NEXTGEN
USER PERSONALIZATION
DEMONSTRATION

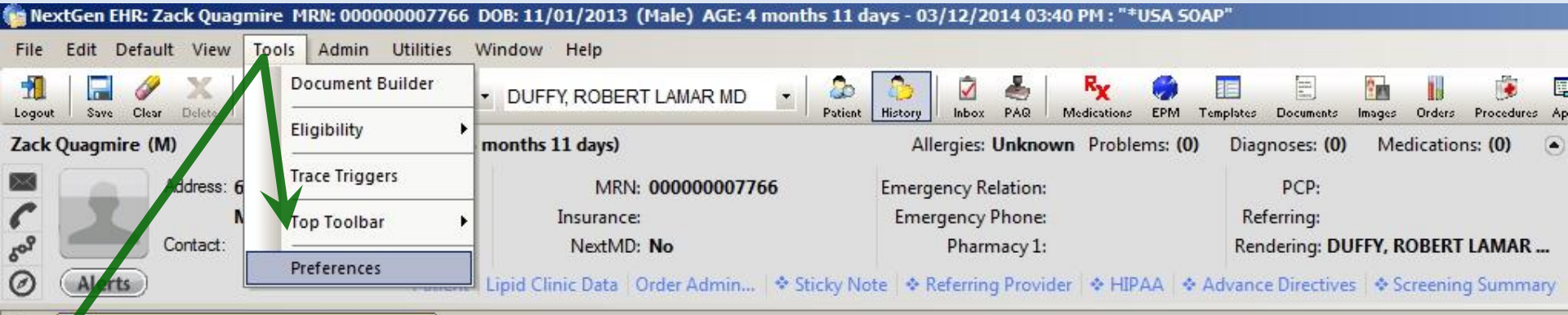
This demonstration reviews some options the user has to modify things in NextGen to meet personal preferences & speed along your documentation.

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

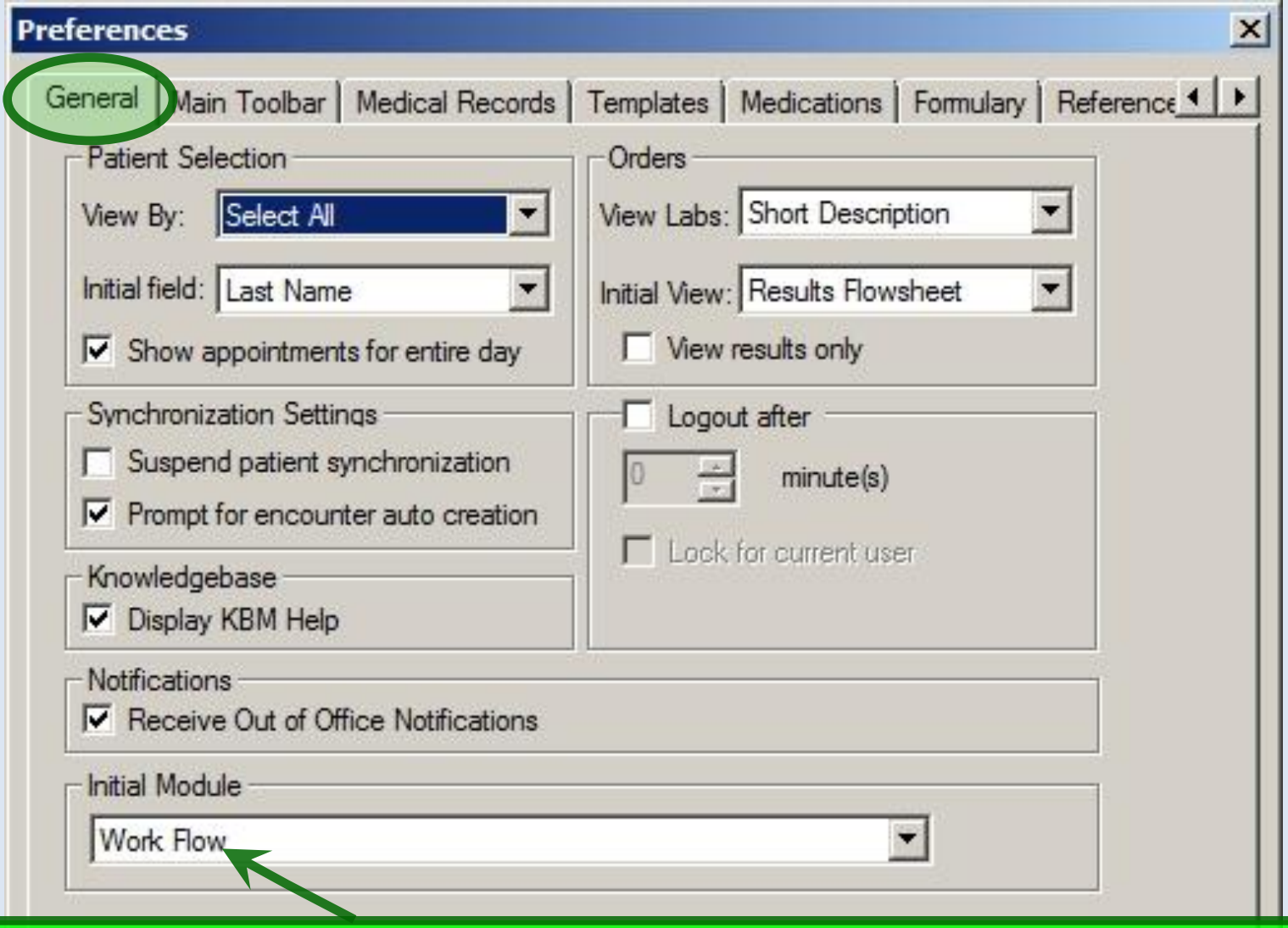
There are several initial preferences you'll want to set up on the Tools menu.



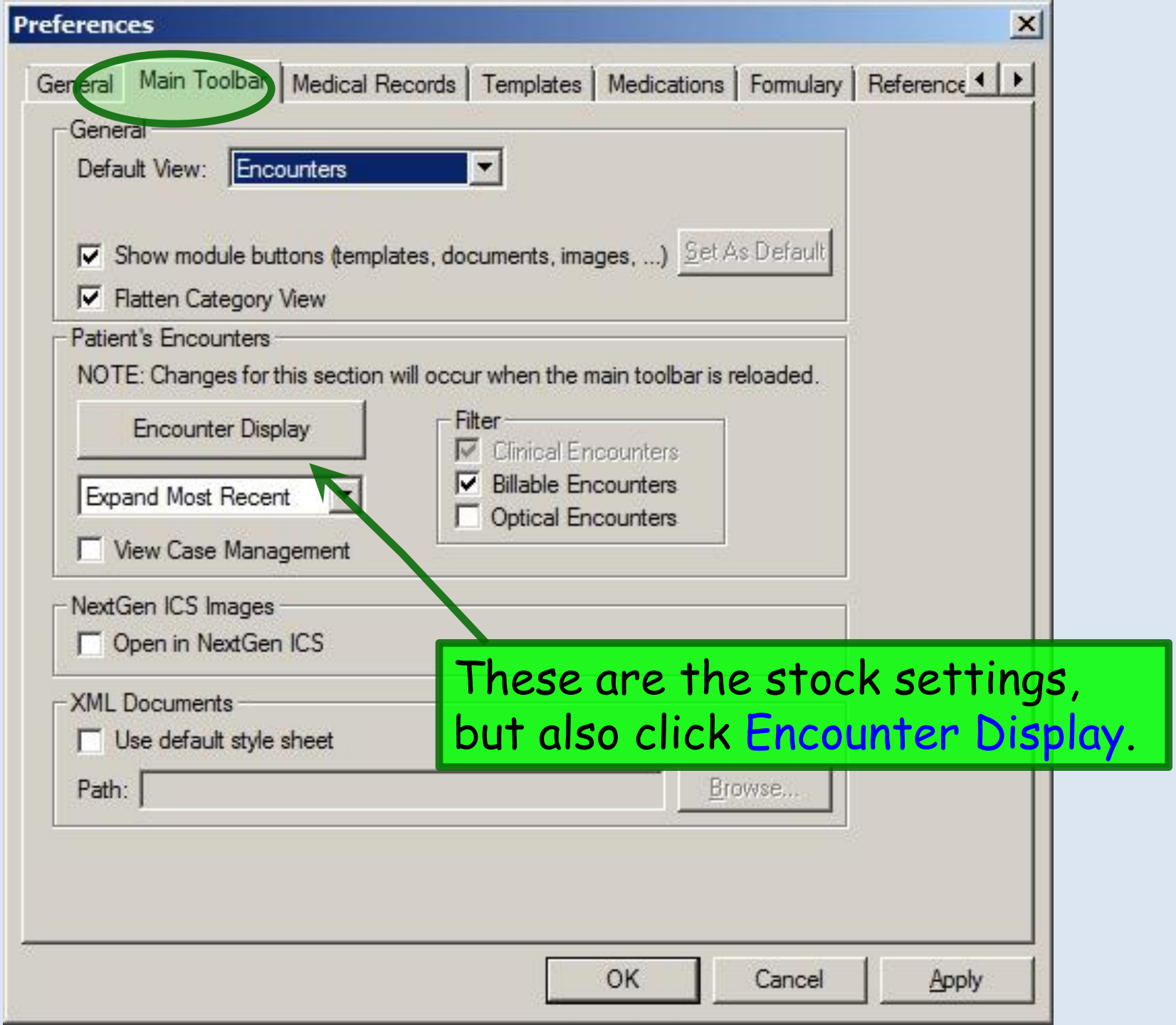
NextGen provides many opportunities for the user to personalize the appearance & functionality of the program, enhancing efficiency & simplifying data entry.

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.

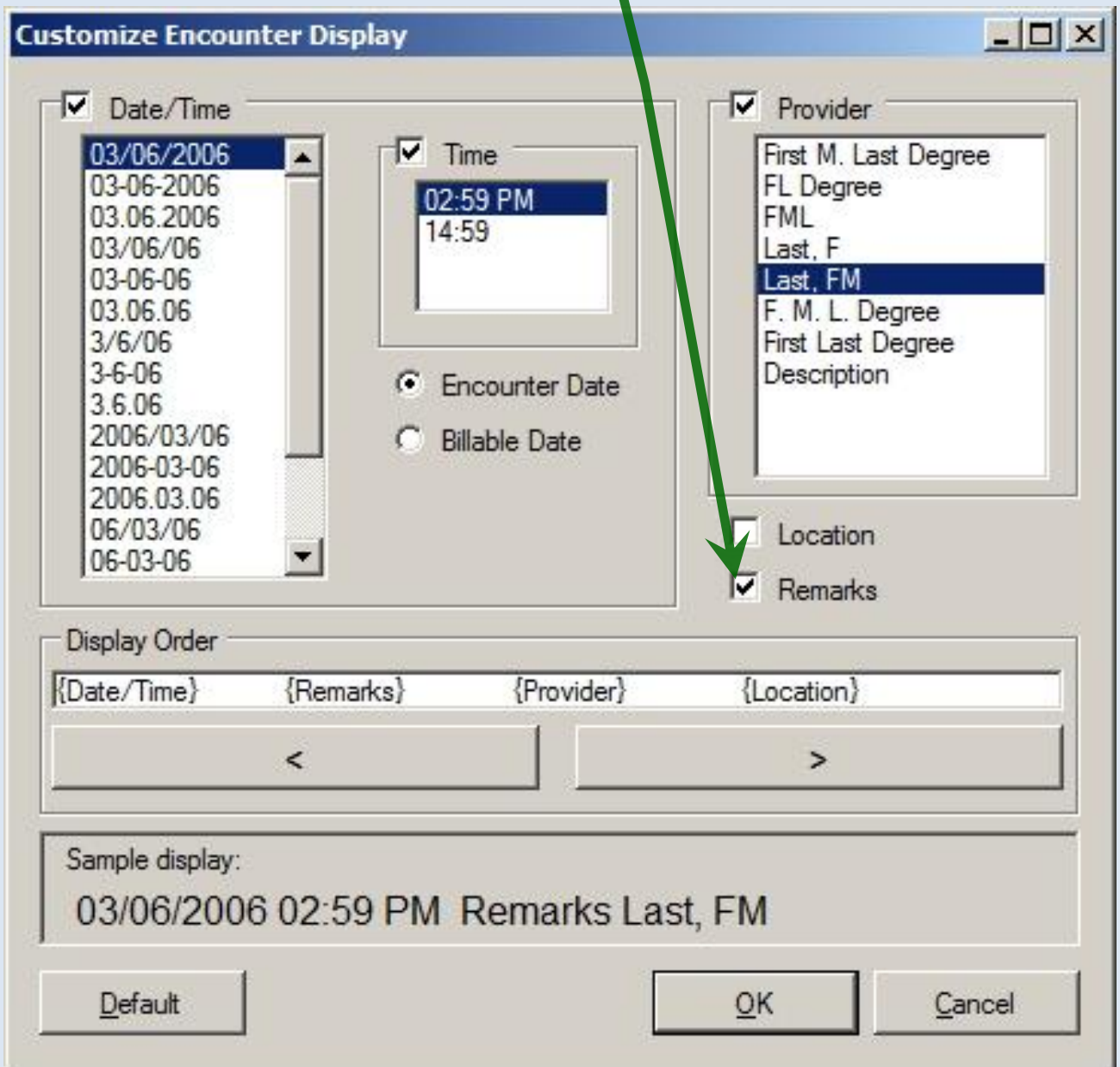
Click Tools|Preferences, & we'll go through the various tabs you see there.



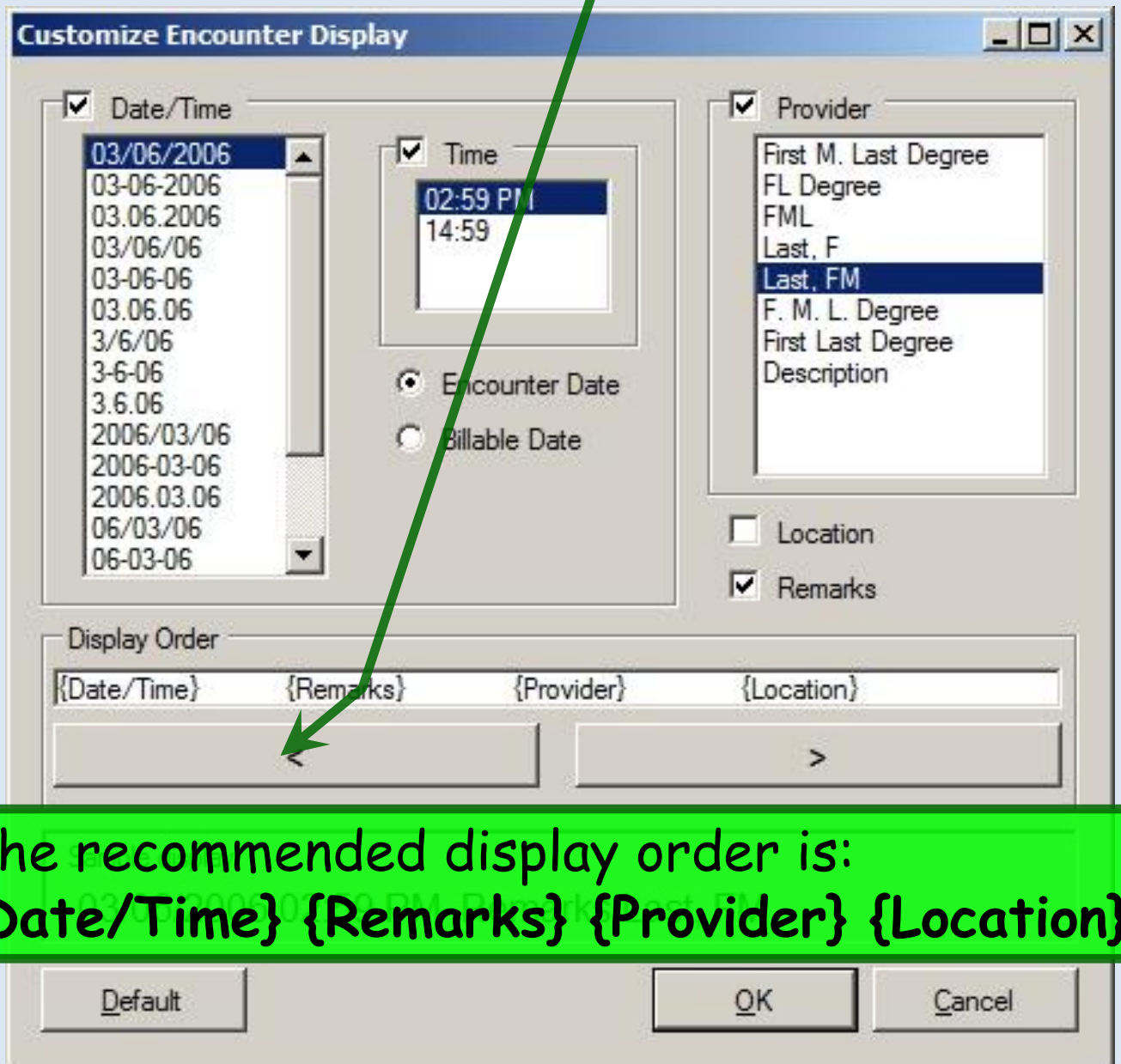
These are the initial settings recommended for most users. If you select Work Flow as your **Initial Module**, you'll see the **Inbox/Appointment List** as soon as you log on to NextGen. If you don't want to see this, leave it blank.


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...
OK
Cancel
Apply
These are the stock settings,
but also click Encounter Display.

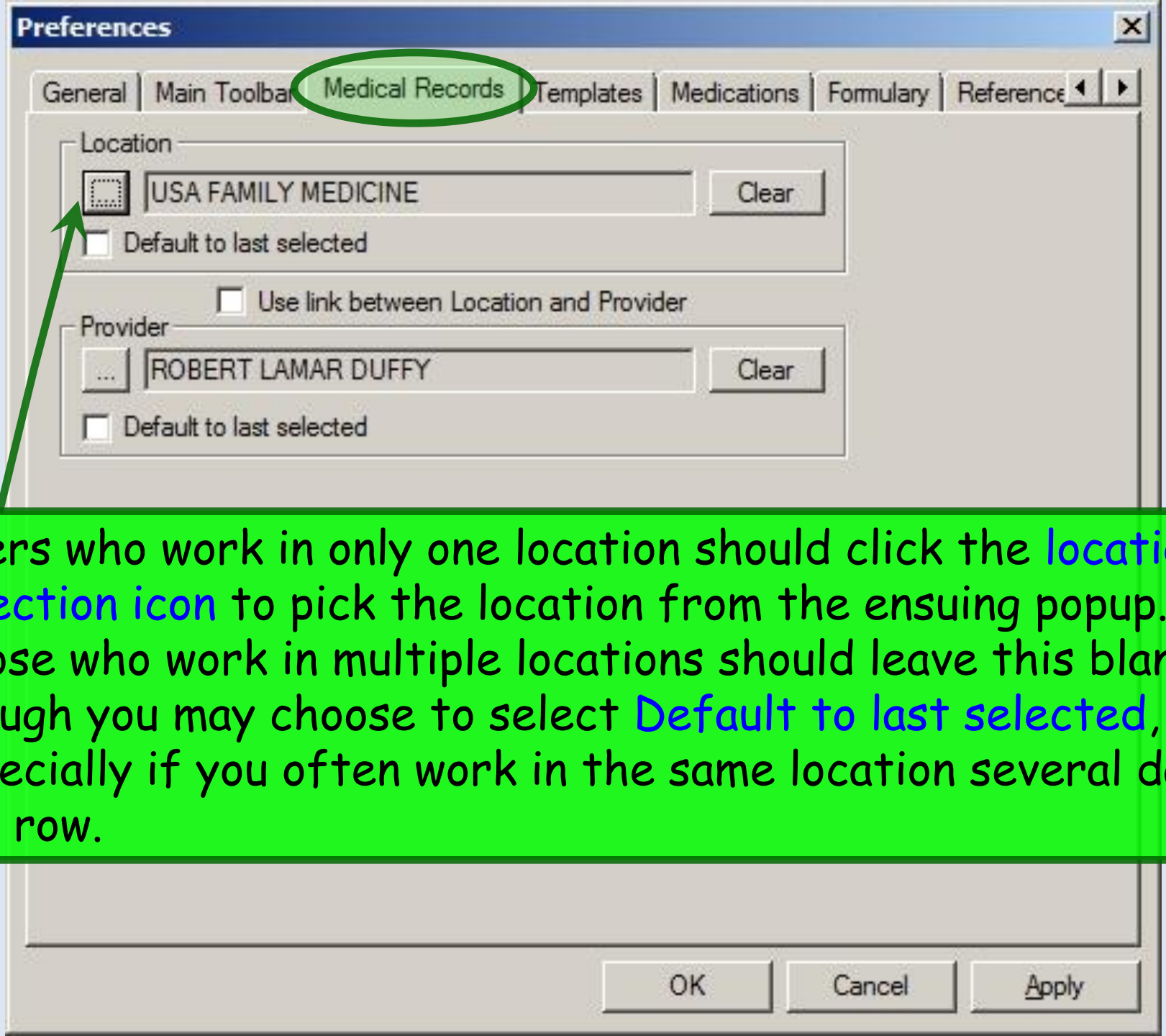
These are the stock settings, but also click the Remarks checkbox if it is not already selected.



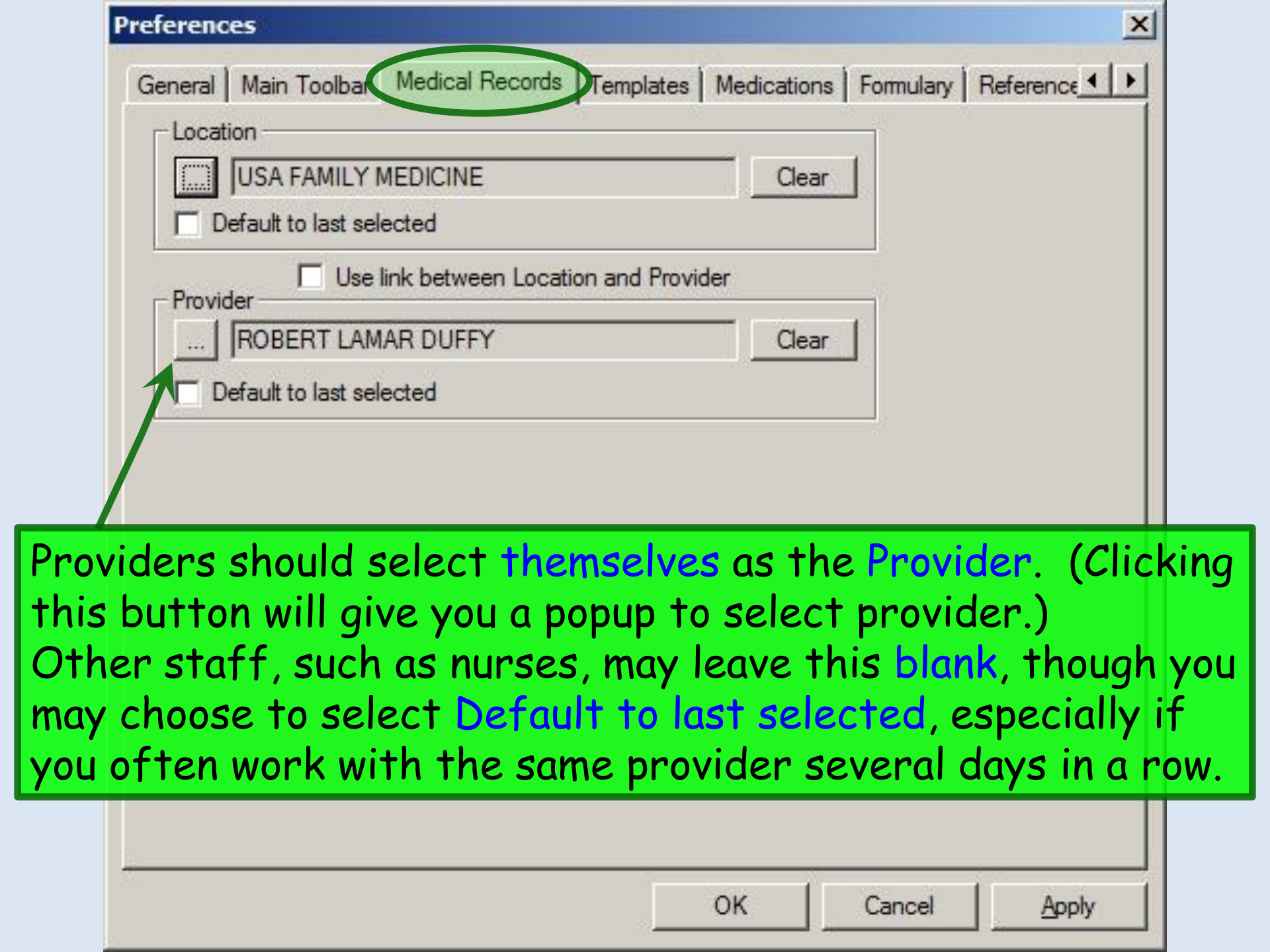
Under Display Order, click on the individual items, & use the < and > buttons to move items left or right.

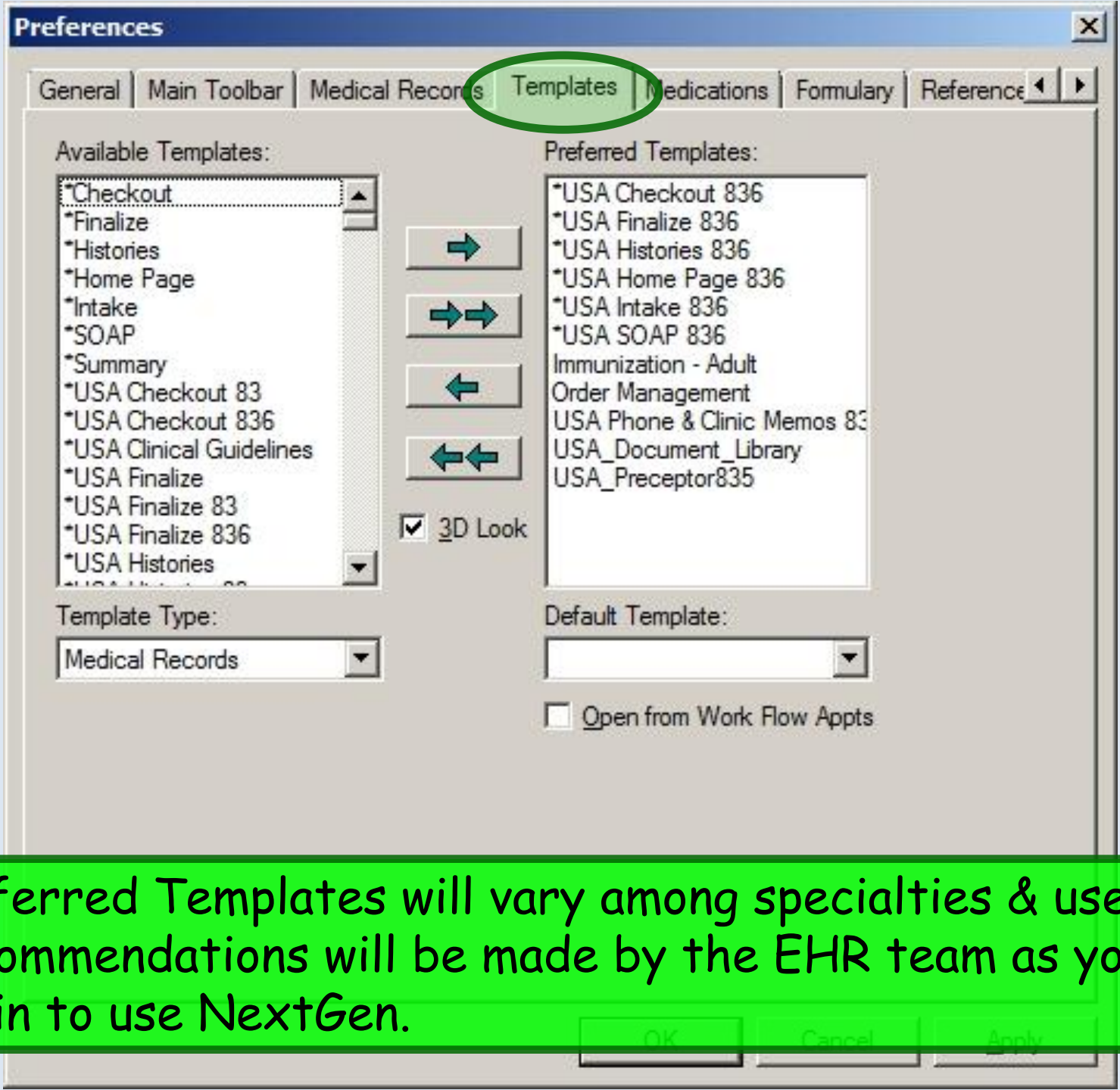


The recommended display order is:
{Date/Time} {Remarks} {Provider} {Location}.

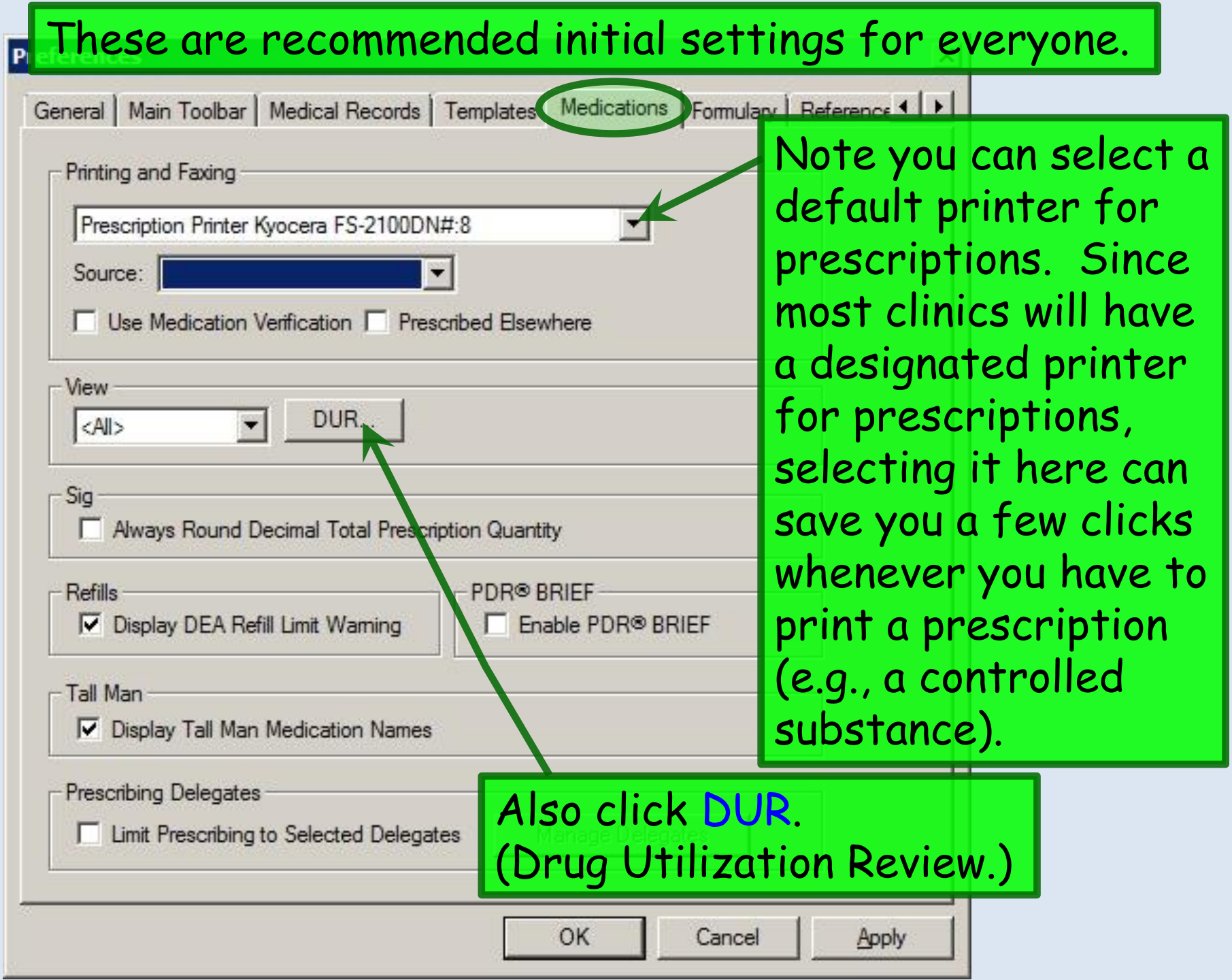


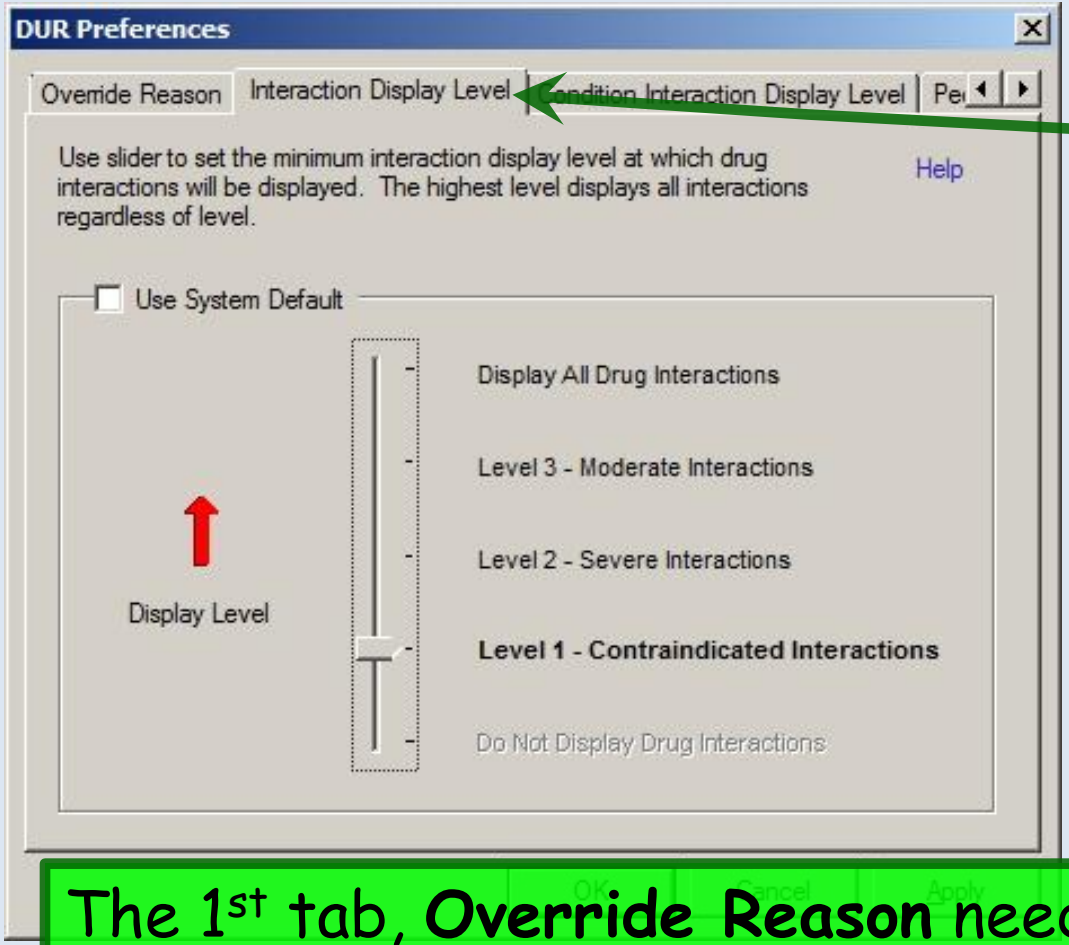
Users who work in only one location should click the location selection icon to pick the location from the ensuing popup. Those who work in multiple locations should leave this blank, though you may choose to select Default to last selected, especially if you often work in the same location several days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


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
OK
Cancel
Apply
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.



