

# NEXTGEN USER PERSONALIZATION DEMONSTRATION

This demonstration reviews some options the user has to modify things in NextGen to meet personal preferences & speed along your documentation.

This has been prepared for EHR 5.8 & KBM 8.3, but you may see some screen shots of earlier versions in the background when they are not germane to the point being illustrated. Subsequent updates may display cosmetic & functional changes.

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

# User Preferences

There are several initial preferences you'll want to set up on the Tools menu.

The screenshot shows the NextGen EHR interface for patient Zack Quagmire. The 'Tools' menu is open, and the 'Preferences' option is highlighted. The interface includes a menu bar (File, Edit, Default, View, Tools, Admin, Utilities, Window, Help), a toolbar with icons for Logout, Save, Clear, Delete, Patient, History, Inbox, PAQ, Medications, EPM, Templates, Documents, Images, Orders, and Procedures. The patient information section displays 'Zack Quagmire (M)', 'Address: 6', 'Contact: N', and 'Alerts'. The patient's MRN is 000000007766, and their age is 4 months 11 days. The interface also shows 'Allergies: Unknown', 'Problems: (0)', 'Diagnoses: (0)', and 'Medications: (0)'. The 'Emergency Relation' is 'Unknown', 'Emergency Phone' is blank, and 'Pharmacy 1' is blank. The 'PCP' is 'DUFFY, ROBERT LAMAR MD'. The 'Referring' provider is 'DUFFY, ROBERT LAMAR ...'. The 'Rendering' provider is 'DUFFY, ROBERT LAMAR ...'. The interface also includes links for 'Lipid Clinic Data', 'Order Admin...', 'Sticky Note', 'Referring Provider', 'HIPAA', 'Advance Directives', and 'Screening Summary'. The bottom status bar shows the date and time: '03/12/2014 03:40 PM : "\*USA SOAP" x'.

NextGen provides many opportunities for the user to personalize the appearance & functionality of the program, enhancing efficiency & simplifying data entry.

First, we'll look at some of the initial user preferences. What follows are some general recommendations. Some details will differ among specialties, & may depend upon whether the user is a provider, nurse, or front office staff.

Click [Tools|Preferences](#), & we'll go through the various tabs you see there.

**Preferences** [X]

General | Main Toolbar | Medical Records | Templates | Medications | Formulary | Reference [◀] [▶]

**Patient Selection**

View By:

Initial field:

Show appointments for entire day

**Orders**

View Labs:

Initial View:

View results only

Logout after

minute(s)

Lock for current user

**Synchronization Settings**

Suspend patient synchronization

Prompt for encounter auto creation

**Knowledgebase**

Display KBM Help

**Notifications**

Receive Out of Office Notifications

**Initial Module**

These are the initial settings recommended for most users. If you select **Work Flow** as your **Initial Module**, you'll see the **Inbox/Appointment List** as soon as you log on to NextGen. If you don't want to see this, leave it blank.

# Preferences

General **Main Toolbar** Medical Records Templates Medications Formulary Reference

## General

Default View: **Encounters**

Show module buttons (templates, documents, images, ...) [Set As Default](#)

Flatten Category View

## Patient's Encounters

NOTE: Changes for this section will occur when the main toolbar is reloaded.

[Encounter Display](#)

Expand Most Recent

View Case Management

## Filter

Clinical Encounters

Billable Encounters

Optical Encounters

## NextGen ICS Images

Open in NextGen ICS

## XML Documents

Use default style sheet

Path:  [Browse...](#)

These are the stock settings,  
but also click **Encounter Display**.

OK

Cancel

Apply

These are the stock settings, but also click the **Remarks** checkbox if it is not already selected.

**Customize Encounter Display**

Date/Time

- 03/06/2006
- 03-06-2006
- 03.06.2006
- 03/06/06
- 03-06-06
- 03.06.06
- 3/6/06
- 3-6-06
- 3.6.06
- 2006/03/06
- 2006-03-06
- 2006.03.06
- 06/03/06
- 06-03-06

Time

- 02:59 PM
- 14:59

Encounter Date  
 Billable Date

Provider

- First M. Last Degree
- FL Degree
- FML
- Last, F
- Last, FM**
- F. M. L. Degree
- First Last Degree
- Description

Location  
 Remarks

Display Order

{Date/Time}	{Remarks}	{Provider}	{Location}
-------------	-----------	------------	------------

< >

Sample display:  
03/06/2006 02:59 PM Remarks Last, FM

Default OK Cancel

Under Display Order, click on the individual items, & use the < and > buttons to move items left or right.

**Customize Encounter Display**

Date/Time

- 03/06/2006
- 03-06-2006
- 03.06.2006
- 03/06/06
- 03-06-06
- 03.06.06
- 3/6/06
- 3-6-06
- 3.6.06
- 2006/03/06
- 2006-03-06
- 2006.03.06
- 06/03/06
- 06-03-06

Time

- 02:59 PM
- 14:59

Encounter Date  
 Billable Date

Provider

- First M. Last Degree
- FL Degree
- FML
- Last, F
- Last, FM**
- F. M. L. Degree
- First Last Degree
- Description

Location  
 Remarks

Display Order

{Date/Time}	{Remarks}	{Provider}	{Location}
-------------	-----------	------------	------------

< >

Default OK Cancel

The recommended display order is:  
{Date/Time} {Remarks} {Provider} {Location}.

## Preferences

General | Main Toolbar | **Medical Records** | Templates | Medications | Formulary | Reference

Location



USA FAMILY MEDICINE

Clear

Default to last selected

Use link between Location and Provider

Provider



ROBERT LAMAR DUFFY

Clear

Default to last selected

Users who work in only one location should click the **location selection icon** to pick the location from the ensuing popup. Those who work in multiple locations should leave this blank, though you may choose to select **Default to last selected**, especially if you often work in the same location several days in a row.

OK

Cancel

Apply

# Preferences

General | Main Toolbar | **Medical Records** | Templates | Medications | Formulary | Reference

Location



USA FAMILY MEDICINE

Clear

Default to last selected

Use link between Location and Provider

Provider



ROBERT LAMAR DUFFY

Clear

Default to last selected

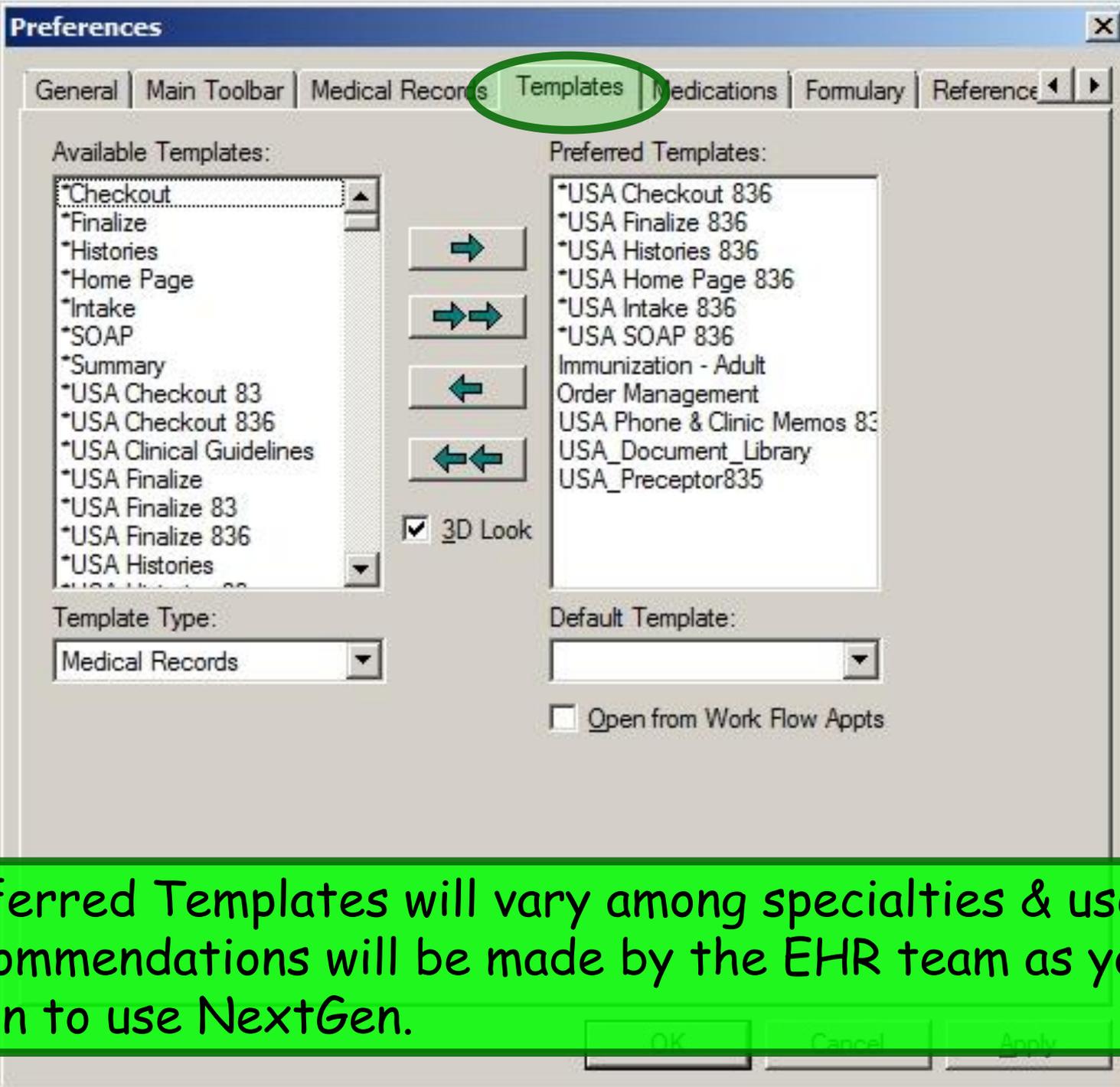


Providers should select **themselves** as the **Provider**. (Clicking this button will give you a popup to select provider.) Other staff, such as nurses, may leave this **blank**, though you may choose to select **Default to last selected**, especially if you often work with the same provider several days in a row.

OK

Cancel

Apply



Preferred Templates will vary among specialties & users. Recommendations will be made by the EHR team as you begin to use NextGen.

These are recommended initial settings for everyone.

General | Main Toolbar | Medical Records | Templates | Medications | Formulary | Reference

Printing and Faxing

Prescription Printer Kyocera FS-2100DN#:8

Source:

Use Medication Verification  Prescribed Elsewhere

View

<All>

DUR

Sig

Always Round Decimal Total Prescription Quantity

Refills

Display DEA Refill Limit Warning

PDR® BRIEF

Enable PDR® BRIEF

Tall Man

Display Tall Man Medication Names

Prescribing Delegates

Limit Prescribing to Selected Delegates

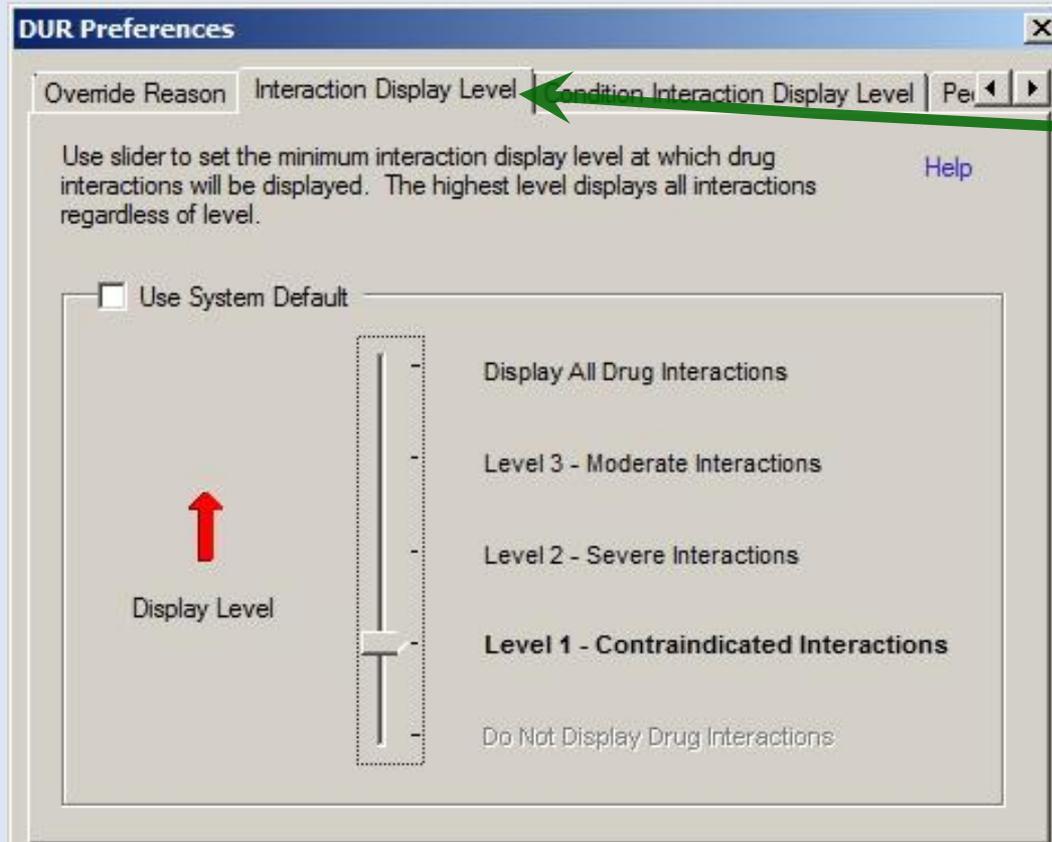
OK

Cancel

Apply

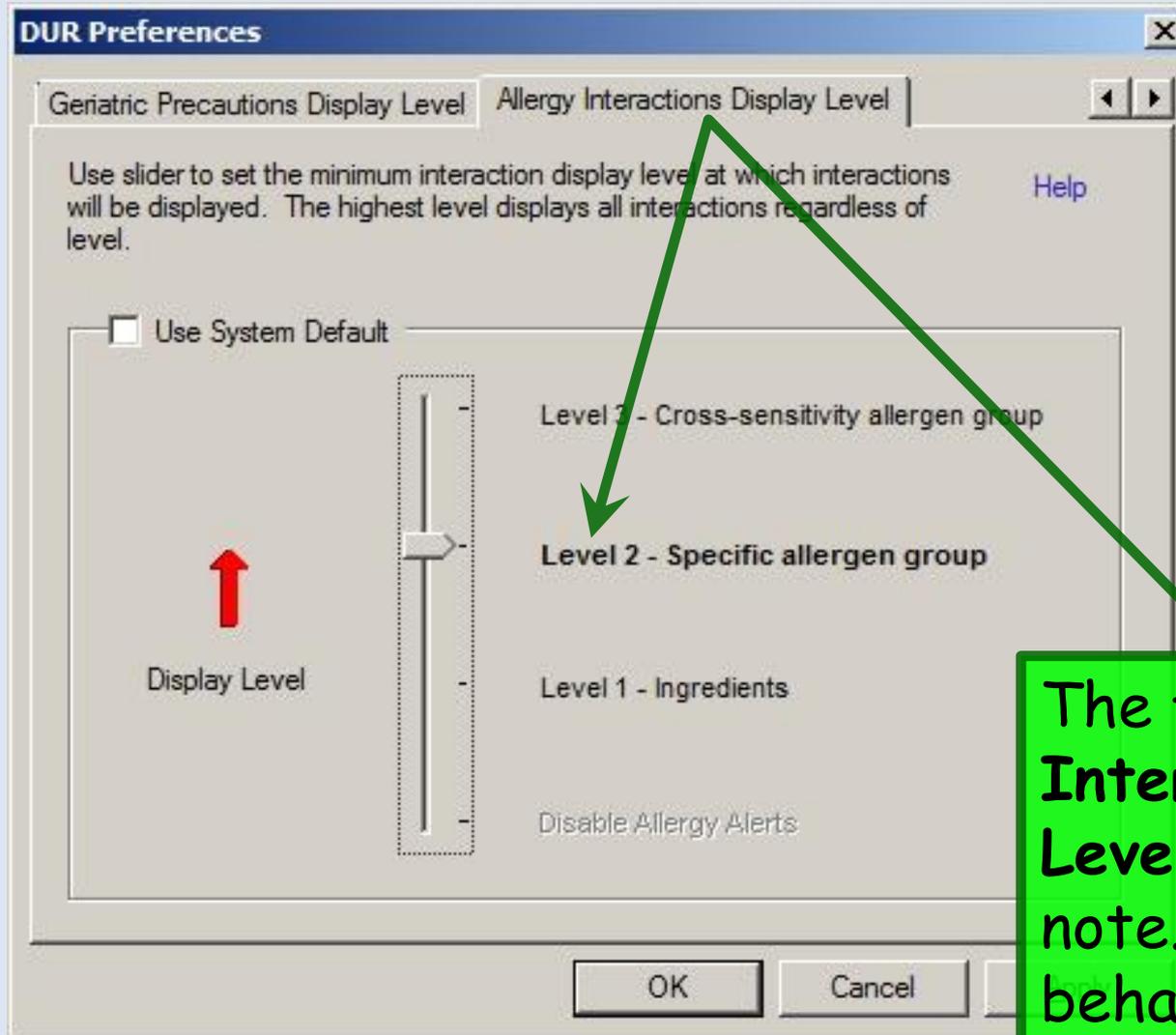
Note you can select a default printer for prescriptions. Since most clinics will have a designated printer for prescriptions, selecting it here can save you a few clicks whenever you have to print a prescription (e.g., a controlled substance).

