

NEXTGEN REPORTING DEMONSTRATION

This demonstration reviews some of the reporting capabilities in NextGen.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may, however, introduce cosmetic & functional changes.

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

Overview

- Creating reports in NextGen can be done via the built-in “native” reporter, or via another free-standing but integrated program called Crystal Reports.
- Either method is a bit involved, and sometimes riddled with problems before you get it right.
- The best option for most users will be to ask the EHR Team or clinic superuser to create the report you desire.
 - Crystal Reports can only be created by USA staff with training & access to the program.
- Once a report is created, you can run it easily as needed.

Crystal Reports

- Picking a report.
- Setting reporting parameters.
- Generating a report.
- Printing a report.
- Exporting to PDF or XLS spreadsheet.

New

Select Patient... Alt + P

Modify Patient...

Close Patient

Save

Close

Print

Custom Print \ Fax

Export Patient Documents

Graph

Reports

ChartMail

Family Unit

NextMD

Patient Education

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To open an existing Crystal Report, click File|Reports|Crystal Reports.

Generate Report

Report List...

Crystal Reports...

Significant Events...

Report Dialog



- This encounter for Current Patient
- All encounters for Current Patient
- All encounters for All Patient**
- Daily Chart Check
- Daily Chart check FMC
- Diagnostic Studies
- enc with remarks
- Encounters w/o documents FMC
- faxed medications that failed
- Images saved to patients FMC
- LabCorp Reg 8.17.2010

Print

Preview

Export

Report Setup

Fax

Save to Chart

Exit

We'll open a report called "Task not Complete FM."

Click on the + to expand the **All encounters for All Patient** heading.

Printer Driver:

Print Port:

Report File:

Report Dialog



- Diagnostic Studies
- enc with remarks
- Encounters w/o documents FMC
- faxed medications that failed
- Images saved to patients FMC
- LabCorp Req 8.17.2010
- No Precetor Note on Chart
- Open Task by User
- outguide
- Patient Entered into EMR FMC
- Referrals by specialty
- Referrals NOT completed FMC
- Superbill fp 06/23
- Task not Complete FM**
- Tasks accepted declined FMC

Print

Preview

Export

Report Setup

Fax

Save to Chart

Exit

Scroll down & highlight **Task not Complete FM**, then click the **Preview** button.

Printer Name: Lexmark 222-232 Color Jetprinter (Copy 1)

Printer Driver: Lexmark 222-232 Color Jetprinter

Report File: Task Not Comp.Report FM_Id.rpt

Enter Values

Please select a date range.

TaskDate

Please enter DateTime in format "yyyy-mm-dd hh:mm:ss".

Start of Range:

Enter a Value:

2010-9-1 00:00:00

Include this value No lower value

End of Range:

Enter a Value:

2010-9-22 00:00:00

Include this value No upper value

OK

Cancel

Some reports allow you to select parameters, such as a date range. Here we've chosen to report on Sept 1-22, 2010.

After making your selection, click **OK**.

Task Not Completed

Task Receipt	Subject	Description	Task create date & time	Task Creator	
Debbie Mullins					
Status	D				
Status	A				
Michael Linder					
Status	D	Physician Sign Off Request	9/2/2010 3:50:33PM	Ashraf Khan	
Status		New referral	9/16/2010 4:49:10PM	Ashraf Khan	
Charles					
Status					
Michael					
Status		Patient visit	9/20/2010 5:19:13PM	Brandy Roose	
Status	A	New diagnostic study order	9/13/2010 4:14:52PM	Brandy Roose	
Status	A	New referral	9/20/2010 5:58:46PM	Brandy Roose	
Status	A	New referral	9/13/2010 5:36:23PM	Brandy Roose	
Status	A	New referral	9/15/2010 9:58:50AM	Brandy Roose	
Status	A	New referral	9/15/2010 9:16:02AM	Brandy Roose	
Brandy Roose	3				
Status	A	Unfinished chart	Please expand HPI or use "Problem List" for chronic problems	9/15/2010 1:44:07PM	Carol Motley
Status	A	New diagnostic study order	9/15/2010 5:36:22PM	Carol Motley	
Status	A	New diagnostic study order	9/15/2010 5:36:47PM	Carol Motley	

Your report generates. If desired, click the **Print Report** button to print it on paper.

Another option is to save the report in some other format, such as a spreadsheet or PDF, by clicking the **Export Report** button.

Export



Format:

- Microsoft Excel 97-2000 - Data only (XLS)
- Adobe Acrobat (PDF)
- Crystal Reports (RPT)
- HTML 3.2
- HTML 4.0
- Microsoft Excel 97-2000 (XLS)
- Microsoft Excel 97-2000 - Data only (XLS)**
- Microsoft Word (RTF)

OK

Cancel

Unfortunately, Excel spreadsheets exported from Crystal Reports often are pretty messy. Things are a little better if you choose the **Data only (XLS)** option.