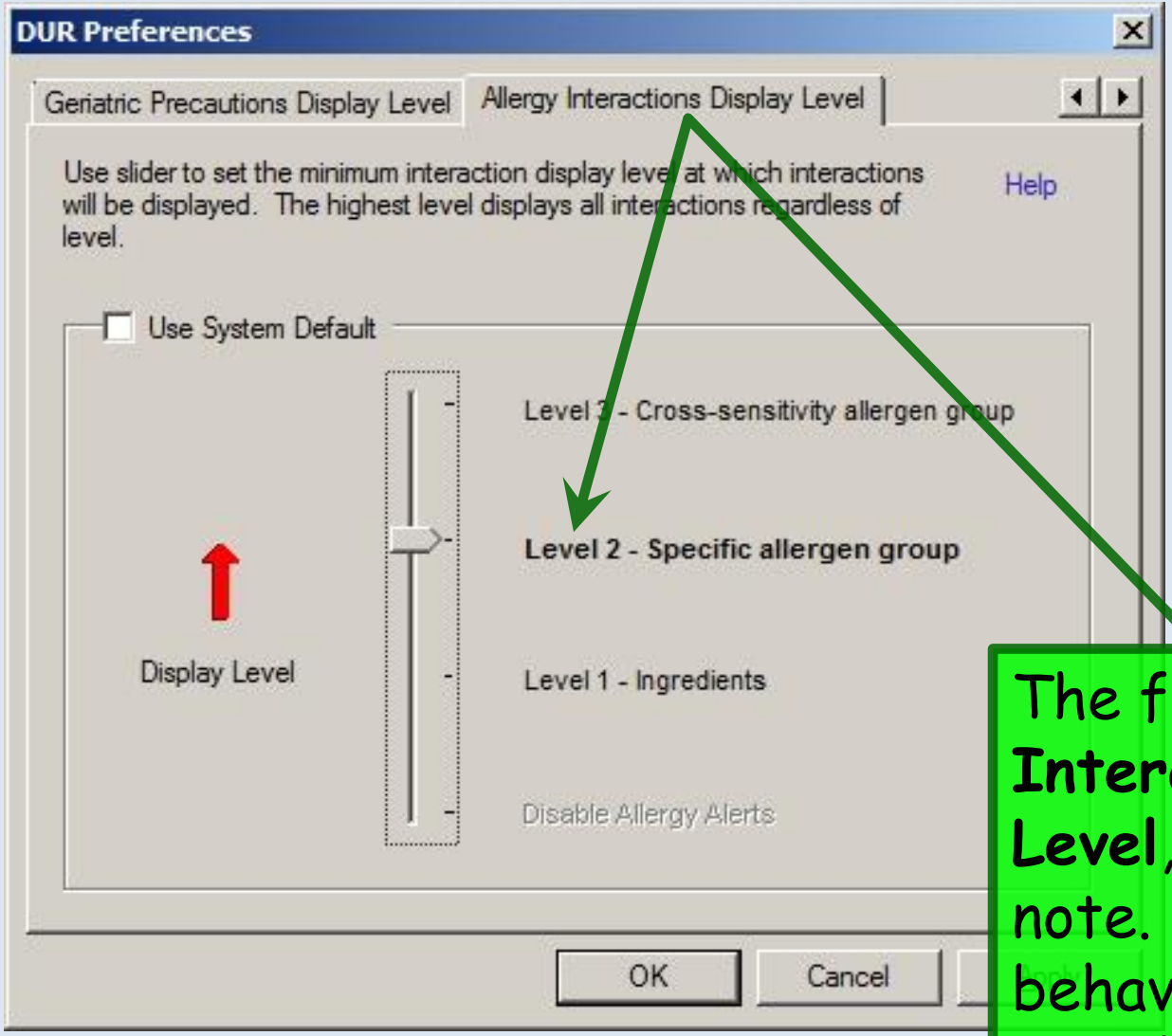
Preferred Templates will vary among specialties & users. Recommendations will be made by the EHR team as you begin to use NextGen.


These are recommended initial settings for everyone.
General
Main Toolbar
Medical Records
Templates
Medications
Formulary
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
Manage 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.)

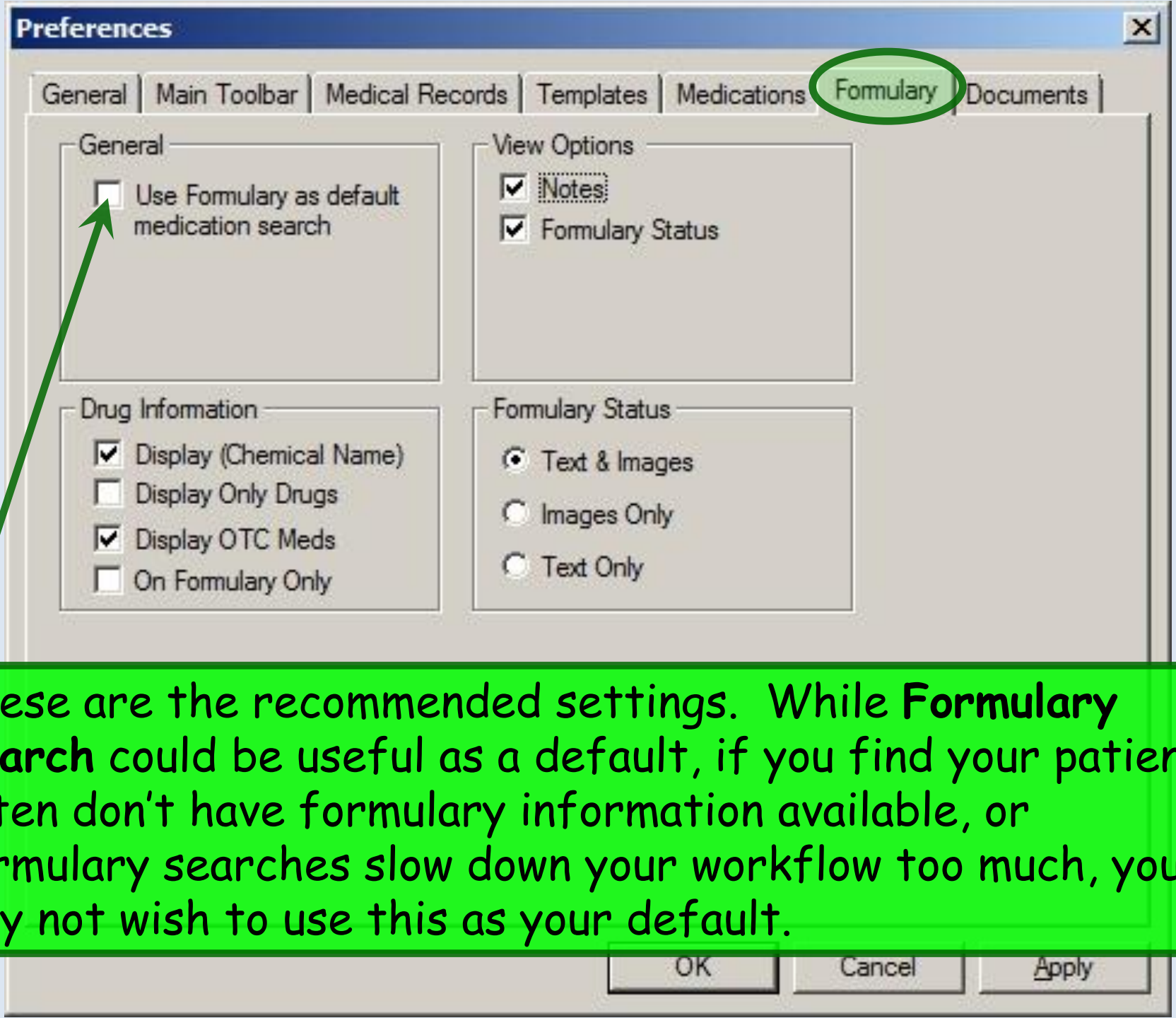


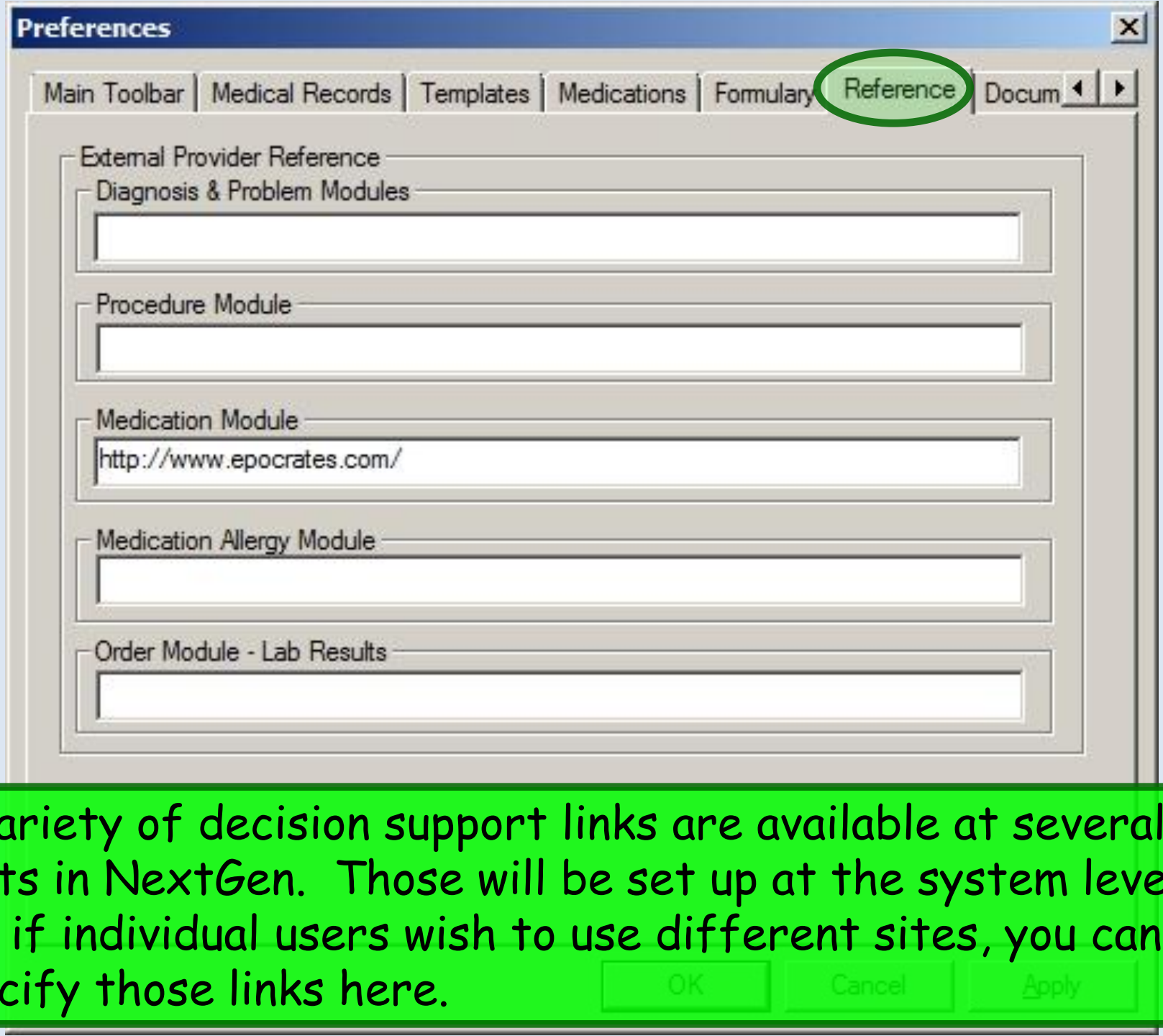
Drug interaction warnings in NextGen can be intrusive, running the risk of warning fatigue. Default settings will generally be low, but you can adjust them as preferred to anything other than off.

The 1st 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

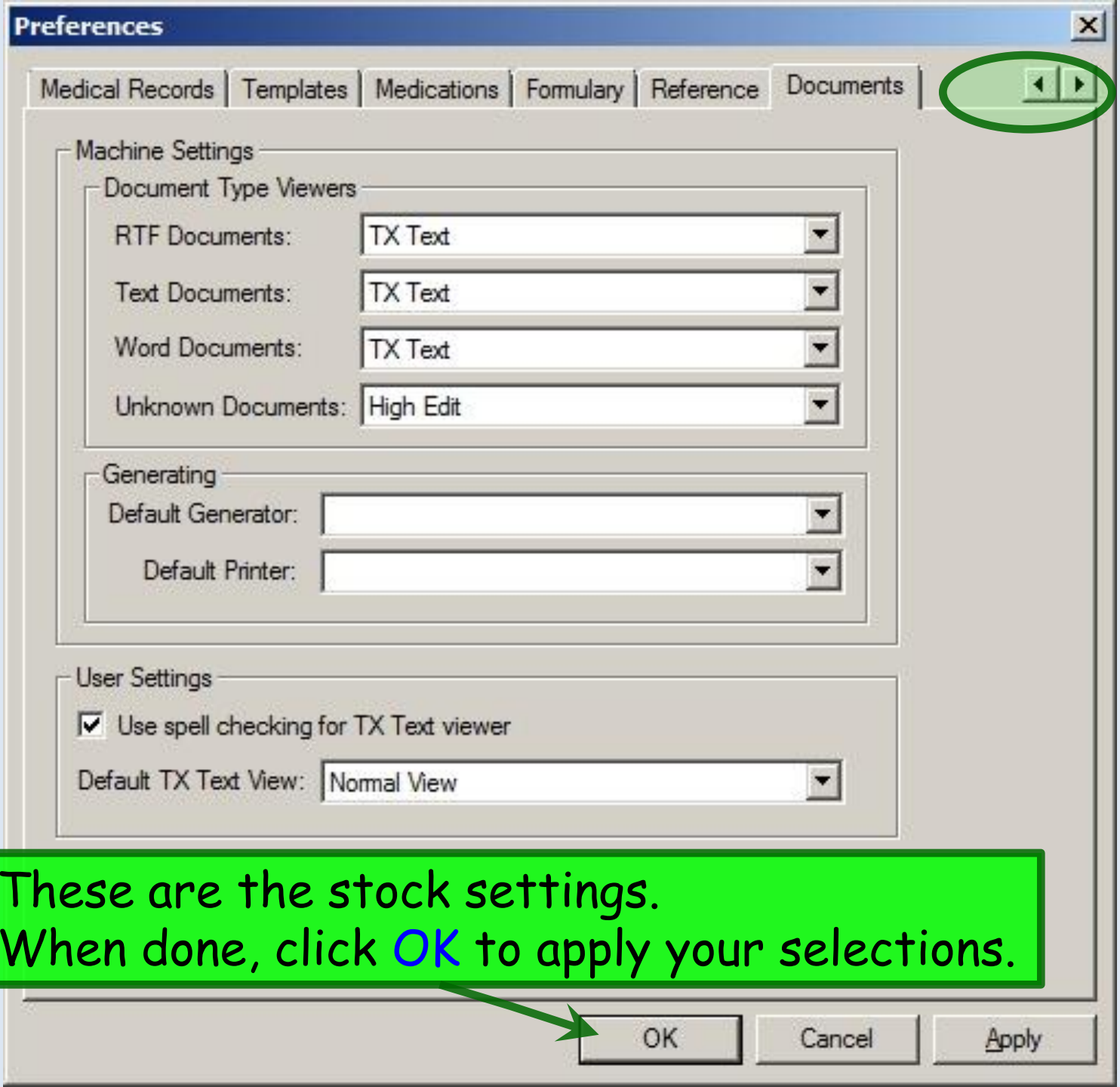


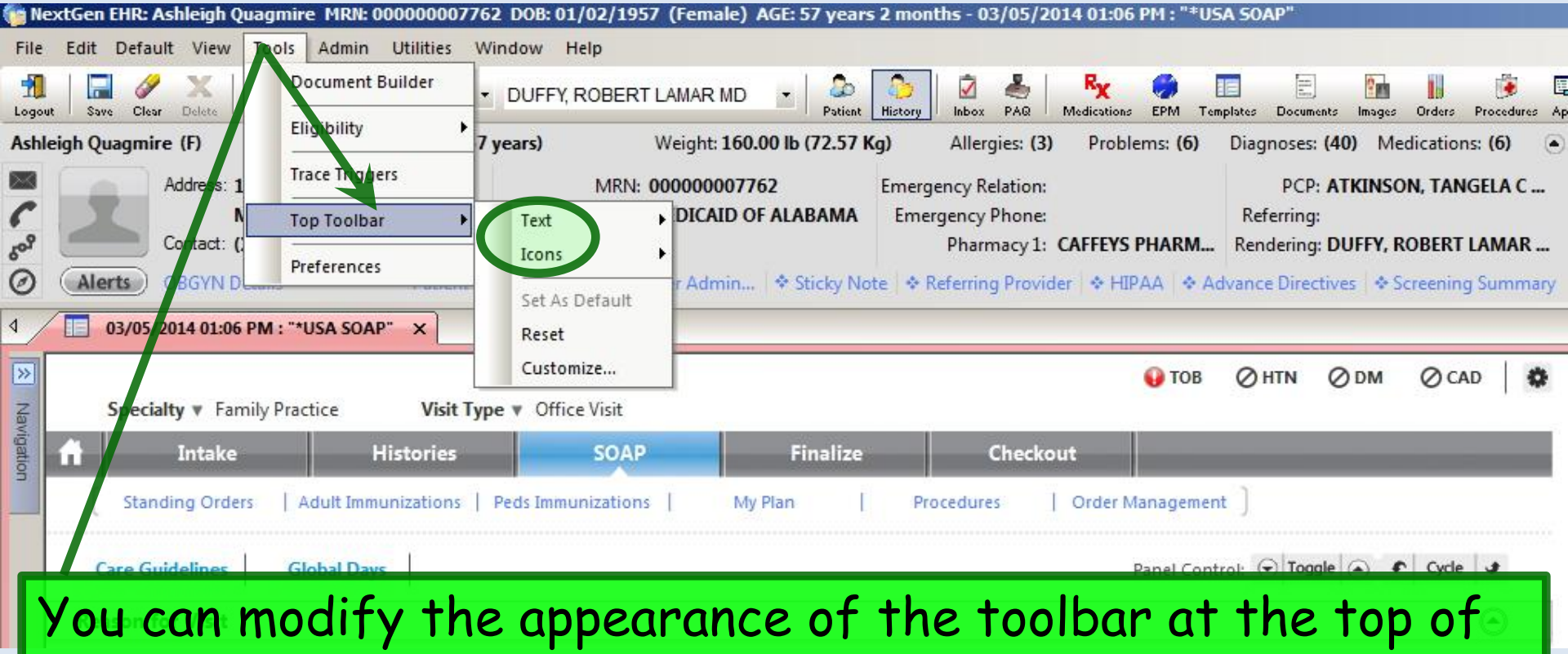
The final tab, **Allergy Interaction Display Level**, merits a special note. As of a change in behavior observed circa March 2014, we recommend selecting Level 2 here.


Preferences
General
Main Toolbar
Medical Records
Templates
Medications
Formulary
Documents
General
Use Formulary as default medication search
View Options
Notes
Formulary Status
Drug Information
Display (Chemical Name)
Display Only Drugs
Display OTC Meds
On Formulary Only
Formulary Status
Text & Images
Images Only
Text Only
OK
Cancel
Apply
These are the recommended settings. While **Formulary 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.



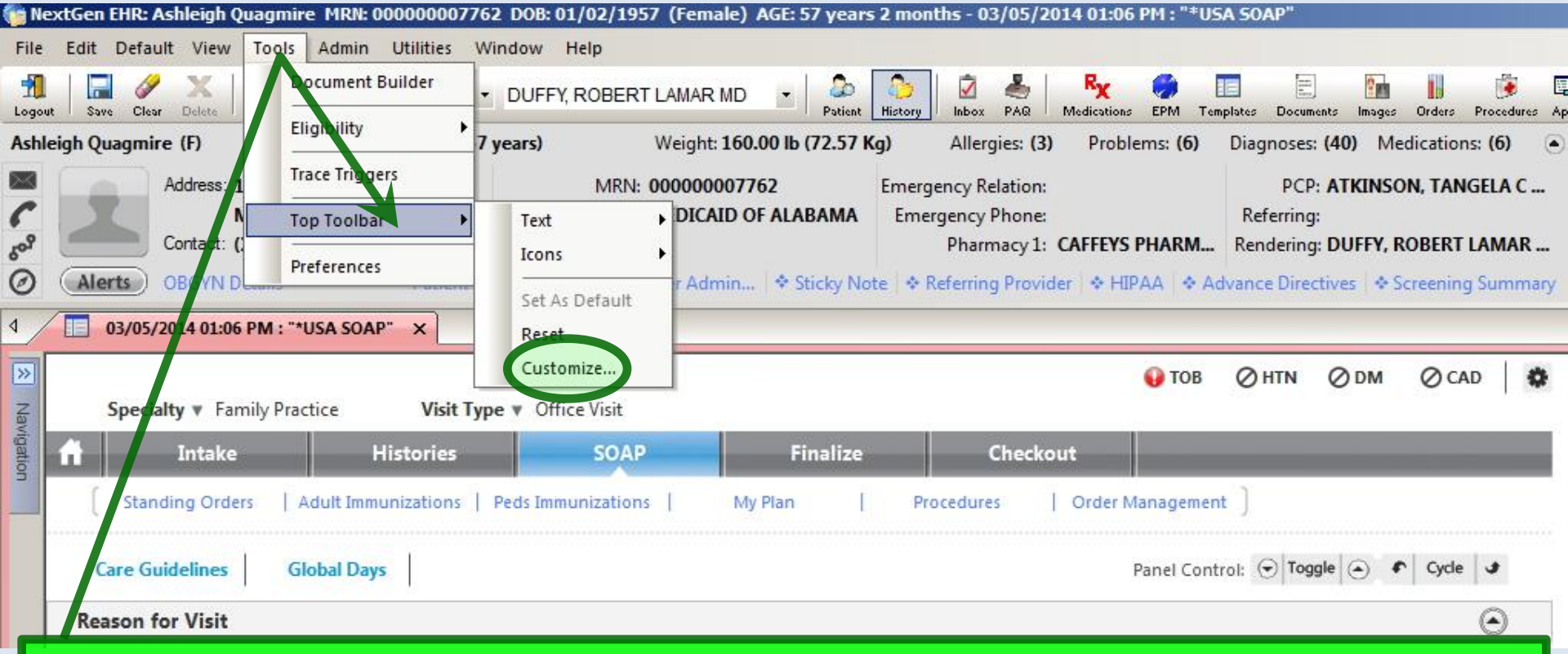
A variety of decision support links are available at several spots in NextGen. Those will be set up at the system level, but if individual users wish to use different sites, you can specify those links here.


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

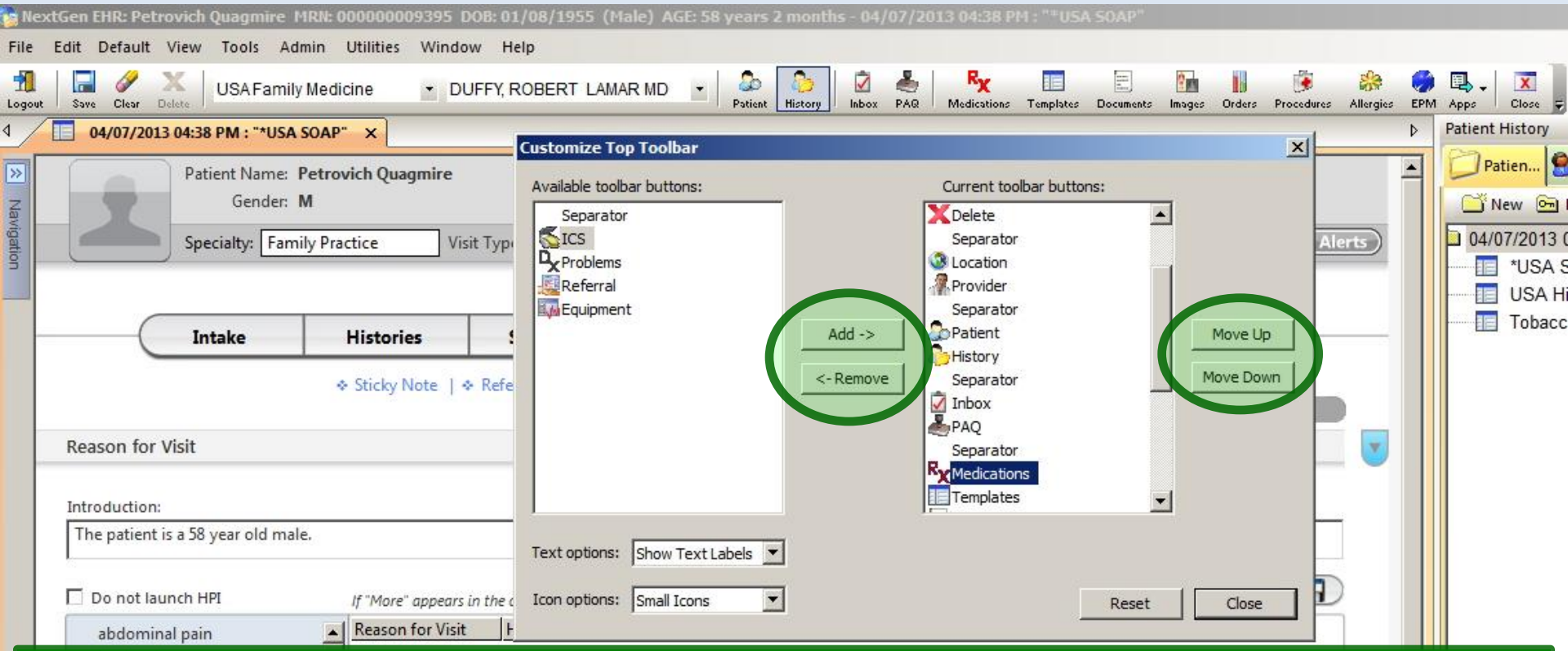


You can modify the appearance of the toolbar at the top of the program window. **Text** & **Icons** allow a few modifications.

For **Text** we recommend Below.
For **Icons** we recommend Small.



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.)



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.

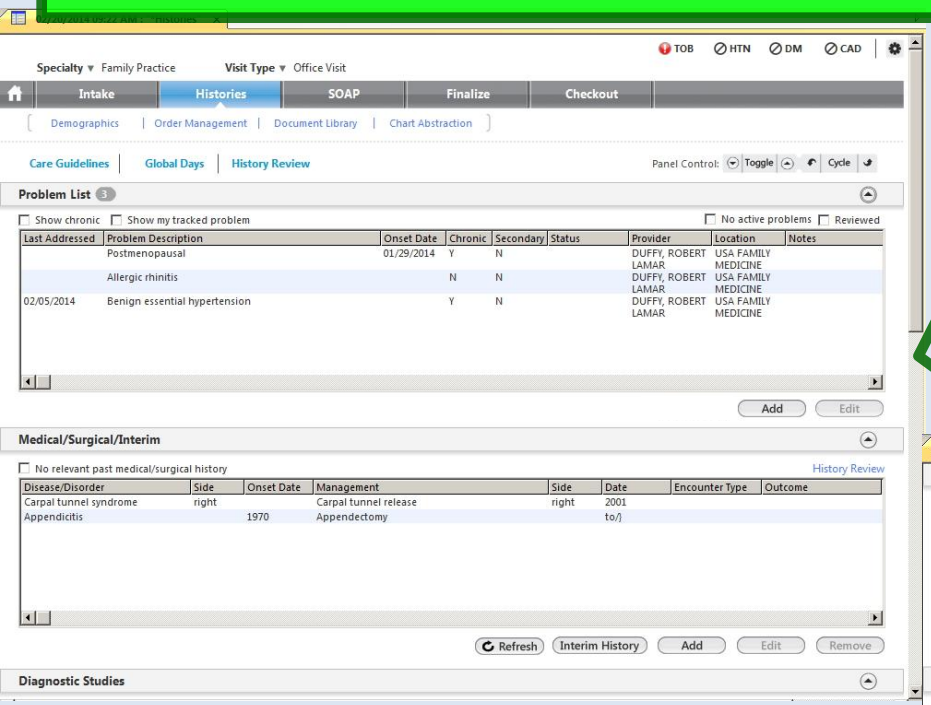
In this example, note that I've placed several buttons that are on the **History Bar** "tic tack toe" board on my toolbar so they'll always be easy to get to directly.

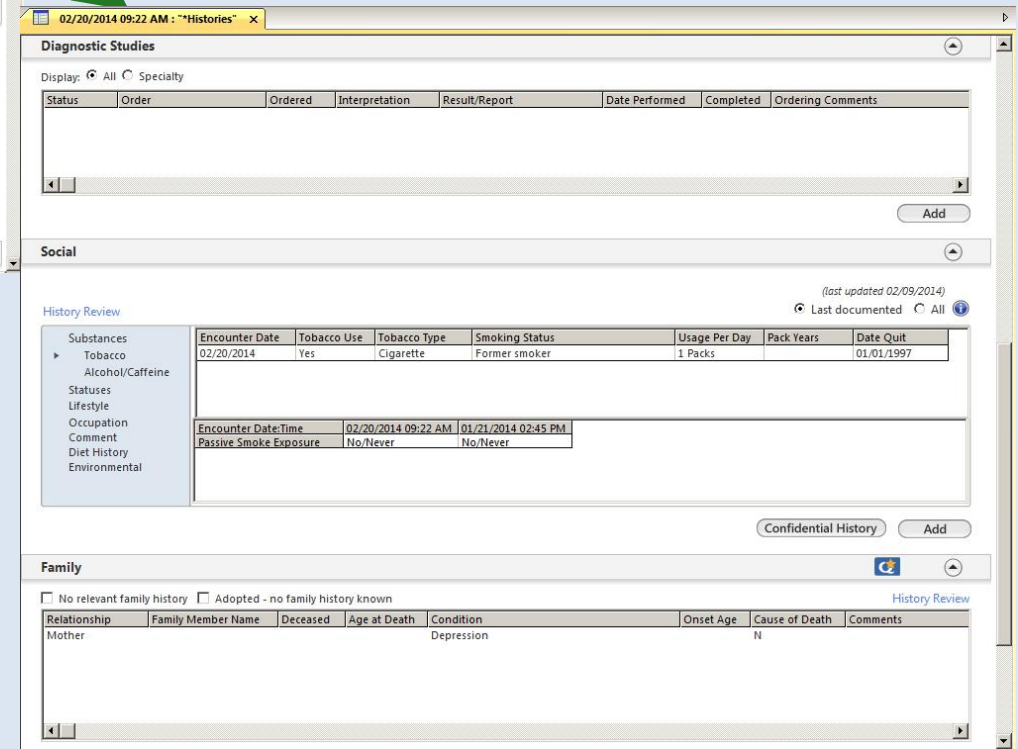
Collapsible Panels

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.





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: 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

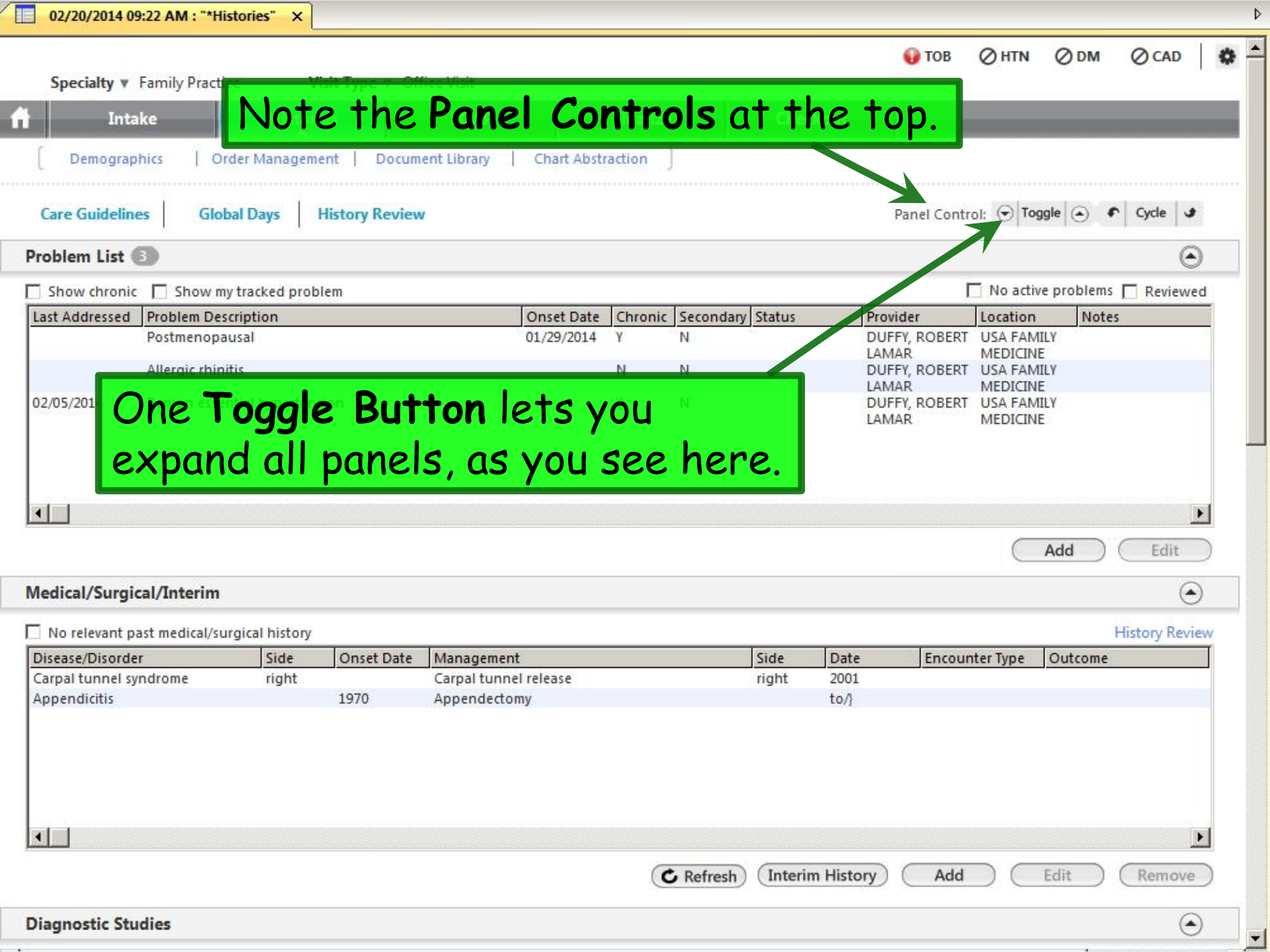
Medical/Surgical/Interim

No relevant past medical/surgical history | History Review

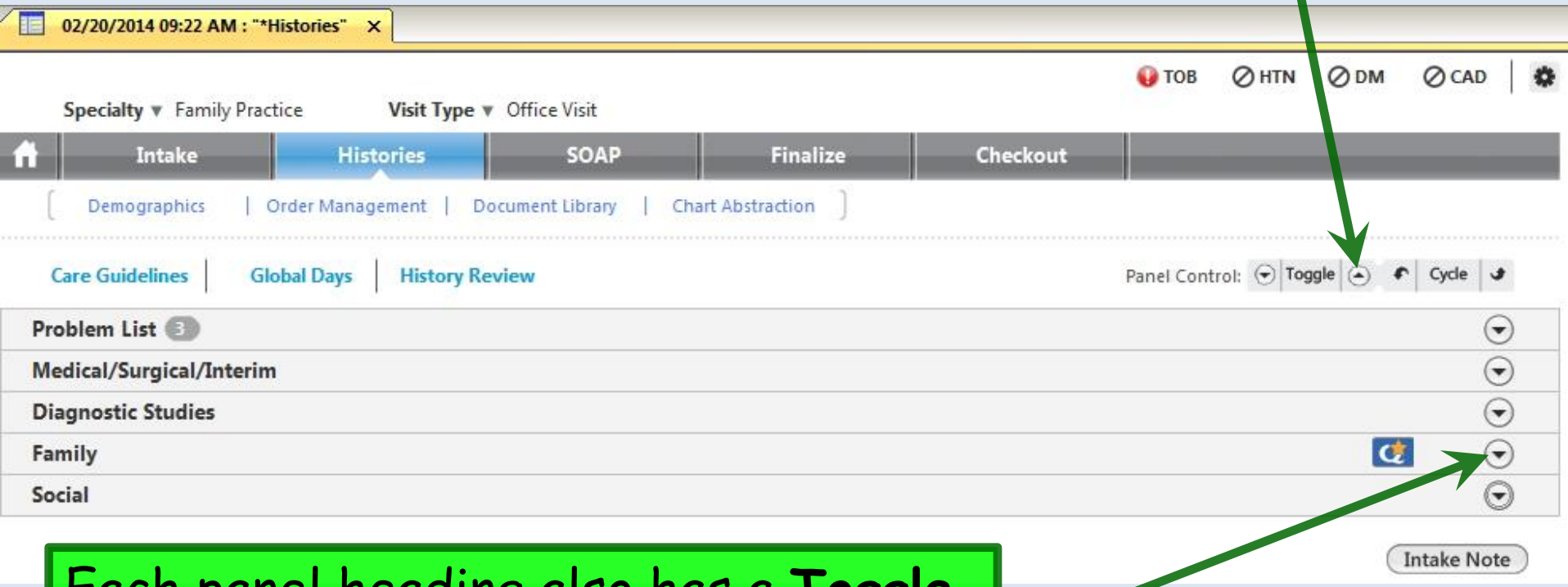
Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Carpal tunnel syndrome	right		Carpal tunnel release	right	2001		
Appendicitis		1970	Appendectomy		to/}		

Refresh | Interim History | Add | Edit | Remove

Diagnostic Studies

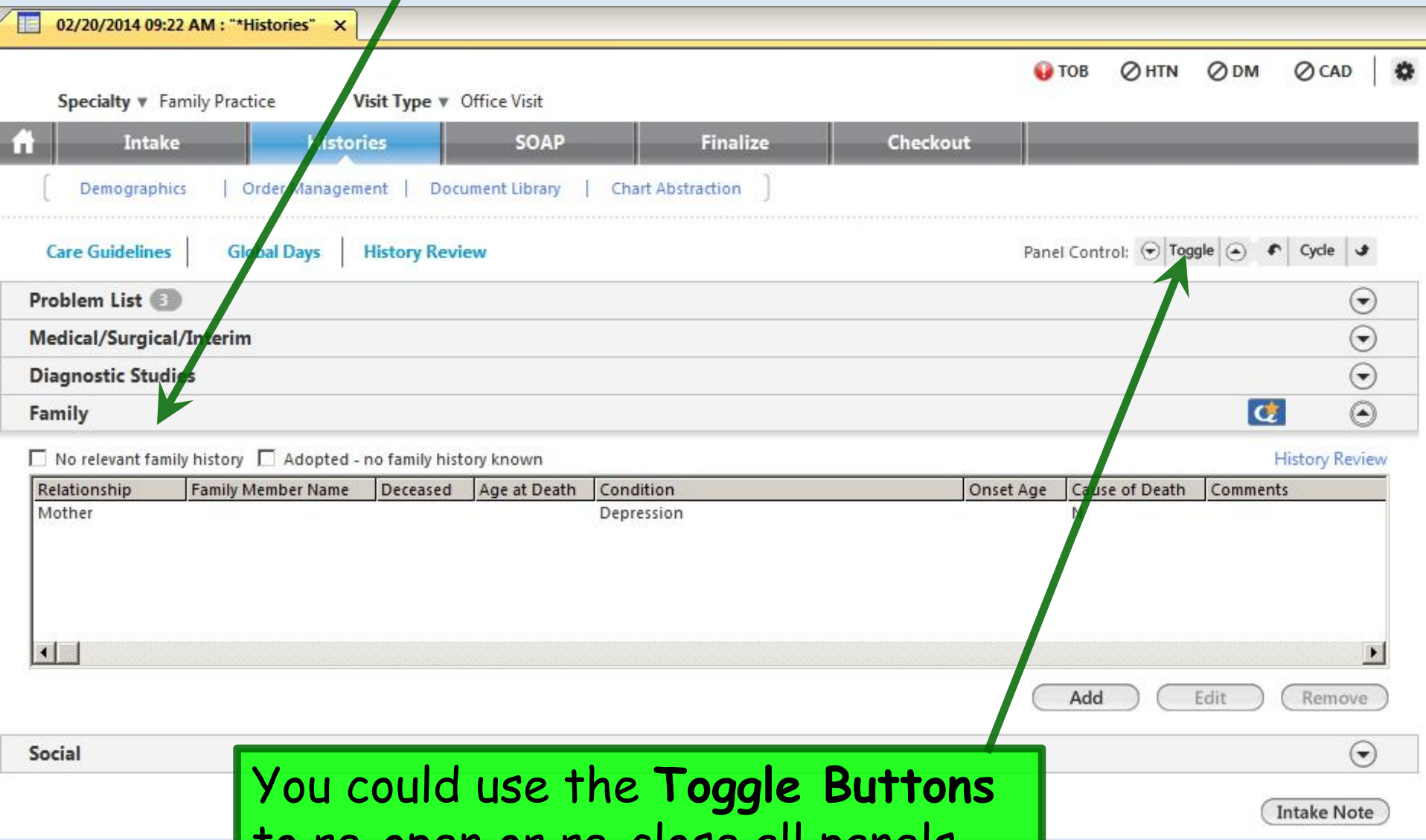

02/20/2014 09:22 AM : "*Histories"
TOB
HTN
DM
CAD
Specialty ▼ Family Practice
Intake
Note the Panel Controls at the top.
Demographics | Order Management | Document Library | Chart Abstraction
Care Guidelines | Global Days | History Review
Panel Control: Toggle Cycle
Problem List 3
Show chronic
Show my 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
02/05/201 | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE
One Toggle Button lets you expand all panels, as you see here.
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

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



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.