Also click **DUR**.  
(Drug Utilization Review.)



Drug interaction warnings in NextGen can be intrusive, running the risk of warning fatigue. Default settings will generally be low, but you can adjust them as preferred to anything other than off.

The 1<sup>st</sup> tab, **Override Reason** needs no entries.  
The next tabs are:  
**Interaction Display Level**  
**Condition Interaction Display Level**  
**Pediatric Precautions Display Level**  
**Geriatric Precautions Display Level**



The final tab, **Allergy Interaction Display Level**, merits a special note. As of a change in behavior observed circa March 2014, we recommend selecting **Level 2** here.

## Preferences

General | Main Toolbar | Medical Records | Templates | Medications | **Fomulary** | Documents

### General

Use Fomulary as default medication search

### View Options

Notes  
 Fomulary Status

### Drug Information

Display (Chemical Name)  
 Display Only Drugs  
 Display OTC Meds  
 On Fomulary Only

### Fomulary Status

Text & Images  
 Images Only  
 Text Only

These are the recommended settings. While **Fomulary Search** could be useful as a default, if you find your patients often don't have formulary information available, or formulary searches slow down your workflow too much, you may not wish to use this as your default.

OK

Cancel

Apply

## Preferences

Main Toolbar

Medical Records

Templates

Medications

Fomulary

Reference

Docum

External Provider Reference

Diagnosis & Problem Modules

Procedure Module

Medication Module

<http://www.epocrates.com/>

Medication Allergy Module

Order Module - Lab Results

A variety of decision support links are available at several spots in NextGen. Those will be set up at the system level, but if individual users wish to use different sites, you can specify those links here.

OK

Cancel

Apply

# Preferences

Medical Records | Templates | Medications | Formulary | Reference | Documents



## Machine Settings

### Document Type Viewers

RTF Documents: TX Text

Text Documents: TX Text

Word Documents: TX Text

Unknown Documents: High Edit

### Generating

Default Generator:

Default Printer:

## User Settings

Use spell checking for TX Text viewer

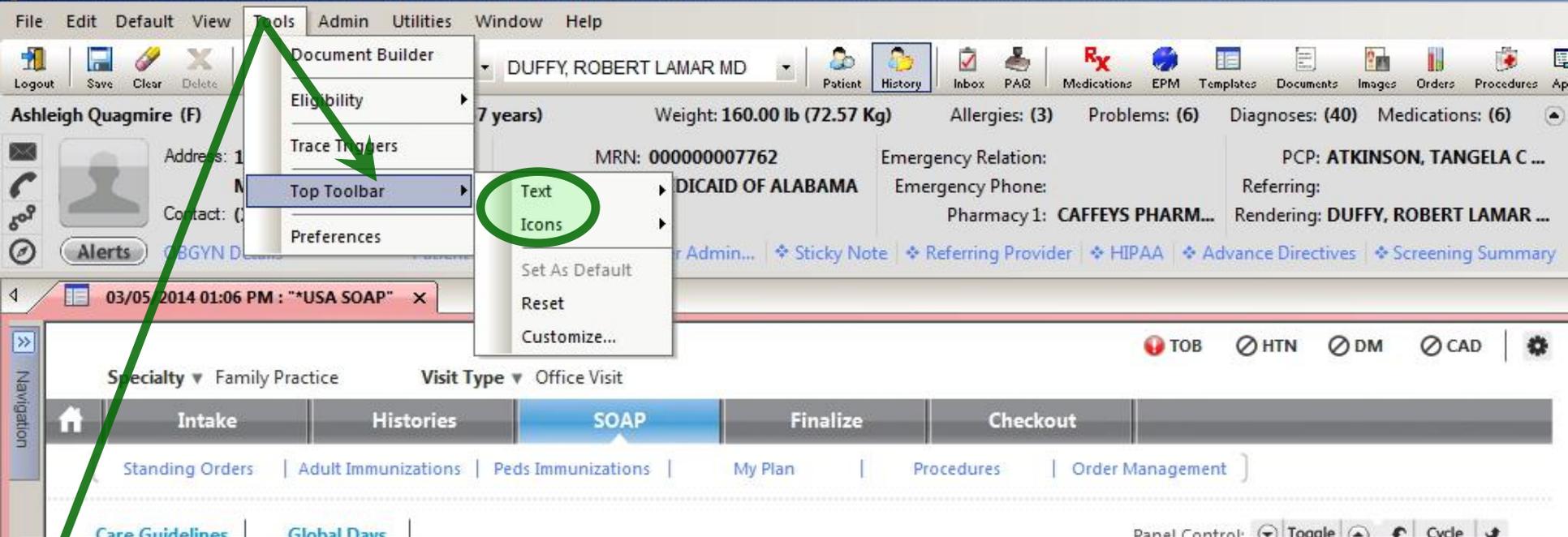
Default TX Text View: Normal View

These are the stock settings.  
When done, click **OK** to apply your selections.

OK

Cancel

Apply



You can modify the appearance of the toolbar at the top of the program window. **Text & Icons** allow a few modifications.

For **Text** we recommend **Below**.

For **Icons** we recommend **Small**.

The screenshot displays the NextGen EHR interface for patient Ashleigh Quagmire. The 'Tools' menu is open, showing options like 'Document Builder', 'Eligibility', 'Trace Triggers', 'Top Toolbar', and 'Preferences'. The 'Top Toolbar' sub-menu is also open, listing 'Text', 'Icons', 'Set As Default', 'Reset', and 'Customize...'. A green arrow points from the 'Tools' menu to the 'Top Toolbar' option, and another green arrow points from 'Top Toolbar' to the 'Customize...' option, which is circled in green. The interface includes a top toolbar with icons for Logout, Save, Clear, Delete, Patient, History, Inbox, PAR, Medications, EPM, Templates, Documents, Images, Orders, and Procedures. The patient's information, including MRN (000000007762) and weight (160.00 lb), is visible. The 'SOAP' tab is selected in the navigation pane.

To select the icons you wish to have on the top toolbar, click **Tools|Top Toolbar|Customize**. (You can also reach this by right-clicking on the toolbar itself.)

Patient Name: Petrovich Quagmire  
Gender: M  
Specialty: Family Practice  
Visit Type:   
**Intake** **Histories**  
Sticky Note | Refe  
Reason for Visit  
Introduction:  
The patient is a 58 year old male.  
 Do not launch HPI  
abdominal pain Reason for Visit

### Customize Top Toolbar

Available toolbar buttons:

- Separator
- ICS
- Problems
- Referral
- Equipment

Current toolbar buttons:

- Delete
- Separator
- Location
- Provider
- Separator
- Patient
- History
- Separator
- Inbox
- PAQ
- Separator
- Medications
- Templates

Text options: Show Text Labels  
Icon options: Small Icons

Buttons: Add ->, <- Remove, Move Up, Move Down, Reset, Close

Use the **Add & Remove** buttons to move buttons to & from your toolbar. You can rearrange them on your toolbar with the **Move Up & Move Down** buttons. In this example, note that I've placed several buttons that are on the **History Bar** "tic tack toe" board on my toolbar so they'll always be easy to get to directly.

## Collapsible Panels

In an EHR, you'd like to be able to see as much information as possible, with as few clicks as possible, while also having a screen that is clean & not confusingly "busy." It is very difficult to simultaneously accommodate all those goals, especially taking into account the variety of screen sizes that may be used.

NextGen has now introduced the concept of "collapsible panels," which helps meet these goals, while also giving the user the ability to customize the desired view on the fly.

Let's look at the Histories Tab. Notice that there's a lot of information here, & you can use the scrollbar to move up & down to view it all.

Specialty Family Practice Visit Type Office Visit

Intake **Histories** SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days **History Review** Panel Control: Toggle Cycle

**Problem List** 3

Show chronic  Show my tracked problem  No active problems  Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Status	Provider	Location	Notes
	Postmenopausal	01/29/2014	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Allergic rhinitis		N	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
02/05/2014	Benign essential hypertension		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

Add Edit

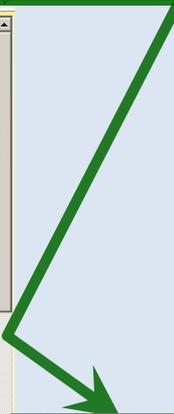
**Medical/Surgical/Interim**

No relevant past medical/surgical history History Review

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/		

Refresh Interim History Add Edit Remove

**Diagnostic Studies**



02/20/2014 09:22 AM: "Histories" x

**Diagnostic Studies**

Display: All Specialty

Status	Order	Ordered	Interpretation	Result/Report	Date Performed	Completed	Ordering Comments
--------	-------	---------	----------------	---------------	----------------	-----------	-------------------

Add

**Social**

*(last updated 02/09/2014)*

History Review Last documented All

Substances	Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
Tobacco	02/20/2014	Yes	Cigarette	Former smoker	1 Packs		01/01/1997

Encounter Date/Time	02/20/2014 09:22 AM	01/21/2014 02:45 PM
Passive Smoke Exposure	No/Never	No/Never

Confidential History Add

**Family**

No relevant family history  Adopted - no family history known History Review

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
Mother				Depression		N	

Now you have several other alternatives to navigate & customize your view. Notice that each section is now a panel, giving you several display options.

Care Guidelines | Global Days | History Review

Panel Control:

### Problem List 3

Show chronic  Show my tracked problem

No active problems  Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Status	Provider	Location	Notes
	Postmenopausal	01/29/2014	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Allergic rhinitis		N	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
02/05/2014	Benign essential hypertension		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

Add

Edit

### Medical/Surgical/Interim

No relevant past medical/surgical history

[History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/}		

### Diagnostic Studies

Specialty Family Pract

Note the Panel Controls at the top.

Intake

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Status	Provider	Location	Notes
	Postmenopausal	01/29/2014	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
02/05/201	Allergic rhinitis		N	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
						DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

One Toggle Button lets you expand all panels, as you see here.

Medical/Surgical/Interim

No relevant past medical/surgical history

History Review

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/}		

Refresh Interim History Add Edit Remove

Diagnostic Studies

The other Toggle Button lets you collapse all panels, giving you this appearance.

The screenshot shows a medical software interface. At the top, there is a browser tab with the address "02/20/2014 09:22 AM : '\*Histories'". Below this, there are filters for "Specialty" (Family Practice) and "Visit Type" (Office Visit). A navigation bar contains buttons for "Intake", "Histories" (which is highlighted), "SOAP", "Finalize", and "Checkout". Below the navigation bar, there are links for "Demographics", "Order Management", "Document Library", and "Chart Abstraction". On the right side, there are status indicators for "TOB", "HTN", "DM", and "CAD", along with a settings gear icon. Below these, there are links for "Care Guidelines", "Global Days", and "History Review". A "Panel Control" section includes a "Toggle" button with a downward arrow, a "Cycle" button, and a refresh icon. The main content area displays a list of panels: "Problem List" (with a count of 3), "Medical/Surgical/Interim", "Diagnostic Studies", "Family", and "Social". Each panel heading has a small downward arrow icon to its right. The "Family" panel is currently expanded, showing a blue icon with a white cross. An "Intake Note" button is located at the bottom right of the interface.

Each panel heading also has a **Toggle Button**, which gives you a quick way to open & close individual panels. For example, let's expand the **Family History** panel.

Now you can focus on the Family History.

02/20/2014 09:22 AM : "\*\*Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: ▾ Toggle ↕ ↺ Cycle ↻

**Problem List** 3

Medical/Surgical/Interim

Diagnostic Studies

**Family**

No relevant family history  Adopted - no family history known

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
Mother				Depression			

Add Edit Remove

Social

Intake Note

You could use the Toggle Buttons to re-open or re-close all panels.

You can also click on a **Panel Heading** & drag it up or down, to put the panels in the order you prefer.

For example, let's say I don't use **Diagnostic Studies** often, so I'll drag that to the bottom, & I also want to see the **Social History** above the **Family History**. I'll click & drag those headings...

02/20/2014 09:22 AM : "\*Histories" x

Specialty ▾ Family Practice    Visit Type ▾ Office Visit    TOB HTN DM CAD ⚙️

Intake    **Histories**    SOAP    Finalize    Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review    Panel Control: ⌵ Toggle ⌶ ↺ Cycle ↻

Problem List <span>3</span>	⌵
Medical/Surgical/Interim	⌵
Diagnostic Studies	⌵
Family <span>🔍</span>	⌵
Social	⌵

Intake Note

...resulting in this appearance.

02/20/2014 09:22 AM : "\*Histories" x

Specialty Family Practice Visit Type Office Visit

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

Problem List 3

Medical/Surgical/Interim

Social

Family

Diagnostic Studies

Intake Note

Taking things a step further, let's say I prefer to have the **Problem List & Social** History open, with the other panels closed. I'll click those individual panel heading **Toggles**...

...leading to this appearance.

Specialty Family Practice

Visit Type Off

Home Intake **Histories** SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

**Problem List** 3

Show chronic  Show my tracked problem  No active problems  Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Status	Provider	Location	Notes
	Postmenopausal	01/29/2014	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Allergic rhinitis		N	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
02/05/2014	Benign essential hypertension		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

Refresh Add Edit

**Medical/Surgical/Interim**

**Social**

(last updated 02/09/2014)

Last documented All

History Review

- Substances
  - Tobacco
  - Alcohol/Caffeine
- Statuses
- Lifestyle
- Occupation
- Comment
- Diet History
- Environmental

Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
02/20/2014	Yes	Cigarette	Former smoker	1 Packs		01/01/1997

Encounter Date:Time	02/20/2014 09:22 AM	01/21/2014 02:45 PM
Passive Smoke Exposure	No/Never	No/Never

Another thing you can do is cycle through the panels, bringing them to the top & expanding them one at a time.

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle Cycle

**Problem List** 3

Show chronic  Show my tracked problem  No active problems  Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Status	Provider	Location	Notes
	Postmenopausal	01/29/2014	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Allergic rhinitis		N	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
02/05/2014	Benign essential hypertension		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

Refresh Add Edit

For example, I'll click **Cycle Up**...

Medical/Surgical/Interim

Social

History Review (last updated 02/09/2014) Last documented All

Substances	Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
► Tobacco	02/20/2014	Yes	Cigarette	Former smoker	1 Packs		01/01/1997
Alcohol/Caffeine							
Statuses							
Lifestyle							
Occupation							
Comment							
Diet History							
Environmental							

Encounter Date:Time	02/20/2014 09:22 AM	01/21/2014 02:45 PM
Passive Smoke Exposure	No/Never	No/Never

...and now the **Medical/Surgical/Interim** history section is at the top.

02/20/2014 09:22 AM : "...

