultrasound/Biopsy Testosterone Pollets 	 Bone Marrow BX/Asp Core Needle Breast Biopsy/Aspiration Joint Aspiration/Injection Joint Aspiration/Injection Joint Aspiration/Injection Joint Aspiration/Injection Joint Aspiration/Injection Joint Aspiration/Injection Product Node Biopsy Product Nodel Biopsy Anyroid Nodule Biopsy Anyroid Nodule Biopsy Anyroid Nodule Biopsy Conscious Sedation EKG
 Anoscopy Banding/infrared Colonoscopy EGD Flex Sigmoidoscopy Hemorrhoidectomy Proctosigmoidoscopy 	 Vasectomy Skin & Nails: Botox Debridement/Burn/Wound Incision & Drainage Laceration Repair Lesion Excision/Shaving Lesion Mart/Punch/Others 	Generic Lumbar Puncture Nebulizer Treatment Procedure/Test Instructions Patient Education Performed today
 Chemodenervation w/Botox EEG EMG Nerve Blocks 	 Nail Avulsion/Hematoma/Removal Wound Care/Suture Removal 	Procedure





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9	ide		×		Arthrocentesis majo	r joint 🗙		Shoulder		×		Method	×		
oint © C C C C	right left	Clos		ent dur ion	knee hip shoulder	Close	ate	anterior aspect bicipital groove an bicipital tendon bursa glenohumeral joint intra-articular & su intra-articular area joint medial acromion a mid-acromial proc rotator cuff sub-acromial burs subacromial space	ea b-acromial rea ess a area bula area	areas		aspiration injection aspiration and	d injection	use this ter	mplate:
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Check the Site prepped Yes b make a selection in the ensuing (or type details in).	Defaults: Right Left How to use this template: Description Proc Code Units
Add Edit Sort Remove Injection detail: Code: Procedure: Location: Method: Site 1: 726.10 arthrocentesis major joint right shoulder subacromial s injection Site 2: Site prepped Image: Site 1: Site prepped Site 1: Blacenic confirm alcohol aseptic technique aseptic technique aseptic technique with povidone-iodine aseptic technique with povidone-iodine aseptic technique with povidone-iodine aseptic technique service technique Site 3: povidone-iodine and alcohol sterile technique Code De Close Patient response: Tolerated procedure well: C No C Yes	Site repped: Yes Technique: Anesthetic: Medie gauge: Mo charge medication Mo charge Pressure Adhesive Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Clear Cl
Improvement by site: 1 0	inject into the joint. (Ethyl chloride is also available here.)

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t Injection/Aspiration									
♦ Consent □ Co	nsent was obtained				Defa	ults: 🔲 Rig	ht 🗌 Left	_ (*	
Click in th here we'll	e Placemer select mar	nt confirr nual palpa	ned b tion.	y b	OX;	otion	How	r to use this Proc Co	template: de Units
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e 1: e 2: ie 3: ie 4:									Clear Clear Clear Clear
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CT fluoroscopy manual palpation MRI ultrasound Close	sir C 4ir Manage My Ph	f you wer ndicate fl rases My Phrases	re asp uid d Follow-u ¢ Custon	oira eta ^{p with:} [n Plan	ting, ils he	you'e ere.	d Appropinstruce eason(s) t For inje Other:	priate post in tions given for next visit ection/aspira	njection : ation

Joint Injection/Aspiration

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njection o	letail: ode:	Procedure:	Add	d C	Edit		ort Remov	e Site prepped: Yes Technique:	Anesthetic	Needle mL gauge:
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								<u>B</u> efresh	OK	Cancel

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mg you are injecting.