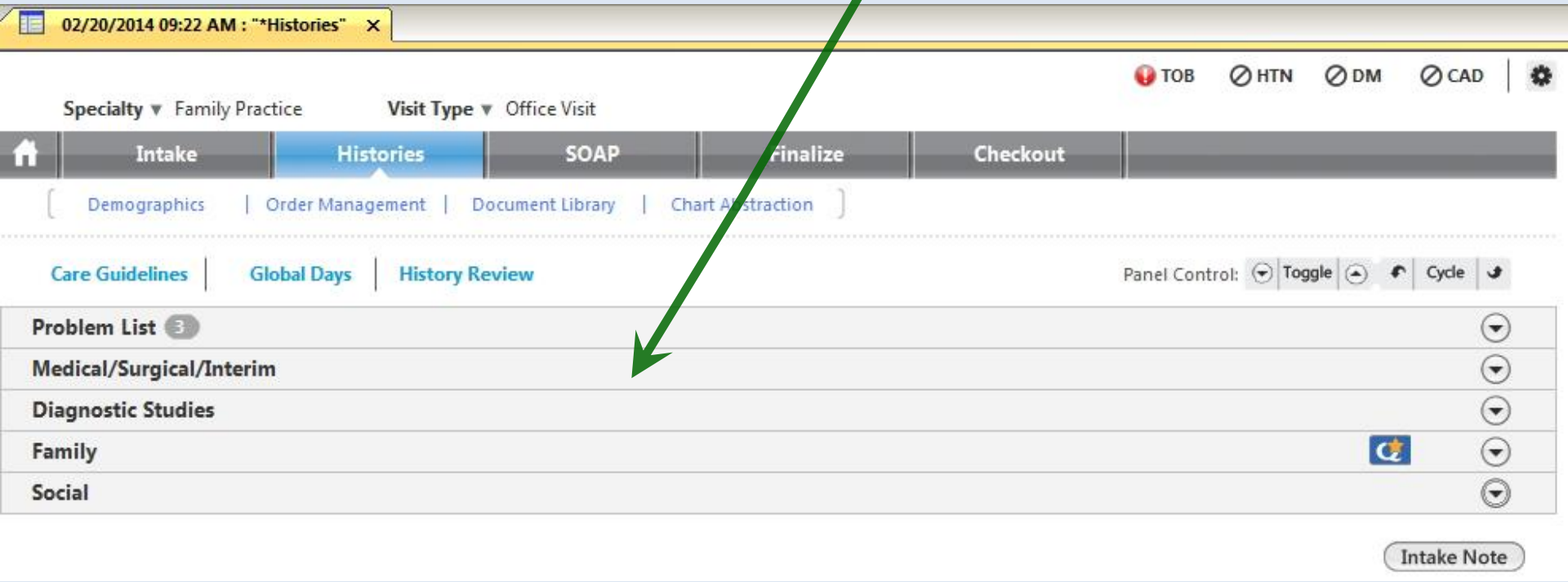
Now you can focus on the **Family History**.



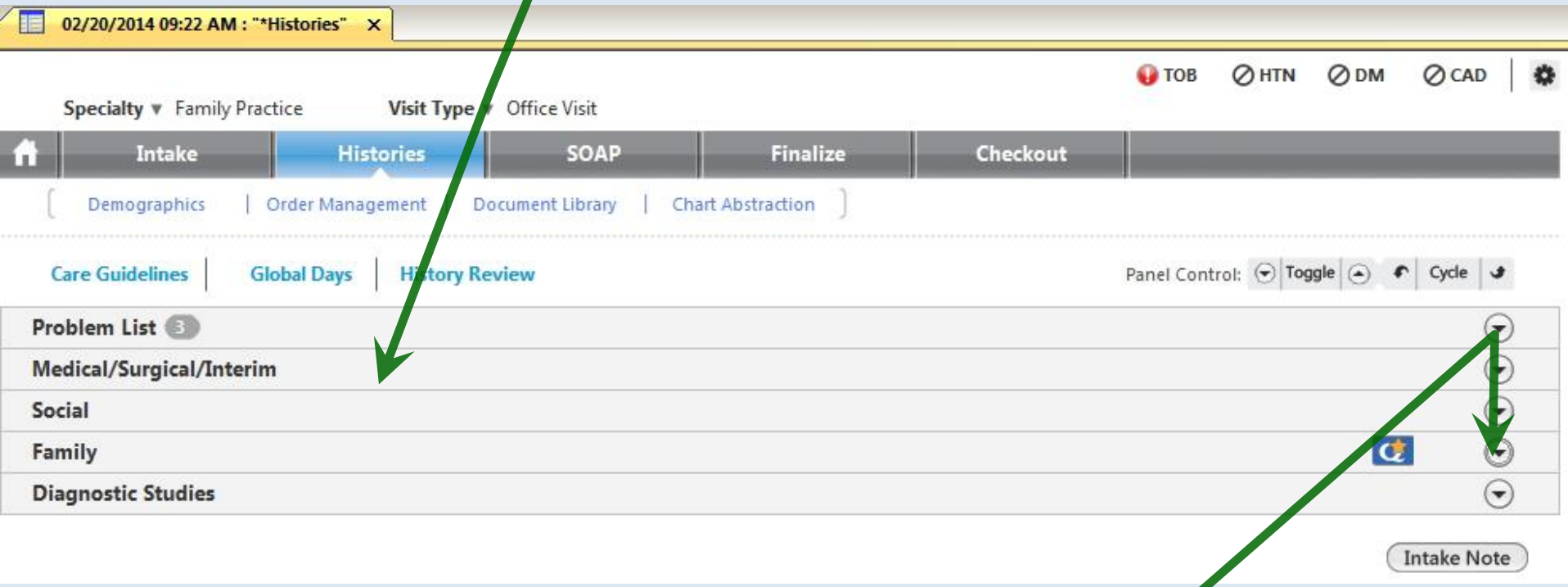
You could use the **Toggle Buttons** to re-open or re-close all panels.

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

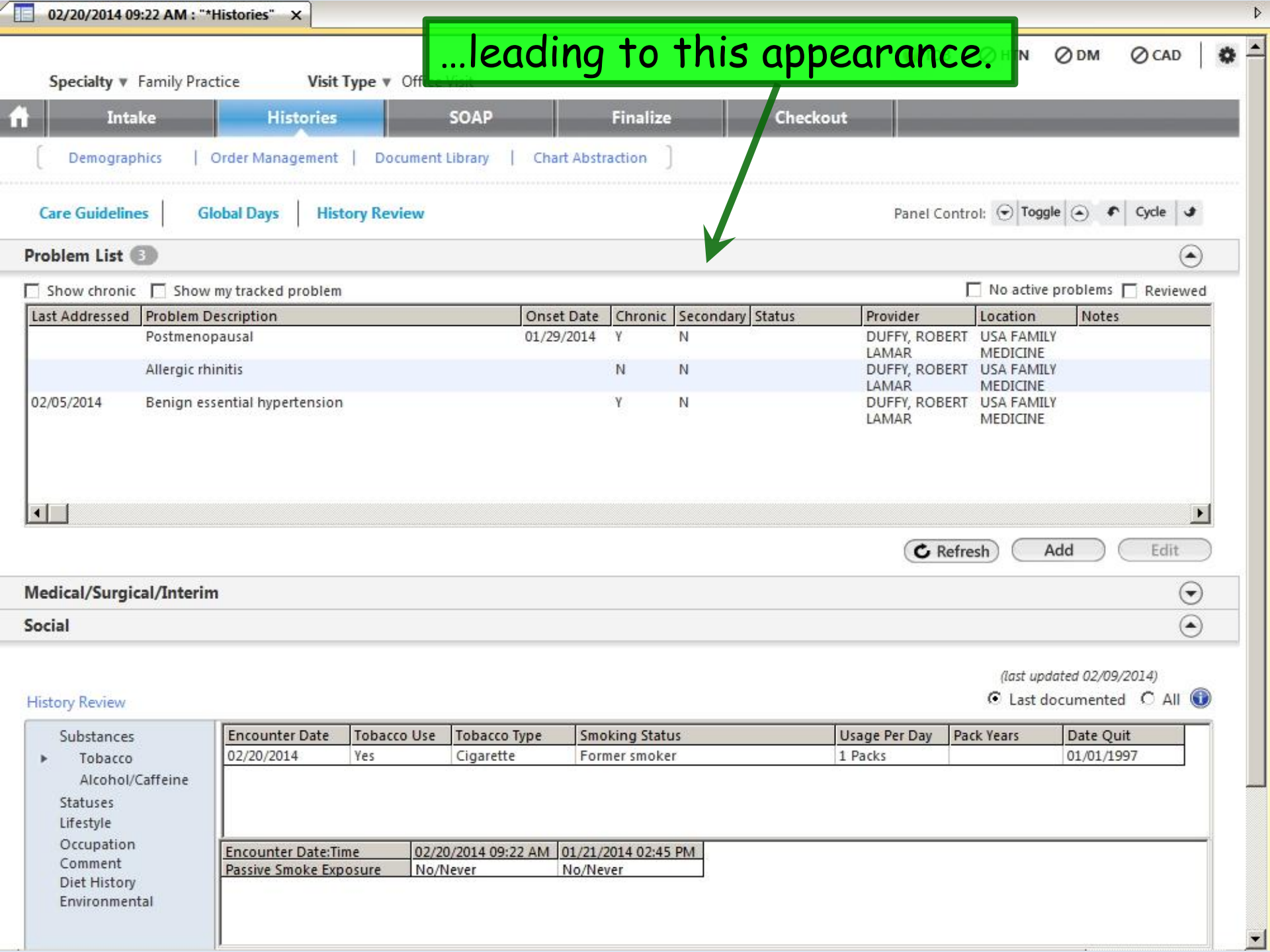
For example, let's say I don't use **Diagnostic Studies** often, so I'll drag that to the bottom, & I also want to see the **Social** History above the **Family** History. I'll click & drag those headings…

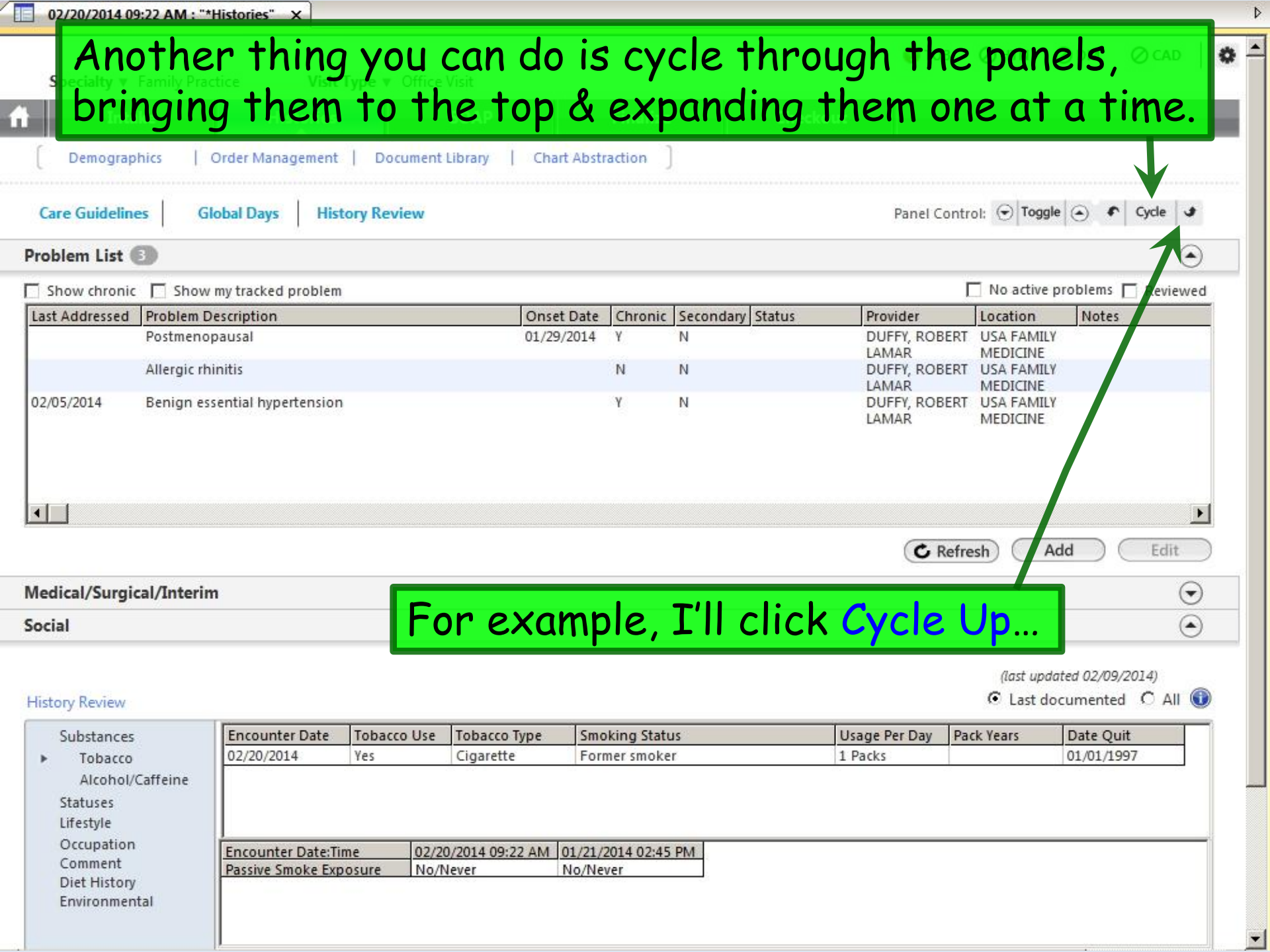


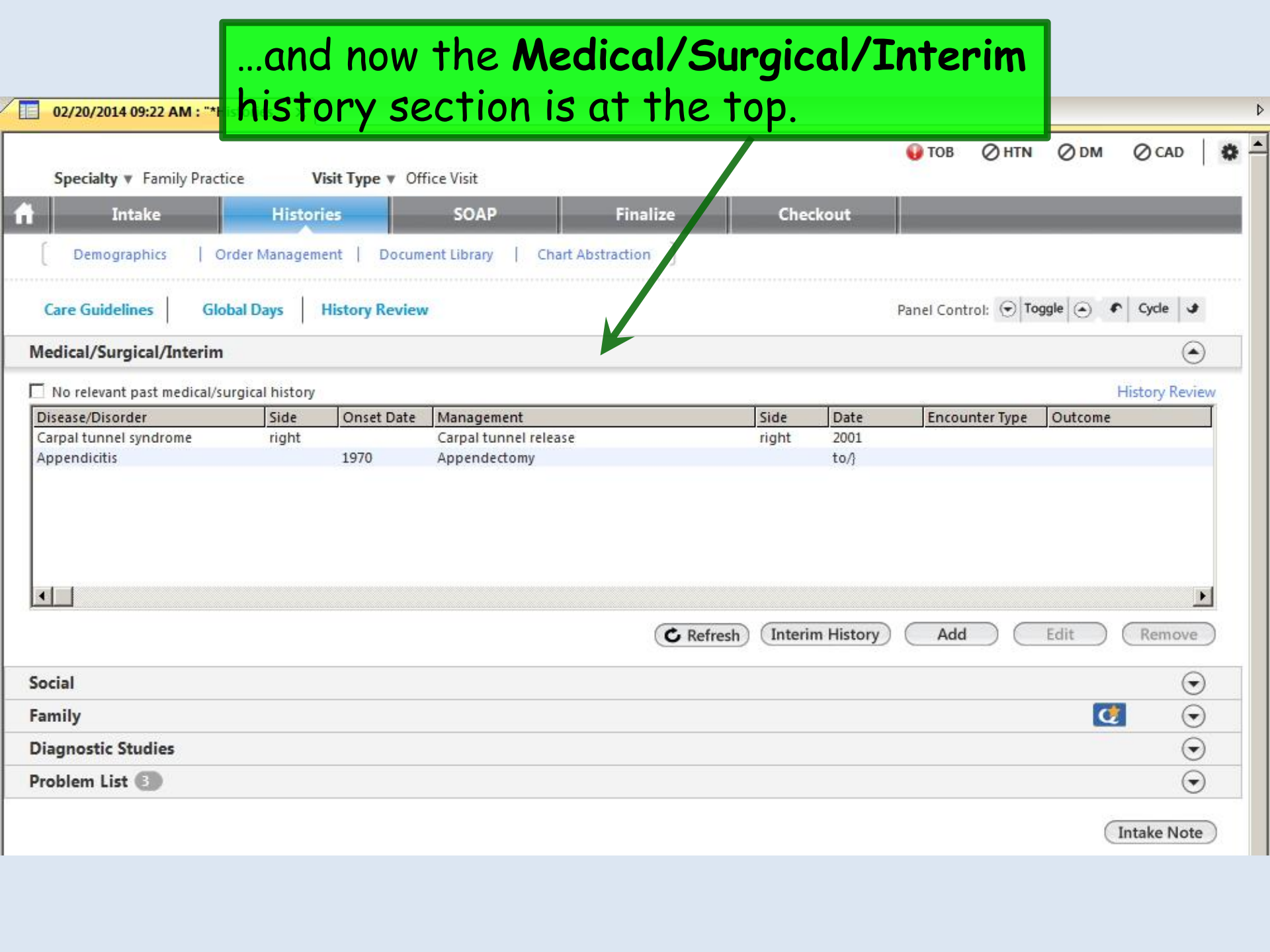
…resulting in this appearance.



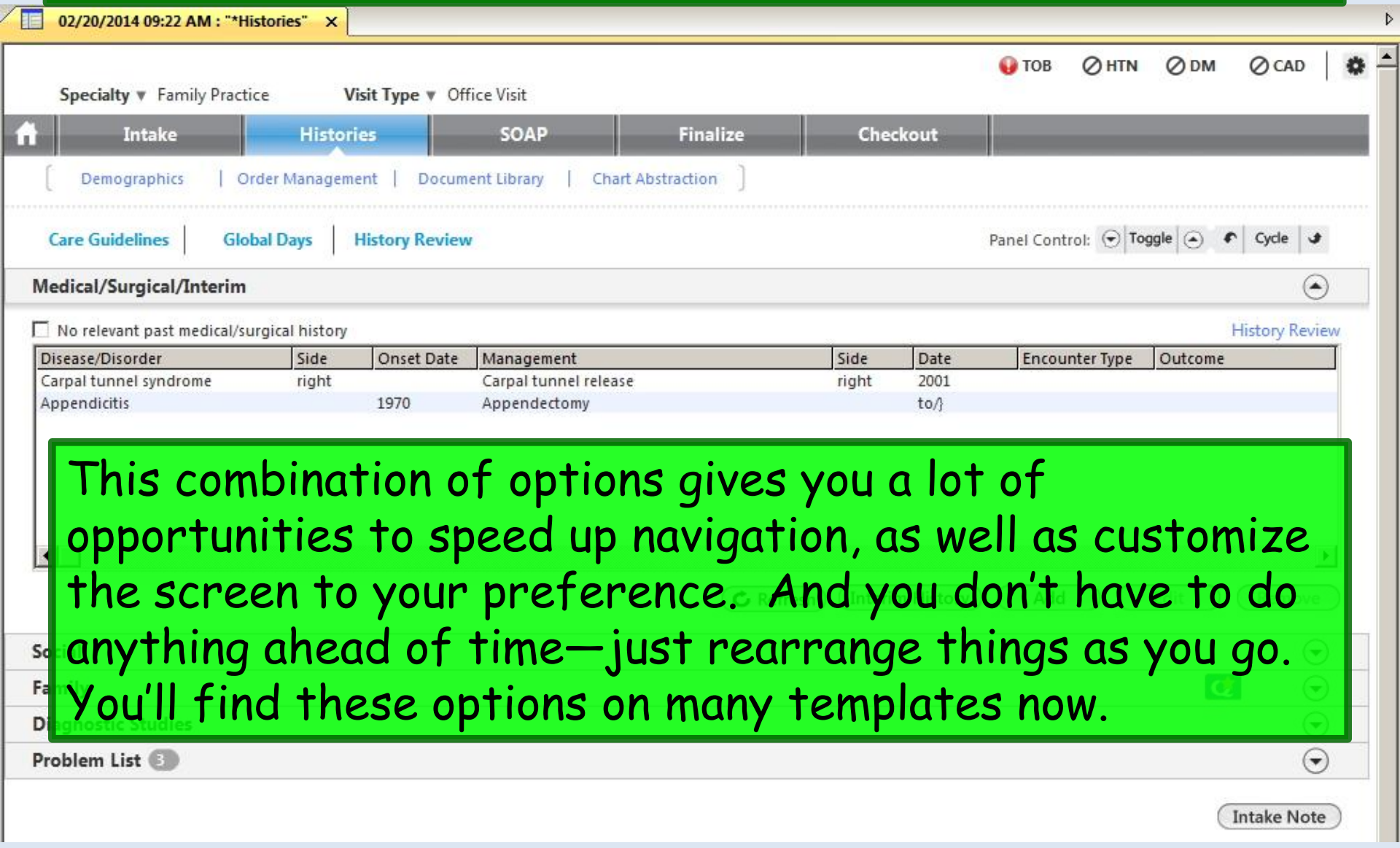
Taking things a step further, let's say I prefer to have the **Problem List** & **Social** History open, with the other panels closed. I'll click those individual panel heading Toggles…


02/20/2014 09:22 AM : "*Histories"
...leading to this appearance.
HTN
DM
CAD
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
Refresh
Add
Edit
Medical/Surgical/Interim
Social
(last updated 02/09/2014)
History Review
Last documented
All
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
Medical/Surgical/Interim
Social
For example, I'll click Cycle Up...
(last updated 02/09/2014)
History Review
Last documented All
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

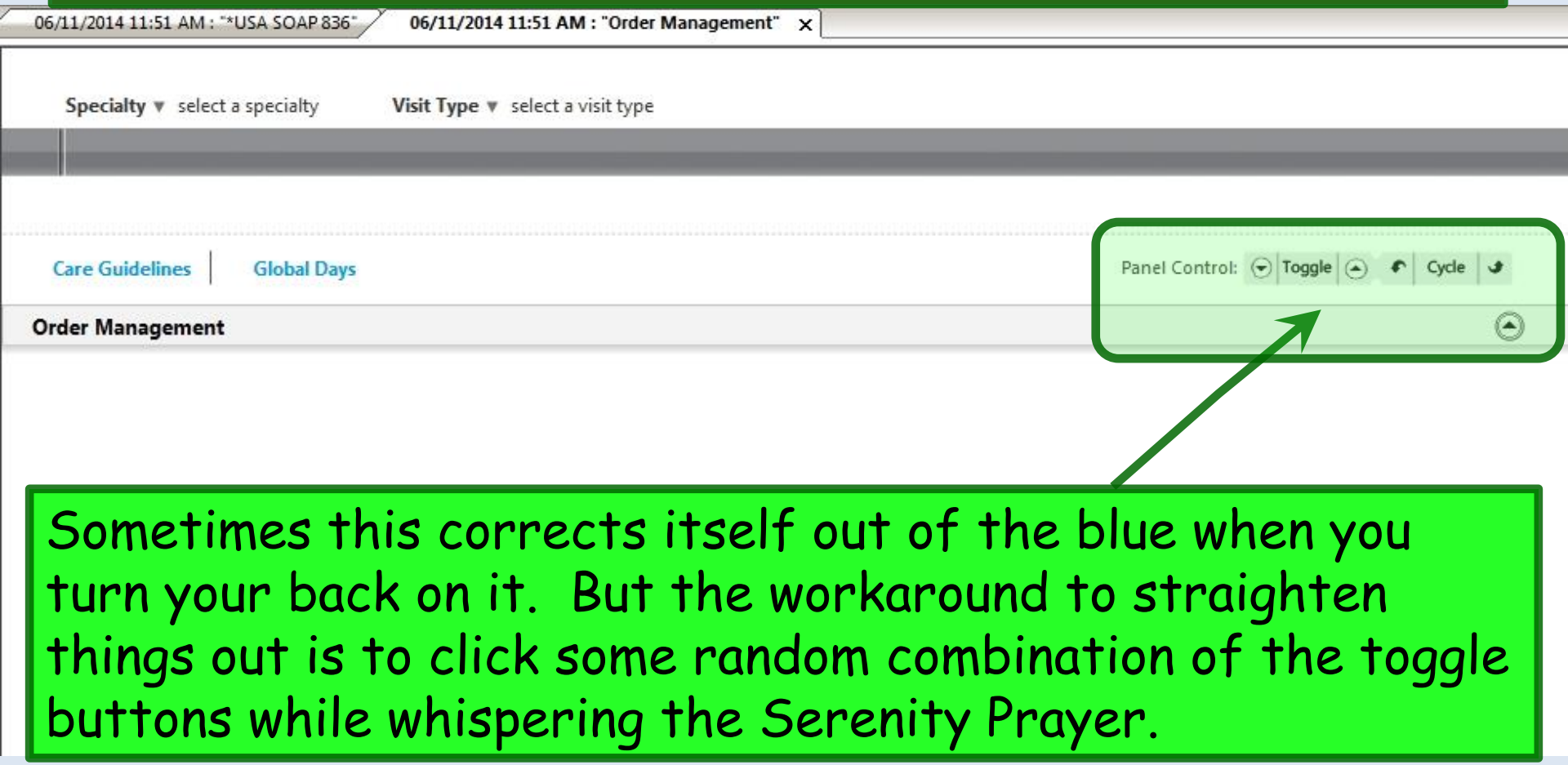

…and now the Medical/Surgical/Interim history section is at the top.
02/20/2014 09:22 AM : "*
TOB
HTN
DM
CAD
Specialty ▼ Family Practice
Visit Type ▼ Office Visit
Intake
Histories
SOAP
Finalize
Checkout
Demographics | Order Management | Document Library | Chart Abstraction
Care Guidelines | Global Days | History Review
Panel Control: Toggle Cycle
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.



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.

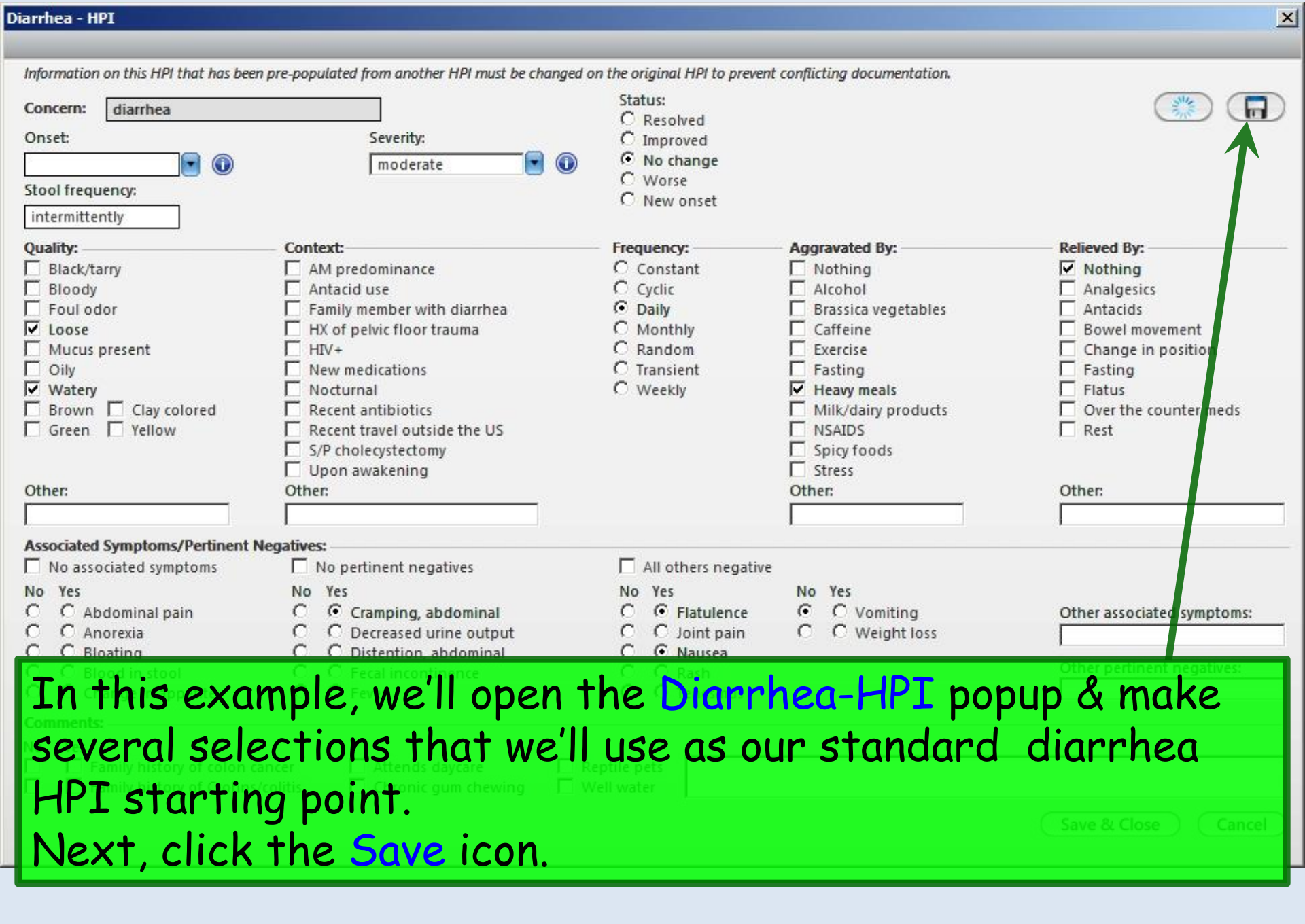
Of course, to compensate for any improvement, NextGen always introduces a new flaw. Sometimes templates with collapsible panels don't display correctly. In this example, we've already selected specialty & visit type, but here they're blank, & a lot of other stuff we should be seeing below is missing.

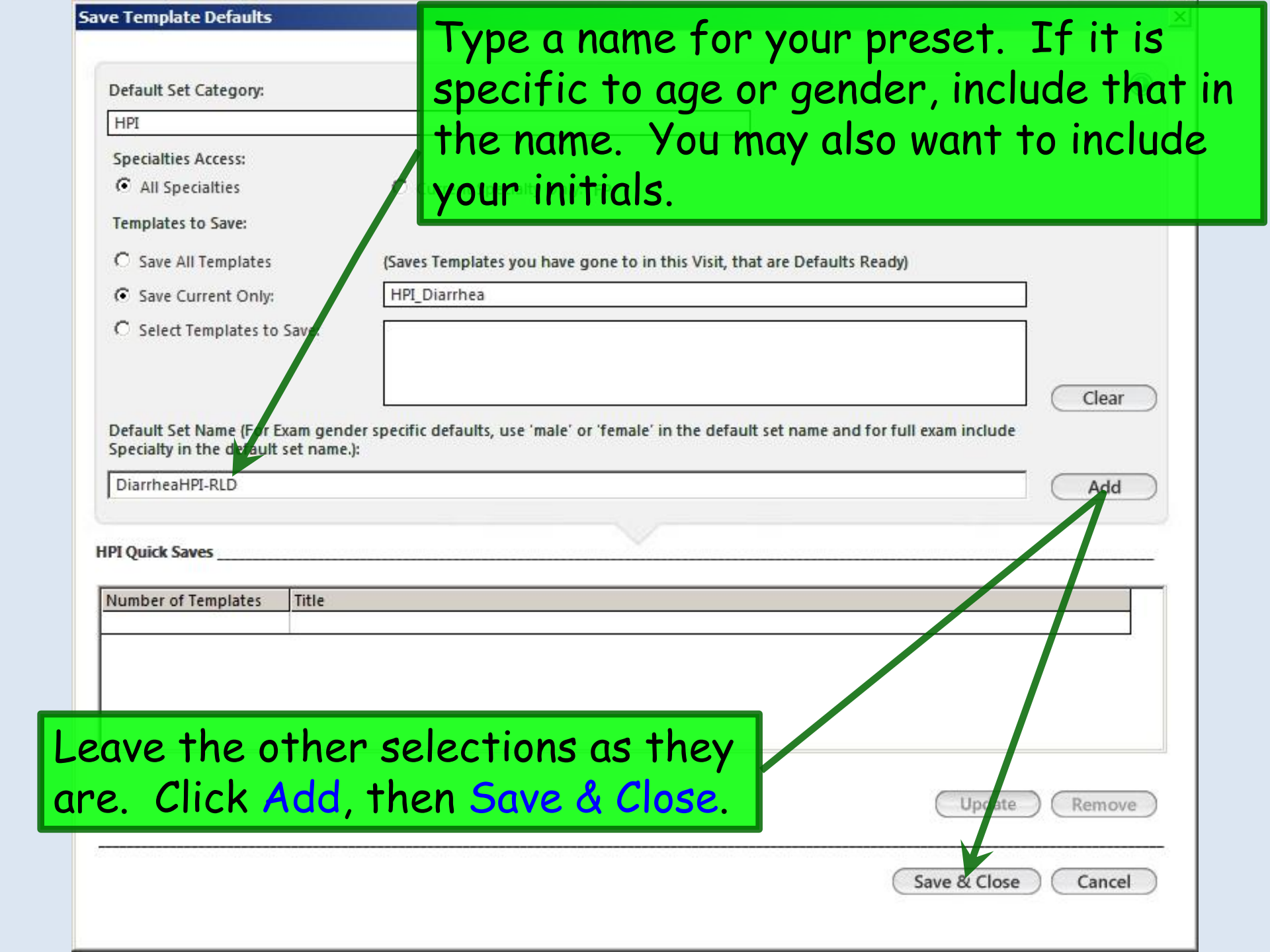


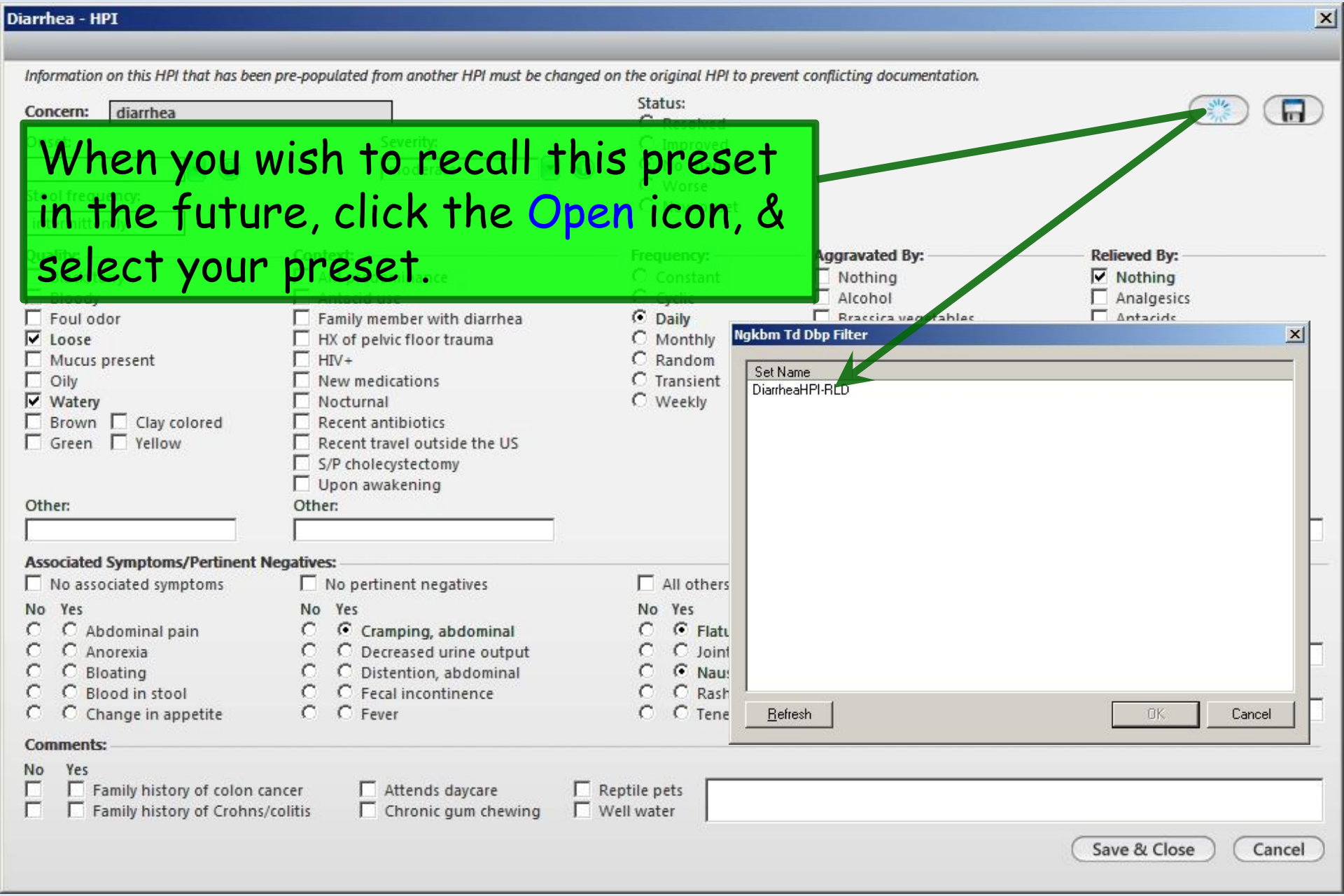
Sometimes this corrects itself out of the blue when you turn your back on it. But the workaround to straighten things out is to click some random combination of the toggle buttons while whispering the Serenity Prayer.