Specialty ▾ Family Practice    Visit Type ▾ Office Visit

TOB   HTN   DM   CAD   ⚙

Intake   **Histories**   SOAP   Finalize   Checkout

Demographics   Order Management   Document Library   Chart Abstraction

Care Guidelines   Global Days   History Review   Panel Control: ⌵ Toggle ⌶ Cycle ⌵

**Medical/Surgical/Interim** ⌵

No relevant past medical/surgical history [History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/}		

Refresh   Interim History   Add   Edit   Remove

Social ⌵

Family  ⌵

Diagnostic Studies ⌵

Problem List 3 ⌵

Intake Note

And here's a neat bonus: If you navigate away to the SOAP, Finalize, or any other tab, when you come back to Histories, it'll still look the way you left it.

02/20/2014 09:22 AM : "\*Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

Medical/Surgical/Interim

No relevant past medical/surgical history [History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/}		

Problem List 3

Intake Note

This combination of options gives you a lot of opportunities to speed up navigation, as well as customize the screen to your preference. And you don't have to do anything ahead of time—just rearrange things as you go. You'll find these options on many templates now.

Of course, to compensate for any improvement, NextGen always introduces a new flaw. Sometimes templates with collapsible panels don't display correctly. In this example, we've already selected specialty & visit type, but here they're blank, & a lot of other stuff we should be seeing below is missing.

06/11/2014 11:51 AM : "\*USA SOAP 836"

06/11/2014 11:51 AM : "Order Management" x

Specialty ▼ select a specialty

Visit Type ▼ select a visit type

Care Guidelines

Global Days

Order Management

Panel Control: ▼ Toggle ▲ ↺ Cycle ↻

Sometimes this corrects itself out of the blue when you turn your back on it. But the workaround to straighten things out is to click some random combination of the toggle buttons while whispering the Serenity Prayer.

# HPI

You can define one or more HPI presets for a number of different chief complaints, to use as your standard starting points in various clinical situations.

# Diarrhea - HPI

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern:

Onset:

Severity:

- Status:
- Resolved
  - Improved
  - No change
  - Worse
  - New onset



Stool frequency:

- Quality:
- Black/tarry
  - Bloody
  - Foul odor
  - Loose
  - Mucus present
  - Oily
  - Watery
  - Brown  Clay colored
  - Green  Yellow

- Context:
- AM predominance
  - Antacid use
  - Family member with diarrhea
  - HX of pelvic floor trauma
  - HIV+
  - New medications
  - Nocturnal
  - Recent antibiotics
  - Recent travel outside the US
  - S/P cholecystectomy
  - Upon awakening

- Frequency:
- Constant
  - Cyclic
  - Daily
  - Monthly
  - Random
  - Transient
  - Weekly

- Aggravated By:
- Nothing
  - Alcohol
  - Brassica vegetables
  - Caffeine
  - Exercise
  - Fasting
  - Heavy meals
  - Milk/dairy products
  - NSAIDS
  - Spicy foods
  - Stress

- Relieved By:
- Nothing
  - Analgesics
  - Antacids
  - Bowel movement
  - Change in position
  - Fasting
  - Flatus
  - Over the counter meds
  - Rest

Other:

Other:

Other:

Other:

### Associated Symptoms/Pertinent Negatives:

No associated symptoms

No pertinent negatives

All others negative

- No Yes
- Abdominal pain
  - Anorexia
  - Bloating

- No Yes
- Cramping, abdominal
  - Decreased urine output
  - Distention, abdominal

- No Yes
- Flatulence
  - Joint pain
  - Nausea

- No Yes
- Vomiting
  - Weight loss

Other associated symptoms:

In this example, we'll open the **Diarrhea-HPI** popup & make several selections that we'll use as our standard diarrhea HPI starting point. Next, click the **Save** icon.

## Save Template Defaults

Default Set Category:

HPI

Specialties Access:

All Specialties

Templates to Save:

Save All Templates

Save Current Only:

Select Templates to Save:

(Saves Templates you have gone to in this Visit, that are Defaults Ready)

HPI\_Diarrhea

Clear

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

DiarrheaHPI-RLD

Add

HPI Quick Saves

Number of Templates	Title

Leave the other selections as they are. Click **Add**, then **Save & Close**.

Update

Remove

Save & Close

Cancel

Type a name for your preset. If it is specific to age or gender, include that in the name. You may also want to include your initials.

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern:

Status:



When you wish to recall this preset in the future, click the **Open** icon, & select your preset.

Severity:  Improved  Worse  
Stool frequency:  Constant  Cyclic  Daily  Monthly  Random  Transient  Weekly

- Foul odor
- Loose
- Mucus present
- Oily
- Watery
- Brown  Clay colored
- Green  Yellow

- Family member with diarrhea
- HX of pelvic floor trauma
- HIV+
- New medications
- Nocturnal
- Recent antibiotics
- Recent travel outside the US
- S/P cholecystectomy
- Upon awakening

- Daily
- Monthly
- Random
- Transient
- Weekly

Aggravated By:

- Nothing
- Alcohol
- Brassica vegetables

Relieved By:

- Nothing
- Analgesics
- Antacids

Other:

Other:

Associated Symptoms/Pertinent Negatives:

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> No associated symptoms | <input type="checkbox"/> No pertinent negatives      | <input type="checkbox"/> All others         |
| No Yes  | No Yes   | No Yes                                      |
| <input type="radio"/> Abdominal pain            | <input checked="" type="radio"/> Cramping, abdominal | <input checked="" type="radio"/> Flatulence |
| <input type="radio"/> Anorexia                  | <input type="radio"/> Decreased urine output         | <input type="radio"/> Joint pain            |
| <input type="radio"/> Bloating                  | <input type="radio"/> Distention, abdominal          | <input checked="" type="radio"/> Nausea     |
| <input type="radio"/> Blood in stool            | <input type="radio"/> Fecal incontinence             | <input type="radio"/> Rash                  |
| <input type="radio"/> Change in appetite        | <input type="radio"/> Fever                          | <input type="radio"/> Tenderness            |

Comments:

- |   |   |  |                                       |
|---|---|--|---------------------------------------|
| No Yes  | <input type="checkbox"/> Family history of colon cancer | <input type="checkbox"/> Attends daycare | <input type="checkbox"/> Reptile pets |
| <input type="checkbox"/> Family history of Crohns/colitis | <input type="checkbox"/> Chronic gum chewing            | <input type="checkbox"/> Well water      |                                       |

**Ngkbn Td Dbp Filter**

Set Name  
DiarrheaHPI-RLD

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: diarrhea

Onset: [ ]

Severity: moderate

- Status:
- Resolved
  - Improved
  - No change
  - Worse
  - New onset



Stool frequency: intermittently

- Quality:
- Black/tarry
  - Bloody
  - Foul odor
  - Loose
  - Mucus present
  - Oily
  - Watery
  - Brown  Clay colored
  - Green  Yellow

- Context:
- AM predominance
  - Antacid use
  - Family member with diarrhea
  - HX of pelvic floor trauma
  - HIV+
  - New medications
  - Nocturnal
  - Recent antibiotics
  - Recent travel outside the US
  - S/P cholecystectomy
  - Upon awakening

- Frequency:
- Constant
  - Cyclic
  - Daily
  - Monthly
  - Random
  - Transient
  - Weekly

- Aggravated By:
- Nothing
  - Alcohol
  - Brassica vegetables
  - Caffeine
  - Exercise
  - Fasting
  - Heavy meals
  - Milk/dairy products
  - NSAIDS
  - Spicy foods
  - Stress

- Relieved By:
- Nothing
  - Analgesics
  - Antacids
  - Bowel movement
  - Change in position
  - Fasting
  - Flatus
  - Over the counter meds
  - Rest

Other: [ ]

Other: [ ]

Other: [ ]

Other: [ ]

Associated Symptoms/Pertinent Negatives:

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> No associated symptoms            | <input type="checkbox"/> No pertinent negatives                            | <input type="checkbox"/> All others negative                    |
| No Yes   | No Yes   | No Yes  |
| <input type="radio"/> <input type="radio"/> Abdominal pain | <input type="radio"/> <input checked="" type="radio"/> Cramping, abdominal | <input checked="" type="radio"/> <input type="radio"/> Vomiting |
| <input type="radio"/> <input type="radio"/> Anorexia       | <input type="radio"/> <input type="radio"/> Decreased urine output         | <input type="radio"/> <input type="radio"/> Weight loss         |
| <input type="radio"/> <input type="radio"/> Bloating       | <input type="radio"/> <input type="radio"/> Distention, abdominal          |   |
| <input type="radio"/> <input type="radio"/> Blood in stool | <input type="radio"/> <input type="radio"/> Fecal incontinence             |   |
|  | <input type="radio"/> <input type="radio"/> Rash                           |   |

Other associated symptoms: [ ]

Other pertinent negatives: [ ]

Suppose you later decide you'd like to make some changes to this HPI & re-save it. Make the changes you want, then click the **Save** icon.

Save & Close Cancel

# Save Template Defaults

Default Set Category:

HPI

Specialties Access:

All Specialties  Current Specialty Only: FP

Templates to Save:

Save All Templates

(Saves Templates you have selected)

Save Current Only:

HPI\_Diarrhea

Select Templates to Save:

[Empty list box for selecting templates to save]

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

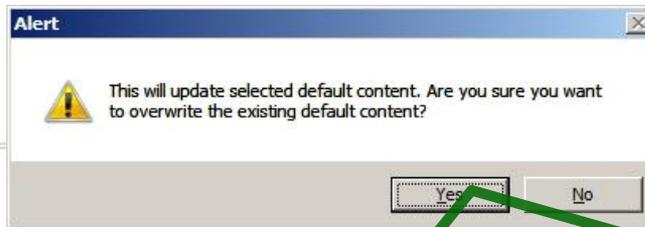
DiarrheaHPI-RLD

Clear

Add

## HPI Quick Saves

Number of Templates	Title
Single	DiarrheaHPI-RLD



Update

Remove

Save & Close

Cancel

Select the preset you wish to change, then click **Update**.

Click **Yes** to confirm, then **Save & Close**.

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: diarrhea

Onset: [ ]

Severity: [ ]

- Status:
- Resolved
  - Improved
  - No change
  - Worse
  - New onset

Stool frequency: [ ]

- Quality:
- Black/tarry
  - Bloody
  - Foul odor
  - Loose
  - Mucus present
  - Oily
  - Watery
  - Brown  Clay colored
  - Green  Yellow

Save  
Close

**Clear**

Default  
Show Field Names

Clear Picklists  
Panel Defaults  
Reload Macro Functions & System Variables

Full Screen

- frequency:
- Constant
  - Cyclic
  - Daily
  - Monthly
  - Random
  - Transient
  - Weekly

- Aggravated By:
- Nothing
  - Alcohol
  - Brassica vegetables
  - Caffeine
  - Exercise
  - Fasting
  - Heavy meals
  - Milk/dairy products
  - NSAIDS
  - Spicy foods
  - Stress

- Relieved By:
- Nothing
  - Analgesics
  - Antacids
  - Bowel movement
  - Change in position
  - Fasting
  - Flatus
  - Over the counter meds
  - Rest

Other: [ ]

Other: [ ]

Other: [ ]

Other: [ ]

Associated Symptoms/Pertinent Negatives:

- No associated symptoms
- No pertinent negatives
- All others positive

Here's another handy thing to note about HPI popups (as well as ROS & PE popups, which we'll discuss below). Say you've got dozens of bullets & boxes checked, & you'd just like to remove all of these checks & start over with a clean slate. Rather than unchecking everything one at a time, just right-click anywhere on the popup & choose **Clear**. All entries will be removed, & you can start over.

## Some tips on HPI presets

- Obviously, there are a lot of chief complaints, & it could take some time to develop your ideal starting point for all of them. And no matter how common the problem, patients often present with a unique combination of complaints, which reduces the usefulness of having HPI presets. Consequently, it is probably best to forgo defining a lot of HPI presets at first. As you use the program, you may discover a handful of situations where you document the same thing over & over. Those are good candidates for you to develop a standard HPI you wish to save.
- Some info on HPI popups is shared with the ROS. So if you use both HPI popups & ROS popups, be careful that these don't lead to conflicting documentation.
- And there is another more robust way to save reusable phrases—My Phrases—that we'll discuss later. You may wish to use that rather than fretting too much over HPI presets.

# Review of Systems

You can define one or more Review of Systems presets to use as your standard starting points in various clinical situations.

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

ROS Defaults:

System	All neg	Neg	Pos	Other
<b>Constitutional</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Cardiovascular</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Reproductive</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Neurological</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Musculoskeletal</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>HEENT</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Gastrointestinal</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Integumentary</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Psychiatric</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Metabolic / Endocrine</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Respiratory</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Genitourinary</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Hematologic / Lymphatic</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<b>Immunologic</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

All others negative

As illustrated for the HPI above, you can save Review of Systems presets. Here we've opened the one-screen ROS-Female popup & made some entries. The **save** process is the same as above.

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

ROS Defaults:



Constitutional  All neg    Cardiovascular  All neg    Reproductive  All neg    **Neurological**  All neg    Musculoskeletal  All neg

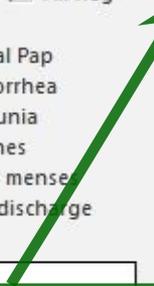
- Neg Pos**
- Chills
  - Fatigue
  - Fever
  - Malaise
  - Night sweats
  - Weight gain
  - Weight loss
  - Other:

- Neg Pos**
- Chest pain
  - Claudication
  - Edema
  - Palpitations
  - Other:

- Neg Pos**
- Abnormal Pap
  - Dysmenorrhea
  - Dyspareunia
  - Hot flashes
  - Irregular menses
  - Vaginal discharge
  - Other:

- Neg Pos**
- Dizziness
  - Extremity numbness
  - Extremity weakness
  - Gait disturbance
  - Headache
  - Memory loss
  - Seizures
  - Tremors
  - Other:

- Neg Pos**
- Back pain
  - Joint pain
  - Joint swelling
  - Muscle weakness
  - Neck pain
  - Other:



Remember that each heading will take you to a more detailed ROS for that system. Here we'll click on **Neurological**.

- Neg Pos**
- Ear drainage
  - Eye pain
  - Hearing loss
  - Nasal drainage
  - Sinus pressure
  - Sore throat
  - Visual changes
  - Other:

- Neg Pos**
- Nausea
  - Vomiting
  - Other:

- Neg Pos**
- Hirsutism
  - Hives
  - Pruritis
  - Mole changes
  - Rash
  - Skin lesion
  - Other:

- Neg Pos**
- Other:
- Metabolic / Endocrine**  All neg
- Neg Pos**
- Cold intolerance
  - Heat intolerance
  - Polydipsia
  - Polyphagia
  - Other:

- Neg Pos**
- Easy bleeding
  - Easy bruising
  - Lymphadenopathy
  - Other:
- Immunologic**  All neg
- Neg Pos**
- Contact allergy
  - Environmental allergies
  - Food allergies
  - Seasonal allergies
  - Other:

- Respiratory**  All neg
- Neg Pos**
- Chronic cough
  - Cough
  - Known TB exposure
  - Shortness of breath
  - Wheezing
  - Other:

- Genitourinary**  All neg
- Neg Pos**
- Dysuria
  - Hematuria
  - Polyuria
  - Urinary frequency
  - Urinary incontinence
  - Urinary retention
  - Other:

All others negative

Save & Close    Cancel

- ❖ Constitutional
- ❖ HEENT
- ❖ Respiratory
- ❖ Cardiovascular
- ❖ Vascular
- ❖ Gastrointestinal
- ❖ Genitourinary
- ❖ Reproductive
- ❖ Metabolic/Endocrine
- ❖ Neuro/Psychiatric
- ❖ PHQ
- ❖ Dermatologic
- ❖ Musculoskeletal
- ❖ Hematologic
- ❖ Immunological

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

Select all negative

**Neurological:**

**Neg Pos**

- Aphasia
- Dizziness
- Dysarthria
- Focal weakness
- Gait disturbance
- Headache
- Incontinence
- Incoordination
- Light-headedness

**Neg Pos**

- Loss of consciousness
- Memory impairment
- Near syncope
- Paresthesias
- Seizures

Other associated symptoms:

Other pertinent negatives:


You can also save preset versions of the system-specific ROS as well.

