

NEXTGEN PROVIDER SELECTION DEMONSTRATION

There are several different spots in NextGen where a "provider" is chosen. Since these different spots have different ramifications with regard to note generation & billing, this often becomes confusing to users. This demonstration tried to clarify that. It has been created using the Family Medicine Department & a fictitious unspecified "FPProvider," but the workflow would be similar in other clinics.

This has been prepared for EHR 5.8 & KBM 8.3, though some earlier versions appear in the background when they are not germane to the point being discussed. Subsequent updates may display cosmetic & functional changes.

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

Appointment List Provider

- Selection of provider for which you are viewing appointments.
- Pertinent to both nurses & providers.

Work Flow [Duffy, Robert L]

Appointments 8/23/2010  **DUFFY, ROBERT LAMAR MD**

Time	Room	Patient/Subject	Reason	Status
11:30 AM		Test, Mom/15 MIN		ATTENDED
01:30 PM		Test, Lisa/15 MIN		ATTENDED
02:00 PM		Test, Debbie/15 MIN		ATTENDED
03:15 PM		Test, Matt/15 MIN		ATTENDED
03:45 PM		Test, Dee dee/15 MIN		ATTENDED

All Tasks | To Do | Bookmarks | Lab Results | Calls

Due Date	Patient/Subject	Description
08/23/2010	Test, Mom/Lab Results	Direct Ag (Non-TCB) \ Magnesium, Serum
08/23/2010	Test, Lisa/Lab Results	PhenoSense(TM) Comprehensive
08/23/2010	Test, Mom/Lab Results	Uric Acid, Serum \ Creatine Kinase, Total, Serum
08/23/2010	Test, Lisa/Lab Results	Lead, Blood (Pediatric)
08/23/2010	Test, Mom/Lab Results	AFP Tetra
08/12/2010	Test, Linda/Lab Results	t-Transglutaminase (tTG) IgA \ Antinuclear Antibodies Direct \ Request Pr...
08/04/2010	Zuleta, Example 002/Physician Sign Off Request	Hepatic Function Panel (7) \ Hemoglobin A1c \ Request Problem
08/04/2010	Zuleta, Example 003/Physician Sign Off Request	sign off request
08/04/2010	Zuleta, Example 004/Physician Sign Off Request	sign off request
08/04/2010	Zuleta, Example 005/Physician Sign Off Request	sign off request
07/13/2010	King, Kathy/Lab Results	Amylase, Serum
07/12/2010	Test, Labcorp/Lab Results	Amylase, Serum
06/25/2010	Davis, Linda Ann/Physician Sign Off Request	sign off request

Click on the Provider Icon to change the provider selection.

Here is where you select which provider's appointment list to view; you can have multiple providers' appointments displaying at one time.

New Task | Delete | Modify | Send | Chart

Work Flow [Duffy, Robert L]

Appointments 8/23/2010 DUFFY, ROBERT LAMAR MD;FPPROVIDER, MD

Time	Room	Patient/Subject	Reason	Status	Provider
11:30 AM		Test, Mom/15 MIN		ATTENDED	DUFFY, ROBERT LAMAR MD
01:30 PM		Test, Lisa/15 MIN		ATTENDED	DUFFY, ROBERT LAMAR MD
02:00 PM		Test, Debbie/15 MIN		ATTENDED	DUFFY, ROBERT LAMAR MD
03:15 PM		Test, Matt/15 MIN		ATTENDED	DUFFY, ROBERT LAMAR MD
03:45 PM		Test, Dee dee/15 MIN		ATTENDED	DUFFY, ROBERT LAMAR MD

You are now viewing the appointment lists for both Dr. Duffy & FPPProvider.

Important. Note that once you open a patient's chart, this provider selection has no direct bearing up who the current or rendering provider is.

All Tasks To Do Bookmarks Lab Results Calls

!	Description
!	08/23/2010 Test, Mom/Lab Results Direct Ag (Non-ICD) \ Magnesium, Serum
!	08/23/2010 Test, Lisa/Lab Results PhenoSense(TM) Comprehensive
!	08/19/2010 Test, Mom/Lab Results Uric Acid, Serum \ Creatine Kinase, Total, Serum
!	08/16/2010 Test, Son Relations/Lab Results Lead, Blood (Pediatric)
!	08/12/2010 Test, Linda/Lab Results t-Transglutaminase (tTG) IGA \ Antinuclear Antibodies Direct \ Request P...
!	08/04/2010 Zuleta, Example001/Physician Sign Off Request sign off request
!	08/04/2010 Zuleta, Example 002/Physician Sign Off Request sign off request
!	07/13/2010 King, Kathy/Lab Results Amylase, Serum
!	07/12/2010 Test, Labcorp/Lab Results Amylase, Serum
!	06/25/2010 Davis, Linda Ann/Physician Sign Off Request sign off request

New Task Delete Modify Send Chart

Current Provider

- This pertains primarily to the nurses—you are specifying the provider you're working under for that patient encounter.
- For providers, the Current Provider should always be yourself.