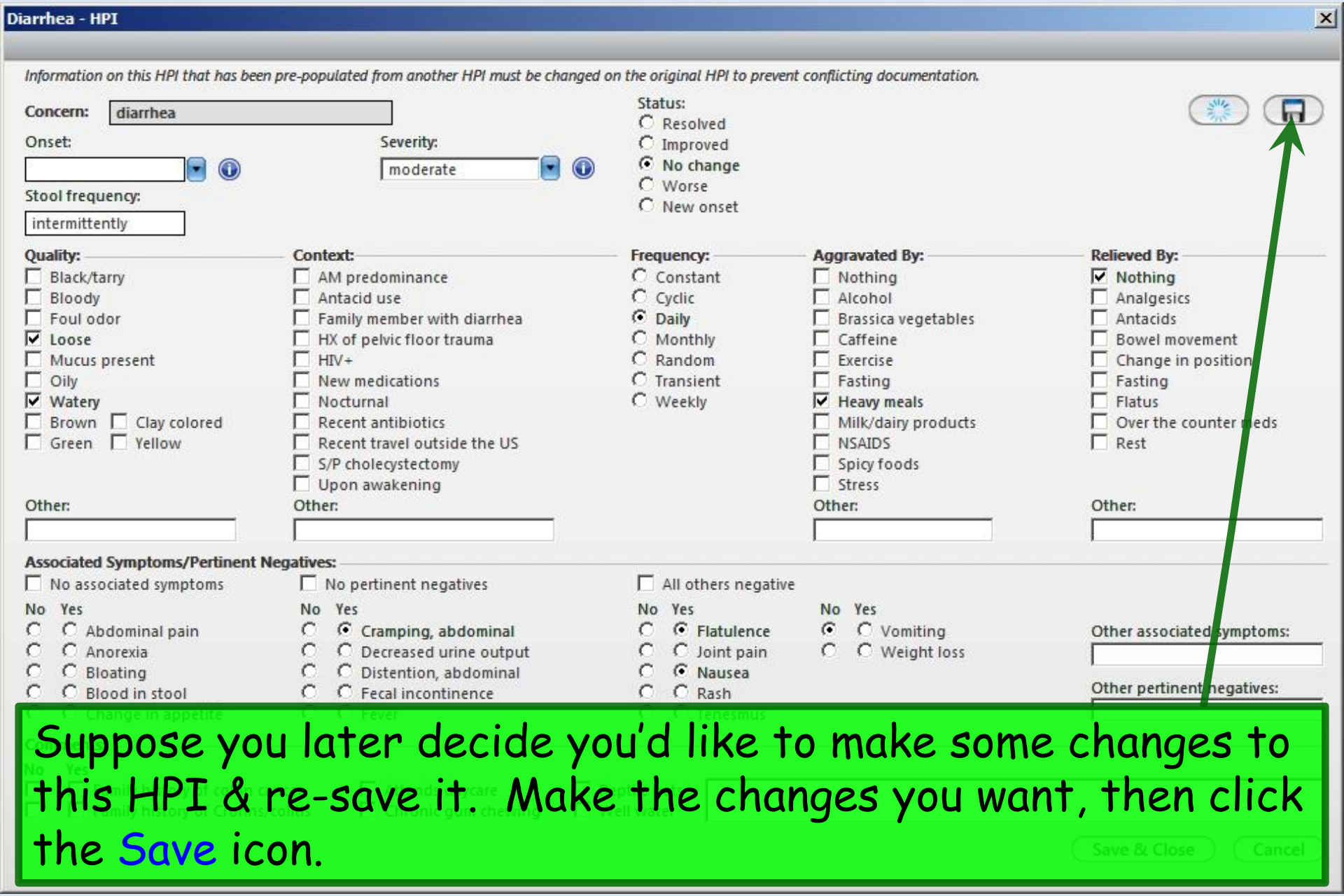
HPI

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.

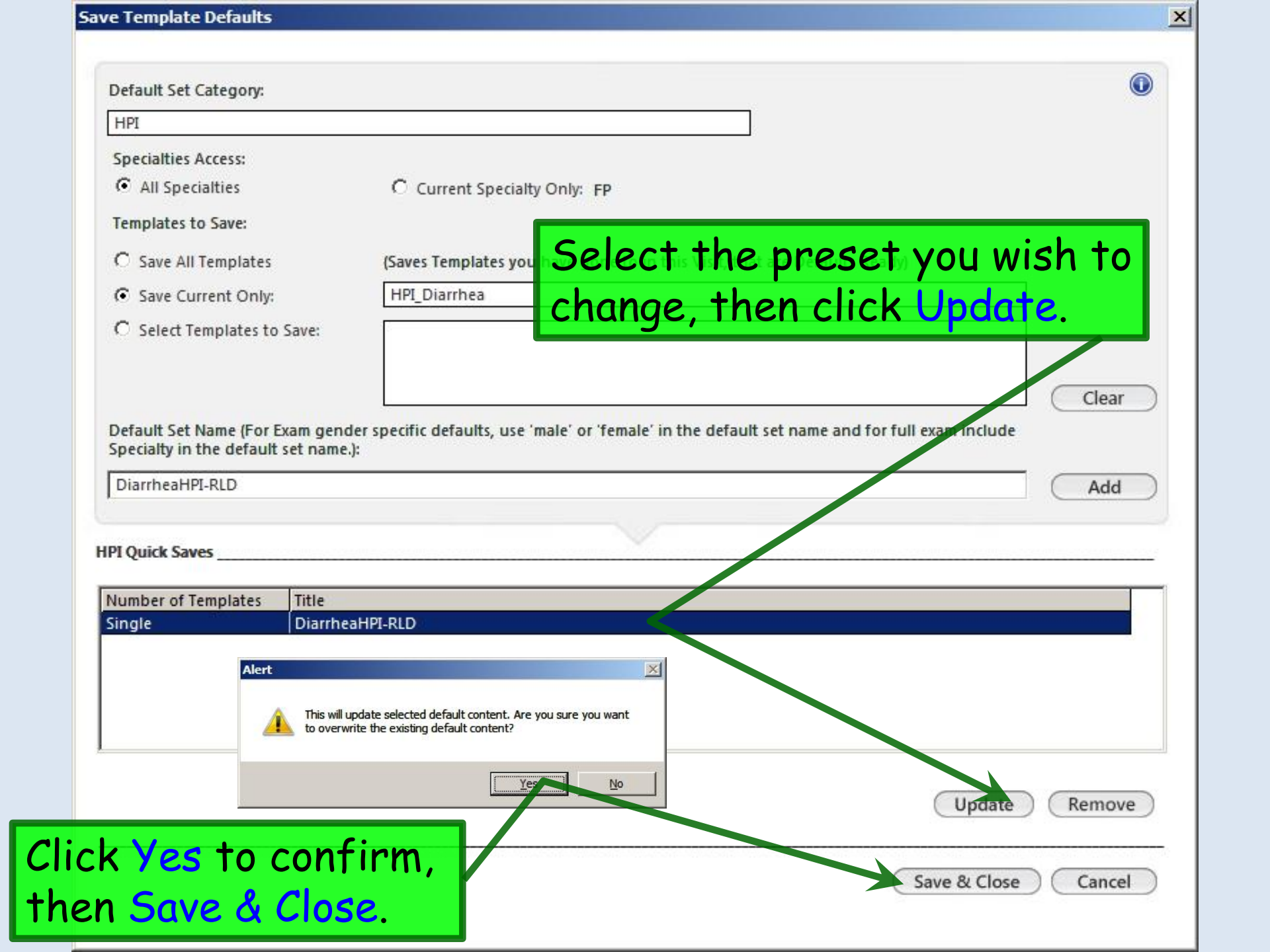

Diarrhea - HPI
Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.
Concern: diarrhea
Onset:
Severity: moderate
Stool frequency: intermittently
Status: Resolved, Improved, No change, Worse, New onset
Quality: Black/tarry, 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
No Yes Anorexia
No Yes Bloating
No Yes Cramping, abdominal
No Yes Decreased urine output
No Yes Distention, abdominal
No Yes Flatulence
No Yes Joint pain
No Yes Nausea
No Yes Vomiting
No Yes 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.

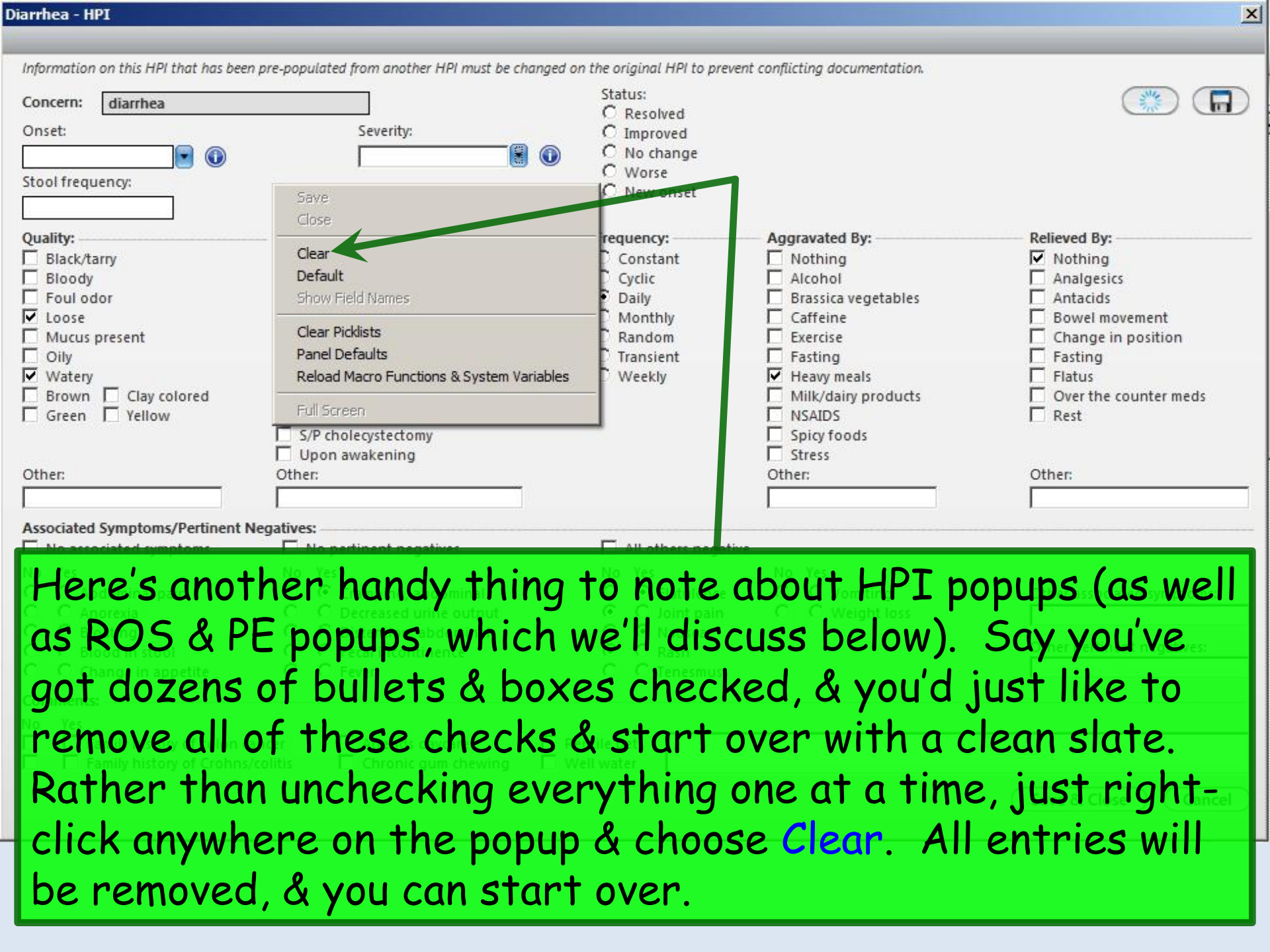

Save Template Defaults
Type a name for your preset. If it is specific to age or gender, include that in the name. You may also want to include your initials.
Default Set Category:
HPI
Specialties Access:
All Specialties
Templates to Save:
Save All Templates
(Saves Templates you have gone to in this Visit, that are Defaults Ready)
Save Current Only:
HPI_Diarrhea
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.):
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


When you wish to recall this preset in the future, click the Open icon, & select your preset.
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:
diarrhea
Status:
Aggravated By:
Nothing
Alcohol
Relieved By:
Nothing
Analgesics
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
Frequency:
Constant
Daily
Monthly
Random
Transient
Weekly
Other:
Other:
Ngkbm Td Dbp Filter
Set Name
DiarrheaHPI-RLD
Refresh
OK
Cancel
Associated Symptoms/Pertinent Negatives:
No associated symptoms
No pertinent negatives
All others
No Yes
Abdominal pain
Anorexia
Bloating
Blood in stool
Change in appetite
Cramping, abdominal
Decreased urine output
Distention, abdominal
Fecal incontinence
Fever
Comments:
No Yes
Family history of colon cancer
Family history of Crohns/colitis
Attends daycare
Chronic gum chewing
Reptile pets
Well water
Save & Close
Cancel



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 Template Defaults
Default Set Category:
HPI
Specialties Access:
All Specialties
Current Specialty Only: FP
Templates to Save:
Save All Templates
Save Current Only:
HPI_Diarrhea
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.):
DiarrheaHPI-RLD
Add
HPI Quick Saves
Number of Templates
Title
Single
DiarrheaHPI-RLD
Alert
This will update selected default content. Are you sure you want to overwrite the existing default content?
Yes
No
Update
Remove
Save & Close
Cancel
Select the preset you wish to change, then Update.
Click Yes to confirm, then Save & Close.



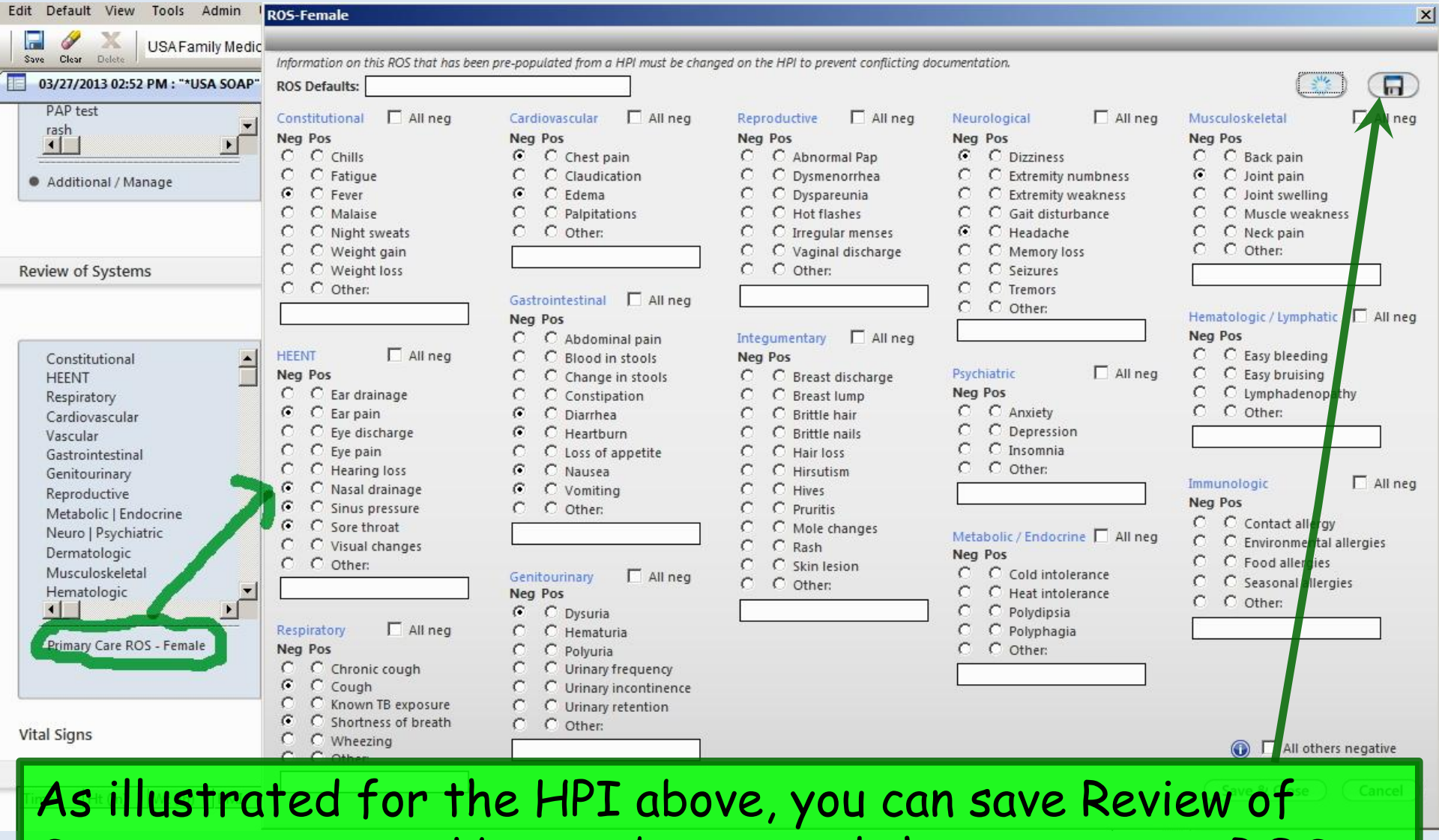
Here's another handy thing to note about HPI popups (as well as ROS & PE popups, which we'll discuss below). Say you've got dozens of bullets & boxes checked, & you'd just like to remove all of these checks & start over with a clean slate. Rather than unchecking everything one at a time, just right-click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

Some tips on HPI presets

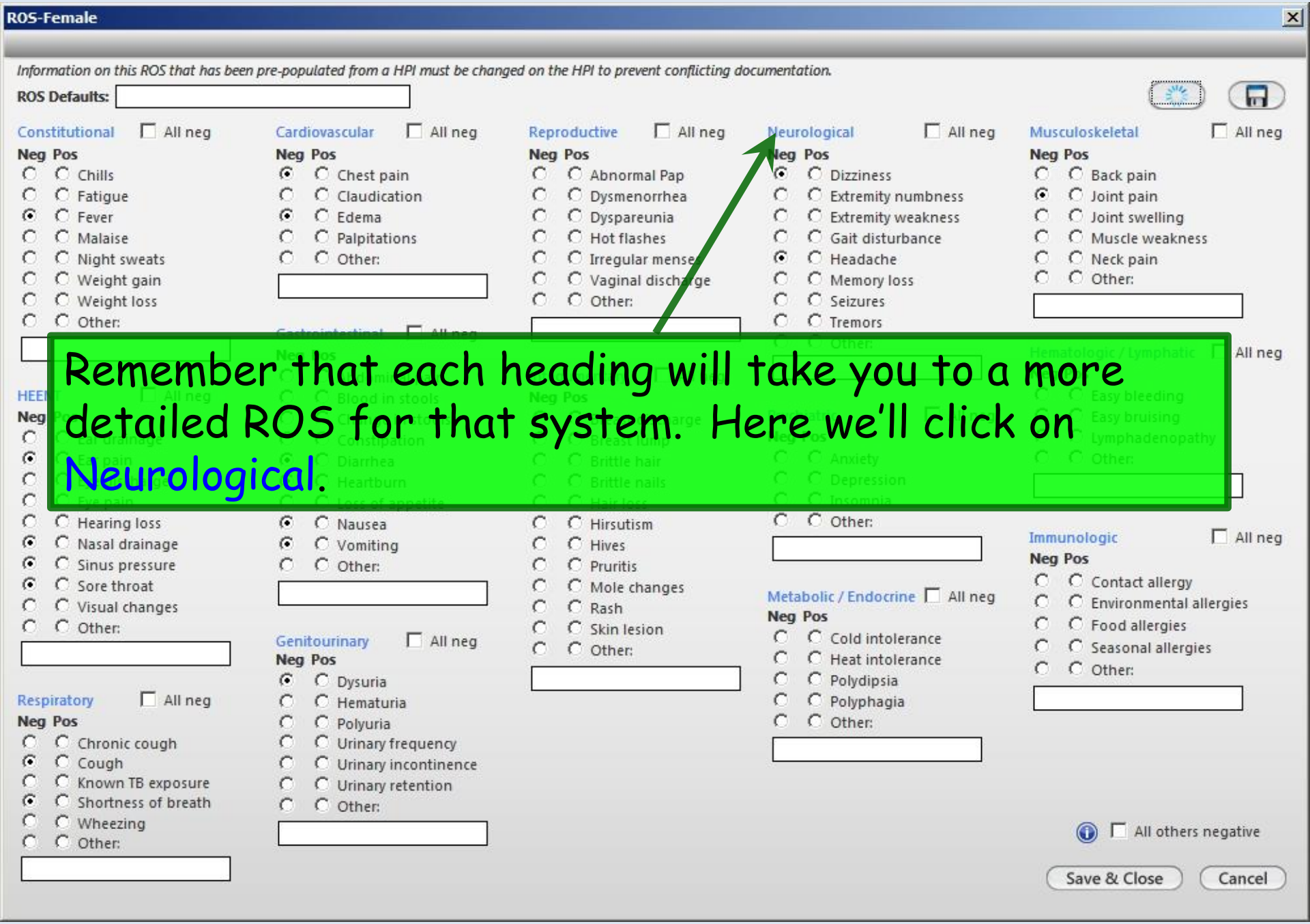
- Obviously, there are a lot of chief complaints, & it could take some time to develop your ideal starting point for all of them. And no matter how common the problem, patients often present with a unique combination of complaints, which reduces the usefulness of having HPI presets. Consequently, it 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.

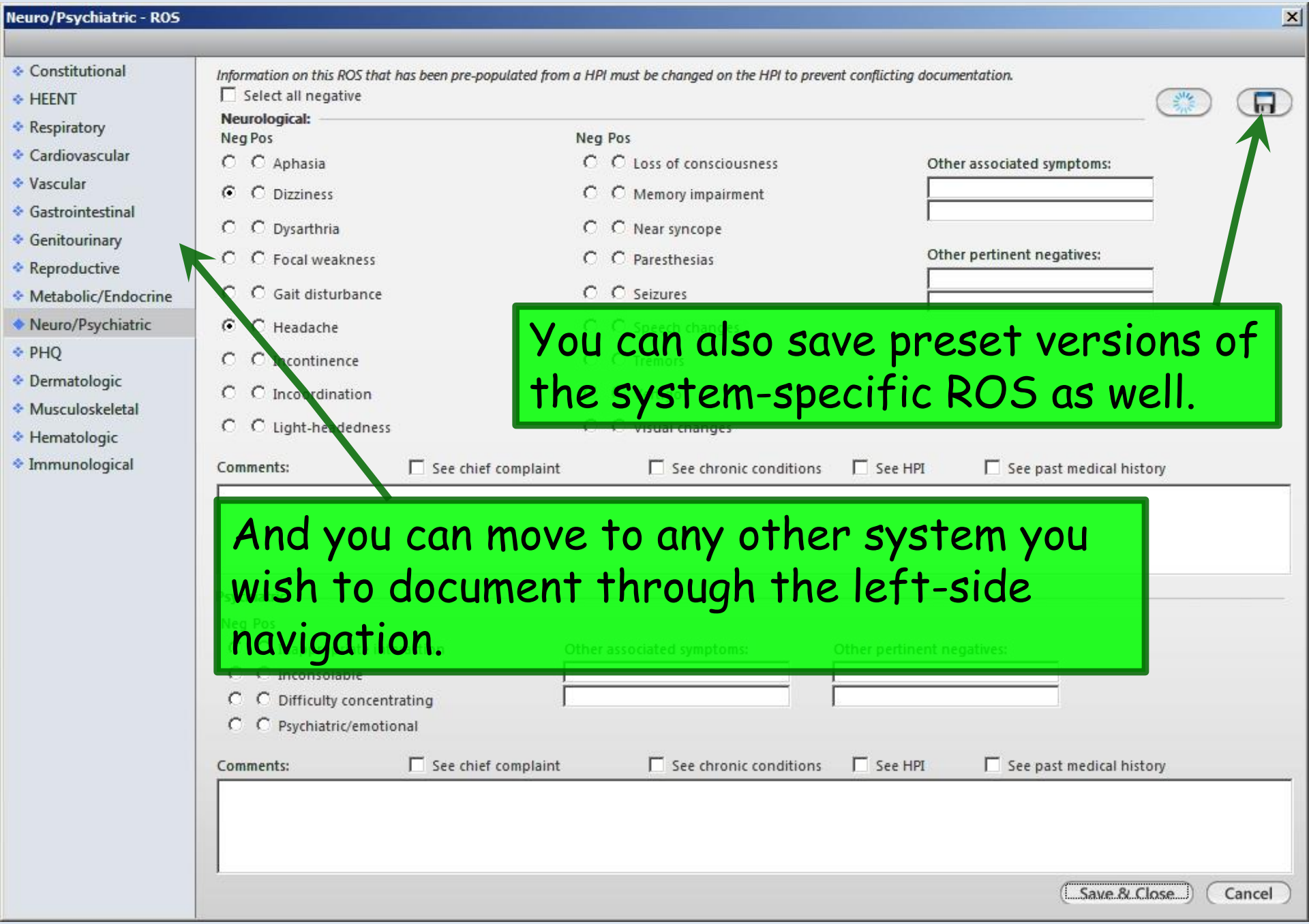
Review of Systems

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

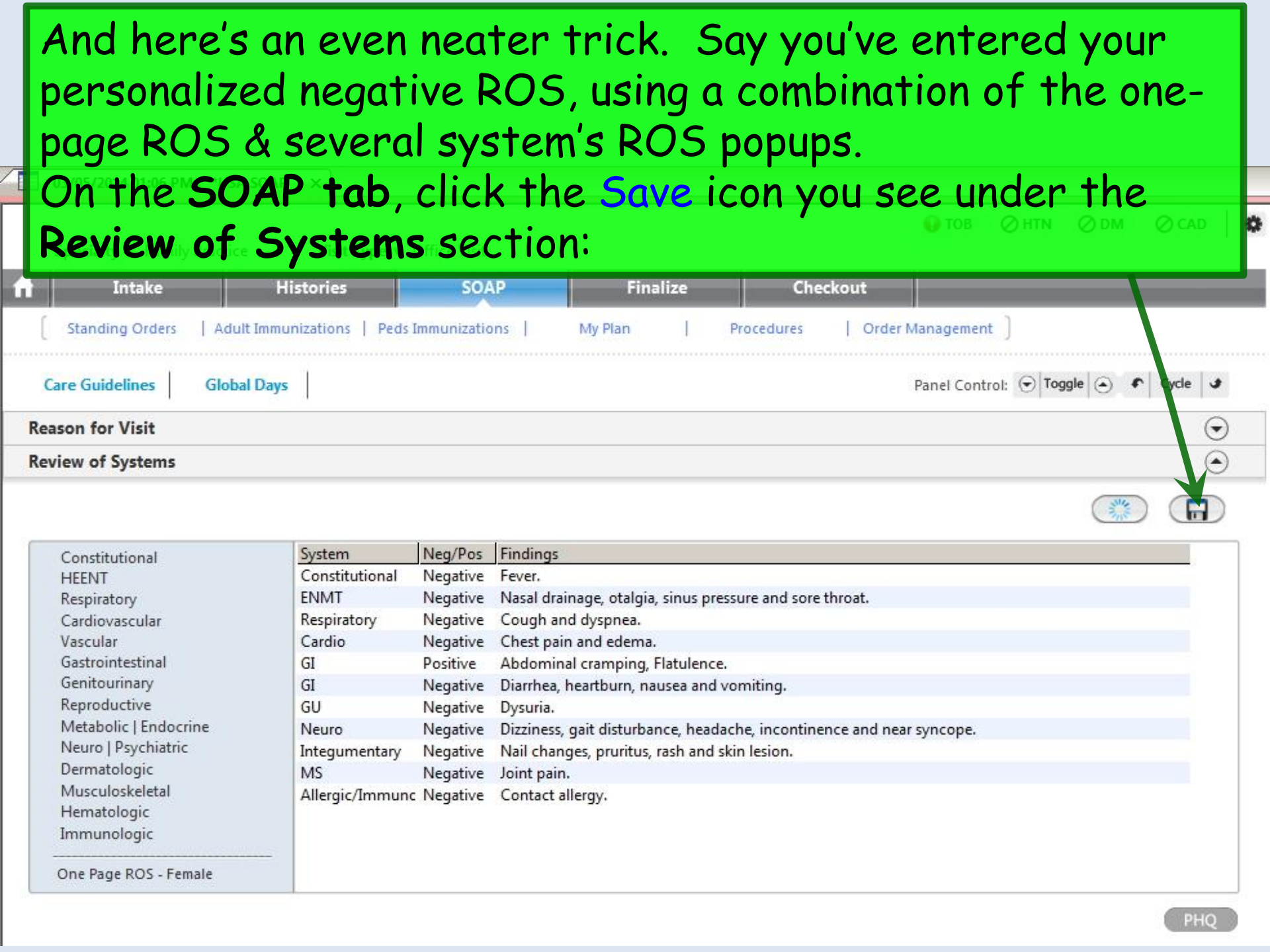


As illustrated for the HPI above, you can save Review of Systems presets. Here we've opened the one-screen ROS-Female popup & made some entries.
The save process is the same as above.

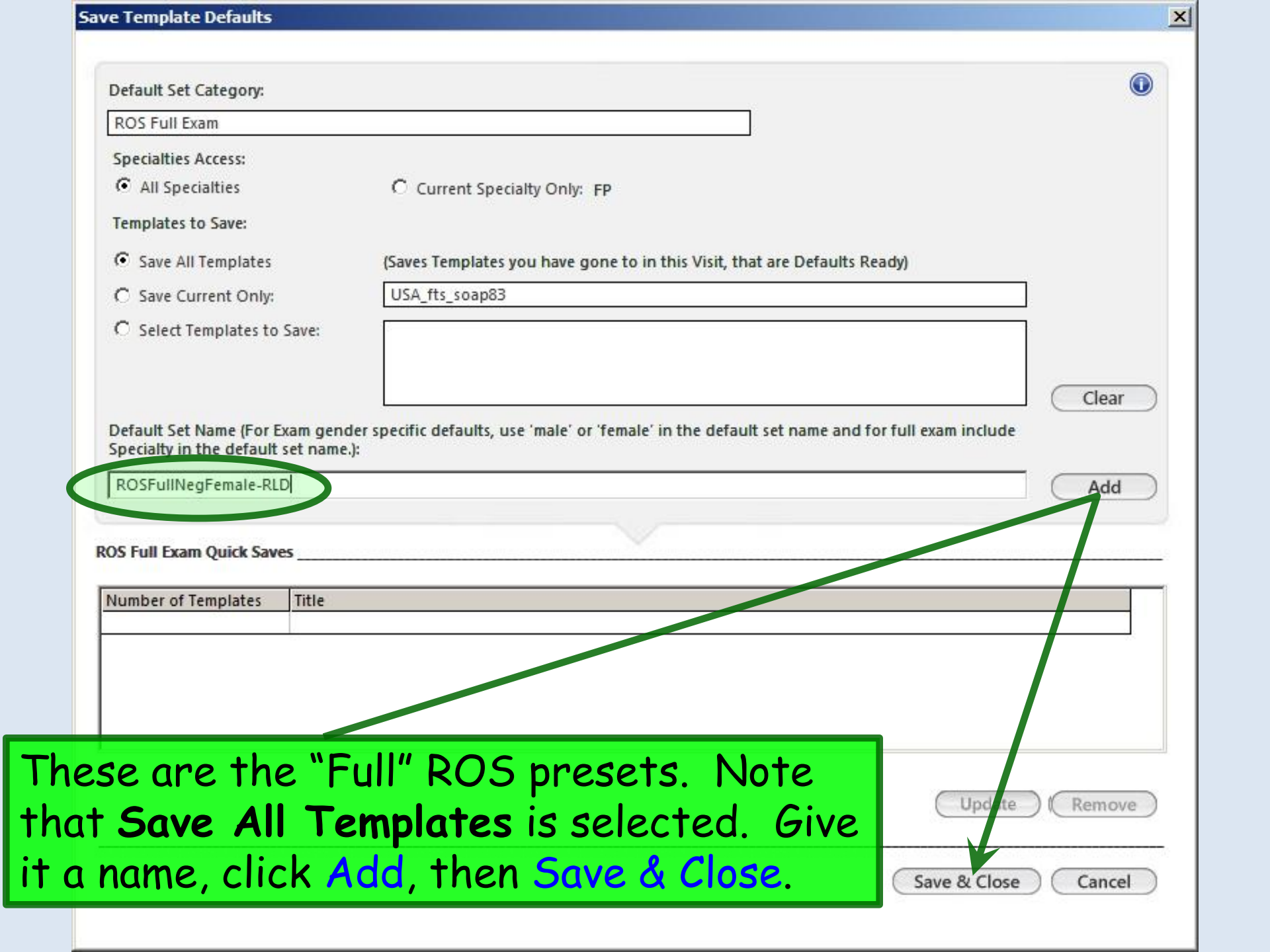

ROS-Female
Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.
ROS Defaults:
Constitutional
All neg
Neg Pos
Chills
Fatigue
Fever
Malaise
Night sweats
Weight gain
Weight loss
Other:
Cardiovascular
All neg
Neg Pos
Chest pain
Claudication
Edema
Palpitations
Other:
Reproductive
All neg
Neg Pos
Abnormal Pap
Dysmenorrhea
Dyspareunia
Hot flashes
Irregular mense
Vaginal discharge
Other:
Neurological
All neg
Neg Pos
Dizziness
Extremity numbness
Extremity weakness
Gait disturbance
Headache
Memory loss
Seizures
Tremors
Other:
Musculoskeletal
All neg
Neg Pos
Back pain
Joint pain
Joint swelling
Muscle weakness
Neck pain
Other:
Hearing loss
Nasal drainage
Sinus pressure
Sore throat
Visual changes
Other:
Respiratory
All neg
Neg Pos
Chronic cough
Cough
Known TB exposure
Shortness of breath
Wheezing
Other:
Nausea
Vomiting
Other:
Genitourinary
All neg
Neg Pos
Dysuria
Hematuria
Polyuria
Urinary frequency
Urinary incontinence
Urinary retention
Other:
Hirsutism
Hives
Pruritis
Mole changes
Rash
Skin lesion
Other:
Anxiety
Depression
Insomnia
Other:
Metabolic / Endocrine
All neg
Neg Pos
Cold intolerance
Heat intolerance
Polydipsia
Polyphagia
Other:
Immunologic
All neg
Neg Pos
Contact allergy
Environmental allergies
Food allergies
Seasonal allergies
Other:
All others negative
Save & Close
Cancel
Remember that each heading will take you to a more detailed ROS for that system. Here we'll click on Neurological.