Comments:

See chief complaint

See chronic conditions

See HPI

See past medical history

And you can move to any other system you wish to document through the left-side navigation.

**Neg Pos**

- Incontinence
- Difficulty concentrating
- Psychiatric/emotional

Other associated symptoms:

Other pertinent negatives:

Comments:

See chief complaint

See chronic conditions

See HPI

See past medical history

Save & Close

Cancel

And here's an even neater trick. Say you've entered your personalized negative ROS, using a combination of the one-page ROS & several system's ROS popups.

On the SOAP tab, click the **Save** icon you see under the **Review of Systems** section:

The screenshot shows a medical software interface with the following elements:

- Navigation Bar:** Intake, Histories, SOAP (selected), Finalize, Checkout.
- Sub-navigation:** Standing Orders, Adult Immunizations, Peds Immunizations, My Plan, Procedures, Order Management.
- Panel Control:** Toggle, Cycle, and other icons.
- Reason for Visit:** Section header.
- Review of Systems:** Section header with a save icon (floppy disk) and a refresh icon.
- Review of Systems Table:**

System	Neg/Pos	Findings
Constitutional	Negative	Fever.
ENMT	Negative	Nasal drainage, otalgia, sinus pressure and sore throat.
Respiratory	Negative	Cough and dyspnea.
Cardio	Negative	Chest pain and edema.
GI	Positive	Abdominal cramping, Flatulence.
GI	Negative	Diarrhea, heartburn, nausea and vomiting.
GU	Negative	Dysuria.
Neuro	Negative	Dizziness, gait disturbance, headache, incontinence and near syncope.
Integumentary	Negative	Nail changes, pruritus, rash and skin lesion.
MS	Negative	Joint pain.
Allergic/Immunc	Negative	Contact allergy.

One Page ROS - Female

PHQ

# Save Template Defaults

Default Set Category:

ROS Full Exam

Specialties Access:

All Specialties

Current Specialty Only: FP

Templates to Save:

Save All Templates

(Saves Templates you have gone to in this Visit, that are Defaults Ready)

Save Current Only:

USA\_fts\_soap83

Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

ROSFullNegFemale-RLD

Clear

Add

ROS Full Exam Quick Saves

Number of Templates	Title

Update

Remove

Save & Close

Cancel

These are the "Full" ROS presets. Note that **Save All Templates** is selected. Give it a name, click **Add**, then **Save & Close**.

Now you can recall this full ROS preset directly from the **SOAP** tab; you can view all your documentation here, too, allowing you to directly change any 1-2 items you need to.

This is a really powerful tool that can significantly speed up your workflow.

Care Guidelines | Global Days | Panel Control: Toggle Cycle

Reason for Visit

Review of Systems

System	Neg/Pos	Findings
Constitutional	Negative	Fever.
ENMT	Negative	Nasal dra
Respiratory	Negative	Cough a
Cardio	Negative	Chest pa
GI	Positive	Abdomir
GI	Negative	Diarrhea,
GU	Negative	Dysuria.
Neuro	Negative	Dizziness
Integumentary	Negative	Nail char
MS	Negative	Joint pai
Allergic/Immunc	Negative	Contact.

Constitutional  
HEENT  
Respiratory  
Cardiovascular  
Vascular  
Gastrointestinal  
Genitourinary  
Reproductive  
Metabolic | Endocrine  
Neuro | Psychiatric  
Dermatologic  
Musculoskeletal  
Hematologic  
Immunologic

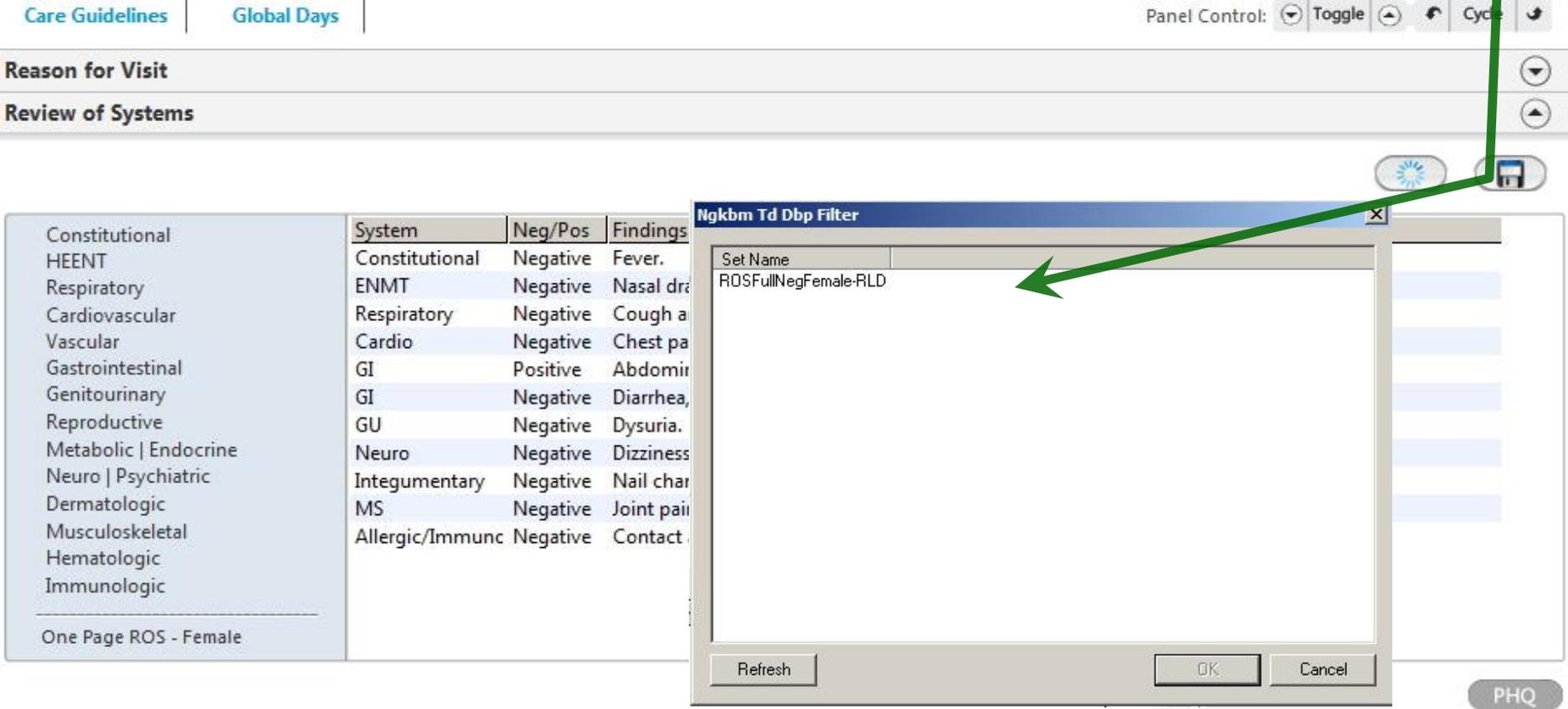
One Page ROS - Female

Ngkbn Td Dbp Filter

Set Name  
ROSFullNegFemale-RLD

Refresh OK Cancel

PHQ



Specialty ▾ Family Practice

Visit Type ▾ Office Visit



Intake

Histories

SOAP

Finalize

Checkout

Standing Orders

Adult Immunizations

Peds Immunizations

My Plan

Procedures

Order Management

Care Guidelines

Global Days

Panel Control: Toggle Cycle

Reason for Visit

Review of Systems

## Some tips on ROS presets

- Note the difference between having your own default normal ROS compared to just choosing "All negative," "All others negative," "Globally normal," etc: you only include items you normally mention, rather than a "scorched earth" laundry list of items that may not be pertinent to the visit or patient type.

- Some info on HPI popups is shared with the ROS. So if you use both HPI popups & ROS popups, be careful that these don't lead to conflicting documentation.

# Physical Exam

You can define several Physical Exam presets to use as your standard starting points in various clinical situations.

## Physical Exam

- One Page Exam
- Constitutional
- Diabetic Foot Exam
- Ears
- Nose | Mouth | Throat
- Neck | Thyroid
- Breast
- Respiratory
- Cardiovascular
- Abdomen
- Genitourinary
- Skin | Hair
- Musculoskeletal
- Psychiatric

Additional

Exam Findings Details

Image

Office Diagnostics

Analogous to the ROS demonstration above, you can save Physical Exam presets. You would often start with the **One Page Exam**.

Pe General Exam

Default: [ ]

❖ Constitutional: Overall appearance:  Normal [ No acute distress ] [ ]

❖ Eyes: ❖ Vision Screening:

Conjunctiva: R  Normal [ ] [ ]  
 L  Normal [ ] [ ]

Pupil: R  Normal [ ] [ ]  
 L  Normal [ ] [ ]

Fundus: R  Normal [ ] [ ]  
 L  Normal [ ] [ ]

❖ Ears: ❖ Nose/Mouth:

External ear: R [ ] [ ]  
 L [ ] [ ]

Canal: R [ ] [ ]  
 L [ ] [ ]

TM: R [ ] [ ]  
 L [ ] [ ]

Hearing: R [ ] [ ]  
 L [ ] [ ]

External nose: [ ] [ ]

Lips/teeth/gums: [ ] [ ]

Oropharynx: [ ] [ ]

Tonsils: [ ] [ ]

❖ Neck/Thyroid: ❖ Lymphatic:

Neck inspection: [ ] [ ]

Neck palpation: [ ] [ ]

❖ Breast:  Breast exam deferred

Breast inspection:  Normal Breast palpation:  Normal

❖ Respiratory:

Effort:  Normal [ ] [ ]

Inspection:  Normal [ ] [ ] [ ]

Auscultation:  Normal [ ] [ ] [ ]

❖ Cardiovascular:  Normal ◆ EKG

❖ Vascular: ❖ Extremity:

Pedal pulses:  Normal Capillary refill:  Less than 2 seconds  
 Greater than 2 seconds

Edema:  No  Yes

❖ Abdomen:

Inspection:  Normal [ No masses ] [ ]

Auscultation:  Normal [ ] [ ]

Neg Pos

Abdominal tenderness: [ ] [ ]

Hepatic enlargement: [ ] cm below margin  Crosses midline

Spleen enlargement: [ ] cm below margin  Crosses midline

External genitalia:  Normal [ ] [ ]

Uterus:  Normal [ ] [ ]

Adnexa:  Normal [ ] [ ]

Sphincter tone:  Normal [ ] [ ]

Fecal occult blood test:  Negative  Positive  Not indicated

Submit to Superbill

❖ Psych:

Sensory:  Normal [ Motor/sensory grossly nl ] [ ]

No Yes

Oriented to person, place, time, situation   Poor judgement

Appropriate mood and affect   Poor insight

Comments:  Carry forward comments

Save & Close Cancel

You can document a general exam on one screen, & save that as a preset just like we did for the ROS above.

And also like above, you can click on any heading to open a more detailed exam for each system, & save presets for those.

Pe General Exam

Default: [ ]

❖ Constitutional: Overall appearance:  Normal [ No acute distress ] [ ]

❖ Eyes: ❖ Vision Screening: Conjunctiva: R  Normal [ ] [ ]

Pupil: [ ] [ ]

Fundus: [ ] [ ]

❖ Ears: External: [ ] [ ]

Canal: [ ] [ ]

TM: [ ] [ ]

Hearing: R  Normal [ ] [ ]

L  Normal [ ] [ ]

External nose:  Normal [ Nares clear ] [ ]

Lips/teeth/gums:  Normal [ ] [ ]

Oropharynx:  Normal [ Clear ] [ ]

Tonsils:  Normal [ ] [ ]

❖ Neck/Thyroid: ❖ Lymphatic: [ ] [ ]

❖ Vascular: ❖ Extremity: Pedal pulses:  Normal Capillary refill:  Less than 2 seconds

Edema:  No  Yes  Greater than 2 seconds

❖ Abdomen: [ ] [ ]

Adnexa:  Normal [ ] [ ]

Sphincter tone:  Normal [ ] [ ]

Fecal occult blood test:  Negative  Positive  Not indicated [ Submit to Superbill ]

❖ Musculoskeletal: Overview:  Normal

❖ Skin: Inspection:  Normal

❖ Neurological: Memory:  Normal [ ] [ ]

Cranial nerves:  II - XII grossly intact  I is grossly intact [ Details ]

DTRs:  Normal [ ] [ ]

Sensory:  Normal [ Motor/sensory grossly nl ] [ ]

❖ Psych: No Yes   Oriented to person, place, time, situation   Poor judgement

Appropriate mood and affect   Poor insight

Carry forward comments

Comments: [ ]

[ Save & Close ] [ Cancel ]

But given the convenience of the **One Page Exam**, there is a great temptation to do everything here, even if you're hammering a square peg into a round hole, as you can see I did here by squeezing both motor & sensory items under a box labeled "Sensory."

The **One Page Exam** always seems to be missing a spot for 1-2 items you want to document, or limits the space you have available.

This is where the "Full" preset save option really shines. Document however you deem fit on the **One Page Exam** & any addition system-specific exams as you like, then on the **SOAP** tab use the **Save** icon you see under the **Physical Exam** section to save all those entries as one preset.

03/05/2014 01:06 PM : "\*\*USA SOAP" x

### Physical Exam

Exam	Fi
One Page Exam	
Constitutional	N
Diabetic Foot Exam	
Ears	*
Ears	N
Nose   Mouth   Throat	
Neck   Thyroid	
Breast	
Respiratory	
Cardiovascular	N
Abdomen	N
Extremity	N
Neurological	*

Save Template Defaults

Default Set Category:  
PE Full Exam

Specialties Access:  
 All Specialties  Current Specialty Only: FP

Templates to Save:  
 Save All Templates (Saves Templates you have gone to in this Visit, that are Defaults Ready)  
 Save Current Only: USA\_fts\_soap83  
 Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):  
PEFullINIAdult-RLD

PE Full Exam Quick Saves

Number of Templates	Title
---------------------	-------

Update Remove

Save & Close Cancel

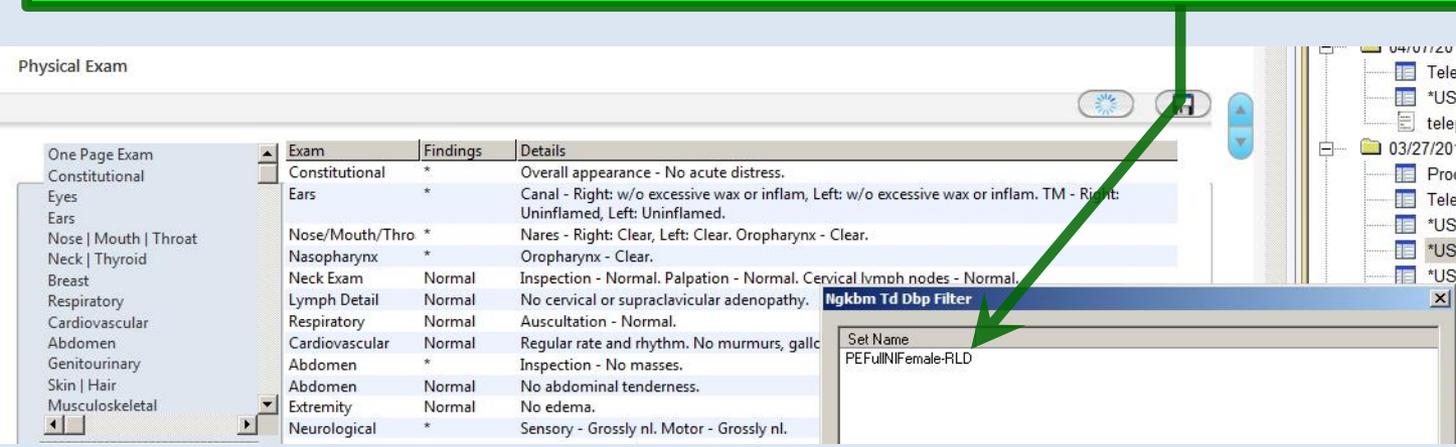
ed otherwise below.