NextGen EHR: Bessemer Quagmire MRN: 000900044691 DOB: 01/02/1957 (Female) AGE: 57 years 5 months - 06/03/2014 04:28 PM : "USA Histories 836"

File Edit Default View Tools Admin Utilities Window Help

Logout Save Clear Delete USA Family Medicine DUFFY, ROBERT LAMAR MD Patient History Inbox PAQ Medications Templates Documents Images Orders Procedures EPM Apps Close Dashboard

Bessemer Quagmire (F) DOB: 01/02/1957 (57 years) Weight: 163.00 lb (73.94 Kg) Allergies: (1) Problems: (3) Diagnoses: (6) Medications: (2)

Address: 555 Drive By Drive MOBILE, AL 36604 MRN: 000900044691 Insurance: AFLAC Emergency Relation: Emergency Phone: Pharmacy 1: PCP: PERKINS, ROBERT ALLEN... Referring: Rendering: DUFFY, ROBERT LAMAR ...

Contact: (251) 555-1111 (Home) NextMD: No

Alerts OBGYN Details Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

For each encounter, the nurse needs to specify the **Current Provider** under whom they are working.

- 1) This *may* be the provider with whom the appointment was scheduled, but it could be switched to another provider.
- 2) If the patient was scheduled with FPPProvider, you'll need to specify the *actual provider* who sees the patient.
- 3) If the patient was scheduled through the FPNurse list, you'll need to change the provider to whoever is supervising you at the time; in most instances, that will be the clinic supervising attending.

Ready NGTest USA Health Services Foundation rlduffy CAP NUM SCRL 06/09/2014

NextGen EHR: Bessemer Quagmire MRN: 000900044691 DOB: 01/02/1957 (Female) AGE: 57 years 5 months - 06/03/2014 04:28 PM : "USA Histories 836"

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Alerts OBGYN Details Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

06/03/2014 04:28 PM : "USA Histories 836"

Intake Histories SOAP Finalize Checkout

Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library

Care Guidelines

Problem List

Diabetes mellitus type 2

Allergic rhinitis

Essential hypertension

Note that this provider selection is part of the 4-point check that should be performed at the start of every encounter.

Medical/Surgical/Interim

No relevant past medical/surgical history

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
LASIK					2003		
Bilateral tubal ligation					1971		

06/03/2014 04:28 PM DUF

*USA Intake 836

*USA SOAP 836

Order Management

*USA Histories 836

06/02/2014 08:44 PM DUF

06/01/2014 09:30 AM DUF

05/31/2014 11:00 PM DUF

05/30/2014 10:44 AM DUF

05/26/2014 01:40 PM DUF

05/24/2014 01:09 PM DUF

05/23/2014 10:00 AM DUF

Custom

NGTest USA Health Services Foundation rlduffy CAP NUM SCRL 06/09/2014

Patient

Location

Provider

Date

Address: 22 Two Tooth Trail
MOBILE, AL 36604
Contact: (251) 555-1111 (Home)

- DUFFY, ROBERT LAMAR MD
- DYESS, DONNA LYNN MD
- ECKSTEIN, CHRISTOPHER P MD
- EDMOND, JULIE PA-C
- EL ZARIF, SAMER ARNP
- ENTZMINGER, LAKESHIA A MD
- ESTRADA, BENJAMIN MD
- FAGAN, KAREN A MD
- FAMILY, PRACTICE DEPT ARNP
- FAMILY, PRACTICE NURSE ARI
- FELIS, ANDREW MD
- FELKNER, REGINA KAY MD
- FERDOUSY, FAIZA MD
- FORTE, KIMBERLY MD
- FRANKS, RONALD D MD
- GAFFNEY, JACQUELYN CHRIS
- GALLEGOS, MARIA ROJAS MD
- GANDY, ROY E MD
- GILL, CURTIS
- GONNER, JACQUELINE CRNP
- GONZALEZ, RICHARD P MD
- GORE, ETHAN MCCALED MD

Emergency Relation:

Emergency Phone:

Pharmacy 1: CAFFEYS PHARM...

PCP: DUFFY, ROBERT LAMAR ...