Neuro/Psychiatric - ROS
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
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.
And you can move to any other system you wish to document through the left-side navigation.
Difficulty concentrating
Psychiatric/emotional
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:

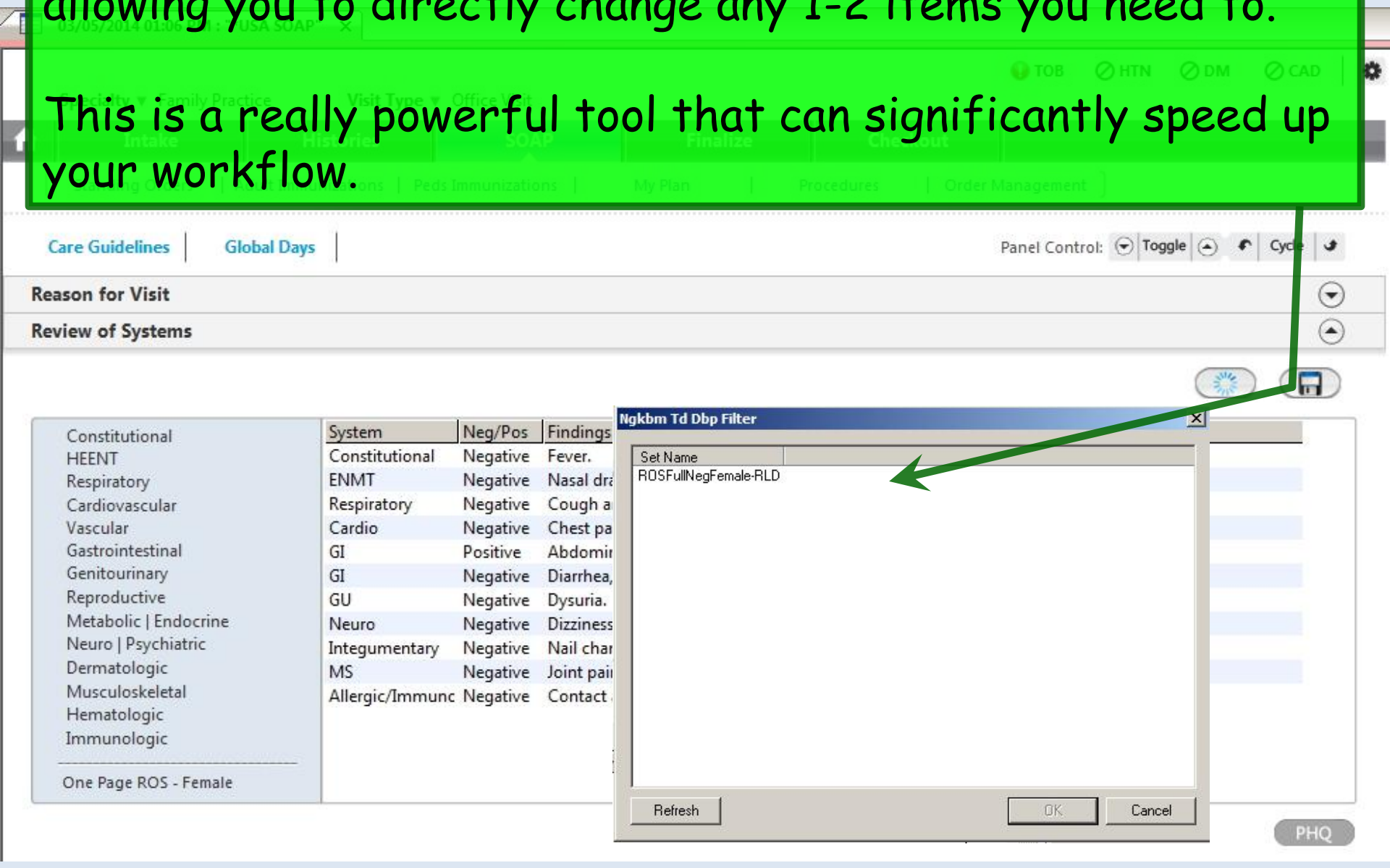


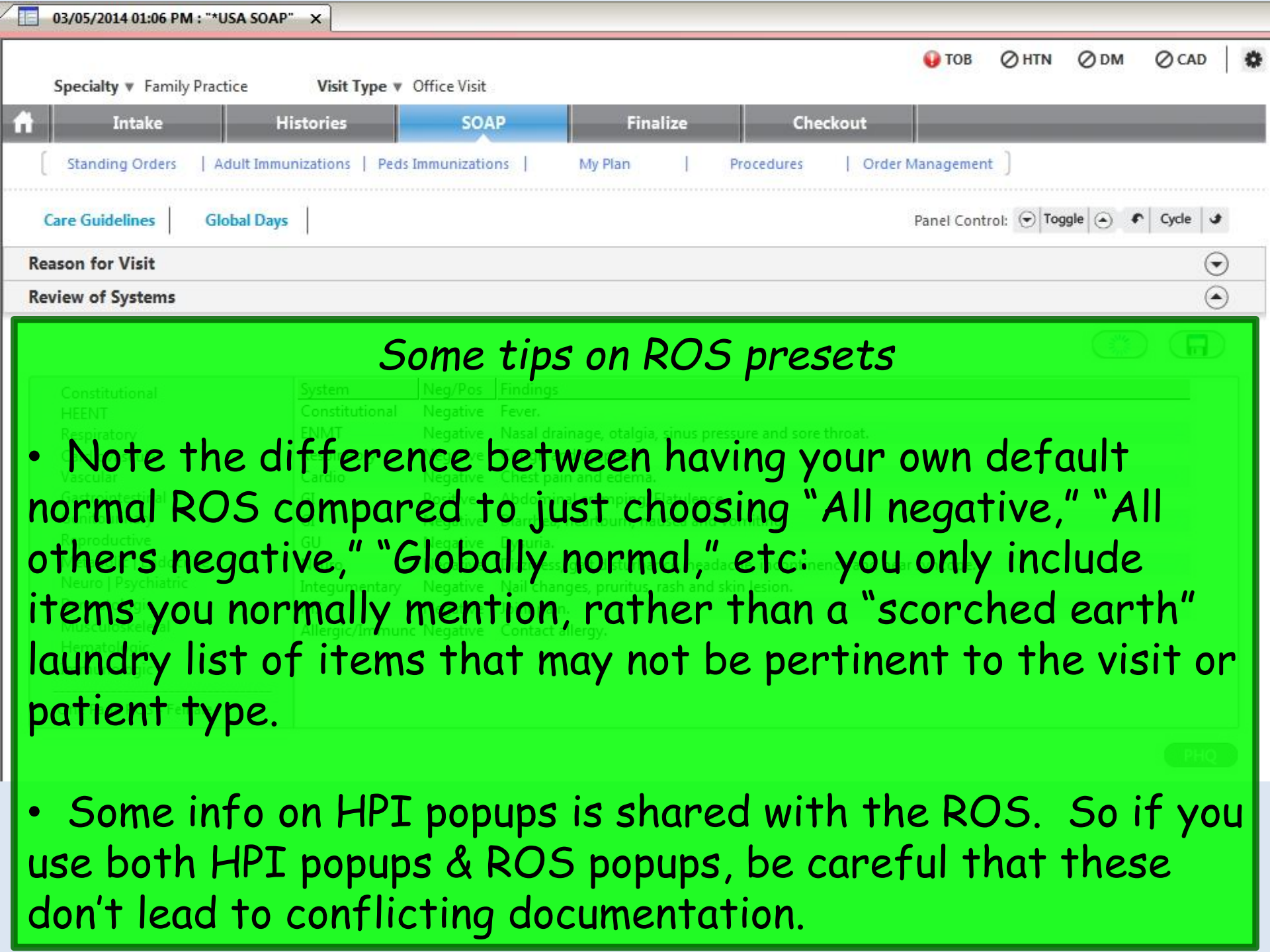
System	Neg/Pos	Findings
Constitutional	Negative	Fever.
ENMT	Negative	Nasal drainage, otalgia, sinus pressure and sore throat.
Respiratory	Negative	Cough and dyspnea.
Cardio	Negative	Chest pain and edema.
GI	Positive	Abdominal cramping, Flatulence.
GI	Negative	Diarrhea, heartburn, nausea and vomiting.
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.


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:
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.):
ROSFullNegFemale-RLD
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.





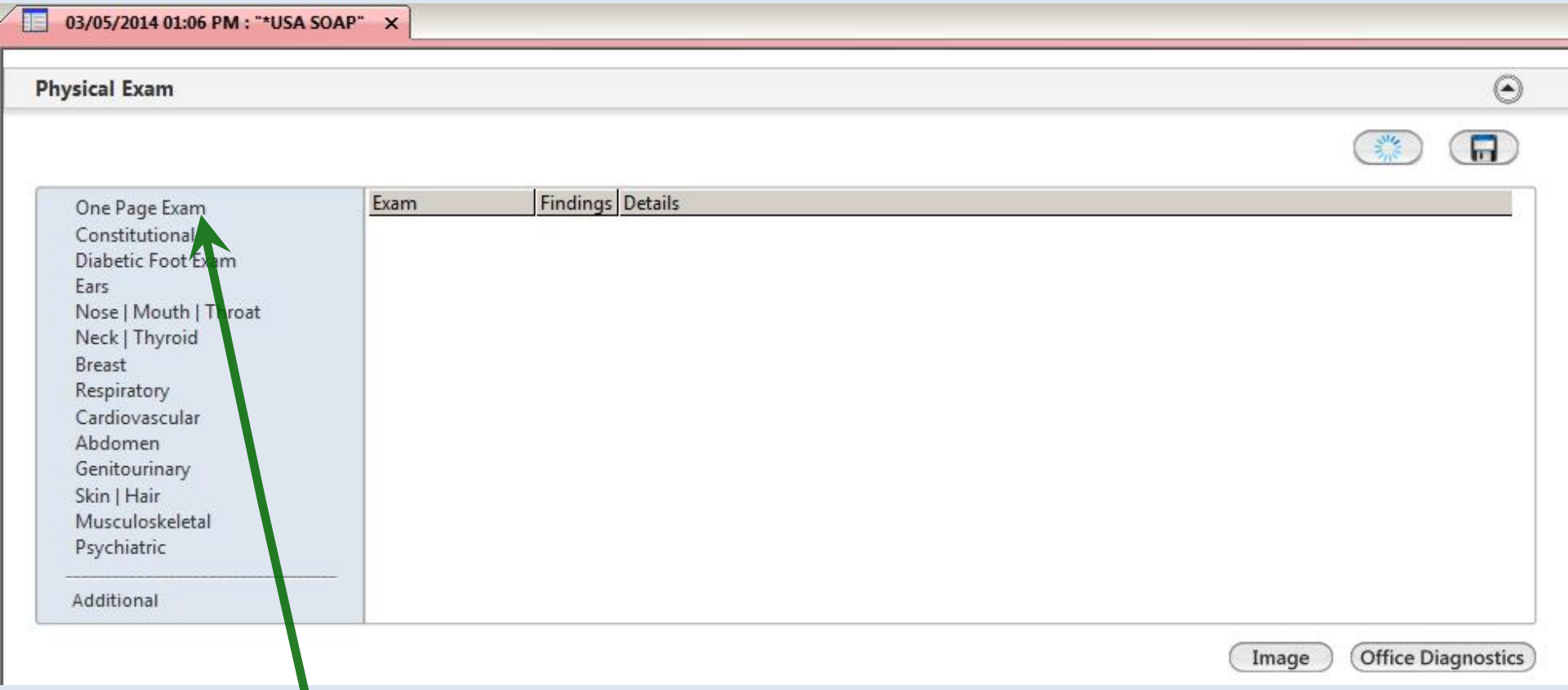
Some tips on ROS presets

- 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.

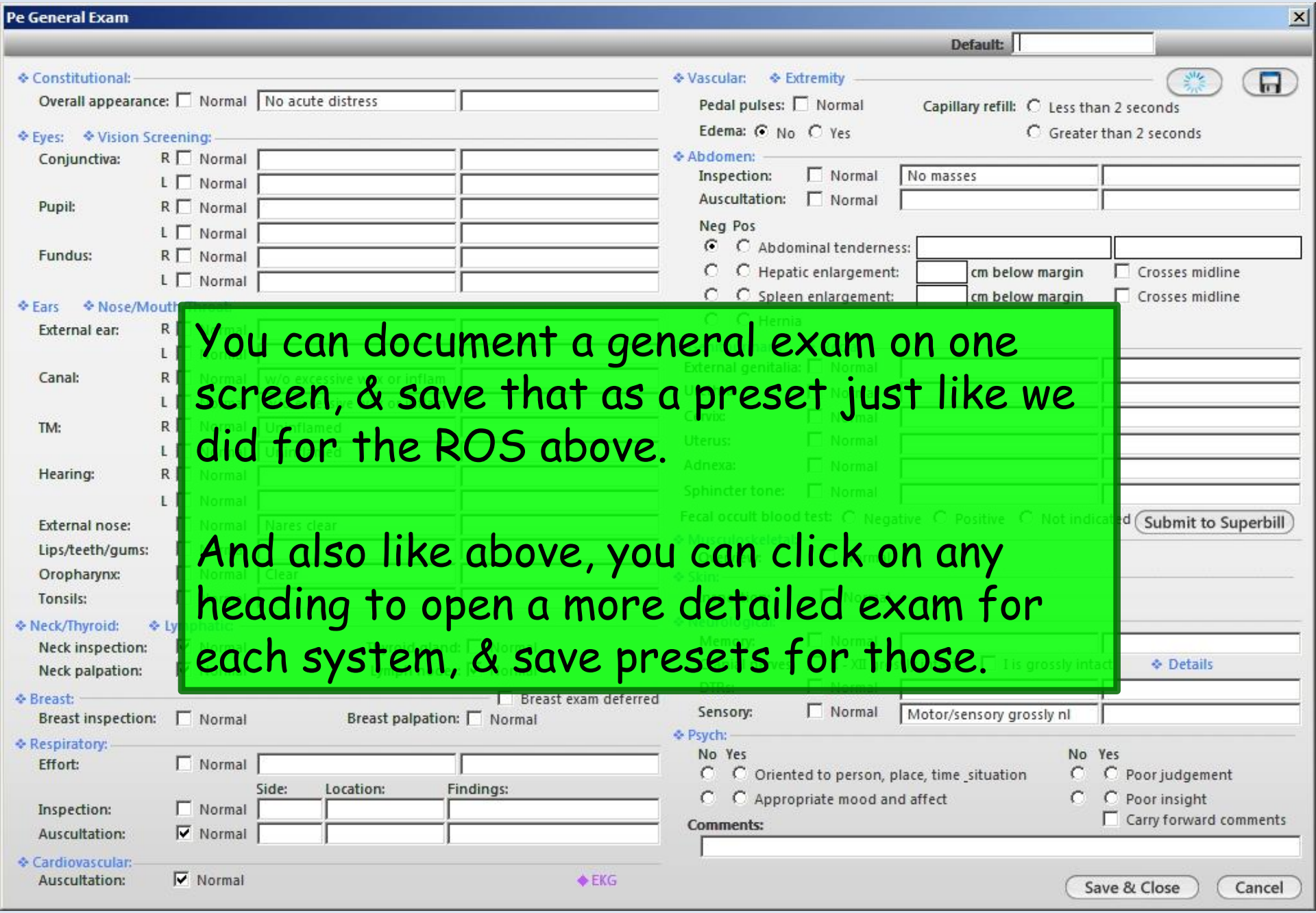
- Some info on HPI popups is shared with the ROS. So if you use both HPI popups & ROS popups, be careful that these don't lead to conflicting documentation.

Physical Exam

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

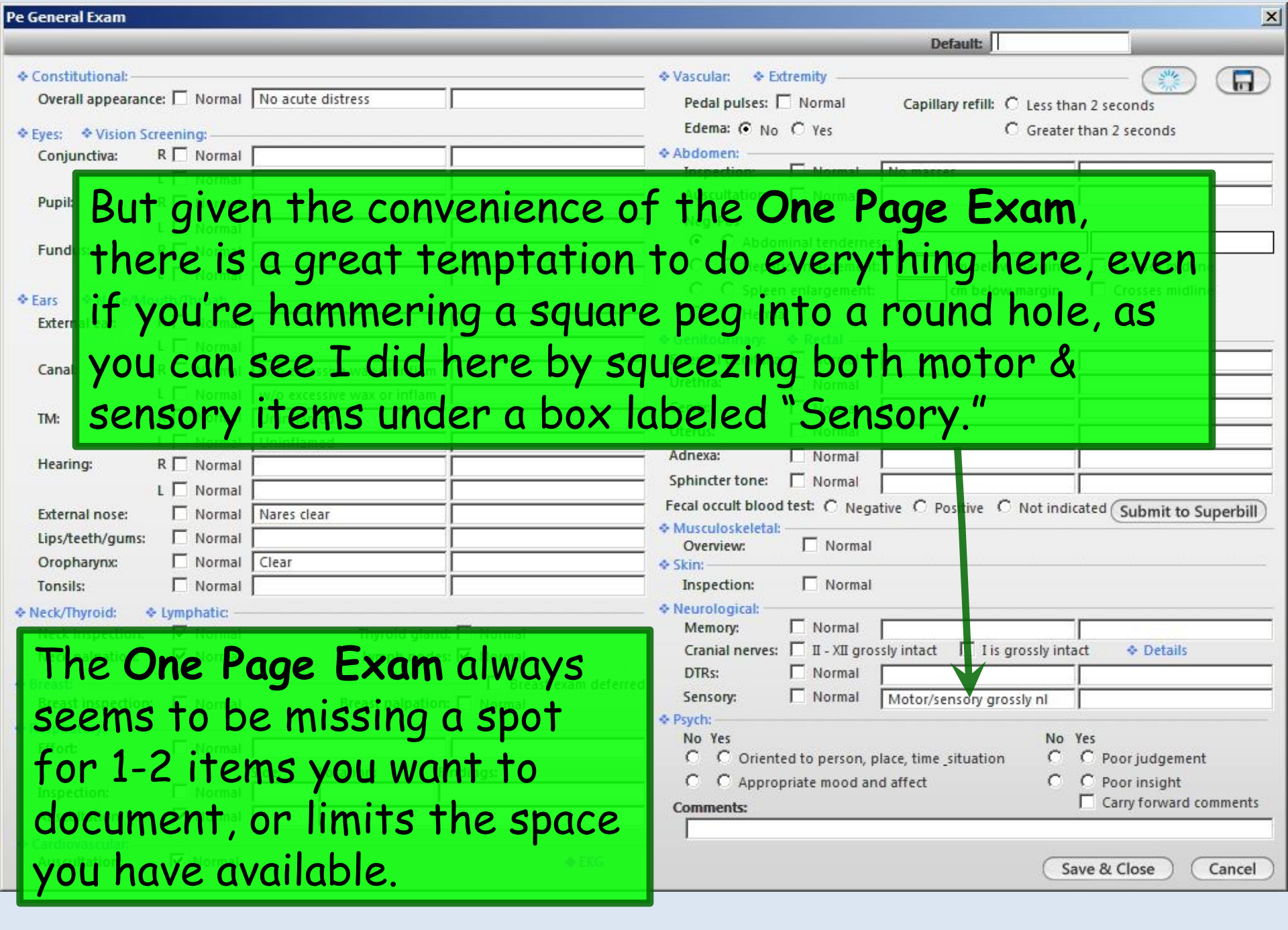


Analogous to the ROS demonstration above, you can save Physical Exam presets. You would often start with the One Page Exam.



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

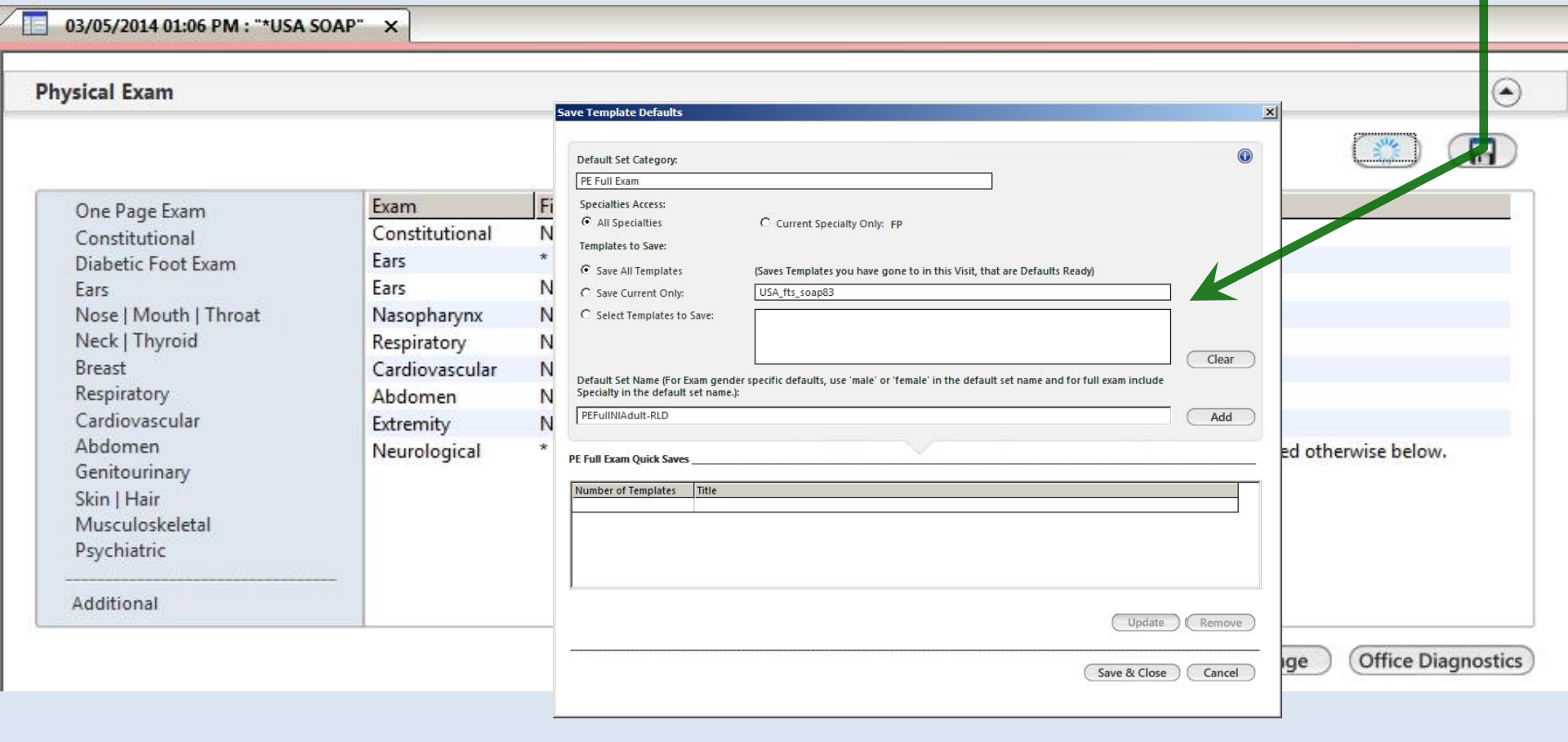
And also like above, you can click on any heading to open a more detailed exam for each system, & save presets for those.



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.

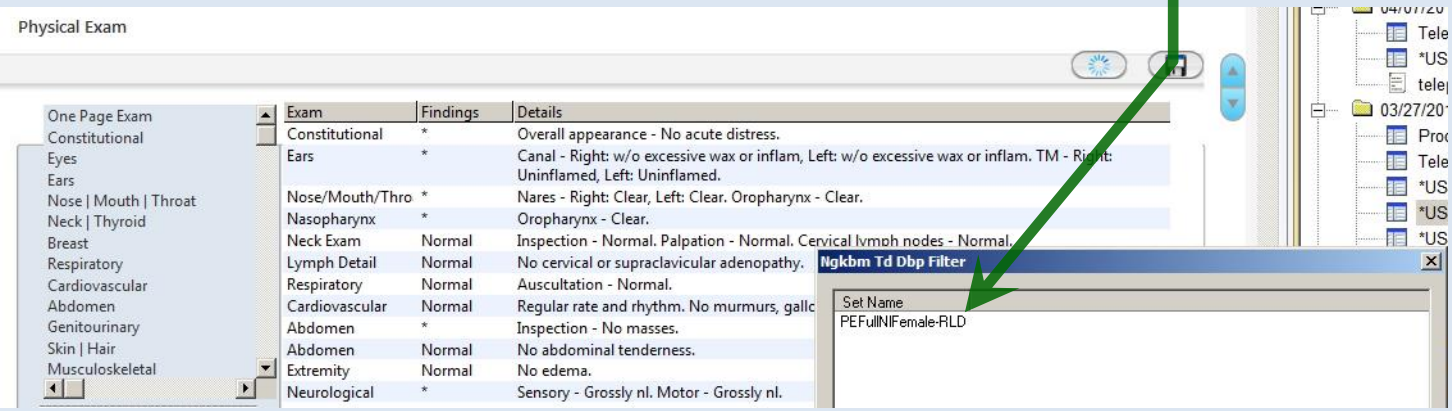
This is where the "Full" preset save option really shines. Document however you deem fit on the **One Page Exam** & any addition system-specific exams as you like, then on the **SOAP tab** use the Save icon you see under the **Physical Exam** section to save all those entries as one preset.



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.

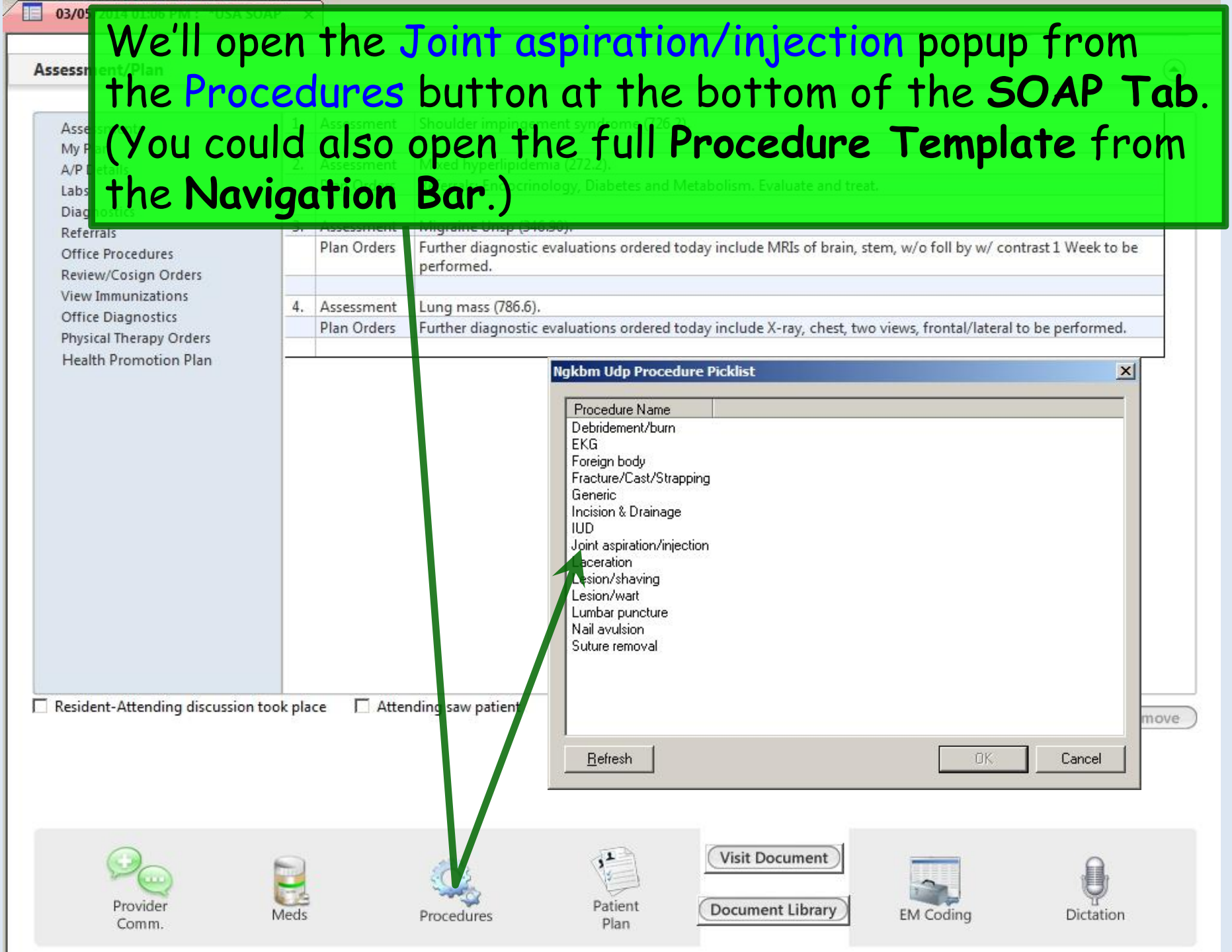
This is a very valuable workflow enhancement.

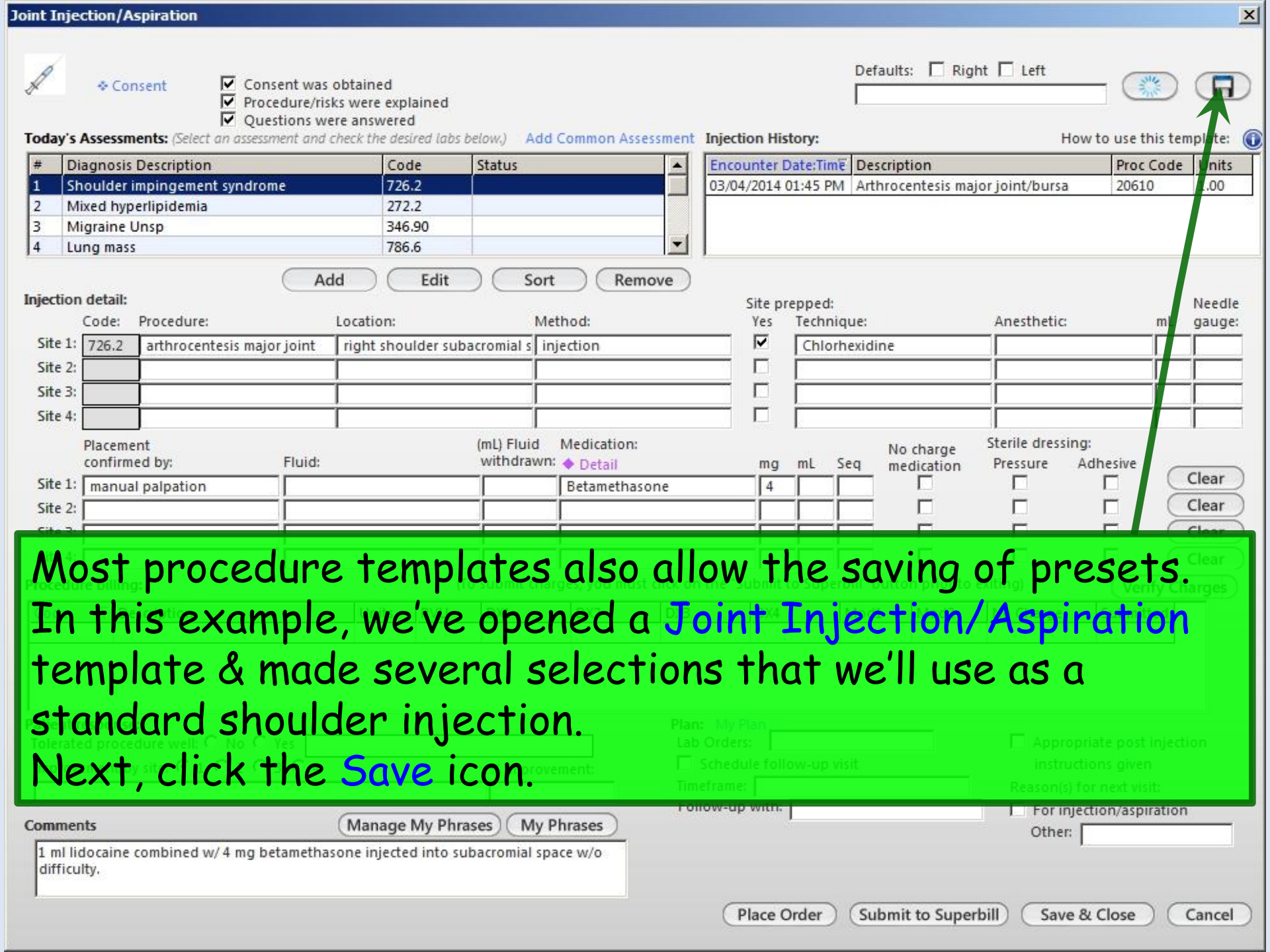


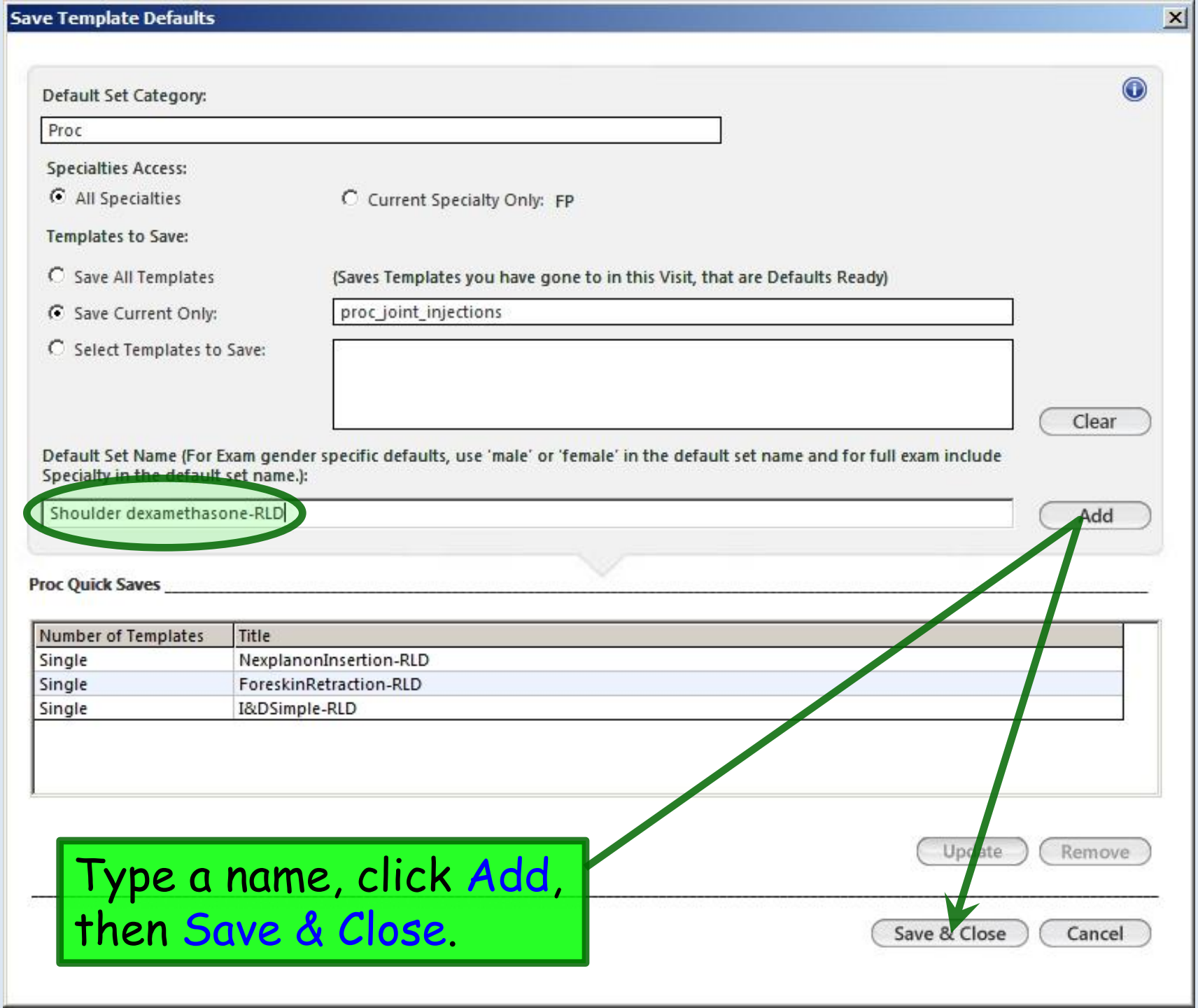
Procedures

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

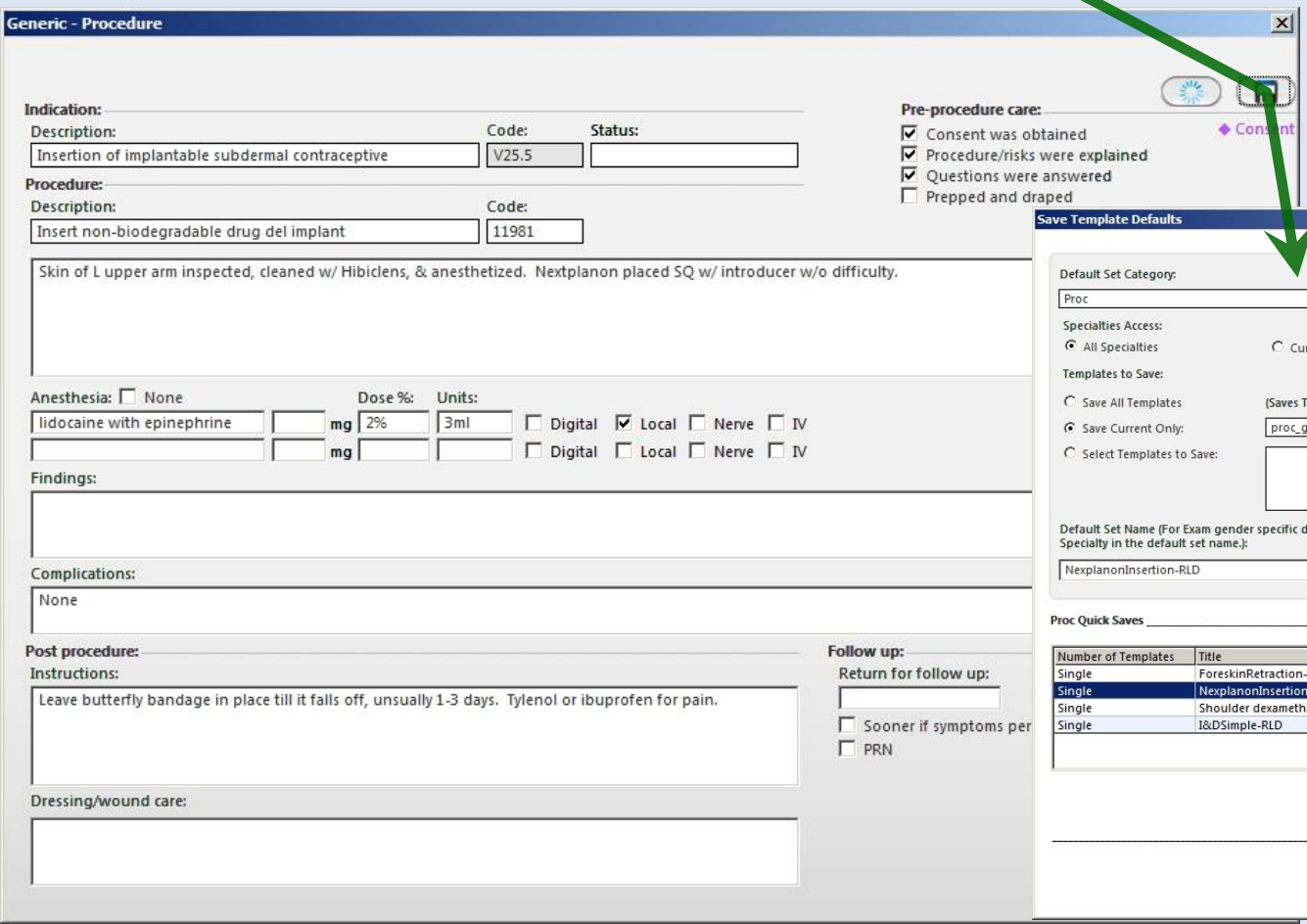
We'll open the Joint aspiration/injection popup from the Procedures button at the bottom of the **SOAP Tab**. (You could also open the full **Procedure Template** from the **Navigation Bar**.)