Synvisc - OneT with dexamethasone

Refresh

Synvisc - OneT with methylprednisolone acetate

Sunvisc - OneT with methylprednisolone acetate

J7325/J1100

J7325/J1020

J7325/J1030

48 mg/1 mg

48 mg/20 mg

48 ma/40 ma

Cancel

oint Injection/Aspiration				
A ⇔ Consent	Consent was obtained		Defaults: 🗌 Right 🛙	Left
What if yo	ou combii	ne meds? If you	click Detail,	How to use this template: (
you'll get a	a popup t	hat lets you spec	cify 2 meds.	Proc Code Units
region, unspecified	Add	Edit Sort Remove	Site prepped:	Needle
Code: Procedure: Site 1: 726.10 arthrocentesis Site 2:	Location: major joint right shoul	Method: der subacromial s injection	Yes Technique: Ai	nesthetic: mL gauge:
Site 4: Placement confirmed by: Site 1: manual palpation	Fluid:	(mL) Fluid Medication withdrawn: & Detail	Mo charge Ste mg mL Seq medication Pr	erile dressing: essure Adhesive Clear
Proc Injection Med Detail First medication: Site 1:	mg: ml: Lot number	Manufacturer: Expiration date:		Clear Clear Clear Clear
Site 3: Site 4: Second medication:	mg: mL: Lot number	Manufacturer: Expiration date:	But not lide	ocaine. You
Site 1:			anesthetics	s. If you
Comments	(Manage N	Save & Close Cancel Follow-u	to mention	, you'll need it in the
			Comments l	D0X.

Use other checkboxes & b as desired, & add further in the Comments box. This good place to clarify drug	ullets detail: s is a	Sini ection Er count	History: er Date:Tim	Defau e Descrip	ılts: 🗖 Rig	iht 🗖 Left Hov	v to use this t	te plate: ()
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Site 2:	es, you must click	on the "Su DX3	bmit to Sup	perbill" but	tton prior to	exiting)	Verif Verif	Clear Clear Clear Clear
Patient response: Tolerated procedure well: O No O Yes Improvement by site: O 1 O 2 O 3 O 4 % Improvem Comments Manage My Phrases My Ph Shoulder prepped & subacromial space injected w/ a 1-1-1 combination of Celest marcaine, & lidocaine.	PI L L nent: T F rases tone,	lan: .ab Orders: Schedul Fimeframe: Follow-up Custom F	e follow-up vith:	An cai	nd re	memt ve pre	Der y esets	OU S

oint Inje	ction/Aspiration												
Today's	♦ Consent	Consent was Procedure/risi	obtained ks were exp re answere heck the de	olained ed	below.) Ad	d Common A	ssessment Ini	ection Histo	Defau	lts: 🗖 Rig	pht □ Left	aw to use th	s template:
and Di	Assessments, (Sea	an assessment and a	TREEK THE GE	de de	Chatter Ad	d contaion A:	isessment inj	ccuon miste	h T E Derer	Intion		Diversion Diversion	Godan Maite
T. di	he nex iffere	xt step ent fron	is a n ma	liff any	erer of t	nt fr the o	om w ther	hat pro	you'r cedul	re th re to	ninkin empla	g, & tes.	is
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Site 5:			<u> </u>								_		
Site 1: Site 2: Site 3: Site 4:	Placement confirmed by: manual palpatio	Fluid:	J.:		(mL) Fluid withdraw	Medication n: Detail Betameth	n: asone acet/soo	mg 1 ph/ 6	mL Seq n	No charge nedication	Sterile dressin Pressure	ng: Adhesive I I I I	Clear Clear Clear Clear
Procedu	re bi <mark>lling:</mark>			(I	o submit ch	arges, you mu	ust click on the	"Submit to	Superbill" but	ton prior to	exiting)	Veri	fy Charges
Code	∇ Description		Units	RVU	DX1	DX2	DX3	DX4	Mod1	Mod2	No Charge	Submitt	ed
Patient r Tolerate Improve	esponse: ed procedure well ement by site: ts der prepped & sul ne, & lidocaine.	: C No O Yes 1 C 2 C 3 C 4 bacromial space injec	(Manage ted w/ a 1:	My Phr.	% Impro	vement: Phrases elestone,	Plan: N Lab Ord Sch Timefra Follow	ly Plan ders: edule follov me: -up with:	w-up visit		Appro instru Reason(s) For inj Other:	priate post ctions given for next visi jection/aspin	injection it: ration
							1	Place Or	der Subr	nit to Supe	rbill Save	& Close	Cancel