Referring:

Rendering: MORGAN, AARON M MD

05/28/2014 10:08 AM : "*USA Intake 836"

Specialty: Family Practice

Visit Type

TOB HTN DM CAD
Former smoker

Click the dropdown arrow & make a selection.
You can only choose one Current Provider at a time.

General

Established patient New patient | History

Reason for Visit

This selection is important because, if the nurse generates a note, e.g., after giving a B12 injection, this is the provider whose name will display at the bottom.

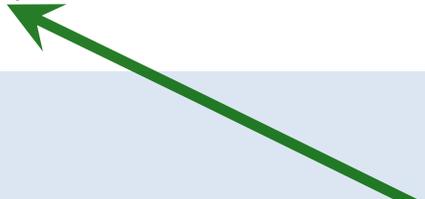
Orders/Procedures/Instructions/Education

Office Procedures/Services

Vitamin B12 1cc

Provider: Robert L. Duffy

Document generated by: Ann Smith, LPN 08/20/2010 4:01 PM

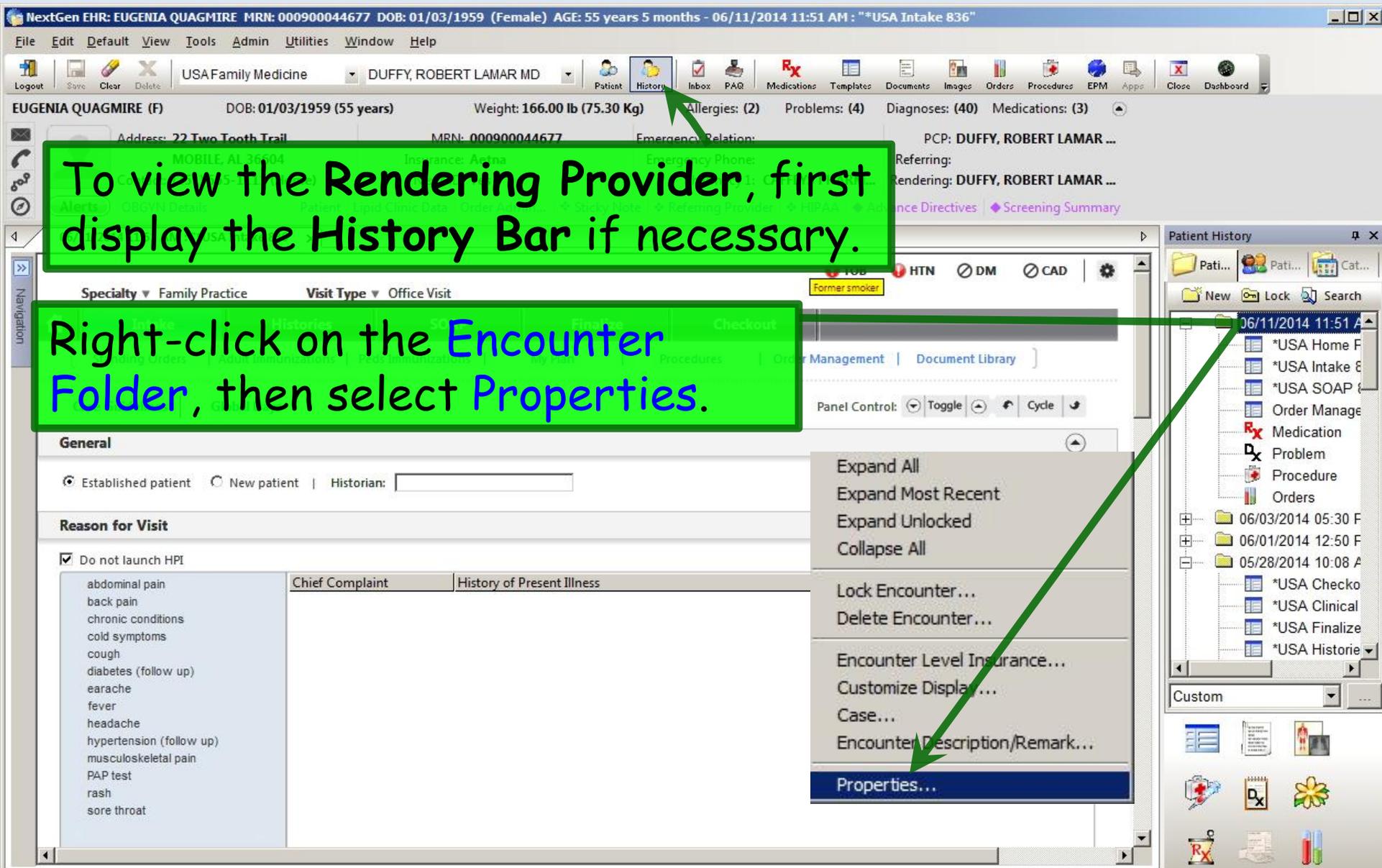


This snippet of the bottom of a note shows the nurse who generated it & her Current Provider.