Export



Format:

- Microsoft Excel 97-2000 - Data only (XLS)
- Adobe Acrobat (PDF)
- Crystal Reports (CRT)
- HTML 3.2
- HTML 4.0
- Microsoft Excel 97-2000 (XLS)
- Microsoft Excel 97-2000 - Data only (XLS)
- Microsoft Word (RTF)

OK

Cancel

If you don't need to manipulate the data, & you just want to preserve a copy of the report, **Adobe Acrobat (PDF)** is a good choice.

Excel Format Options

Column width

Column width based on objects in the

Whole Report

Constant column width (in points) :

36.0

Export page headers and page footers :

Once Per Report

Create page breaks for each page

Convert date values to strings

Show Gridlines

Page range

All pages

From:

0

To:

0

OK

Cancel

You may be presented some export options; start with the default choices & experiment to see what gives you the best result. When done, click **OK**.

Select Export File



Save in: My Documents



- My Recent Documents
- Desktop
- My Documents
- My Computer
- My Network Places

- Ask and Record Toolbar
- cache
- Downloads
- Fax
- My iSiteExport
- My Videos
- PDF Favorites
- Sony Media Libraries
- WebEx

Navigate to the location of your choice, then click *Save*.



File name:

Save as type:

Native Reports

- Picking a report.
- Setting reporting parameters.
- Generating report.
- Printing report.
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File Edit Default View Tools Admin Utilities Window Help

New



Select Patient...

Alt + P

Modify Patient...

Close Patient



Save



Close

Print

Custom Print \ Fax

Export Patient Documents

Generate CCD...

Graph

Reports

ChartMajl

Family Unit

NextMD

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Histories

To open an existing Native Report, click File|Reports|Report List.

Office Visit

Refused:

BP

Pulse

Temp F

R

Generate Report

Report List...

Crystal Reports...

Cancel

Significant Events...

Memorized Reports

Report Type

A/R Reports

A/R Reports

Appointment Reports

Daily Reports

EHR REPORTS

Management Reports

Monthly Reports

NEXTGEN Best Practice Reports

System Reports

Click the dropdown arrow under **Report Type** & select **EHR REPORTS**.

Memorized Reports

Report Type

EHR REPORTS

△	Description	Repo
	Referrals By Encounter Date	Patient
	Referrals By Patient	Patient
	Referrals By Specialty	Patient
	Referrals By Specialty, USAFM	Patient
	SmokingStatusOver13	Patient
	Tasks	Patient
	Telephone Msg Rept	Patient
	Telephone Msg Rept-Take1	Patient
	Telephone Msg Rept-Take2	Patient
	UNBILLED AS OF 04-21-2010	Patient
	USAFM Home Health Patients	Patient
	USAFM Nursing Home Patients	Patient
	USAFMWarfarinPts	Patient

Scroll through the list to find the report you want. In this example we'll select **USAFM Nursing Home Patients**.

- Settings List
- Allergy
- Columns
- Diagnosis
- Filter
- Logical Group
- Medication
- Orders
- Patient
- Patient Chart
- Procedure
- Provider
- Sorting
- Templates
- Totals

- Include the following columns:
- Last Name
 - Fst Name
 - Mid Name
 - DOB
 - Age
 - Gen
 - Race
 - Ethnicity
 - Deceased
 - Addr 1
 - Addr 2
 - Pat City
 - Pat State
 - Pat Zip
 - Pat Hm Phone
 - Practice Name
 - USAalerts_mrp_chk_homehealth_pt
 - Rndrng Prvdr
 - Rndrng Prvdr Phone
 - Refer Prvdr
 - Refer Prvdr Phone

The Settings List can be used to refine parameters for the report, such as picking providers, location, or date range. However, this is often a bit confusing & counterintuitive. It would be best to seek the assistance of the EHR team or clinic superuser to save yourself a lot of trial & error.

To generate the report, click **OK**.

Detail Summary Report List Add Sub Report

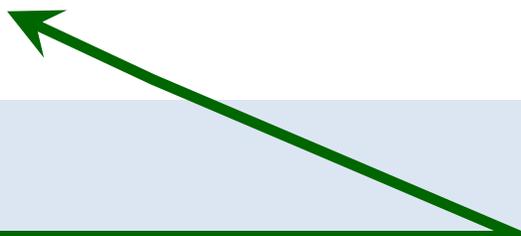
Options Head/Foot Save **OK** Cancel



Print

Spreadsheet

<u>Lst Name</u>	<u>Fst Name</u>	<u>Mid Name</u>	<u>DOB</u>
TestDuffy	AdultFemale002		01/11/1965
TestDuffy	AdultMale001		01/11/1959



Your report will display. You can print it or save it to a spreadsheet using the buttons indicated.

If you choose to save a spreadsheet, you will be asked to specify a name & location (such as the desktop) to save it.

This concludes the
NextGen Reporting demonstration.

What disease did cured ham actually have?