Office Diagnostics

Now you're not limited to the boxes on the **One Page Exam** popup, & you can see your exam directly on the **SOAP** tab. Click on any specific item to change 1-2 findings.

You might want to save several normal exams, divided by age or gender, or whether they are brief or complete. You might save a different normal exam for diabetics that includes a monofilament exam, which you probably wouldn't mention for most non-diabetics. You might even save some abnormal exams as a starting point for common conditions.

This is a very valuable workflow enhancement.



# Procedures

You can define several Procedure presets to use as your standard starting points in various clinical situations.

We'll open the **Joint aspiration/injection** popup from the **Procedures** button at the bottom of the **SOAP Tab**. (You could also open the full **Procedure Template** from the **Navigation Bar**.)

- Office Procedures
- Review/Co-sign Orders
- View Immunizations
- Office Diagnostics
- Physical Therapy Orders
- Health Promotion Plan

Plan Orders	Further diagnostic evaluations ordered today include MRIs of brain, stem, w/o foll by w/ contrast 1 Week to be performed.
4. Assessment	Lung mass (786.6).
Plan Orders	Further diagnostic evaluations ordered today include X-ray, chest, two views, frontal/lateral to be performed.

**Ngkbn Udp Procedure Picklist**

Procedure Name
Debridement/burn
EKG
Foreign body
Fracture/Cast/Strapping
Generic
Incision & Drainage
IUD
Joint aspiration/injection
Laceration
Lesion/shaving
Lesion/wart
Lumbar puncture
Nail avulsion
Suture removal

Refresh      OK      Cancel

Resident-Attending discussion took place     Attending saw patient

Provider Comm.    Meds    **Procedures**    Patient Plan    Visit Document    Document Library    EM Coding    Dictation



Consent

- Consent was obtained
- Procedure/risks were explained
- Questions were answered

Defaults:  Right  Left



Today's Assessments: (Select an assessment and check the desired labs below.) [Add Common Assessment](#)

Injection History:

How to use this template:

#	Diagnosis Description	Code	Status
1	Shoulder impingement syndrome	726.2	
2	Mixed hyperlipidemia	272.2	
3	Migraine Unsp	346.90	
4	Lung mass	786.6	

Encounter Date:Time	Description	Proc Code	Units
03/04/2014 01:45 PM	Arthrocentesis major joint/bursa	20610	1.00

[Add](#) [Edit](#) [Sort](#) [Remove](#)

Injection detail:

Code:	Procedure:	Location:	Method:
726.2	arthrocentesis major joint	right shoulder subacromial s	injection
Site 2:			
Site 3:			
Site 4:			

Site prepped:	Technique:	Anesthetic:	mL	Needle gauge:
<input checked="" type="checkbox"/> Yes	Chlorhexidine			
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Placement confirmed by:	Fluid:	(mL) Fluid withdrawn:	Medication:	mg	mL	Seq	No charge medication	Sterile dressing:	Pressure	Adhesive
Site 1: manual palpation			Betamethasone	4			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site 2:							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site 3:							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Most procedure templates also allow the saving of presets. In this example, we've opened a **Joint Injection/Aspiration** template & made several selections that we'll use as a standard shoulder injection. Next, click the **Save** icon.

Comments [Manage My Phrases](#) [My Phrases](#)

1 ml lidocaine combined w/ 4 mg betamethasone injected into subacromial space w/o difficulty.

Plan: My Plan  
 Lab Orders:  Schedule follow-up visit  
 Timeframe:  Appropriate post injection instructions given  
 Reason(s) for next visit:  
 For injection/aspiration  
 Other:

[Place Order](#) [Submit to Superbill](#) [Save & Close](#) [Cancel](#)

Default Set Category:



Proc

Specialties Access:

 All Specialties Current Specialty Only: FP

Templates to Save:

 Save All Templates

(Saves Templates you have gone to in this Visit, that are Defaults Ready)

 Save Current Only:

proc\_joint\_injections

 Select Templates to Save:

Clear

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

Shoulder dexamethasone-RLD

Add

Proc Quick Saves

Number of Templates	Title
Single	NexplanonInsertion-RLD
Single	ForeskinRetraction-RLD
Single	I&DSimple-RLD

Update

Remove

Type a name, click **Add**,  
then **Save & Close**.

Save &amp; Close

Cancel

Procedure presets can be particularly handy when a specific procedure template isn't available in NextGen. For example, here I've used the **Generic Procedure** template to create a preset for Nexplanon insertion. You need to know what the appropriate diagnosis & procedure codes are, but after you save this once, you never have to know them again.

**Generic - Procedure**

**Indication:**  
Description: Insertion of implantable subdermal contraceptive Code: V25.5 Status:

**Procedure:**  
Description: Insert non-biodegradable drug del implant Code: 11981

Skin of L upper arm inspected, cleaned w/ Hibiclens, & anesthetized. Nexplanon placed SQ w/ introducer w/o difficulty.

Anesthesia:  None Dose %: Units:  
lidocaine with epinephrine mg 2% 3ml  Digital  Local  Nerve  IV  
mg  Digital  Local  Nerve  IV

**Findings:**

**Complications:**  
None

**Post procedure:**  
Instructions:  
Leave butterfly bandage in place till it falls off, usually 1-3 days. Tylenol or ibuprofen for pain.

**Dressing/wound care:**

**Pre-procedure care:**  
 Consent was obtained  
 Procedure/risks were explained  
 Questions were answered  
 Prepped and draped

**Save Template Defaults**

Default Set Category: Proc

Specialties Access:  
 All Specialties  Current Specialty Only: FP

Templates to Save:  
 Save All Templates (Saves Templates you have gone to in this Visit, that are Defaults Ready)  
 Save Current Only: proc\_generic  
 Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):  
NexplanonInsertion-RLD

**Proc Quick Saves**

Number of Templates	Title
Single	ForeskinRetraction-RLD
Single	NexplanonInsertion-RLD
Single	Shoulder dexamethasone-RLD
Single	I&DSimple-RLD

Update Remove

Save & Close Cancel

## Some tips on Procedure presets

- Given that some of the procedure templates are a bit tedious to work with, carefully setting up your most commonly used procedure presets can save you some time & frustration.
- In the past, text in the **Comments** box was not consistently preserved as part of the preset. It appears this problem has been largely remedied, but you may want to keep an eye on this to make sure comments appear as desired.

Tolerated procedure well:  No  Yes

Improvement by site:  1  2  3  4 % Improvement:

Comments

1 ml lidocaine combined w/ 4 mg betathasone injected into subacromial space w/o difficulty.

[Manage My Phrases](#) [My Phrases](#)

Lab Orders:

Schedule follow-up visit

Timeframe:

Follow-up with:

[Custom Plan](#)

Appropriate post injection instructions given

Reason(s) for next visit:

For injection/aspiration

Other:

[Submit to Superbill](#)

[Save & Close](#)

[Cancel](#)

# My Plan

You can define several Plan presets to use as your standard starting points in various clinical situations.

*Please Note:*

A number of design issues & technical problems have prevented us from emphasizing this template in the past. We are currently evaluating its potential in this iteration of NextGen, & we'll get back to you when we know more. In the meantime, here are a few notes on anticipated usage.

My Plan

Assessments **My Plan** A/P Details Lab

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Add Edit Remove

Selected Dx: Migraine Unsp

On the Assessment-Plan Suite, after you've made your assessments, you can move to the next tab to the right, **My Plan**.

Perform: -today

Lab orders

- Sed rate
- C-Reactive Protein
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Diagnostics

MRI/MRA Information

- Brain (including Brainstem) MRI WITH Contrast click arrow to choose
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- click arrow to choose

Office medications

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Office procedures

- HYDRATION IV INFUSION, INIT
- HYDRATE IV INFUSION, ADD-ON
- click arrow to choose

Display office supplies DME

Office labs

- click arrow to choose

For this example, we'll click on the **Migraine Unsp** diagnosis; an **Order set** of potential orders appears on the template. And each user can customize these as desired.

Pregnant:

No  Yes  Possible  Not pertinent

Record Request

Counseling Details

She is to schedule a follow-up visit

She will be referred to

Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

**Today's Assessments:**  
 (Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Reference System:

Diagnosis Group:

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Protocols due in:

**Pregnant:**  No  Yes  Possible  Not pertinent

[Save Order Set](#) [Procedure/Test Instructions](#)  
[Record Request](#)  
[Counseling Details](#)

Selected Dx: Migraine Unsp

Perform:  Lab orders

1  Sedation  
 2  C-Reactive Protein  
 3  BMP  
 4  CMP  
 5  CBC  
 6 click arrow to choose

Diagnostics

1  Brain MRI WITH Contrast  
 2  Brain (including Brainstem) MRI WITHOUT Contrast  
 3  Brain/Head CT WITH Contrast  
 4  Brain/Head CT WITHOUT Contrast  
 5 click arrow to choose

Office medications

1  SUMATRIPTAN SUCCINATE / 6 MG  
 2  KETOROLAC TROMETHAMINE INJ  
 3  METOCLOPRAMIDE HCL INJECTION  
 4  PROCHLORPERAZINE INJECTION  
 5  NORMAL SALINE SOLUTION INFUS  
 6 click arrow to choose

Office labs

1 click arrow to choose

Follow-up visit/referral

She is to schedule a follow-up visit  
 She will be referred to  
 Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
 ♦ Lab/Diagnostics/Radiology Order Module Processing

[Task](#) [Place Order](#) [Save & Close](#) [Cancel](#)

Notice that you're actually working on an **Order set** for a **Diagnosis Group**, & not just one specific diagnosis. This means you can use the order set for all of the various headache diagnoses, instead of having to recreate it for every individual diagnosis code.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

Use order set from:  My saved  Others saved -select a set to use

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	
5	Benign essential hypertension	

Reference System: custom\_impression\_pl

Display:  Order sets  Protocols

Protocols due in:

Save Order Set

Diagnosis Group:

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1  Sed rate
- 2  C-Reactive Protein
- 3  BMP
- 4  CMP
- 5  CBC w/diff
- 6  click arrow to choose

Diagnostics

- 1  Brain (includi
- 2  Brain (includi
- 3  Brain/Head C
- 4  Brain/Head C
- 5  click arrow to

Office medications

- 1  SUMATRIPTAN
- 2  KETOROLAC T
- 3  METOCLOPRA
- 4  PROCHLORPE
- 5  NORMAL SALINE SOLUTION INFUS
- 6  click arrow to choose

Follow-up visit/referral

- She is to schedule a follow-up visit
- She will be referred to
- Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

We'll modify this order set. Under Lab Orders, let's say I don't really want C-Reactive Protein.

Click **Cl** (for Clear), & in the ensuing popup select item #2.

Clear which item?

- 1
- 2
- 3
- 4
- 5
- 6
- all

Close

**My Plan**

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

**Today's Assessments:**  
 (Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	
5	Benign essential hypertension	

Reference System:       Display:  Order sets       Protocols      Protocols due in:

Diagnosis Group: \_\_\_\_\_      [Save Order Set](#)

Use order set from:  My saved       Others saved -select a set to use

Selected Dx:       [Add](#)      [Edit](#)      [Remove](#)

Perform:       [CI](#)

**Lab orders**      [CI](#)

- Sed rate
- click arrow to choose
- BMP
- CMP
- CBC w/diff
- click arrow to choose

**Office procedures**      [CI](#)

- HYDRATION IV INFUSION, INIT
- HYDRATE IV INFUSION, ADD-ON
- click arrow to choose

**Instructions**       My Instructions      [Add](#)      [Del](#)      [CI](#)

- 

**Additional orders**      [CI](#)

Select type (Required)

- click arrow to choose

**Diagnostics**      [MRI/MRA Info](#)

- Brain (including Brainstem)
- Brain (including Brainstem)
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- click arrow to choose

**Office medications**      [CI](#)

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

**Office labs**      [CI](#)

- click arrow to choose

She is to schedule a follow-up visit

She will be referred to

Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
 ♦ [Lab/Diagnostics/Radiology Order Module Processing](#)

[Task](#)      [Place Order](#)      [Save & Close](#)      [Cancel](#)

C-Reactive Protein drops off the list.

For demonstration purposes, let's add a TSH. Click the 1<sup>st</sup> unused dropdown arrow.

You'll see a short list of orders, but it doesn't include TSH. So double-click **\*\*\*See All\*\*\*** to get a full list of tests.

Today's Assessments:  
(Select a diagnosis to associate with the orders below)

#	Description
1	Shoulder impingement syndrome
2	Mixed hyperlipidemia
3	Migraine Unsp
4	Lung mass
5	Benign essential hypertension

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

Instruction	Code
*** See All ***	
Amylase	NG001396
BMP	NG322758
CBC w/diff	NG005009
CMP	NG322000
Hepatic Function Panel	NG322755
Lipase	NG001404
Stool Culture	NG008144
Urinalysis	NG003038
Urine Culture, Comprehensive	NG008086

Select Order	Column2
12+Oxycodone+Crit-Unbund	NG763824
13+Oxycodone+Crit-Scr	NG733726
9+Oxycodone+Crit-Scr	NG733692
9+Oxycodone+Crit-Unbund	NG737588
1-Methyl-histidine	NG911172
1-Methyl-histidine, 24hr Urine	NG911925
1-Methyl-histidine, CSF	NG910752
1-Methyl-histidine, Urine	NG911917
10+Oxycodone+Crit-Scr	NG733727
11-Dehydro Thromboxane B2/Crt.	NG500319
11-dehydro TXB2/Creat Ratio	NG501620
11-Desoxycortisol	NG500550
12+Oxycodone+Crit-Scr	NG733690
17-alpha-Hydroxyprogesterone	NG004713
17-Hydroxycort, 24H+Creat.Ratio	NG120998
17-Hydroxycorticosteroids, Urine	NG004242
17-Hydroxypregnenolone	NG140715
17-Hydroxyprogesterone 3 Spec	NG47522
17-Hydroxyprogesterone 4 Spec	NG49742

Click anywhere in the list & type **TSH**.

Today's Assessments:  
(Select a diagnosis to associate with the

#	Description	
1	Shoulder impingement syndrome	
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

The list scrolls down to TSH; double-click on it.

Diagnosis Group:  
Headache

Protocols

Pregnant:  
 No  Yes  Possible  Not pertinent

Procedure/Test Instructions  
Record Request  
Counseling Details

Add Edit Remove

Selected Dx: Migraine Unsp

Perform: -today  
Lab orders

- 1  Sed rate
- 2 click arrow to choose
- 3  BMP
- 4  CMP
- 5  CBC w/diff
- 6 click arrow to choose

- Diagnostics
- 1  Brain (including Brainstem) MRI WITH Cor
  - 2  Brain (including Brainstem) MRI WITHOUT
  - 3  Brain/Head CT WITH Contrast
  - 4  Brain/Head CT WITHOUT Contrast
  - 5 click arrow to choose

- Office medications
- 1  SUMATRIPTAN SUCCINATE / 6 MG
  - 2  KETOROLAC TROMETHAMINE INJ
  - 3  METOCLOPRAMIDE HCL INJECTION
  - 4  PROCHLORPERAZINE INJECTION
  - 5  NORMAL SALINE SOLUTION INFUS
  - 6 click arrow to choose

Ngkbn Dbp Labs Radiology

Select Order	Column2
Trichloroacetic Acid, Urine	NG723254
Trichloroethane Exposure Prof	NG723262
Trichloroethane Metabolite,U	NG723247
Trichloroethane, Blood	NG723189
Trichloroethanol, Blood	NG723197
Trichloroethylene Exposure	NG723015
Trichloroethylene, Blood	NG723122
Tricyclic Antidepressants	NG007690
Triglycerides	NG001172
Triiodothyronine,Free,Serum	NG010389
Troponin I	NG120832
Trypsin	NG010355
Tryptophan,Qn,24hr,Ur	NG911826
Tryptophan,Qn,CSF	NG910703
Tryptophan,Qn,Pl	NG911123
Tryptophan,Qn,U	NG911818
<b>TSH</b>	<b>NG004259</b>
TSH+Free T4	NG224576
Tumor Necrosis Factor-Alpha	NG140673

Refresh OK Cancel

Add Del

Auto Tasking On  
do not upload to modules.)  
Order Module Processing

task Place Order Save & Close Cancel

TSH is added to the list. Follow the same process to delete, add, or rearrange orders as desired.