Note this can be different from the **Rendering Provider**, which we'll get to next.

Rendering & Supervising Provider

- Pertinent to both nurses & providers—especially to resident providers.
- A source of confusion, since the term **Rendering Provider** sometimes means different things in a teaching environment, depending on whether you are thinking about who *saw* the patient or who is *billing for* the encounter.
- For residents, the **Supervising Provider**, or attending, also becomes an issue.



To view the Rendering Provider, first display the History Bar if necessary.

Right-click on the Encounter Folder, then select Properties.

Encounter Maintenance - Encounter: 2047 for - Quagmire, Nigel

Billable Date: 08/20/2010 | Billable Time: 4:38 P | Occurrence Code: | State: | Onset Date: | Onset Time: |

General | Billing & Collections | Encounter Specifics | Claims | Marketing | Properties | History

Patient Type: | Condition Related to Employment: | Remarks: | Same/Similar Date: | Complaints: | Date Last Seen: |

Providers Rendering: DUFFY, ROBERT LAMAR | Referring: | Referring Facility: | First Consulting: | Supervisor: | Service Location: USA FAMILY MEDICINE

Incident-To Bill Encounter

Case: | Case Date: |

If the patient has been scheduled with the provider who will actually be seeing the patient, there's nothing to do here.

Billable Date	Billable Time	Occurrence Code	State	Onset Date	Onset Time
08/20/2010	4:38 P				

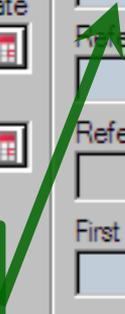
General
 Billing & Collections
 Encounter Specifics
 Claims
 Marketing
 Properties
 History

Patient Type: Condition Related to Employment
 Remarks: Same/Similar Date:
 Complaints: Date Last Seen:
 Admit Date: Discharge Date: Initial Treatment Date:

Providers Rendering:
 Referring:
 Referring Facility:
 First Consulting:
 Supervisor:
 Service Location:

Incident-To Bill Encounter

But if the patient was scheduled with another provider, or with a fictitious walk-in provider like **FPPProvider**, the nurse will need to change the **Rendering Provider** to whoever is actually seeing the patient.



Billable Date: 08/20/2010 | Billable Time: 4:38 P | Occurrence Code: | State: | Onset Date: | Onset Time: |

General | Billing & Collections | Encounter | Claims | Marketing | Properties | History

Click the dropdown arrow, then select the provider. In this example, the patient will be seen by a resident, Dr. McFaden.

Providers Rendering

- FPPROVIDER, MD
- LAUGHLIN, BRITTNEY B
- LENZ, CARA B
- LINDER, MICHAEL M
- LIU, GERALD
- MCCOLGIN, STERLING
- McFaden, Thomas
- MEREDITH, COURTNEY E
- MESSER, CYNTHIA F

Service Location: USA FAMILY MEDICINE

Facility: | Encounter Types: Billable;Clinical | Print Encounter On Statements | Patient is Homebound

Incident-To Bill Encounter

Case: | Case Date: |

You would use a similar process to move the patient from one rendering provider to another.

Encounter Maintenance - Encounter: 2047 for - Quagmire, Nigel

Billable Date: 08/20/2010
Billable Time: 4:38 P
Occurrence Code: [dropdown]
State: [dropdown]
Onset Date: [calendar]
Onset Time: [dropdown]

General | Billing & Collections | Encounter Specifics

Patient Type: [dropdown] Condition Related to Employment

Remarks: [text] Same/Similar Date: [calendar]

Complaints: [text] Date Last Seen: [calendar]

Admit Date: [calendar] Discharge Date: [calendar] Initial Treatment Date: [calendar]

Facility: [dropdown]

Encounter Types: [dropdown] Billable;Clinical

Print Encounter On Statements Patient is Homebound

Case: [text] Case Date: [calendar]

Click **OK** to close the popup.

Providers

Rendering: **McFaden, Thomas** [dropdown]

Referring: [dropdown]

Referring Facility: [dropdown]

First Consulting: [dropdown]

Supervisor: [dropdown]

Service Location: USA FAMILY MEDICINE [dropdown]

Incident-To Bill Encounter

The resident performs the encounter, but then needs to view encounter properties again, to set the Supervising Physician.