Joint Injection/Aspiration							×
Consent Consent was obtai Consent was obtai Procedure/risks we Questions were an Today's Assessments: (Select an assessment and check	ned re explained swered the desired labs	below.) Add Commo	n Assessment Injec	tion History:		How to use this template:	D
# Diagnosis Description	Code	Status	Enco	ounter Date:Time De	scription	Proc Code Units	5
1 Acute bronchitis	466.0			- Maria - State			
2 Neoplasm of uncertain behavior of skin	238.2						
Injection detail Code:	s are t to s	posted Superbi	to this II then	s grid. <mark>Save &</mark>	When do Close.	ne, Needle mL gauge	le e:
Site 1: 726.10 arthrocentesis major joint righ	t shoulder sub	acromial s injection		Chlorhexic	line		
Site 2:							
Site 3:							
Site 4:							
Placement confirmed by: Fluid:		(mL) Fluid Medica withdrawn: 🔶 Deta	tion: iil	mg mL Seq	No charge Sterile dre medication Pressure	Adhesive	
Site 1: manual palpation		Betam	ethasone acet/sod p	hc 6		Clear	2
Site 2:						Clear	2
Site 3:						Clear)
Site 4:						Clear)
Procedure billing:	(o submit charges, you	i must click on the "	Submit to Superbill"	button prior to exiting)	Verify Charges)
Code V Description U	nits RVU	DX1 DX2	DX3	DX4 Mod	1 Mod2 No Charg	ge Submitted	87 I
J0702 Betamethasone acet/sod phosp		726.10			N	N	
20610 Arthrocentesis major joint/bursa 1	1.54	726.10		RT	N	N	
Patient response:			Plan: My	Plan			
Place Order gives	you [.]	the cha	Lab Order	rs: lule follow-up visit e: p with:	Reaso	propriate post injection structions given n(s) for next visit: r injection/aspiration her:	
probably don't nee	ed to	do here	2.	Place Order	ubmit to Superbill	ave & Close D Cancel	Ð

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Indication:			Pre-procedure care:	
Description:	Code:	Status:	Consent was obtained	Consent
Redundant prepuce and phimosis	605		Procedure/risks were explained	
Procedure:	,		Questions were answered	
Description:	Code:		Prepped and draped	
Foreskin manipulation/stretching	54450			
Foreskin was retracted using gauze & digital tra	action, breaking adhesions	5,		
dedicated popup It is helpful to k of time when you There is another the Generic Proc	s, & save now the c use this lesson the edure Pop	them as p diagnosis o popup. hat furthe pup.	er reviews the use o	se. head f
Family instructed to gently retract foreskin at lea	ast once daily while bathin	ng to prevent recurrence.	Sooner if symptoms persist/worsen	
Dressing/wound care:				
			(Submit to	Superbill
			Save & Close	Cancel

05/27/2013 11:05 AM : "Procedures " ×						
Pre-procedure care: Procedure/Risks were explained Questions were answered Consent was obtained Consent						
	As discussed in the beginning, it is a good any of the procedure templates you think sample patient to learn its idiosyncrasies.	l idea to try out you'll use on a				
G	There are, unfortunately, a few misbehaviors in the procedure templates. A separate lesson online reviews some of them, along with some workarounds.					
	If you find a problem you can't work through, please inform the EHR Team.					
c [& EMG & Nerve Blocks Comments:	Arthrocentesis major joint/bursa BETAMETHASONE ACET&SOD PHOSP 3MG				
		Offline Proc Note Preview Proc Note				

This concludes the NextGen Procedures demonstration.

For further information, please review the Procedures Problems & Tips lesson as well.

Being over the hill is much better than being under it.

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