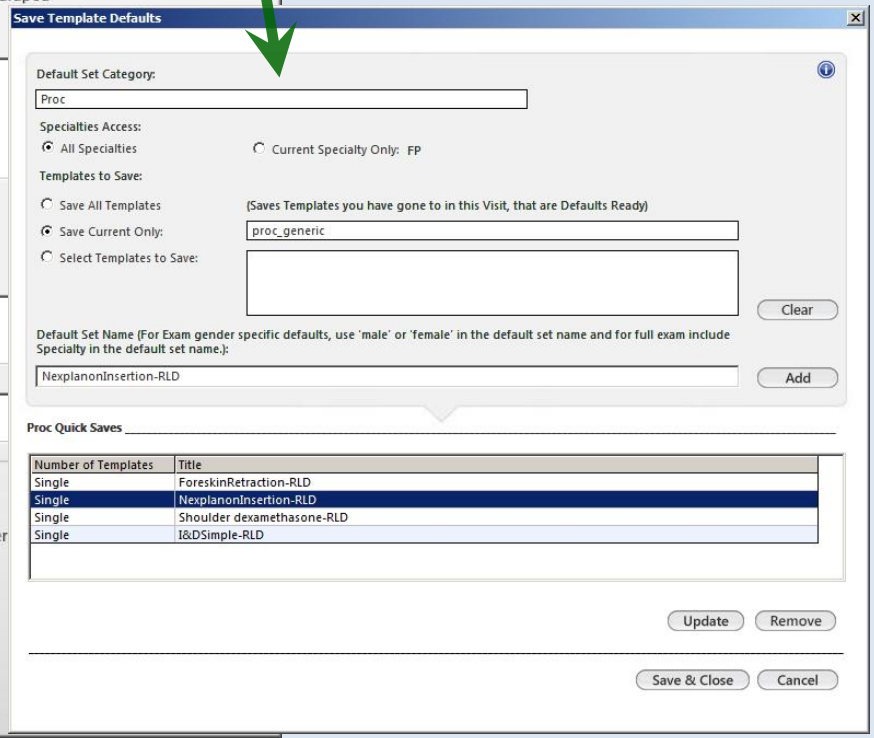


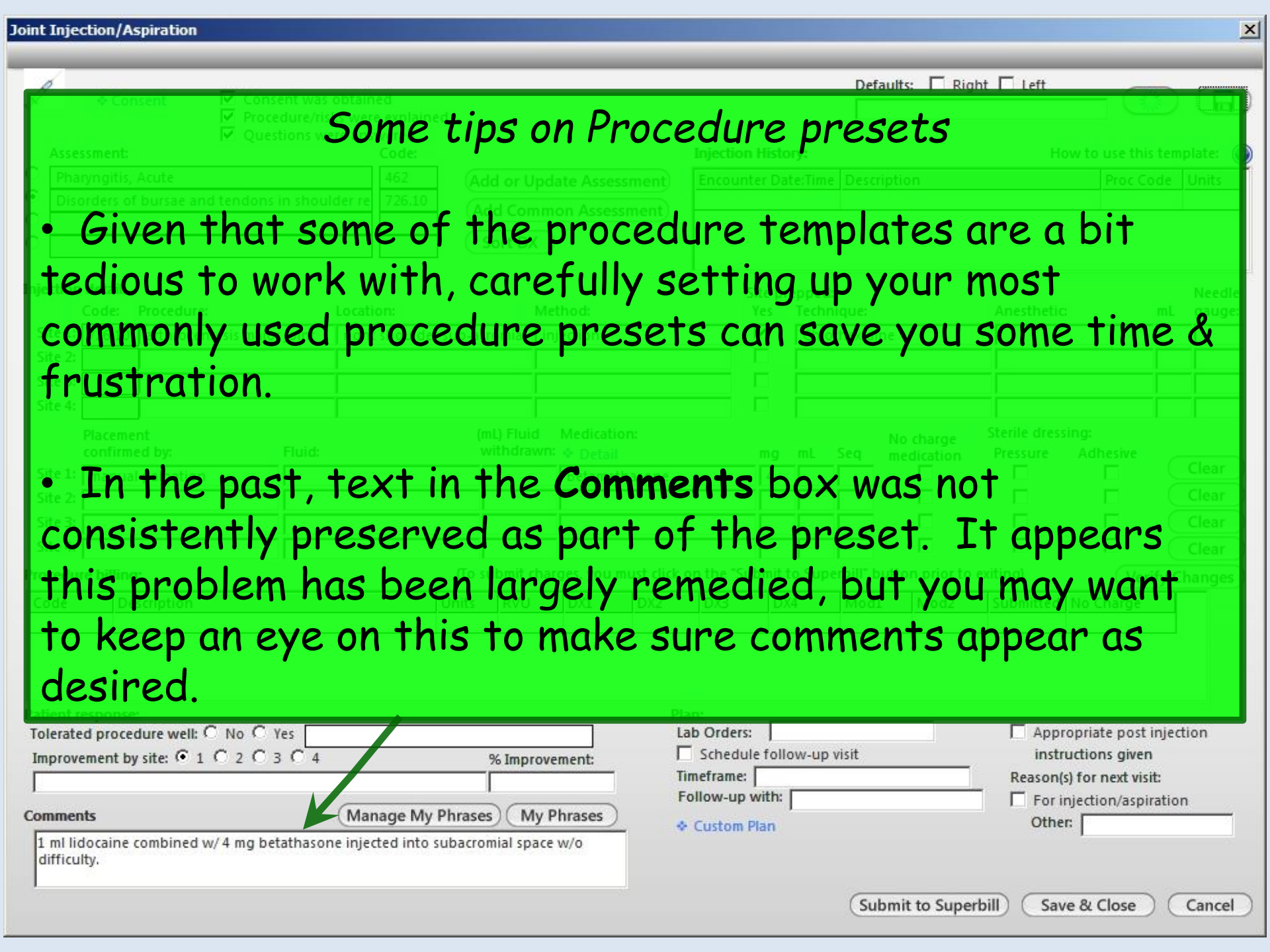

Joint Injection/Aspiration
Consent
Consent was obtained
Procedure/risks were explained
Questions were answered
Defaults: Right Left
Today's Assessments: (Select an assessment and check the desired labs below.)
Add Common Assessment
Injection History:
How to use this template:
Diagnosis Description Code 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:
Site prepped: Yes Technique: Anesthetic: Needle gauge:
Site 1: 726.2 arthrocentesis major joint right shoulder subacromial s injection Chlorhexidine
Site 2:
Site 3:
Site 4:
Placement confirmed by: Fluid: (mL) Fluid withdrawn: Medication: Detail mg mL Seq
No charge medication
Sterile dressing: Pressure Adhesive
Site 1: manual palpation Betamethasone 4
Site 2:
Clear
Clear
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.
Other:
Place Order
Submit to Superbill
Save & Close
Cancel


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_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
Save & Close
Cancel
Type a name, click Add, then Save & Close.

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 Nextplanon 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.





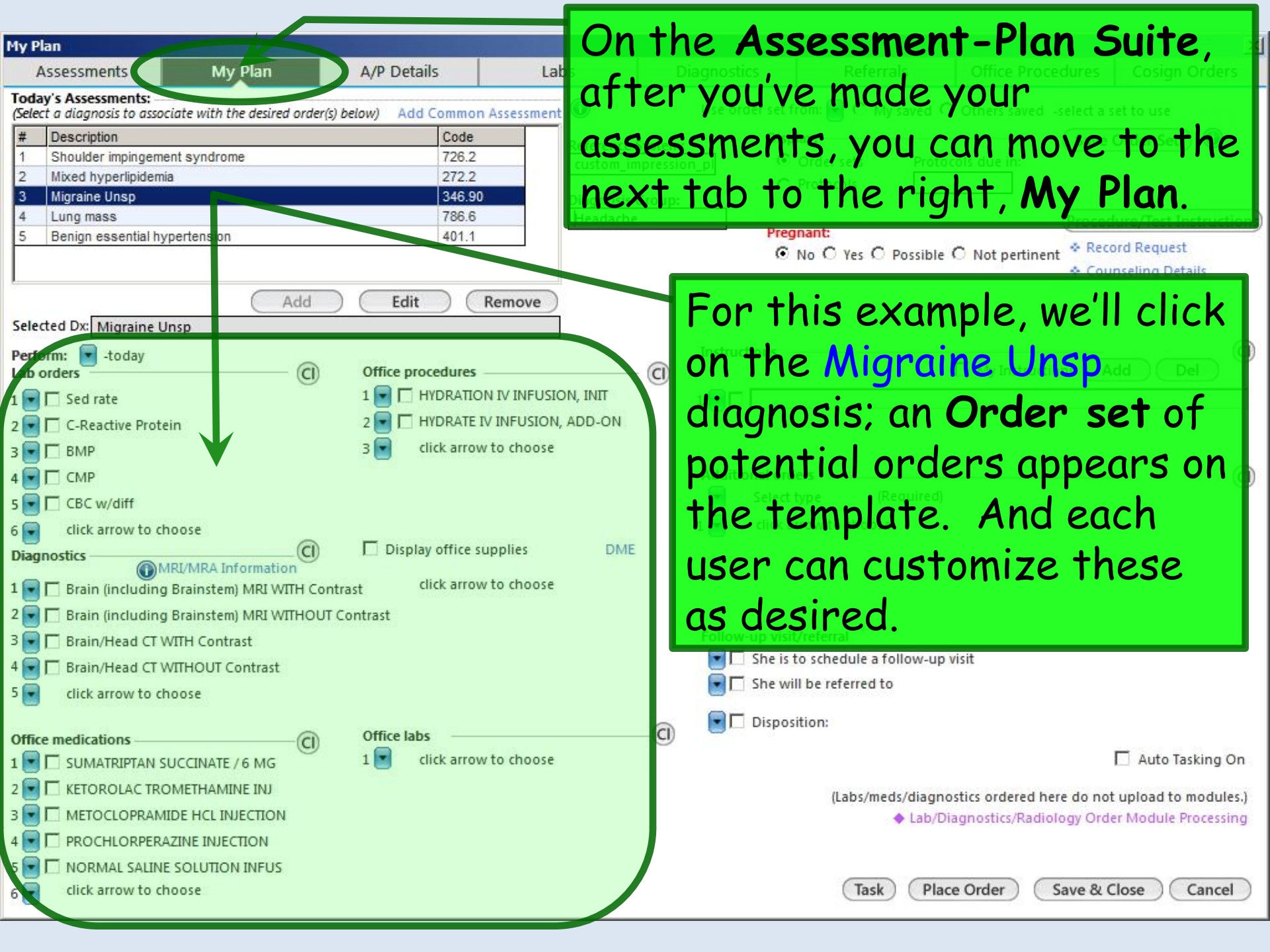

Joint Injection/Aspiration
Some tips on Procedure presets
• Given that some of the procedure templates are a bit tedious to work with, carefully setting up your most commonly used procedure presets can save you some time & frustration.
• In the past, text in the **Comments** box was not consistently 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
Manage My Phrases
My Phrases
1 ml lidocaine combined w/ 4 mg betathasone injected into subacromial space w/o difficulty.
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.

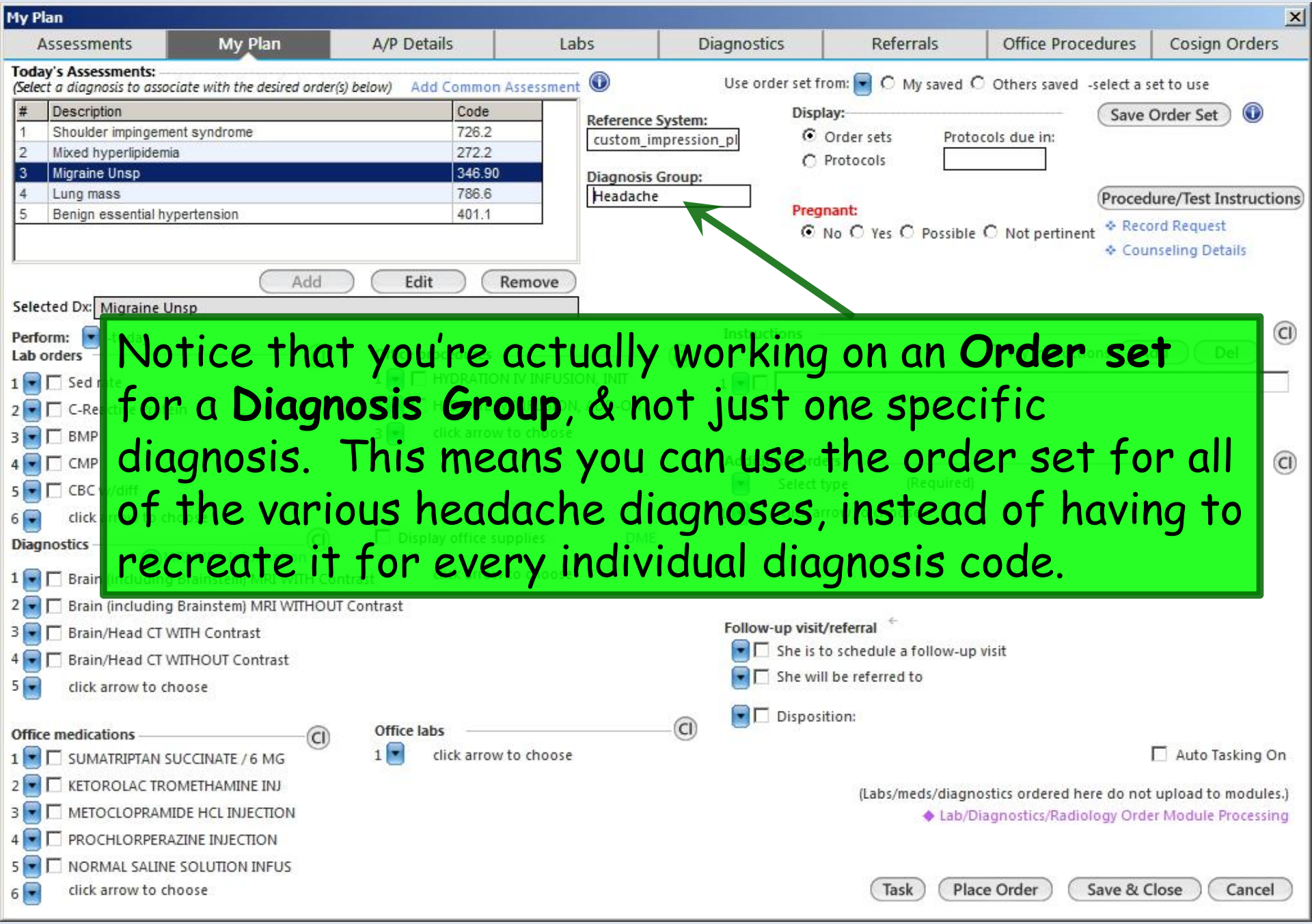
Please Note:

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.

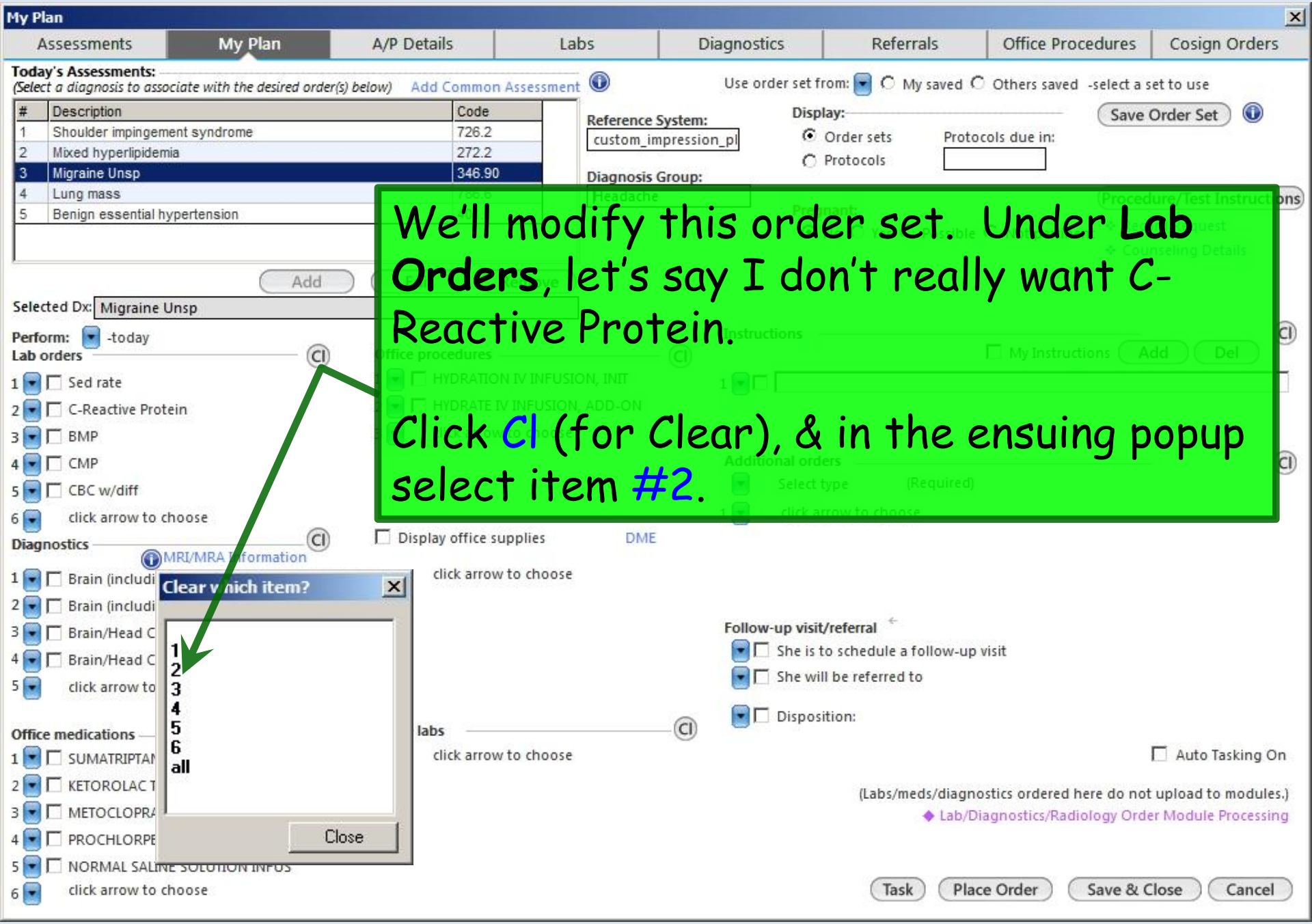


On the **Assessment-Plan Suite**, after you've made your assessments, you can move to the next tab to the right, **My Plan**.

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.

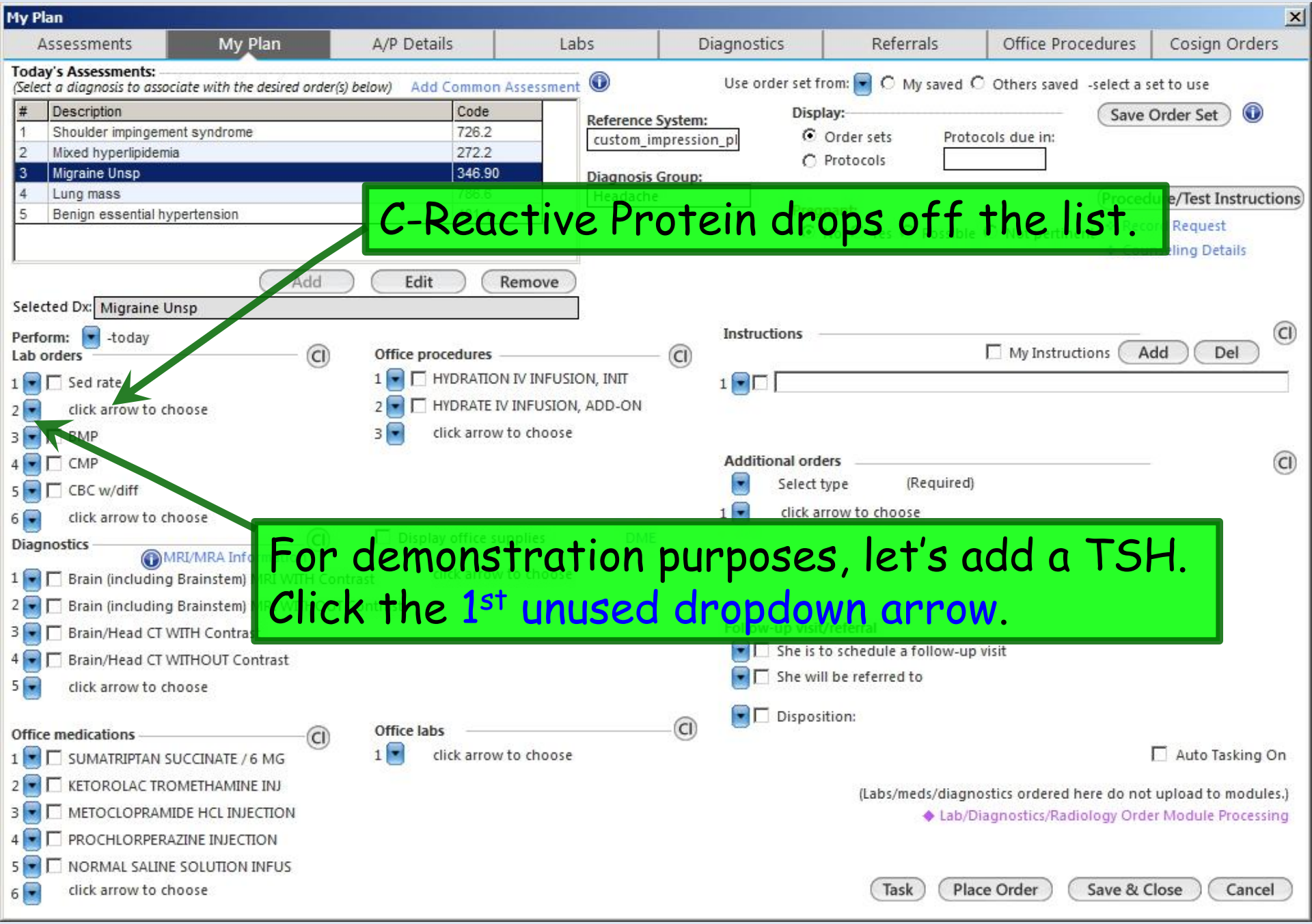


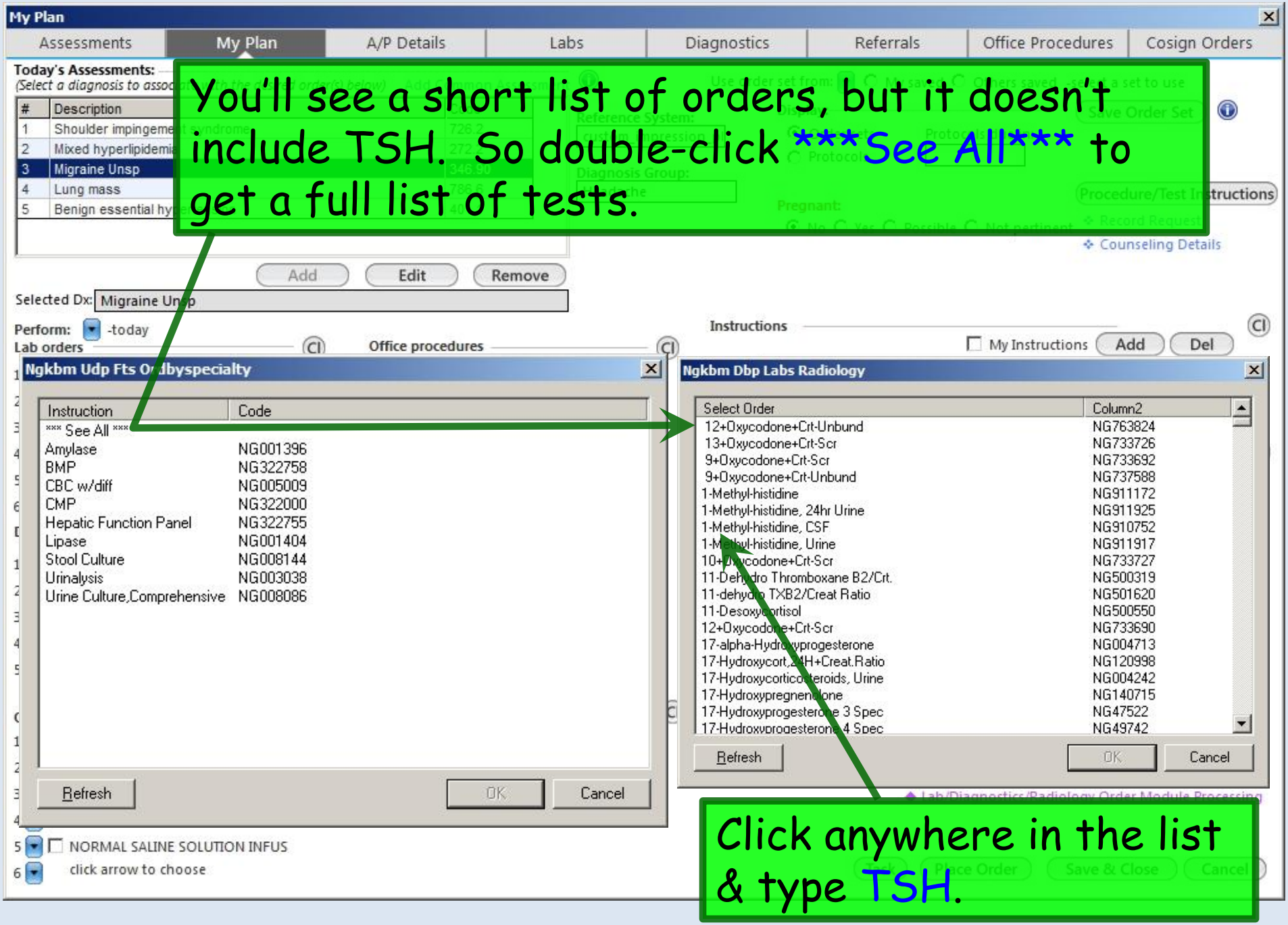
Notice that you're actually working on an **Order set** for a **Diagnosis Group**, & not just one specific diagnosis. This means you can use the order set for all of the various headache diagnoses, instead of having to recreate it for every individual diagnosis code.

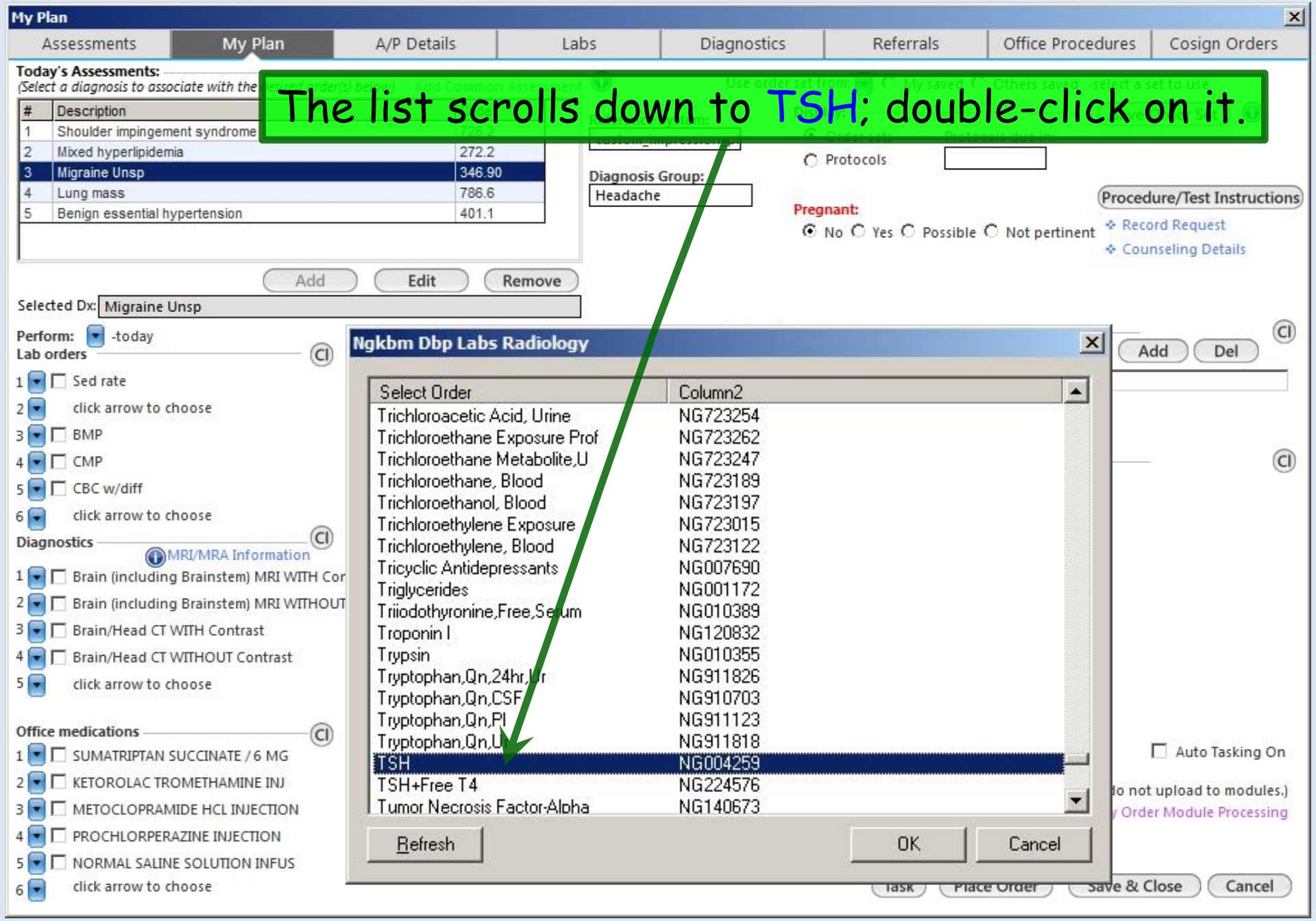


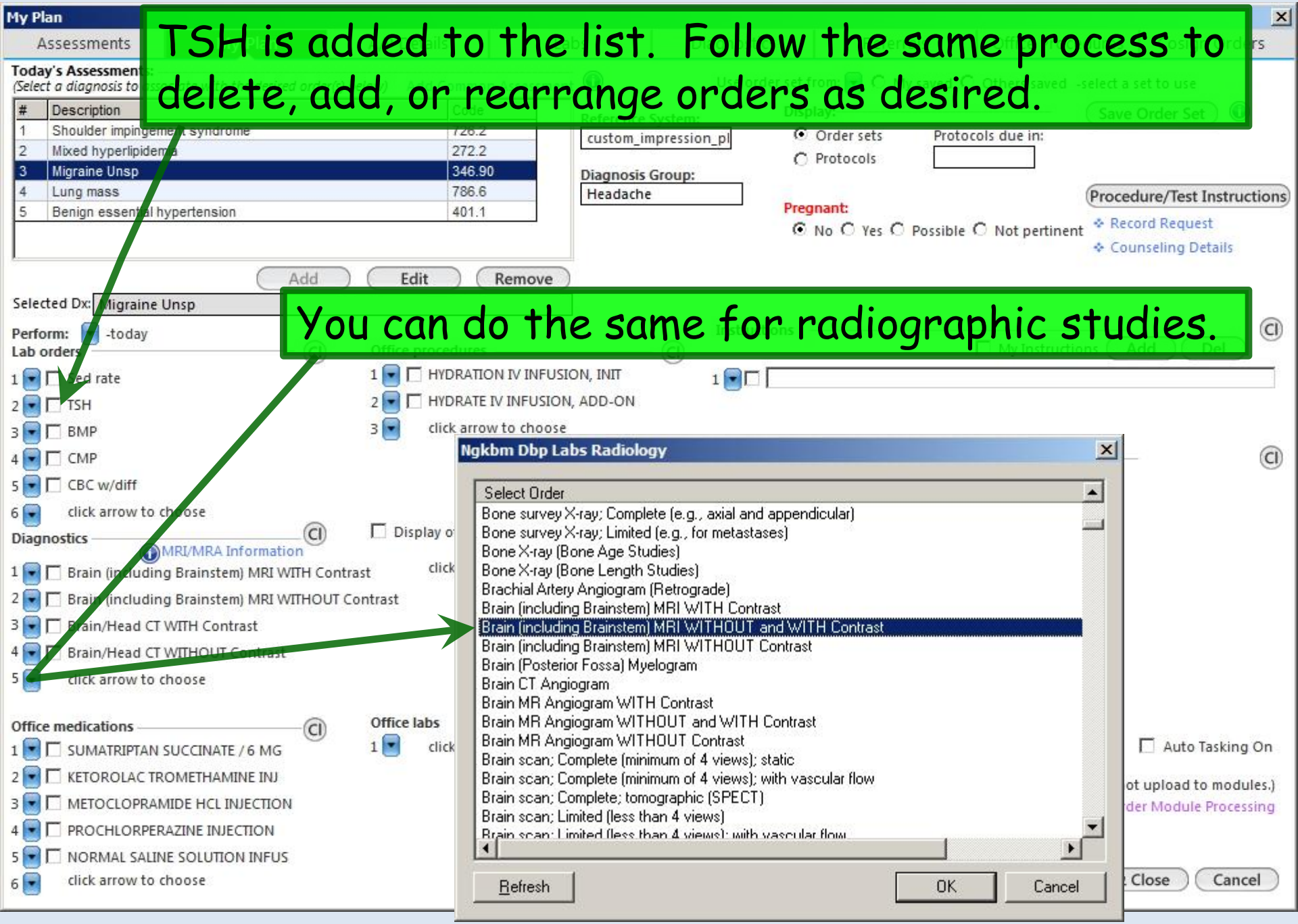
We'll modify this order set. Under **Lab Orders**, let's say I don't really want C-Reactive Protein.

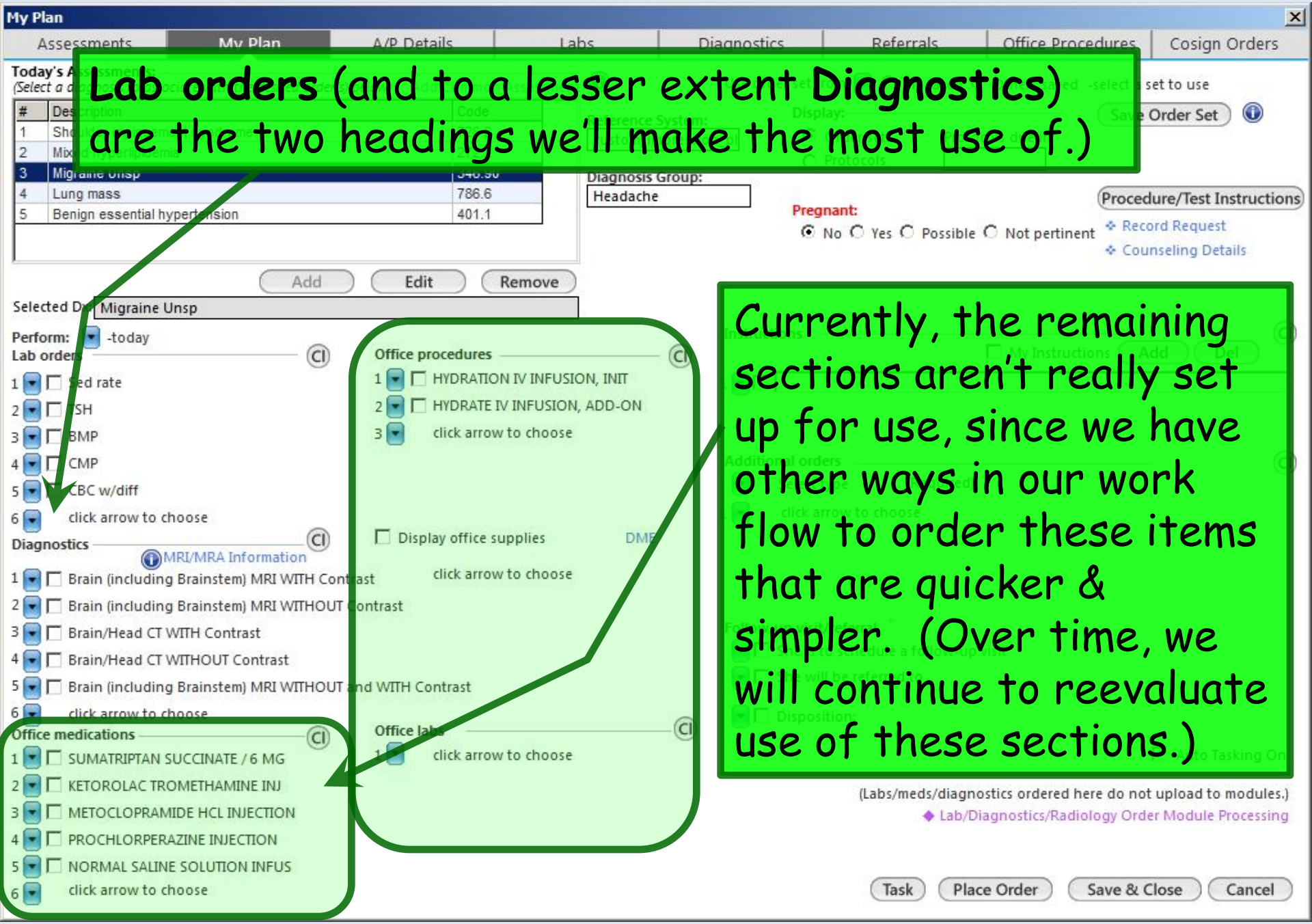
Click Cl (for Clear), & in the ensuing popup select item #2.