- Expand All
- Expand Most Recent
- Expand Unlocked
- Collapse All
- Lock Encounter...
- Delete Encounter...
- Encounter Level Insurance...
- Customize Display...
- Case...
- Encounter Description/Remark...
- Properties...**

Unable to obtain: [] Refused: [] Add

Time	Ht Ft	Ht In	Wt Lb	BMI	BP	Pulse	Temp F	Resp	Pulse Ox	Pain Score
12:40 PM										

Chronic Problems Add Problem

Last Addressed	Comorbidity	Code	Problem	Comments
/ /		530.81	Esophageal reflux	
06/11/2010		351.0	Bell's palsy	

Allergies No known allergies

Reviewed, no change
 Allergies added today

Medications No medications

Medication	Sig Description
Ambien CR 12.5 mg Tab	take 1 tablet (12.5MG) ORAL route every day bedtime

Allergen	Reaction
SULFA (SULFONAMIDE ANTIBIOTICS)	Rash

Order Type: All orders

Status	Ordered	Order	Appt Timeframe
ordered	10/01/2010	Chest x-ray, two views	-today
ordered	06/30/2010	Chest x-ray, two views	-today
result received	06/23/2010	Spine X-ray, Scoliosis Study (Complete, supine and standing views)	-today

Patient History

10/20/2010 10:08 AM

- Histories -
- Intake - OV
- SOAP - OV
- Summary -
- Procedures
- Protocols
- Telephone
- Master_Im
- telephone_
- Provider Te
- Provider Te

10/20/2010 09:3

10/19/2010 01:3

10/18/2010 03:4

10/15/2010 04:0

10/15/2010 03:5

09/30/2010 02:1

07/01/2010 03:5

06/23/2010 10:2

Review of Systems

System	Neg/Pos	Finding:

Custom

Billable Date	Billable Time	Occurrence Code	State	Onset Date	Onset Time
08/20/2010	4:38 P				

General | Billing & Collections | Encounter Specifics | Claims | Marketing | Properties | History

The resident doctor clicks the Supervisor dropdown arrow & selects the attending. In this example, we'll use Dr. Duffy.

Providers

Rendering: McFaden, Thomas

Referring:

Referring Facility:

First Consulting:

Supervisor:

- ATKINSON, TANGELA C
- BAHNMILLER, JODY
- BAKER, SUSAN L
- BODIE, FRANKIE L
- BROOKS, MARJORIE N
- DUFFY, ROBERT LAMAR
- HOGAN, WALTER L Jr
- LAFLEUR, JOHN C

Encounter Types

Billable;Clinical

Print Encounter On Statements Patient is Homebound

Case: Case Date:

Billable Date: 08/20/2010
Billable Time: 4:38 P
Occurrence Code: [dropdown]
State: [dropdown]
Onset Date: [calendar]
Onset Time: [dropdown]

General | Billing & Collections | Encounter Specifics | Claims | Marketing | Properties | History

Patient Type: [dropdown] Condition Related to Employment
Remarks: [text] Same/Similar Date: [calendar]
Complaints: [text] Date Last Seen: [calendar]
Admit Date: [calendar] Discharge Date: [calendar] Initial Treatment Date: [calendar]
Facility: [dropdown]
Encounter Types: Billable;Clinical
 Print Encounter On Statements Patient is Homebound
Case: [text] Case Date: [calendar]

Providers Rendering: McFaden, Thomas
Referring: [dropdown]
Referring Facility: [dropdown]
First Consulting: [dropdown]
Supervisor: DUFFY, ROBERT LAMAR
Service Location: USA FAMILY MEDICINE
 Incident-To Bill Encounter

Click OK to close the popup.



That is all that has to be done here; the resident would finish by submitting charges & generating the visit note.

One last thing to note, however: The selection of Rendering determines which provider's PAQ the note will go to. So if you set the Rendering wrong, it goes to the *wrong provider's PAQ*. And if you leave it set to a fictitious provider, like FPPProvider, it doesn't go to *anyone's PAQ*. So make sure to update the Rendering when necessary; this would most commonly be when the patient has been moved from one provider's schedule to another.

No relevant past medical/surgical history

All History Review details are to be reviewed and included in visit note unless user indicates otherwise [History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
			LASIK		2003		
			Bilateral tubal ligation		1971		

Custom

This concludes the
NextGen provider selection
demonstration.

How do you tell when you're out of invisible ink?