You can do the same for radiographic studies.

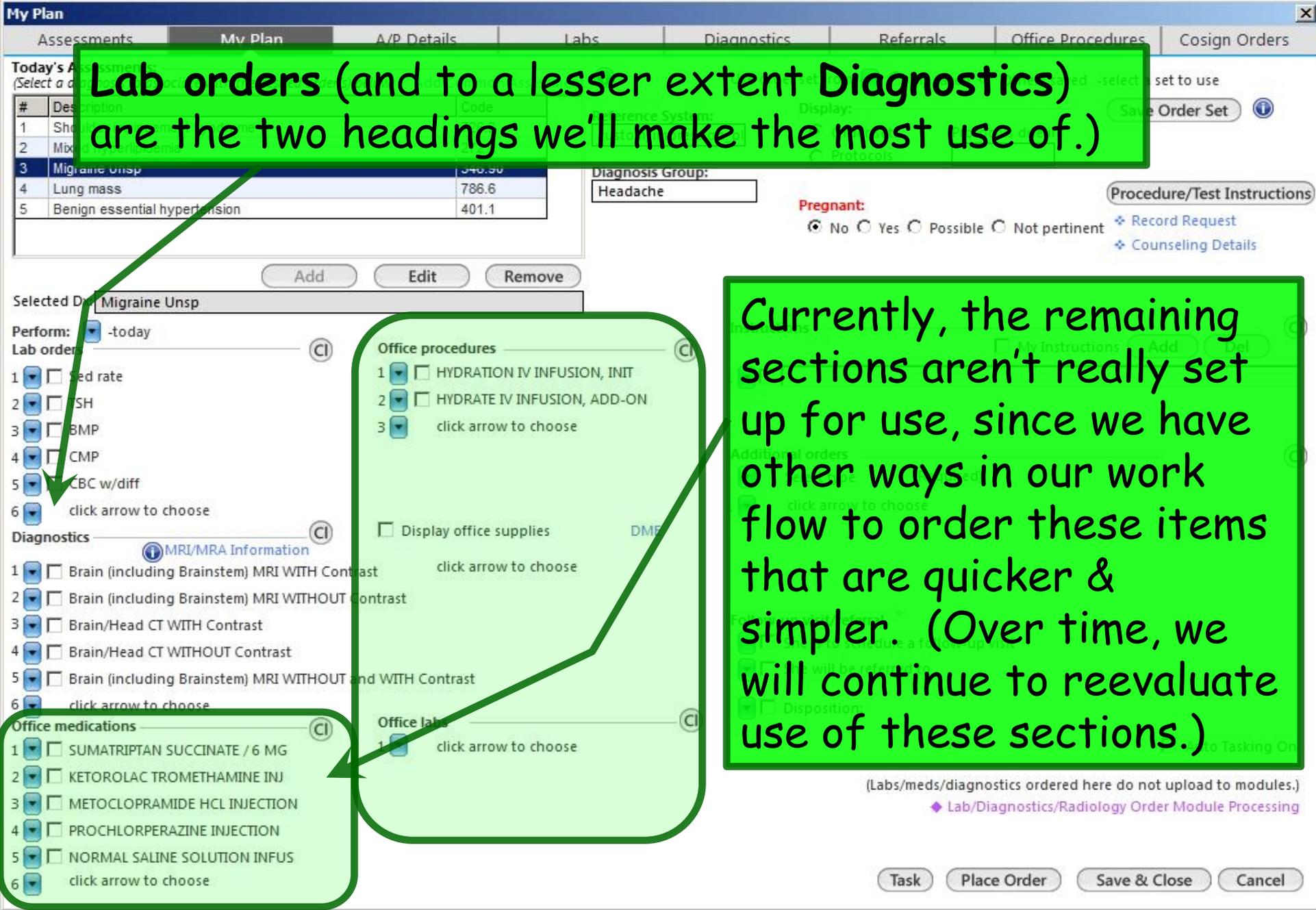
The screenshot displays a medical software interface with several sections:

- My Plan - Assessments:** A table listing various medical conditions and their associated values.
- Today's Assessments:** A section for selecting a diagnosis to add to the plan.
- Selected Dx:** A list of currently selected diagnoses, including 'Migraine Unsp'.
- Perform:** A section for adding lab orders to the patient's plan.
- Diagnosics:** A section for adding radiographic studies to the plan.
- Office medications:** A section for adding medications to the plan.
- Office labs:** A section for adding lab tests to the plan.

Key elements and callouts:

- Assessments Table:**

#	Description	Code	Value
1	Shoulder impingement syndrome	726.2	
2	Mixed hyperlipidemia	272.2	
3	Migraine Unsp	346.90	
4	Lung mass	786.6	
5	Benign essential hypertension	401.1	
- Diagnosis Group:** A dropdown menu currently set to 'Headache'.
- Pregnant:** Radio buttons for 'No' (selected), 'Yes', 'Possible', and 'Not pertinent'.
- Procedure/Test Instructions:** Links for 'Record Request' and 'Counseling Details'.
- Lab orders:** A list of lab tests with checkboxes and dropdown menus for selection. 'TSH' is highlighted.
- Diagnosics:** A list of radiographic studies with checkboxes and dropdown menus. 'Brain (including Brainstem) MRI WITHOUT and WITH Contrast' is highlighted.
- Ngkbn Dbp Labs Radiology Dialog:** A window titled 'Select Order' showing a list of radiographic studies. The selected item is 'Brain (including Brainstem) MRI WITHOUT and WITH Contrast'.



Lab orders (and to a lesser extent Diagnostics) are the two headings we'll make the most use of.)

Currently, the remaining sections aren't really set up for use, since we have other ways in our work flow to order these items that are quicker & simpler. (Over time, we will continue to reevaluate use of these sections.)

Office procedures  
1  HYDRATION IV INFUSION, INIT  
2  HYDRATE IV INFUSION, ADD-ON  
3  click arrow to choose  
  
 Display office supplies  
  
Office labs  
1  click arrow to choose

Office medications  
1  SUMATRIPTAN SUCCINATE / 6 MG  
2  KETOROLAC TROMETHAMINE INJ  
3  METOCLOPRAMIDE HCL INJECTION  
4  PROCHLORPERAZINE INJECTION  
5  NORMAL SALINE SOLUTION INFUS  
6  click arrow to choose

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1  Sed rate
- 2  TSH
- 3  BMP

Office procedures

- 1  HYDRATION IV INFUSION, INIT
- 2  HYDRATE IV INFUSION, ADD-ON
- 3  click arrow to choose

Reference System: custom\_impression\_pl

Diagnosis Group: Headache

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Protocols due in:

Pregnant:  No  Yes  Possible  Not pertinent

Procedure/Test Instructions

- Record Request
- Counseling Details

Instructions

My Instructions

1

**You can also add a few brief Instructions to your order set. In general, Plan Details, with the ability to save My Phrases, provides better functionality, & this is what we recommend. In addition, the setup of instructions here can be a bit confusing.**

**However, for those users who wish to use this feature, a brief explanation follows.**

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

Lab/Diagnostics/Radiology Order Module Processing

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

#	Description	Code
1	Shoulder impingement syndrome	726.2

Reference System: custom\_impression\_pl

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Protocols due in:

Save Order Set

Pregnant:  No  Yes  Possible  Not pertinent

Procedure/Test Instructions

- Record Request
- Counseling Details

Instructions

My Instructions

1  Keep headache diary

2  click arrow to

Additional orders

Select type (Required)

1  click arrow to choose

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

◆ Lab/Diagnostics/Radiology Order Module Processing

We want to start by populating "My Instructions," a list of instructions you frequently use. In the first Instructions line, type **Keep headache diary**.

Click **Add** & select **1** in the ensuing popup. Note that, while this is not made particularly clear, you are actually adding this to your list of "My Instructions."

Add which instruction?

1

2

3

Close

My Plan

Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Save Order Set

Reference System: custom\_impression\_pl

Diagnosis Group: Headache

Pregnant:  No  Yes  Possible  Not pertinent

Procedure/Test Instructions:  Record Request  Counseling Details

Instructions:  My Instructions

1  Take abortive med & lie down in dark, quiet room

2  click arrow to

Additional orders:  Select type (Required)  click arrow to choose

1  click arrow to choose

2  click arrow to choose

3  click arrow to choose

4  click arrow to choose

5  click arrow to choose

6  click arrow to choose

Office procedures:

1  HYDRATION IV INFUSION, INIT

2  HYDRATE IV INFUSION, ADD-ON

3  click arrow to choose

Office labs:

1  click arrow to choose

Lab orders:

1  Sed rate

2  TSH

3  BMP

4  CMP

5  CBC w/diff

Office medications:

1  SUMATRIPTAN SUCCINATE / 6 MG

2  KETOROLAC TROMETHAMINE INJ

3  METOCLOPRAMIDE HCL INJECTION

4  PROCHLORPERAZINE INJECTION

5  NORMAL SALINE SOLUTION INFUS

6  click arrow to choose

(Labs/meds/diagnostics ordered here do not upload to modules.)  
◆ Lab/Diagnostics/Radiology Order Module Processing

Task | Place Order | Save & Close | Cancel

Delete or type over "Keep headache diary," typing instead "Take abortive med & lie down in dark, quiet room."

Again click Add & select 1 in the ensuing popup. In a similar fashion, add other lines as desired.

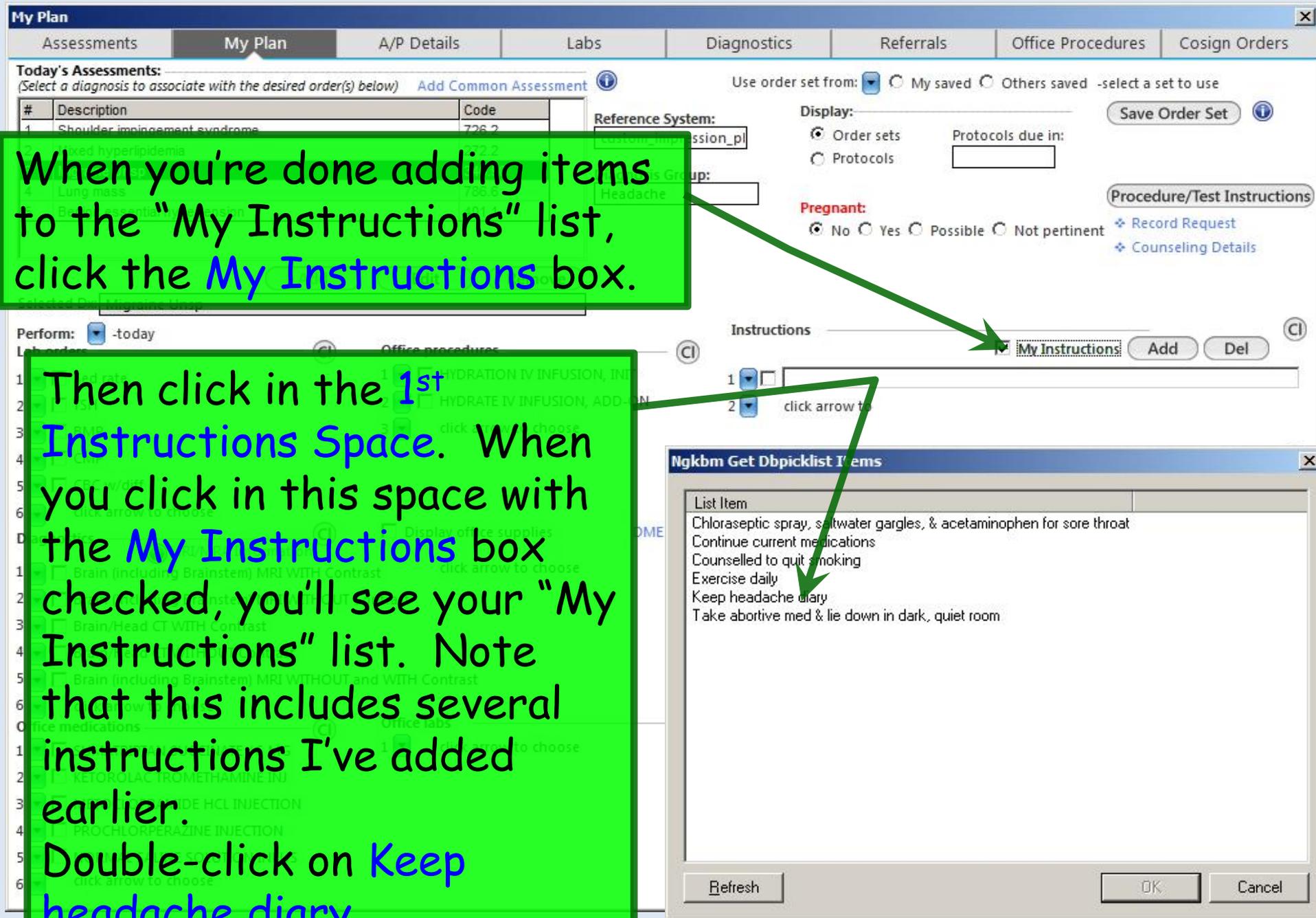
Add which instruction?

1

2

3

Close



When you're done adding items to the "My Instructions" list, click the **My Instructions** box.

Then click in the **1st Instructions Space**. When you click in this space with the **My Instructions** box checked, you'll see your "My Instructions" list. Note that this includes several instructions I've added earlier. Double-click on **Keep headache diary**.

Ngkbn Get Dbpicklist Items

List Item
Chloraseptic spray, saltwater gargles, & acetaminophen for sore throat
Continue current medications
Counselled to quit smoking
Exercise daily
Keep headache diary
Take abortive med & lie down in dark, quiet room

Refresh OK Cancel

Today's Assessments:  
Select a diagnosis to associate with the desired order(s) below. Add Common Assessments  
1. Headache 726.2  
2. Mixed hyperlipidemia 272.2  
3. Migraine 786.6  
4. Large mass 401.1  
Add Edit Remove  
Selected Dr: Migraine Unsp  
Lab orders Office procedures  
1. HYDRATE IV INFUSION, AD-D-ON  
2. HYDRATE IV INFUSION, AD-D-ON  
3. CMP  
4. CMP

Use order set from:  My saved  Others saved -select a set to use  
Display:  Order sets  Protocols Protocols due in:   
Reference System: custom\_impression\_pl  
Diagnosis Group: Headache  
Pregnant:  No  Yes  Possible  Not pertinent  
Save Order Set  
Procedure/Test Instructions  
Record Request  
Counseling Details  
Instructions  My Instructions Add Del  
1.  Keep headache diary  
2.  click arrow to

Ngkbn Get Ibpicklist Items

List Item
Chloraseptic spray, saltwater gargles, & acetaminophen for sore throat
Continue current medications
Counselled to quit smoking
Exercise daily
Keep headache diary
Take abortive med & lie down in dark, quiet room

Refresh OK Cancel

Continue this process until you have added all the instructions you desire.

- 2.  KETOROLAC TROMETHAMINE INJ
- 3.  METOCLOPRAMIDE HCL INJECTION
- 4.  PROCHLORPERAZINE INJECTION
- 5.  NORMAL SALINE SOLUTION INFUS
- 6.  click arrow to choose

Now note the **Additional Orders** section. You can add more orders even if you run out of space in one of the sections. Under **Additional Orders**, click the **Select type** dropdown arrow & choose the instruction type. You can then add specific orders as demonstrated above.