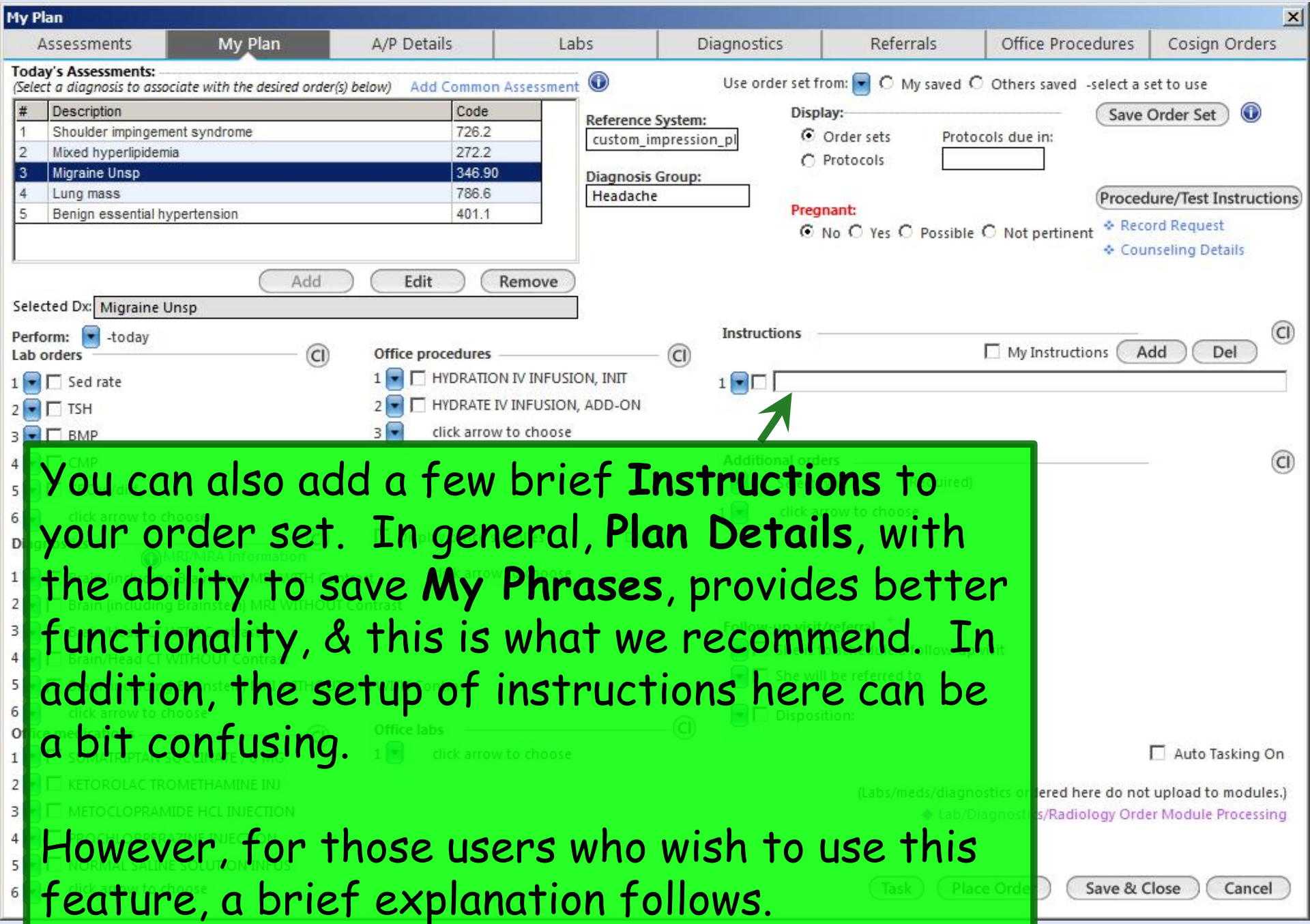

My Plan
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below)
Add Common Assessment
Description Code
1 Shoulder impingement syndrome 726.2
2 Mixed hyperlipidemia 272.2
3 Migraine Unsp 346.90
4 Lung mass
5 Benign essential hypertension
Add
Edit
Remove
Selected Dx: Migraine Unsp
Use order set from: My saved Others saved -select a set to use
Reference System: custom_impression_pl
Display: Order sets Protocols
Protocols due in:
Save Order Set
Diagnosis Group: Headache
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
Office procedures
1 HYDRATION IV INFUSION, INIT
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose
Instructions
My Instructions
Add
Del
1
Additional orders
Select type (Required)
1 click arrow to choose
Diagnostics
MRI/MRA Info
1 Brain (including Brainstem)
2 Brain (including Brainstem)
3 Brain/Head CT WITH Contrast
4 Brain/Head CT WITHOUT Contrast
5 click arrow to choose
She is to schedule a follow-up visit
She will be referred to
Disposition:
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
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 1st unused dropdown arrow.


My Plan
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments:
Description
1 Shoulder impingeme
2 Mixed hyperlipidemi
3 Migraine Unsp
4 Lung mass
5 Benign essential hy
Add
Edit
Remove
Selected Dx: Migraine Unsp
Perform: -today
Lab orders
Office procedures
Instructions
My Instructions
Add
Del
Counseling Details
Ngkbm Udp Fts Ordbyspecialty
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
Refresh
OK
Cancel
Ngkbm Dbp Labs Radiology
Select Order
Column2
12+Oxycodone+Crt-Unbund NG763824
13+Oxycodone+Crt-Scr NG733726
9+Oxycodone+Crt-Scr NG733692
9+Oxycodone+Crt-Unbund NG737588
1-Methyl-histidine NG911172
1-Methyl-histidine, 24hr Urine NG911925
1-Methyl-histidine, CSF NG910752
1-Methyl-histidine, Urine NG911917
11-Dehydro Thromboxane B2/Crt. NG500319
11-dehydro TXB2/Creat Ratio NG501620
11-Desoxycortisol NG500550
12+Oxycodone+Crt-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
Refresh
OK
Cancel
NORMAL SALINE SOLUTION INFUS
click arrow to choose
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.
Click anywhere in the list & type TSH.


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
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
Add
Edit
Remove
Selected Dx: Migraine Unsp
Diagnosis Group:
Headache
Protocols
Pregnant:
No Yes Possible Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
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
MRI/MRA Information
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
Add
Del
Auto Tasking On
Save & Close
Cancel
Ngkbm 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
TSH NG004259
TSH+Free T4 NG224576
Tumor Necrosis Factor-Alpha NG140673
Refresh
OK
Cancel
The list scrolls down to TSH; double-click on it.

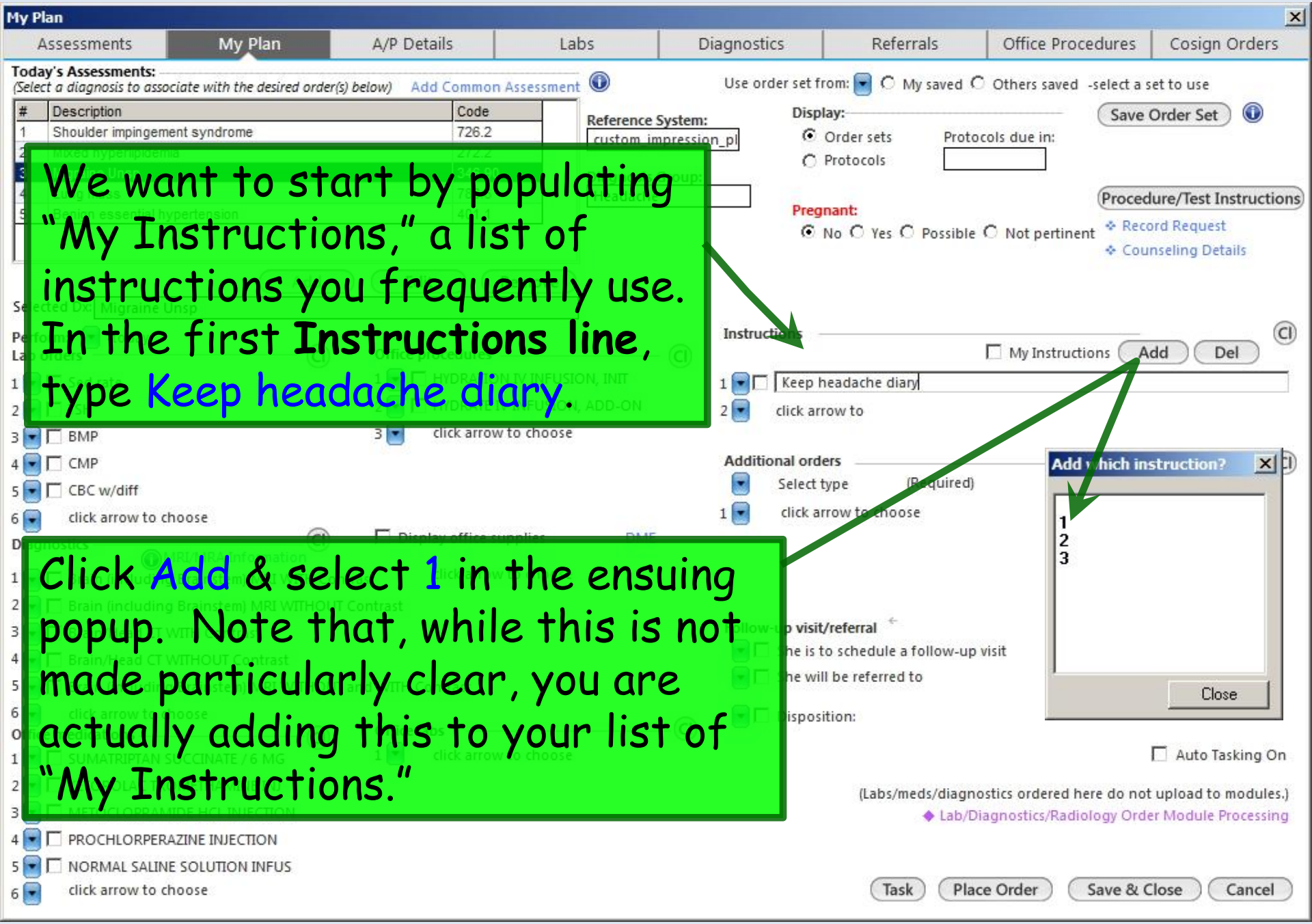

TSH is added to the list. Follow the same process to delete, add, or rearrange orders as desired.
You can do the same for radiographic studies.
My Plan
Assessments
Today's Assessment
(Select a diagnosis to
Description
1 Shoulder impingement syndrome 726.2
2 Mixed hyperlipidemia 272.2
3 Migraine Unsp 346.90
4 Lung mass 786.6
5 Benign essential hypertension 401.1
Add
Edit
Remove
Selected Dx: Migraine Unsp
Perform: -today
Lab orders
1 ed rate
2 TSH
3 BMP
4 CMP
5 CBC w/diff
6 click arrow to choose
Diagnostics
MRI/MRA Information
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 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
custom_impression_pl
Order sets
Protocols
Protocols due in:
Diagnosis Group:
Headache
Pregnant:
No Yes Possible Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
1 HYDRATION IV INFUSION, INIT
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose
Office labs
Ngkbm Dbp Labs Radiology
Select Order
Bone survey X-ray; Complete (e.g., axial and appendicular)
Bone survey X-ray; Limited (e.g., for metastases)
Bone X-ray (Bone Age Studies)
Bone X-ray (Bone Length Studies)
Brachial Artery Angiogram (Retrograde)
Brain (including Brainstem) MRI WITH Contrast
Brain (including Brainstem) MRI WITHOUT and WITH Contrast
Brain (including Brainstem) MRI WITHOUT Contrast
Brain (Posterior Fossa) Myelogram
Brain CT Angiogram
Brain MR Angiogram WITH Contrast
Brain MR Angiogram WITHOUT and WITH Contrast
Brain MR Angiogram WITHOUT Contrast
Brain scan; Complete (minimum of 4 views); static
Brain scan; Complete (minimum of 4 views); with vascular flow
Brain scan; Complete; tomographic (SPECT)
Brain scan; Limited (less than 4 views)
Refresh
OK
Cancel
Auto Tasking On
Close
Cancel

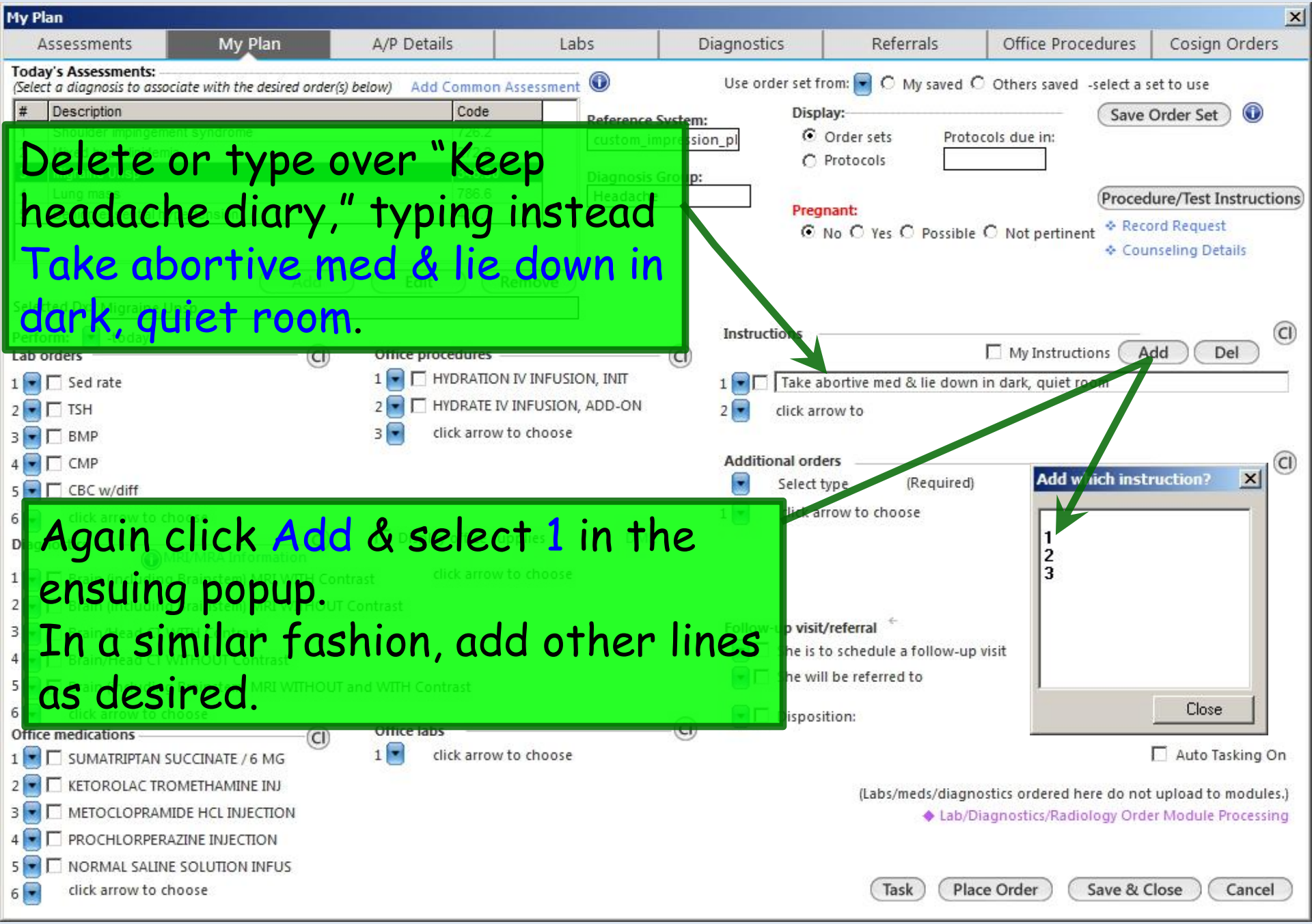

My Plan
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Lab orders (and to a lesser extent Diagnostics) are the two headings we'll make the most use of.)
Description Code
1
2
3 Migraine Unsp
4 Lung mass 786.6
5 Benign essential hypertension 401.1
Add
Edit
Remove
Selected Dx: Migraine Unsp
Diagnosis Group:
Headache
Pregnant:
No Yes Possible Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
Perform: -today
Lab orders
1 Sed rate
2 TSH
3 BMP
4 CMP
5 CBC w/diff
6 click arrow to choose
Diagnostics
MRI/MRA Information
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 / 6 MG
2 KETOROLAC TROMETHAMINE INJ
3 METOCLOPRAMIDE HCL INJECTION
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose
Office procedures
1 HYDRATION IV INFUSION, INIT
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose
Display office supplies
click arrow to choose
Office labs
1 click arrow to choose
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.)
(Labs/meds/diagnostics ordered here do not upload to modules.)
Lab/Diagnostics/Radiology Order Module Processing
Task
Place Order
Save & Close
Cancel

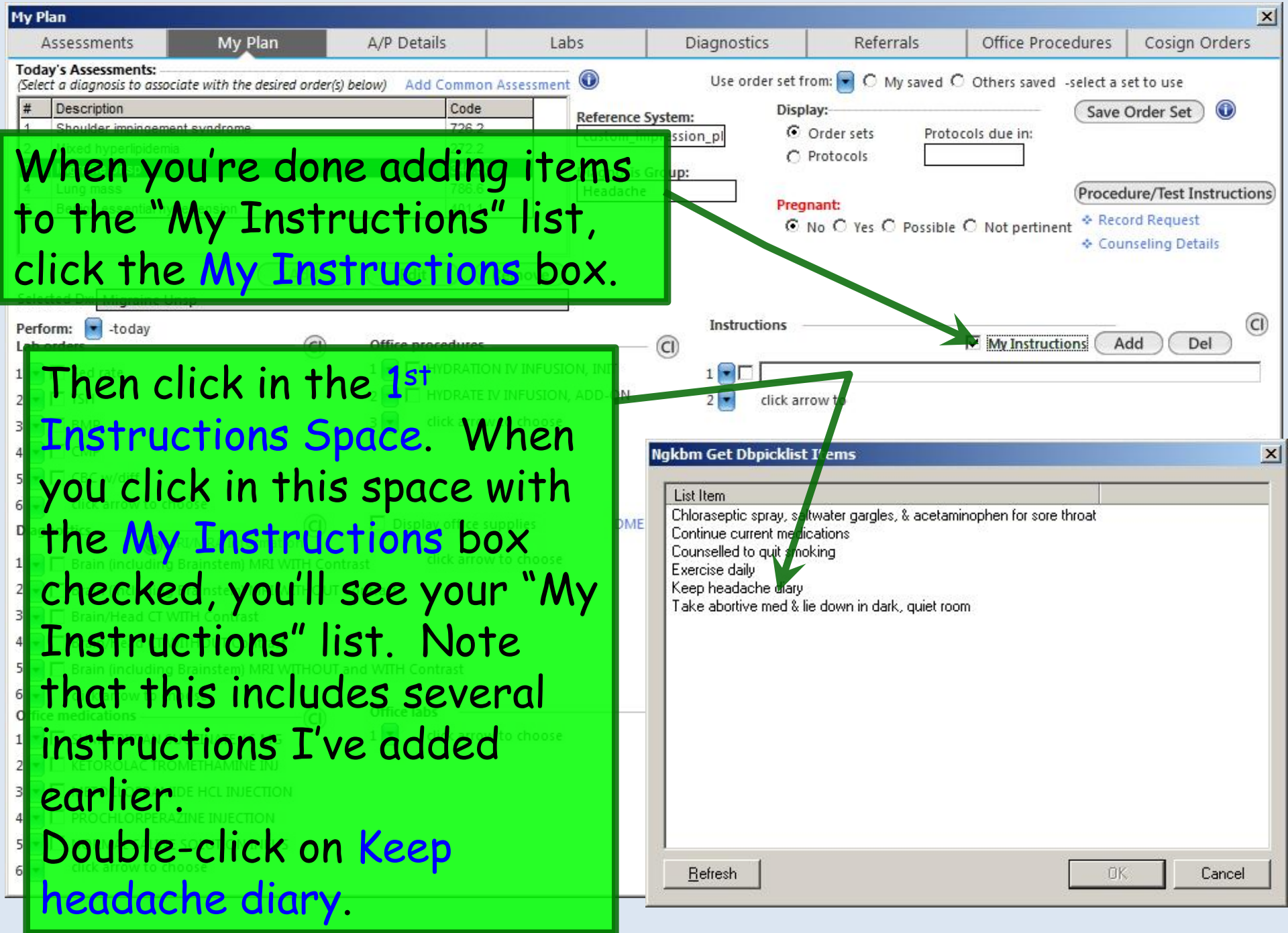


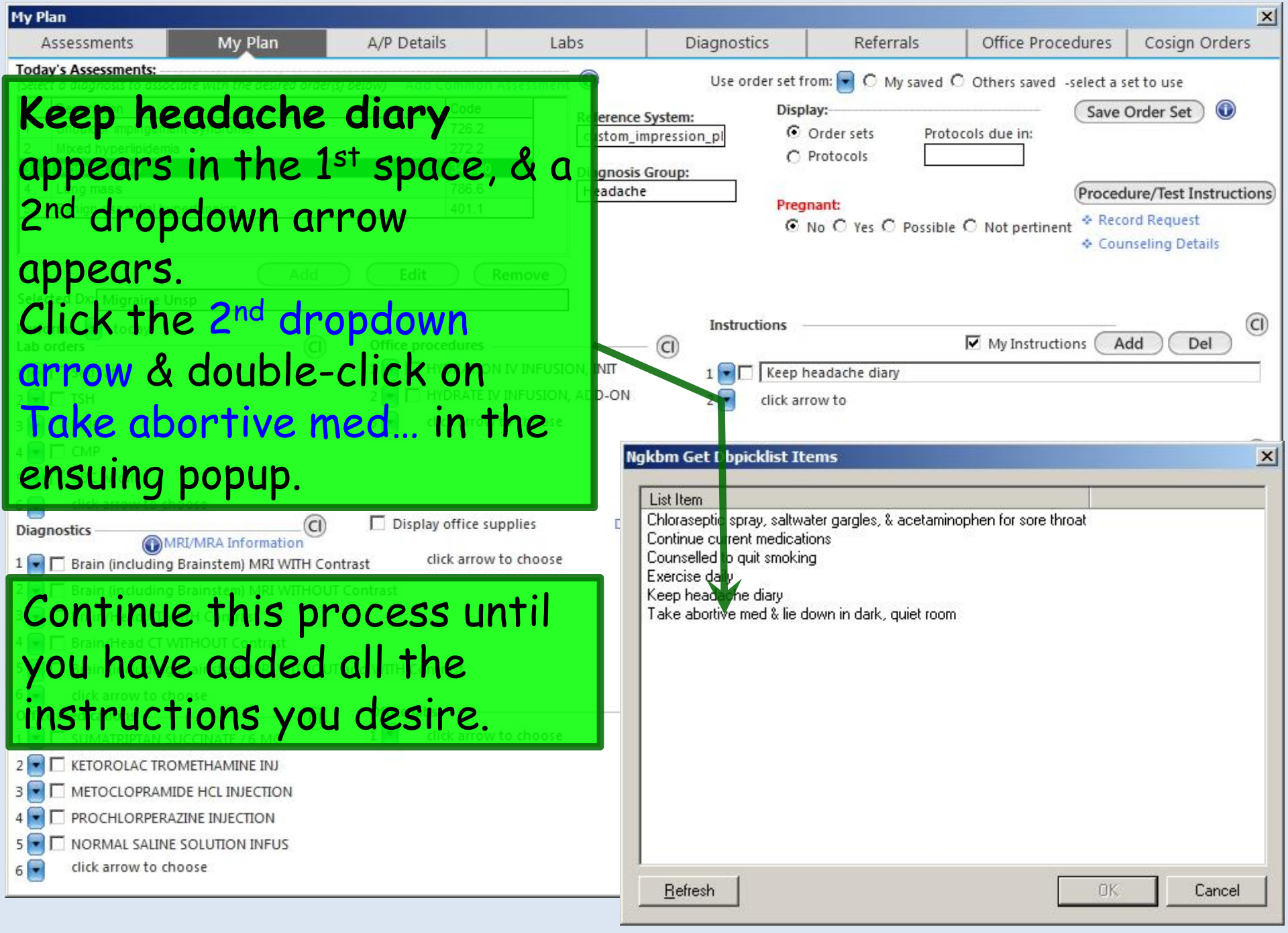
You can also add a few brief **Instructions** to your order set. In general, **Plan Details**, with the ability to save **My Phrases**, provides better functionality, & this is what we recommend. In addition, the setup of instructions here can be a bit confusing.

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


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
Use order set from:
My saved
Others saved
-select a set to use
Save Order Set
Reference System:
custom_impression_pl
Display:
Order sets
Protocols
Protocols due in:
Procedure/Test Instructions
Pregnant:
No
Yes
Possible
Not pertinent
Record Request
Counseling Details
We want to start by populating "My Instructions," a list of instructions you frequently use. In the first Instructions line, type Keep headache diary.
Instructions
My Instructions
Add
Del
1 Keep headache diary
2 click arrow to
3 BMP
4 CMP
5 CBC w/diff
6 click arrow to choose
3 click arrow to choose
Additional orders
Select type
(Required)
1 click arrow to choose
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
visit/referral
he is to schedule a follow-up visit
he will be referred to
isposition:
Auto Tasking On
(Labs/meds/diagnostics ordered here do not upload to modules.)
Lab/Diagnostics/Radiology Order Module Processing
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose
Task
Place Order
Save & Close
Cancel

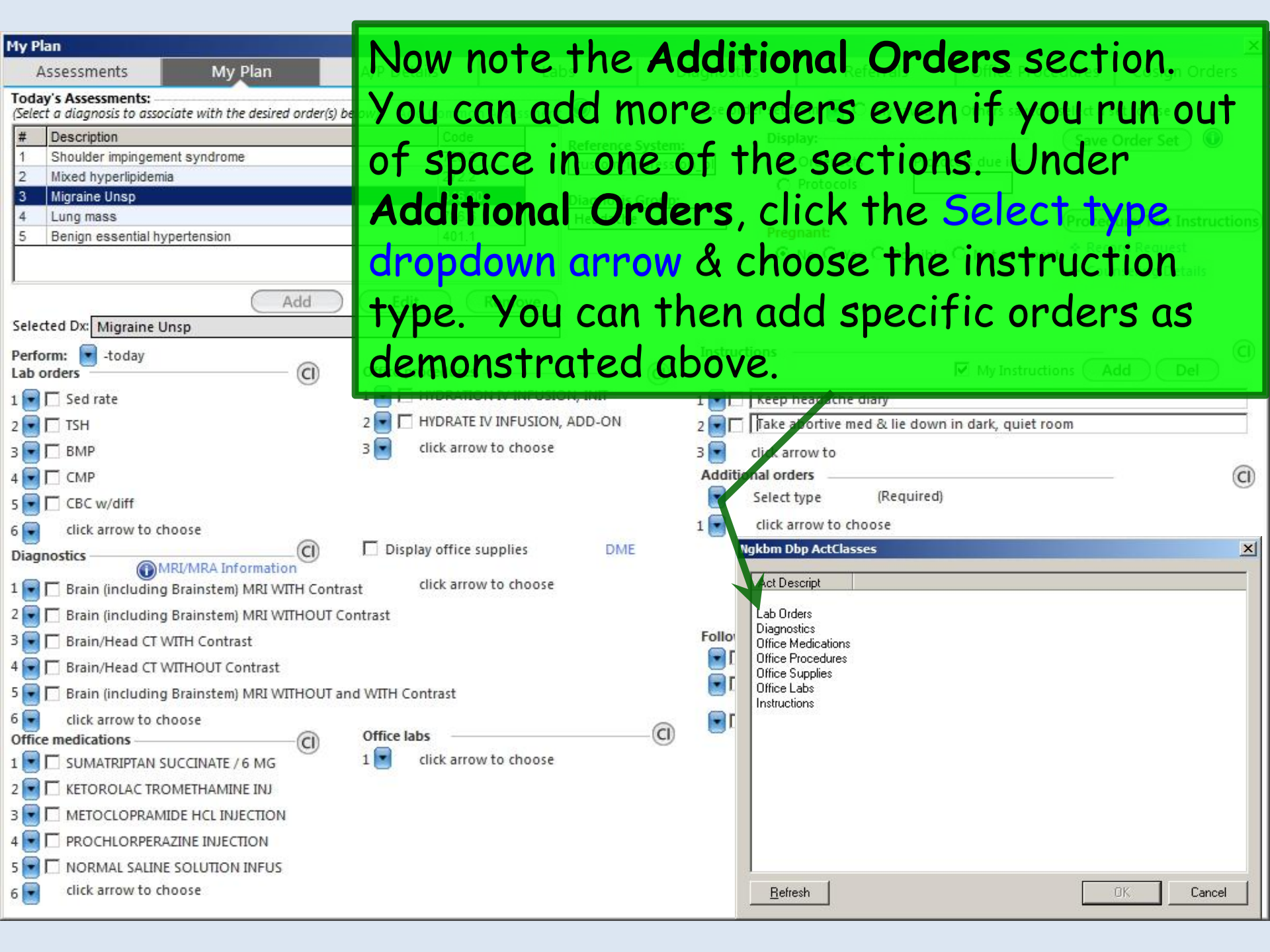

My Plan
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below)
Add Common Assessment
Use order set from:
My saved
Others saved
-select a set to use
Save Order Set
Display:
Order sets
Protocols
Protocols due in:
Pregnant:
No
Yes
Possible
Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
Delete or type over "Keep headache diary," typing instead Take abortive med & lie down in dark, quiet room.
Instructions
My Instructions
Add
Del
Take abortive med & lie down in dark, quiet room
click arrow to
Lab orders
Sed rate
TSH
BMP
CMP
CBC w/diff
Office procedures
HYDRATION IV INFUSION, INIT
HYDRATE IV INFUSION, ADD-ON
click arrow to choose
Additional orders
Select type
(Required)
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
Office medications
SUMATRIPTAN SUCCINATE / 6 MG
KETOROLAC TROMETHAMINE INJ
METOCLOPRAMIDE HCL INJECTION
PROCHLORPERAZINE INJECTION
NORMAL SALINE SOLUTION INFUS
Office labs
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

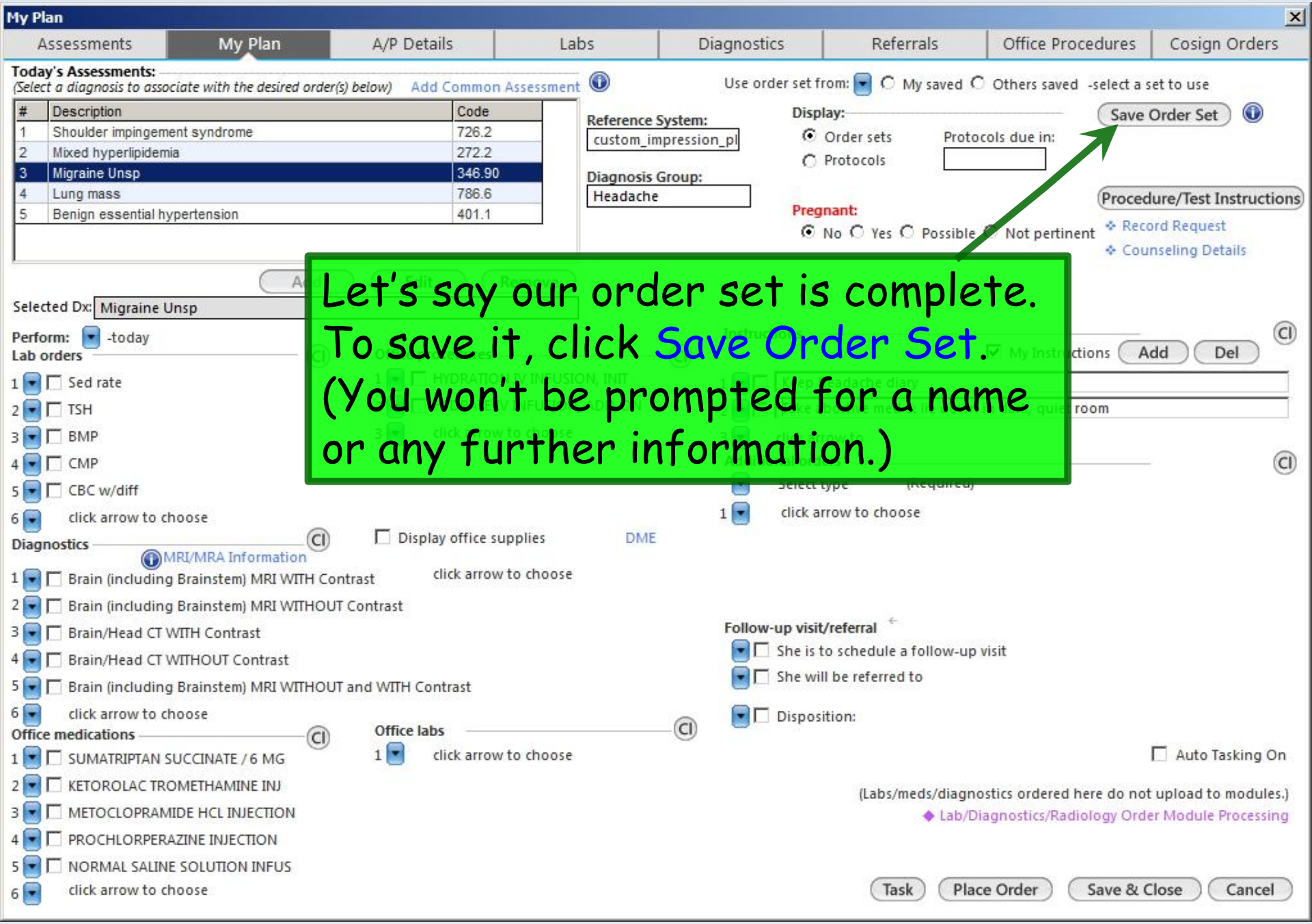

My Plan
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below)
Add Common Assessment
Description Code
Use order set from: My saved Others saved -select a set to use
Save Order Set
Reference System:
Display:
Order sets
Protocols
Protocols due in:
Pregnant:
No Yes Possible Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
Perform: -today
Instructions
My Instructions
Add
Del
click arrow to
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.
Ngkbm 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



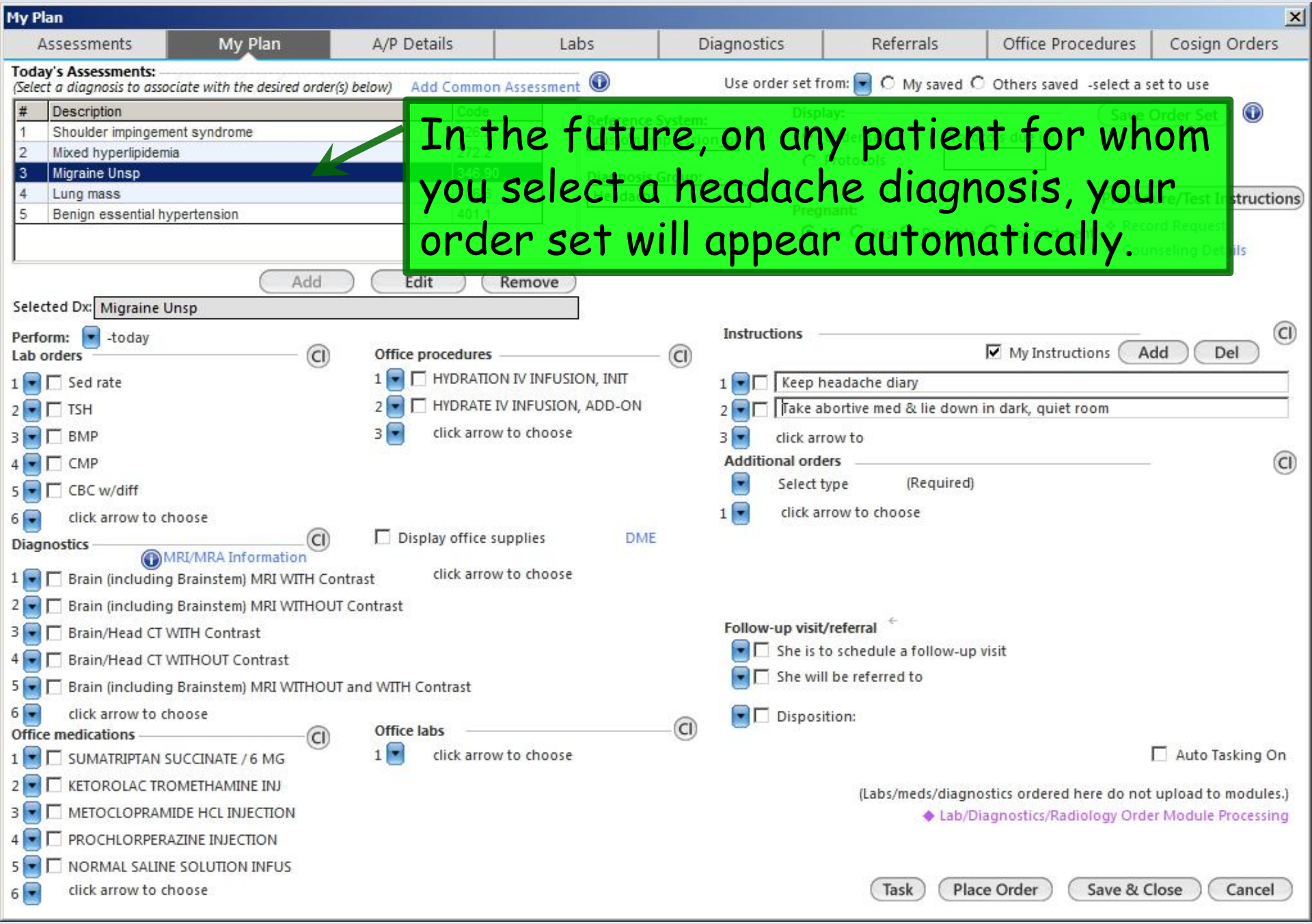
Keep headache diary appears in the 1st space, & a 2nd dropdown arrow appears.
Click the 2nd dropdown arrow & double-click on Take abortive med… in the ensuing popup.