**My Plan**

Assessments | **My Plan**

**Today's Assessments:**  
(Select a diagnosis to associate with the desired order(s) below)

#	Description
1	Shoulder impingement syndrome
2	Mixed hyperlipidemia
3	Migraine Unsp
4	Lung mass
5	Benign essential hypertension

Selected Dx: Migraine Unsp

Perform: -today

**Lab orders**

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff
- click arrow to choose

**Diagnostics**

**MRI/MRA Information**

- Brain (including Brainstem) MRI WITH Contrast
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

**Office medications**

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

**Office labs**

- click arrow to choose

**Additional Orders**

- keep near the diary
- Take abortive med & lie down in dark, quiet room
- click arrow to

**Additional orders** (Required)

- Select type
- click arrow to choose

**Ngkbn Dbp ActClasses**

Act Descript
Lab Orders
Diagnostics
Office Medications
Office Procedures
Office Supplies
Office Labs
Instructions

Refresh | OK | Cancel

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
 (Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Reference System:

Diagnosis Group:

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Protocols due in:

**Save Order Set**

Pregnant:  No  Yes  Possible  Not pertinent

Procedure/Test Instructions  
 Record Request  
 Counseling Details

Selected Dx:

Perform:

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Diagnostics

Display office supplies

**MRI/MRA Information**

- Brain (including Brainstem) MRI WITH Contrast
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

Office labs

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Follow-up visit/referral

She is to schedule a follow-up visit

She will be referred to

Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
 ♦ Lab/Diagnostics/Radiology Order Module Processing

**Let's say our order set is complete. To save it, click Save Order Set. (You won't be prompted for a name or any further information.)**

**Task** **Place Order** **Save & Close** **Cancel**

Today's Assessments: (Select a diagnosis to associate with the desired order(s) below) Add Common Assessment Use order set from: My saved Others saved -select a set to use

#	Description
1	Shoulder impingement syndrome
2	Mixed hyperlipidemia
3	Migraine Unsp
4	Lung mass
5	Benign essential hypertension

In the future, on any patient for whom you select a headache diagnosis, your order set will appear automatically.

Selected Dx: Migraine Unsp Add Edit Remove

Perform: -today Lab orders Office procedures Instructions My Instructions Add Del

- 1 Sed rate
- 2 TSH
- 3 BMP
- 4 CMP
- 5 CBC w/diff
- 6 click arrow to choose

- 1 HYDRATION IV INFUSION, INIT
- 2 HYDRATE IV INFUSION, ADD-ON
- 3 click arrow to choose

- 1 Keep headache diary
- 2 Take abortive med & lie down in dark, quiet room
- 3 click arrow to

- Diagnostics MRI/MRA Information
- 1 Brain (including Brainstem) MRI WITH Contrast click arrow to choose
  - 2 Brain (including Brainstem) MRI WITHOUT Contrast
  - 3 Brain/Head CT WITH Contrast
  - 4 Brain/Head CT WITHOUT Contrast
  - 5 Brain (including Brainstem) MRI WITHOUT and WITH Contrast
  - 6 click arrow to choose

Display office supplies DME

Additional orders Select type (Required) click arrow to choose

- Office medications
- 1 SUMATRIPTAN SUCCINATE / 6 MG
  - 2 KETOROLAC TROMETHAMINE INJ
  - 3 METOCLOPRAMIDE HCL INJECTION
  - 4 PROCHLORPERAZINE INJECTION
  - 5 NORMAL SALINE SOLUTION INFUS
  - 6 click arrow to choose

- Office labs
- 1 click arrow to choose

- Follow-up visit/referral
- 1 She is to schedule a follow-up visit
  - 2 She will be referred to
  - 3 Disposition:
- Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.) Lab/Diagnostics/Radiology Order Module Processing

To use your order set, click the checkboxes for the desired orders for that patient & then click **Place Order**.

There are some other steps that go into actually processing the order—and that is one of the main reasons we're not wholeheartedly endorsing this workflow yet. But this gives you the idea on how to create order sets.

My Plan

Assessments My Plan

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below)

#	Description	786.6	Headache
1	Shoulder impingement syndrome		
2	Mixed hyperlipidemia		
3	Migraine Unsp		
4	Lung mass		
5	Benign essential hypertension		

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/Cliff
- click arrow to choose

Diagnostics

- Brain (including Brainstem) MRI WITH Contrast
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

Office medications

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Office labs

- click arrow to choose

Follow-up visit/referral

- She is to schedule a follow-up visit
- She will be referred to
- Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)  
◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Use order set from:  My saved  Others saved -select a set to use

Reference System: custom\_impression\_pl

Diagnosis Group: Headache

Display:  Order sets  Protocols

Pregnant:  No  Yes  Possible  Not pertinent

Save Order Set

Procedure/Test Instructions

- Record Request
- Counseling Details

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1  Sed rate
- 2  TSH
- 3  BMP
- 4  CMP
- 5  CBC w/diff

Office procedures

- 1  HYDRATION IV INFUSION, INIT
- 2  HYDRATE IV INFUSION, ADD-ON
- 3  click arrow to choose

Task | Place Order | Save & Close | Cancel

You can also click the **Use order set from dropdown arrow** to select from order sets for other diagnoses. For example, you could use this **Headache** order set as the starting point for a new order set for **Fatigue**.

By default you're using order sets you've saved before (or are already pre-populated in the system). But you can also click **Others saved** to see a list of other providers in your practice who have saved order sets. You can then pick from their order sets instead.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:  
 (Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

#	Description	Code
1	Shoulder impingement syndrome	726.2
2	Mixed hyperlipidemia	272.2
3	Migraine Unsp	346.90
4	Lung mass	786.6
5	Benign essential hypertension	401.1

Reference System: custom\_impression\_pl

Diagnosis Group: Headache

Use order set from:  My saved  Others saved -select a set to use

Display:  Order sets  Protocols

Protocols due in:

**Save Order Set**

Pregnant:  No  Yes  Possible  Not pertinent

Procedure/Test Instructions  
 Record Request  
 Counseling Details

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1  Sed rate
- 2  TSH
- 3  BMP
- 4  CMP
- 5  CBC w/diff
- 6  click arrow to choose

Office procedures

- 1  HYDRATION IV INFUSION, INIT
- 2  HYDRATE IV INFUSION, ADD-ON
- 3  click arrow to choose

Diagnosics

- 1  Brain (including Brainstem) MRI WITH Contrast
- 2  Brain (including Brainstem) MRI WITHOUT Contrast
- 3  Brain/Head CT WITH Contrast
- 4  Brain/Head CT WITHOUT Contrast
- 5  Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- 6  click arrow to choose

Office medications

- 1  SUMATRIPTAN SUCCINATE
- 2  KETOROLAC TROMETHAMINE INJ
- 3  METOCLOPRAMIDE HCL
- 4  PROCHLORPERAZINE INJECTION
- 5  NORMAL SALINE SOLUTION INFUS
- 6  click arrow to choose

Instructions

- 1  Keep headache diary
- 2  Take abortive med & lie down in dark, quiet room
- 3  click arrow to

Additional orders

- 1  Select type (Required)
- 1  click arrow to choose

Follow-up visit/referral

- She is to schedule a follow-up visit

Task | Place Order | **Save & Close** | Cancel

You can make changes to your order sets on the fly. Add or remove orders, & just click **Save Order Set** again.

# My Phrases

You have the ability to establish & modify text, in your own words, that you can then use at multiple locations within NextGen.

Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

#	Description	Code	Status
	Shoulder impingement syndrome	726.2	
	Migraine Unsp	548.50	
	Upper mass	786	
	...	40	

Links to My Phrases appear at several spots within the program, but one of the most useful places is A/P Details, where you see several opportunities to use them.

Selected Assessment:

Impression/Comments:

Differential Diagnosis:

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

[Previous Patient Details](#) | [Previous Provider Details](#) | [Health Promotion Plan](#)

Patient Details:

Provider Details:

(Provider details will not print on the patient plan.)

Today's Orders:

Further diagnostic evaluations ordered today include MRIs of brain, stem, w/o foll by w/ contrast 1 Week to be performed.

Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

#	Description	Code	Status
	Shoulder impingement syndrome	726.2	
	Migraine Unsp	548.90	
	Lump mass	786.6	

Take note of the 4 fields where My Phrases can be used, especially Patient Details vs Provider Details, since you'll need to know what type of phrase you'll be adding.

Selected Assessment: Migraine Unsp

Add Edit Sort DX Remove

Impression/Comments:

My Phrases

Differential Diagnosis:

My Phrases

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Previous Patient Details | Previous Provider Details | Health Promotion Plan

Patient Details:

My Phrases

Common Phrases

Provider Details:

My Phrases

Common Phrases

Today's Orders:

Further diagnostic evaluations ordered today include

Manage My Phrases

Follow Up

Counseling Details

Save & Close

Cancel

To begin setup of My Phrases, click **Manage My Phrases**.

Let's add a phrase for the Patient Details field, for instructions we commonly give allergic rhinitis patients. Click in the **My Phrase type** box. In the ensuing popup, select **Plan-Patient**.

**Manage My Phrases**

My phrase type:   List

My phrase summary:   Copy phrase

My phrase:

Characters left: 1000

**Manage which phrase type?**

- Advice
- ASC Anesthesia Comments
- ASC Nursing Comments
- ASC Pathology Collection
- ASC PostOp Nursing Comments
- ASC PostOp Orders Comments
- ASC PreOp Nursing Comments
- Derm Instruct
- Derm Mohs
- Derm Plan
- Derm Repair
- Diagnostics History
- Differential Diagnosis
- Event Log
- Family History
- HPI
- Impression
- OB Education
- OB Postpartum
- OB Prenatal Progress Note
- ONC Cancer Dx Narrative
- ONC Progress Note
- ONC Radiation Narrative
- ONC Social Hx
- Pathology Results
- Physician Note
- Plan - Patient
- Plan - Provider
- proc description
- proc instructions
- Procedure Documentation
- procedure supplies
- Provider Test Action
- Review
- RHE INF Nurse Note
- RHE INF Prov Note

**My Phrase Type** | **My Phrase Summary**

My Phrase Type	My Phrase Summary
Plan - Patient	ADD Start
Plan - Patient	Balance-multifactorial
Plan - Patient	Advance As Tolerated
Plan - Patient	Abd pain, nonspecific
Plan - Patient	AK-Cryo
Plan - Patient	Asthma
Plan - Patient	Ankle Sprain
Plan - Patient	Aphthous Sore
Plan - Provider	Muskrat Attack

child has attention deficit disorder. We often see some pretty good improvement w/ medication: reasons to have balance troubles, including arthritis, diabetes, & hypertension; sometimes medication activities as tolerated.

have a little belly pain for a lot of different reasons that aren't very serious: a minor viral infection w/ liquid nitrogen. These may blister over the coming days; if so, just let the blister heal in its own opportunity. Ice for swelling 15 min at a time every 3-4 hrs for next couple days, or until swelling or "aphthous sore." They hurt a lot, but go away on their own within about a wk. Some people Provider Plan in the event a patient is attacked by a muskrat, or is exposed to the song "Muskrat Love"

**Add** **Update** **Save & Close** **Remove**

**Close**

Click in the **My Phrase summary** box; think of this as the name of your phrase. We'll type **Allergic rhinitis-Patient**.

## Manage My Phrases

My phrase type:

Plan - Patient

List only these phrase types

My phrase summary:

Allergic rhinitis-Patient

Copy phrase

My phrase:

Avoid smoke and other identified allergens/irritants. Fluticasone 1 spray each nostril daily, using 2 sprays each nostril daily during first week of use. USE EVERY DAY; it doesn't help much if you just use it "as needed." If doing well in 2-3 months, you may try leaving it off, but resume it if your symptoms return. You may use it intermittently throughout the year like this. Loratadine or cetirizine (available over the counter) as needed for runny nose, itchy/watery eyes. Recheck if symptoms are not satisfactorily managed over the next 4 wks or so.

Characters left: 439

Add

Update

My Phrase Type	My Phrase Summary	My Phrase
Plan - Patient	ADD Start	It does appear your child has attention deficit disorder. We often see some pathologic improvement w/ medication:
Plan - Patient	Balance-multiple	You've got multiple reasons for your problems including arthritis, diabetes, & hypertension, sometimes med-
Plan - Patient	As needed	As needed
Plan - Patient	Add pain, nonspecific, children	Sometimes you can have a little belly pain for a lot of different reasons that aren't very serious: a minor viral infecti-
Plan - Patient	As needed	As needed
Plan - Patient	Asthma	Avoid smoke and other identified allergens/irritants. Continue Advair 250/50 1 puff twice daily. Albuterol as need-
Plan - Patient	Ankle Sprain	Elevate ankle at every opportunity. Swelling will go down in a few days. If you're not feeling better in 3-4 days, you may need to see a doctor.
Plan - Patient	As needed	As needed
Plan - Patient	As needed	As needed
Plan - Provider	Muskrat Attack	This is my sample Provider Plan in the event a patient is attacked by a muskrat, or is exposed to the song "Muskrat L-

Type your phrase. You have 1000 characters, so there is plenty of room to provide details for those things that you say a dozen times a week. This will be included in the Patient Plan that you print for the patient at the end of the visit, so we'll word them in patient-friendly language. When done, click **Add**.

## Manage My Phrases

My phrase type:

Plan - Patient

List only these phrase types

My phrase summary:

Allergic rhinitis-Patient

Copy phrase

My phrase:

Avoid smoke and other identified allergens/irritants. Fluticasone 1 spray each nostril daily, using 2 sprays each nostril daily during first week of use. USE EVERY DAY; it doesn't help much if you just use it "as needed." If doing well in 2-3 months, you may try leaving it off, but resume it if your symptoms return. You may use it intermittently throughout the year like this. Loratadine or cetirizine (available over the counter) as needed for runny nose, itchy/watery eyes. Recheck if symptoms are not satisfactorily managed over the next 4 wks or so.

Characters left: 439

Add

Update

My Phrase Type	My Phrase Summary	My Phrase
Plan - Patient	Allergic rhinitis-Patient	Avoid smoke and other identified allergens/irritants. Fluticasone 1 spray each nostril daily, using 2 sprays each nostril daily during first week of use. USE EVERY DAY; it doesn't help much if you just use it "as needed." If doing well in 2-3 months, you may try leaving it off, but resume it if your symptoms return. You may use it intermittently throughout the year like this. Loratadine or cetirizine (available over the counter) as needed for runny nose, itchy/watery eyes. Recheck if symptoms are not satisfactorily managed over the next 4 wks or so.
Plan - Patient	AK-Cryo	Lesions frozen twice w/ liquid nitrogen. These may blister over the coming days; if so, just let the blister heal in its own time.
Plan - Patient	Ankle Sprain	Elevate ankle at every opportunity. Ice for swelling 15 min at a time every 3-4 hrs for next couple days, or until swelling subsides.
Plan - Patient	Aphthous Sore	This is a mouth ulcer or "aphthous sore." They hurt a lot, but go away on their own within about a wk. Some people have them frequently.
Plan - Patient	Asthma	Avoid smoke and other identified allergens/irritants. Continue Advair 250/50 1 puff twice daily. Albuterol as needed.
Plan - Patient	Balance-multifactorial	You've got multiple reasons to have balance troubles, including arthritis, diabetes, & hypertension; sometimes medication.
Plan - Patient	Abd pain, nonspecific, children	Sometimes you can have a little belly pain for a lot of different reasons that aren't very serious: a minor viral infection, constipation, or indigestion.
Plan - Patient	ADD Start	It does appear your child has attention deficit disorder. We often see some pretty good improvement w/ medication.
Plan - Patient	Advance As Tolerated	Relative rest, advancing activities as tolerated.

Save & Close

Remove

You can update your phrase, or you can delete it. You can also copy an existing phrase, modify it, & save it with a new name or different My Phrase Type.

Since you have these editing options, you can begin creating & modifying My Phrases immediately, without worrying about getting them perfect on the first try.

*This is important to note!*

If you keep telling yourself you'll find some time to sit down & create your perfect list of My Phrases, you'll never do it, & you'll never cover everything you'll need them for.

Instead, the 1st time you realize you're typing several lines of instructions about a problem there is any chance you'll see again, *save it as a My Phrase*, no matter how good or bad you think it is. The next time you see a patient with that problem, modify/improve the phrase as appropriate for the next patient, & save those changes. By the time you buff it 2-3 times, you'll have something pretty useful.

# Assessment Plan Details

Assessments

My Plan

A/P Details

Labs

Today's Assessments: (Select an assessment and enter the details below.)

#	Description
1	Shoulder impingement syndrome
2	Mixed hyperlipidemia
3	Migraine Unsp
4	Lung mass
5	Benign essential hypertension

Selected Assessment: Migraine Unsp

Impression/Comments:

My Phrases

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Patient Details:

My Phrases

Common Phrases

Provider Details:

My Phrases

Common Phrases

### Ngkbnm Udp Dbpicklist Items

Qualifier 2	List Item
Abd pain, nonspecific, children	Sometimes you can have a little belly pain for a lot of different rea
ADD Start	It does appear your child has attention deficit disorder. We often
Advance As Tolerated	Relative rest, advancing activities as tolerated.
AK-Cryo	Lesions frozen twice w/ liquid nitrogen. These may blister over th
Allergic rhinitis-Patient	Avoid smoke and other identified allergens/irritants. Fluticasone
Ankle Sprain	Elevate ankle at every opportunity. Ice for swelling 15 min at a ti
Aphthous Sore	This is a mouth ulcer or "aphthous sore." They hurt a lot, but go
Asthma	Avoid smoke and other identified allergens/irritants. Continue Ad
Balance-multifactorial	You've got multiple reasons to have balance troubles, including e
Migraine Initial-Patient	Imitrex 100 mg immediately at onset of bad headache; may repea
URI-PtPlan Sample	Sample MyPhrase for Pt Plan section.
URI-PtPlan-Sample	Sample Patient Plan for URI.

Refresh OK Cancel

Back in Plan Details, to use your phrase, select the diagnosis & click the **My Phrases** button for the appropriate section, then double-click the **Allergic rhinitis** phrase.

Plan Details is the place where My Phrases are of the greatest use, but there are other locations where they're available, with further expansion anticipated over time.

Generic Free Form3 - HPI

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern:  Severity:  Mild  Moderate  Severe  Incapacitating  Other:  Frequency:  Constantly  Daily  Weekly  Randomly  Other:  E & M coding information: ⓘ

Onset:  ⓘ

Duration:  ⓘ Location:

Aggravated by:  Relieved by:

Acute  Chronic

Review of Test(s)

HPI: Filter:  Summary  Phrase

This field is limited to 9000 characters.

One useful place you'll find them is on the Generic Free Form HPI popup.

Specialty Family Practice Visit Type Office Visit

**HPI Notes**

Chief complaint/reason for visit: Manage My Phrases

Diarrhea My Phrases

1.

Shoulder pain My Phrases

2.

Squirrels follow me My Phrases

3.

4.

5.

6.

Save & Close Cancel

Intake  
Standing Orders  
Care Guidelines

**Reason for Visit**

Introduction:

This 57 year old female

Do not launch HPI

- asthma
- chest pain
- depression
- diabetes
- fatigue
- GERD
- headache
- hyperlipidemia
- hypertension
- back pain
- chronic condition:

Order Management

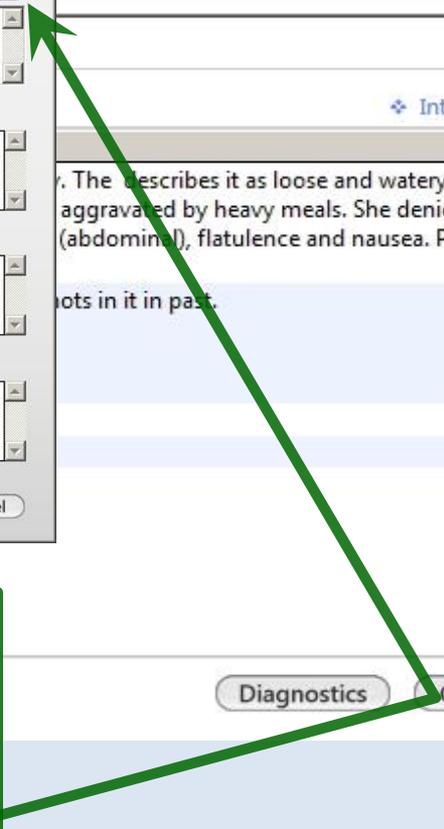
Panel Control: Toggle ↶ ↷ Cycle ↻

[Intake Comments](#)

The describes it as loose and watery. It aggravated by heavy meals. She denies (abdominal), flatulence and nausea. Pertinent notes in it in past.

Diagnostics Comments

An even more handy place My Phrases appear is in the **Reasons for Visit/HPI** section of the **SOAP** tab, when you click the **Comments** button.





Consent

- Consent was obtained
- Procedure/risks were explained
- Questions were answered

Defaults:  Right  Left



Today's Assessments: (Select an assessment and check the desired labs below.) [Add Common Assessment](#)

Injection History: [How to use this template:](#)

#	Diagnosis Description	Code	Status
1	Acute bronchitis	466.0	
2	Neoplasm of uncertain behavior of skin	238.2	
3	Disorders of bursae and tendons in shoulder region, unspecified	726.10	

Encounter Date:Time	Description	Proc Code	Units

[Add](#) [Edit](#) [Sort](#) [Remove](#)

Injection detail:

	Code:	Procedure:	Location:	Method:
Site 1:				
Site 2:				
Site 3:				
Site 4:				

Site prepped:		Needle gauge:	
Yes	Technique:	Anesthetic:	mL
<input type="checkbox"/>			

Placement confirmed by:	Fluid:	(mL) Fluid withdrawn:	Medication:	mg			mL			Seq			No charge medication		Sterile dressing:		Pressure	Adhesive	Clear
Site 1:			<a href="#">Detail</a>									<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Clear</a>
Site 2:												<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Clear</a>
Site 3:												<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Clear</a>
Site 4:												<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Clear</a>

Procedure bill [Verify Charges](#) (To submit charges, you must click on the "Submit to Superbill" button prior to clicking Verify Charges)

Some procedure templates also include My Phrases.

Patient response:

Tolerated procedure well:  No  Yes

Improvement by site:  1  2  3  4      % Improvement: \_\_\_\_\_

Plan: [My Plan](#)

Lab Orders: \_\_\_\_\_

Schedule follow-up visit

Timeframe: \_\_\_\_\_

Follow-up with: \_\_\_\_\_

Appropriate post injection instructions given

Reason(s) for next visit:

For injection/aspiration

Other: \_\_\_\_\_

Comments

[Manage My Phrases](#) [My Phrases](#)

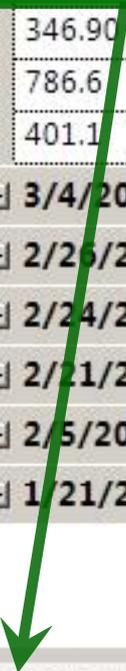
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# Diagnosis Favorites

You can save diagnoses you use frequently, making it easy to add them quickly to an encounter. While the diagnosis search tools are MUCH better now in NextGen, this still can come in handy.

You add Diagnosis Favorites through the diagnosis search tool, anywhere you can access it. From the Problems Module, click **Add ICD**.



Note that Diagnosis Favorites are ICD diagnoses—not the SNOMED codes used to populate the Problem List. This also means you're probably better off waiting to configure these until ICD-10 appears 10/1/14.

ICD Code	Description	Chronic	Status	Severity	Date of Onset
346.90	Migraine Unsp	<input type="checkbox"/>			
786.6	Lung mass	<input type="checkbox"/>			
401.1	Benign essential hypertension	<input type="checkbox"/>			

- + 3/4/2014 1:45:21 PM
- + 2/26/2014
- + 2/24/2014
- + 2/21/2014
- + 2/5/2014 2
- + 1/21/2014

Notice I've already set up a few Favorites folders, to help me group my most commonly-used diagnoses.

The screenshot shows a software window with a search bar at the top. The search bar contains the text "Enter search term" and a "Search" button. Below the search bar is a list of diagnoses. The list is divided into sections: "All Diagnoses", "Patient's Diagnoses", "Patient's Chronic Diagnoses", "Favorites", and "Categories". The "Favorites" section is expanded, showing four folders: "Metabolic", "CV", "Pulmonary", and "Misc". A green box highlights the "Favorites" section, and a green arrow points from the top text box to the "Search" button. Another green box highlights the "Search" button, and a green arrow points from the bottom text box to it. The "Categories" section is also expanded, showing a list of categories such as "Abnormal Tests/L", "Accucheck", "Acute Otitis", "All FX", "Arrhythmias", "Arthritis", "ASTHMA", "Asymptomatic", "Bleeding/Menstru", "Blood and Blood-", "Breast", and "Breast needle bio".

Enter search term Search

**All Diagnoses**

- Patient's Diagnoses
- Patient's Chronic Diagnoses
- ▼ Favorites
  - Metabolic
  - CV
  - Pulmonary
  - Misc
- ▼ Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis
  - ASTHMA
  - Asymptomatic
  - Bleeding/Menstru
  - Blood and Blood-
  - Breast
  - Breast needle bio
  - Diagnoses

Clinical Description and ICD Code | Billing Description

Click in the search field. Type **hypothyroidism**, then click **Search**.

Select Cancel

I'll take the first finding, Hypothyroidism 244.9. Click on that, drag it to the Metabolic folder, then release.

Q hypothyroidism Search

**All Diagnoses**

- Patient's Diagnoses
- Patient's Chronic Diagno
- ▼ Favorites
  - Metabolic
  - CV
  - Pulmonary
  - Misc
- ▼ Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis
  - ASTHMA
  - Asymptomatic
  - Bleeding/Menstru
  - Blood and Blood-Breast
  - Breast needle bio
  - Diagn Arm

Clinical Description and ICD Code	Billing Description
<b>Hypothyroidism   244.9</b>	<b>Unspecified acquired hypothyroidism</b>
Hypothyroidism after radioiodine therapy   244.1	Other postablative hypothyroidism
Hypothyroidism after radio-iodine therapy   244.1	Other postablative hypothyroidism
Hypothyroidism following radioiodine therapy   244.1	Other postablative hypothyroidism
Hypothyroidism post ablative   244.1	Other postablative hypothyroidism
Hypothyroidism S/P ablation   244.1	Other postablative hypothyroidism
Hypothyroidism S/P radioiodine therapy   244.1	Other postablative hypothyroidism
Hypothyroidism status post ablation   244.1	Other postablative hypothyroidism
Hypothyroidism status post radioiodine therapy   244.1	Other postablative hypothyroidism
Acquired hypothyroidism   244.9	Unspecified acquired hypothyroidism
Congenital hypothyroidism   243	Congenital hypothyroidism
Congenital iodine deficiency hypothyroidism   243	Congenital hypothyroidism
Hypothyrotropic hypothyroidism   244.8	Other specified acquired hypothyroidism
Iatrogenic hypothyroidism   244.3	Other iatrogenic hypothyroidism
Infantile hypothyroidism   243	Congenital hypothyroidism
Iodine hypothyroidism   244.2	Iodine hypothyroidism
Nonpitting edema associated with hypothyroidism   244.9	Unspecified acquired hypothyroidism
Other iatrogenic hypothyroidism   244.3	Other iatrogenic hypothyroidism
Other postablative hypothyroidism   244.1	Other postablative hypothyroidism

78 rows returned Select Cancel

Now when you click on the **Metabolic folder**, you see the Hypothyroidism diagnosis.

The screenshot shows a search interface with a search bar containing 'hypothyroidism' and a search button. Below the search bar is a list of folders and categories. The 'Metabolic' folder is highlighted in blue, and a green arrow points from the text above to it. The main area displays a table with one row of results.

Clinical Description and ICD Code	Billing Description
Hypothyroidism   244.9	Unspecified acquired hypothyroidism

At the bottom of the window, there is a status bar with a gear icon, the text '1 rows returned', and two buttons: 'Select' and 'Cancel'.

Note you can drag folders up & down; here I've arranged them in alphabetical order.

Q Migraine | Search

**All Diagnoses**

- Patient's Diagnoses
- Patient's Chronic Diagnoses
- ▼ Favorites
  - CV
  - Metabolic
  - Misc
  - Neuro
  - Pulmonary
- ▼ Categories
  - Abnormal Tests/L
  - Accucheck
  - Acute Otitis
  - All FX
  - Arrhythmias
  - Arthritis
  - ASTHMA
  - Asymptomatic
  - Bleeding/Menstru
  - Blood and Blood-
  - Breast
  - Breast needle biopsy

Clinical Description and ICD Code

Migraine   346.80
Migraine attack   346.90
Migraine headache variant   346.20
Migraine w/ prolonged aura   346.00
Migraine w/o aura   346.10
Migraine with aura without HA   346.00
Migraine without aura   346.10
Migraine with aura, without mention of intractable migraine, without mention of status migrainosus   346.00
Migraine attack with an aura (sensory warning sign such as a bright light or unpleasant smell) before the attack   346.0
Migraine headache characterized by extreme pain, nausea, vomiting and sensitivity to light, not adequately controlled by analgesics   346.02
Migraine   346.92
Migraine with aura w/ status migrainosus   346.02
Migraine attack without an aura (sensory warning sign such as a bright light or unpleasant smell) before the attack that is accompanied by transient neurological phenomena   346.02
Migraine with acute-onset aura w/ status migrainosus   346.02
Migraine w/ aura   346.02
Migraine w/ aura w/o headache w/ status migrainosus   346.02
Migraine w/ aura without HA   346.02
Migraine w/ status migrainosus   346.92

You can delete diagnoses, or entire folders. And the same diagnosis can be placed in more than one folder.

To select a diagnosis, click on the folder you put it in, then double-click on the diagnosis.

The screenshot shows a medical software interface. At the top, there is a search bar with the placeholder text "Enter search term" and a "Search" button. Below the search bar is a table with two columns: "Clinical Description and ICD Code" and "Billing Description". The table contains three rows of data:

Clinical Description and ICD Code	Billing Description
CVA   434.91	Cerebral artery occlusion, unspecified with cerebral infarction
Migraine   346.80	Other forms of migraine without mention of intractable migraine
Parkinson's disease   332.0	Paralysis agitans

On the left side of the interface, there is a navigation pane with a tree view. The "Favorites" section is expanded, showing several folders: "CV", "Metabolic", "Misc", "Neuro" (which is highlighted in blue and has a red 'X' next to it), and "Pulmonary". Below the "Favorites" section, there is a "Categories" section with a list of medical conditions, each preceded by a small icon. The "Neuro" folder is highlighted with a green arrow pointing to it from the text box above. Another green arrow points from the "Neuro" folder to the search bar.

Here's something that might initially confuse users: Make sure you have nothing in the search box when you select a folder. For example, if you had **diabetes** in the search box & clicked on the **Neuro** folder, the results would be blank.

## Add or Update Assessment

Assessments

My Plan

A/P Details

### Today's Concerns/Reason for Visit:

1. Diarrhea 2. Shoulder pain 3. Squirrels follow me

(Select a row from any grid to add to Today's Assessments)  Add Assessments on 1-click

Diagnosis History  Show Chronic only

Diagnosis Description	Code
Acute bronchitis	466.0
Acute laryngitis without mention of obstruction	464.00
Allergic Rhinitis	477.9
Asymptomatic postmenopausal status (age-related) (natural)	V49.81
Benign essential hypertension	401.1
Cerumen Impaction	380.4
Chronic frontal sinusitis	473.1
Constipation, unspecified	564.00
COPD	496
Cough	786.2
Disorders of bursae and tendons in shoulder region, unspecified	726.10
Dysuria	788.1

Show Chronic  Show My Tracked problems  No active problems

Description	Onset Date
Allergic rhinitis	
Benign essential hypertension	
Chronic obstructive lung disease	02/24/2014

My Favorites Favorites Category: All Filter:

Description	Code
Benign essential hypertension	401.1
Coronary artery disease	414.00
Cough	786.2
CVA	434.91

Notice that your favorites appear in the My Favorites section of the Add or Update Assessment popup.

Also observe that you can narrow it down to the folders you created by clicking the Favorites Category dropdown. This gives you a quick way to add diagnoses to today's encounter without having to perform a search.

Ngkbn Diagnosis Favorite Mst

Diag Favorite Name
All
CV
Metabolic
Misc
Neuro
Pulmonary

Refresh OK Cancel

This concludes the  
NextGen User Personalization  
demonstration.

My mechanic told me he couldn't repair  
my brakes, so he made my horn louder.