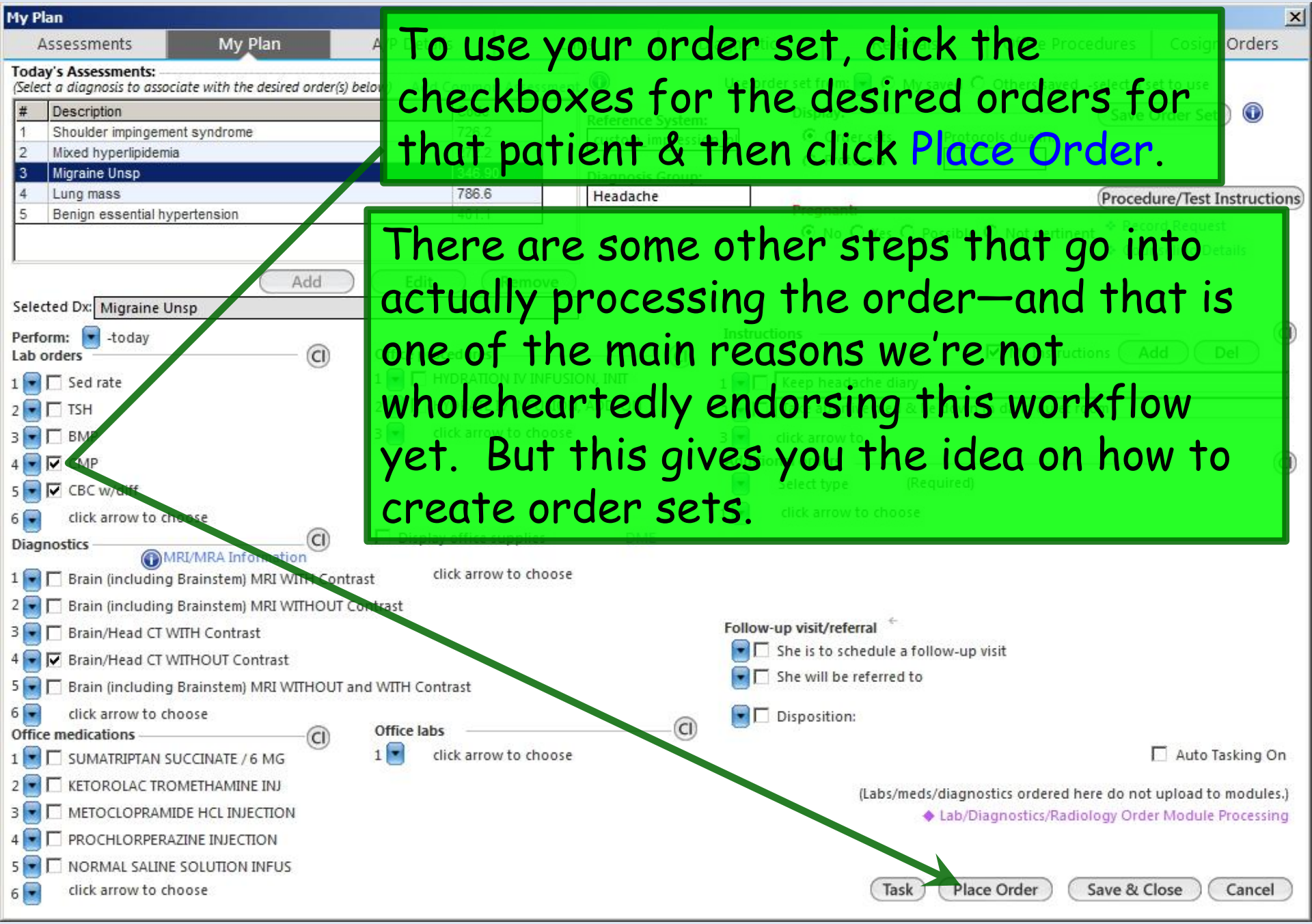
Continue this process until you have added all the instructions you desire.


My Plan
Assessments
My Plan
Today's Assessments:
(Select a diagnosis to associate with the desired order(s) be
Description
1 Shoulder impingement syndrome
2 Mixed hyperlipidemia
3 Migraine Unsp
4 Lung mass
5 Benign essential hypertension
Add
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
Diagnostics
MRI/MRA Information
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 / 6 MG
2 KETOROLAC TROMETHAMINE INJ
3 METOCLOPRAMIDE HCL INJECTION
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose
Display office supplies
DME
click arrow to choose
Office labs
1 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.
2 Take abortive med & lie down in dark, quiet room
3 click arrow to
Additional orders
Select type (Required)
1 click arrow to choose
Ngkbm Dbp ActClasses
Act Descript
Lab Orders
Diagnostics
Office Medications
Office Procedures
Office Supplies
Office Labs
Instructions
Refresh
OK
Cancel



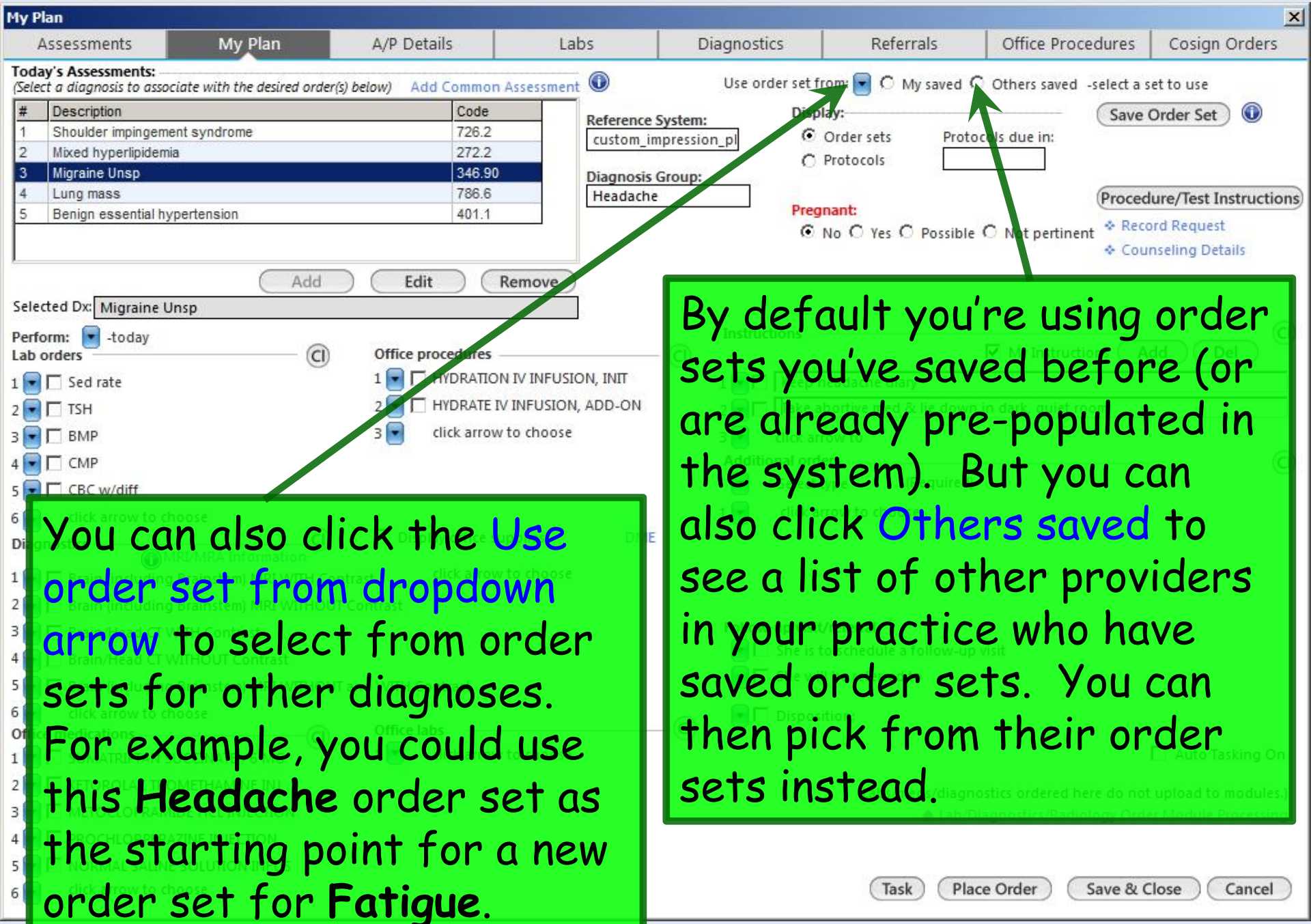
Let's say our order set is complete. To save it, click Save Order Set. (You won't be prompted for a name or any further information.)


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
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.
Add
Edit
Remove
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
Instructions
My Instructions
Add
Del
1 Keep headache diary
2 Take abortive med & lie down in dark, quiet room
3 click arrow to
Additional orders
Select type (Required)
1 click arrow to choose
Diagnostics
MRI/MRA Information
Display office supplies
DME
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
Follow-up visit/referral
She is to schedule a follow-up visit
She will be referred to
Disposition:
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
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



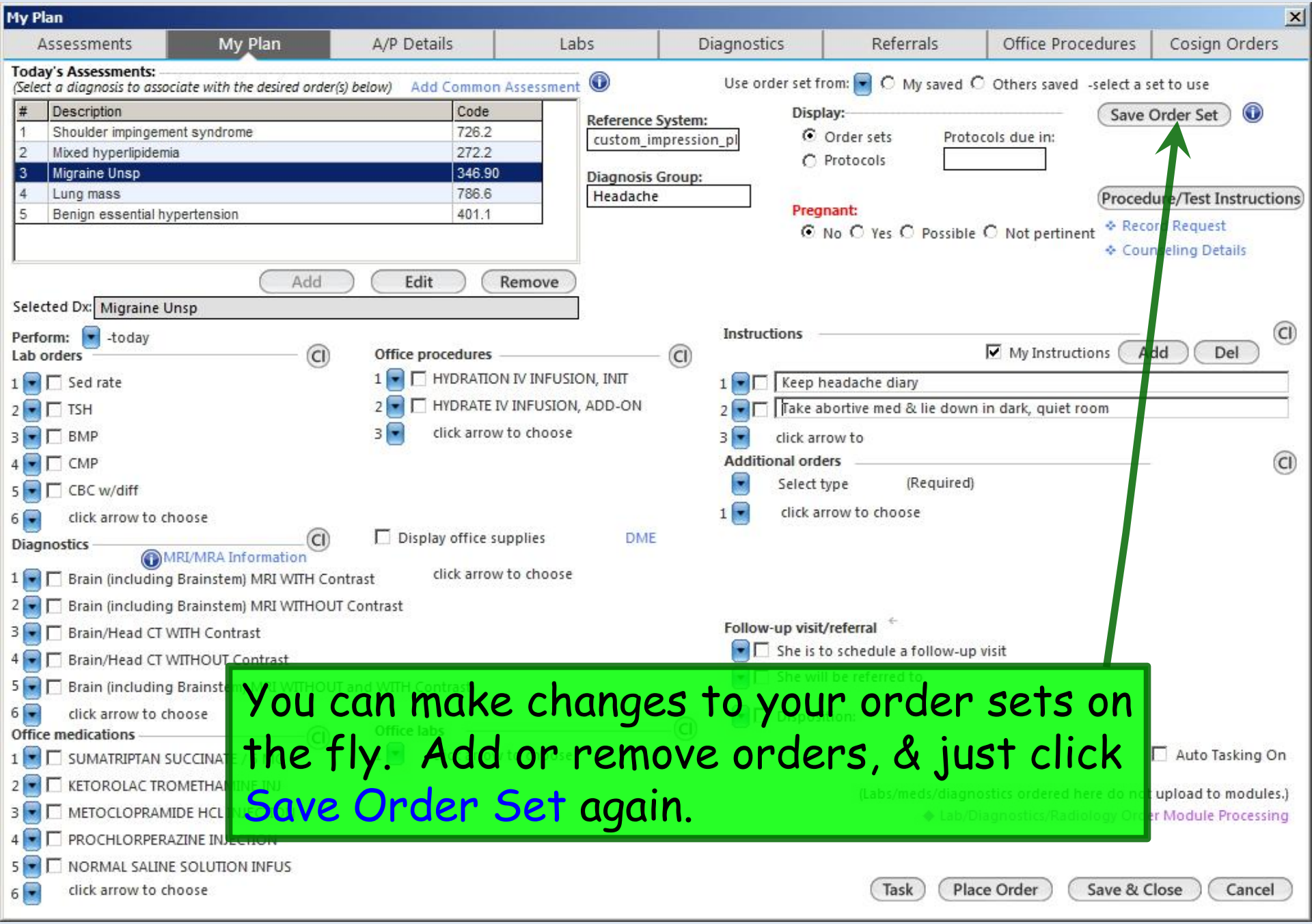
To use your order set, click the checkboxes for the desired orders for that patient & then click Place Order.

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.



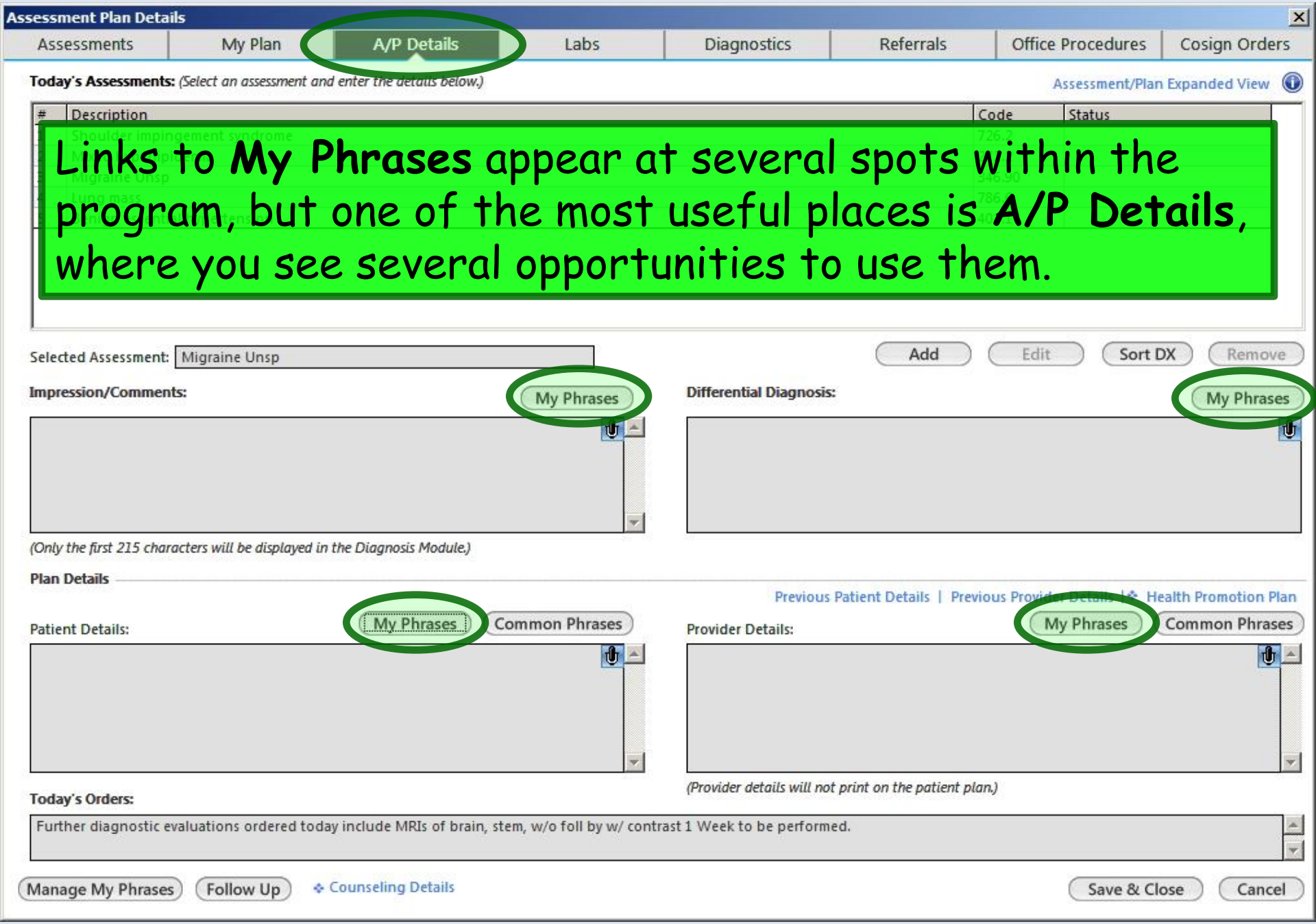
You can also click the Use order set from dropdown arrow to select from order sets for other diagnoses. For example, you could use this **Headache** order set as the starting point for a new order set for **Fatigue**.

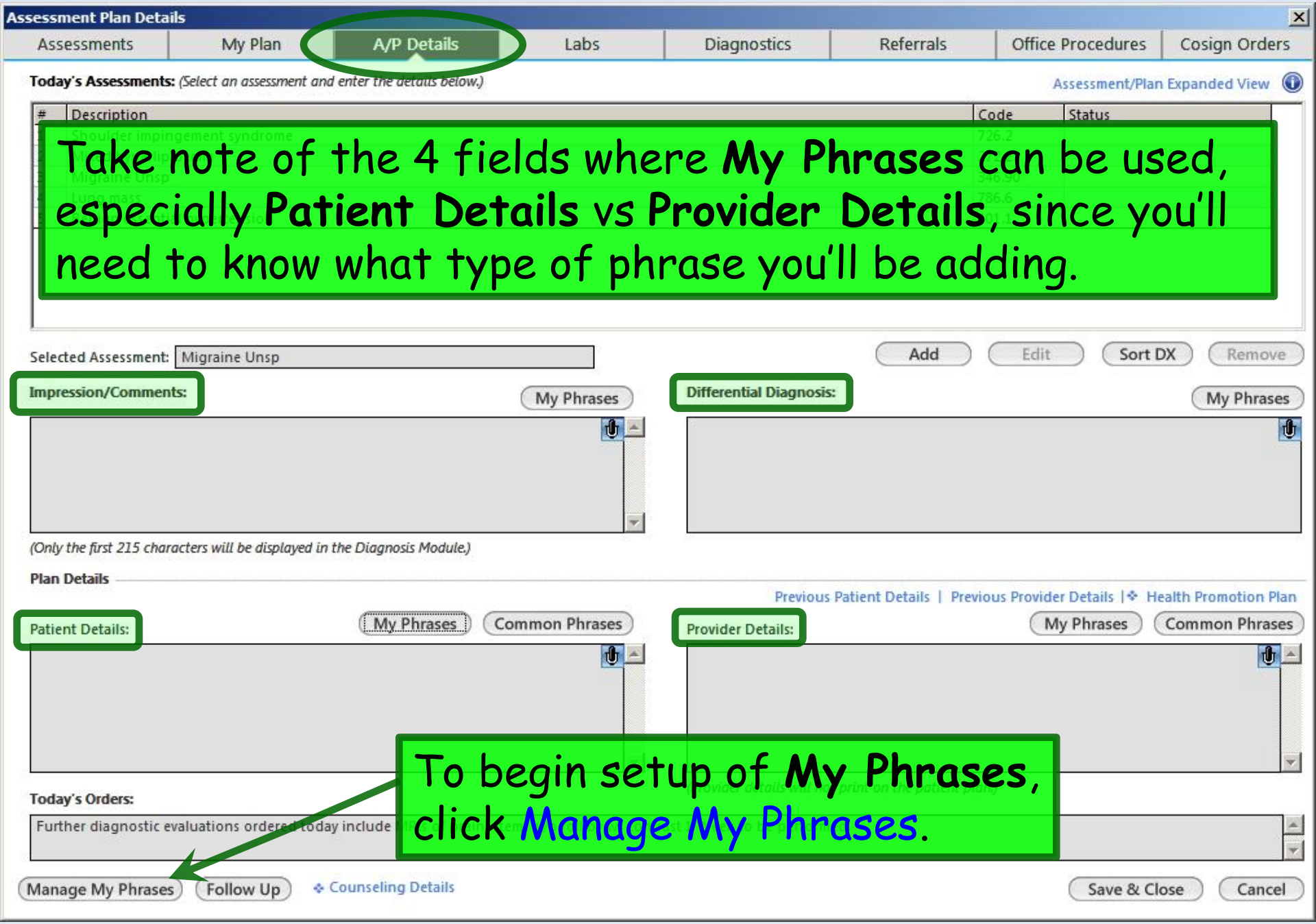
By default you're using order sets you've saved before (or are already pre-populated in the system). But you can also click Others saved to see a list of other providers in your practice who have saved order sets. You can then pick from their order sets instead.


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
Add
Edit
Remove
Selected Dx: Migraine Unsp
Use order set from: My saved Others saved -select a set to use
Save Order Set
Reference System:
custom_impression_pl
Diagnosis Group:
Headache
Display:
Order sets
Protocols
Protocols due in:
Pregnant:
No Yes Possible Not pertinent
Procedure/Test Instructions
Record Request
Counseling Details
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
Instructions
My Instructions
Add
Del
1 Keep headache diary
2 Take abortive med & lie down in dark, quiet room
3 click arrow to
Additional orders
Select type (Required)
1 click arrow to choose
Diagnostics
MRI/MRA Information
Display office supplies
DME
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 INJ
4 PROCHLORPERAZINE INJECTION
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
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
You can make changes to your order sets on the fly. Add or remove orders, & just click Save Order Set again.

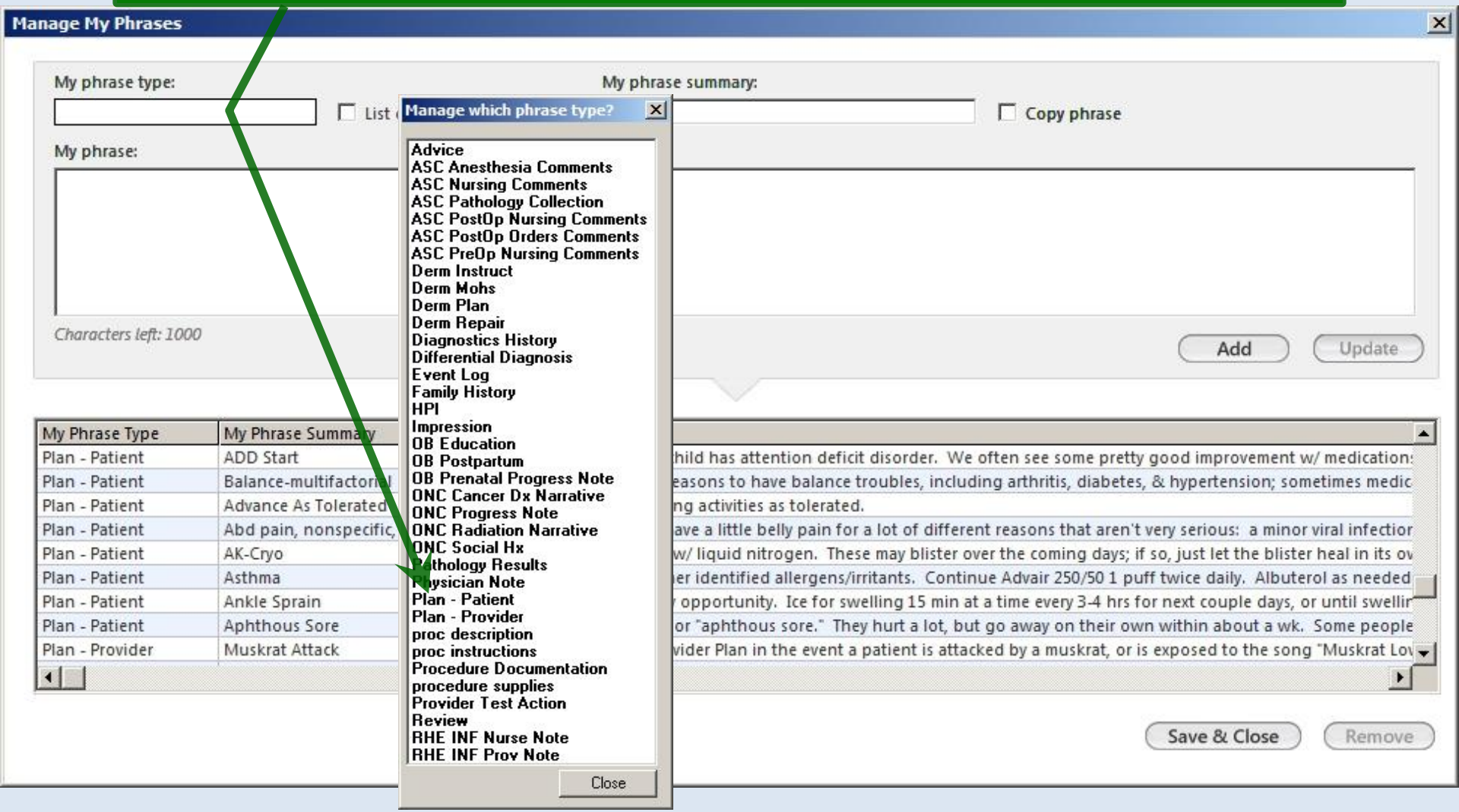
My Phrases

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

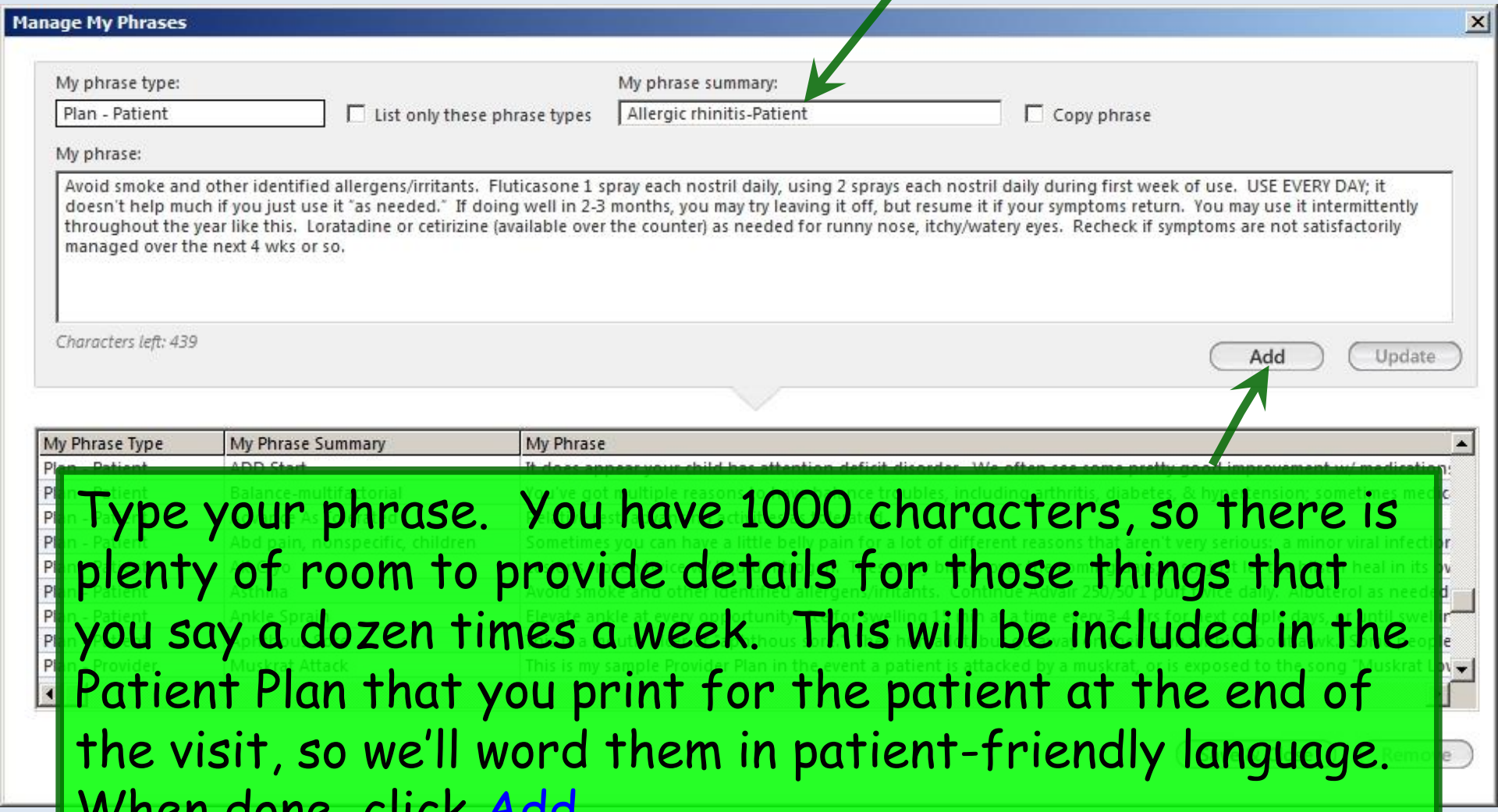

Assessment Plan Details
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments: (Select an assessment and enter the details below.)
Assessment/Plan Expanded View
Description Code Status
Links to My Phrases appear at several spots within the program, but one of the most useful places is A/P Details, where you see several opportunities to use them.
Selected Assessment: 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
(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.
Manage My Phrases
Follow Up
Counseling Details
Save & Close
Cancel


Assessment Plan Details
Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Cosign Orders
Today's Assessments: (Select an assessment and enter the details below.)
Assessment/Plan Expanded View
Description Code Status
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
To begin setup of My Phrases, click Manage My Phrases.
Today's Orders:
Further diagnostic evaluations ordered today include
Manage My Phrases
Follow Up
Counseling Details
Save & Close
Cancel

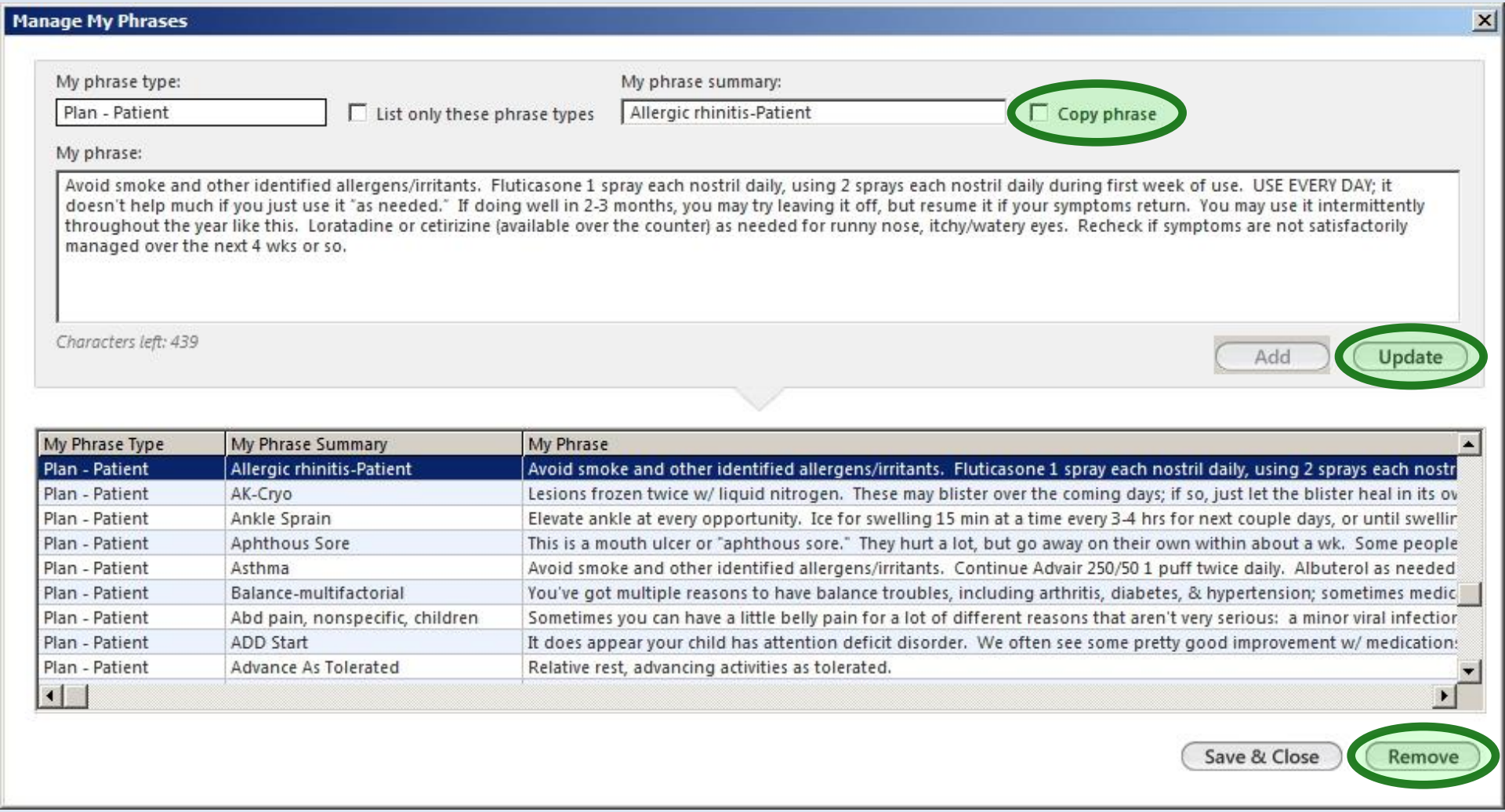
Let's add a phrase for the **Patient Details** field, for instructions we commonly give allergic rhinitis patients. Click in the My Phrase type box.
In the ensuing popup, select Plan-Patient.



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



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.



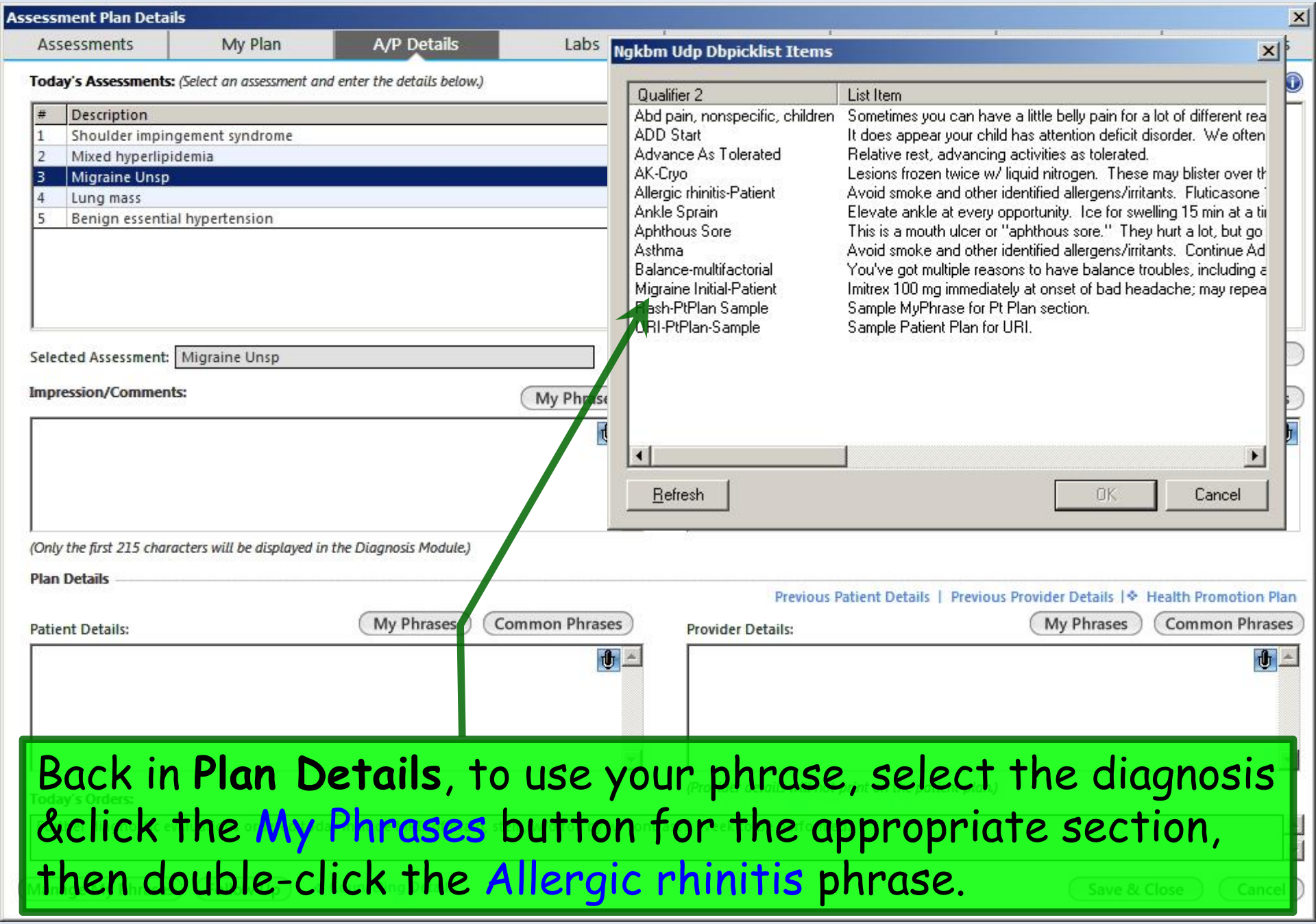
You can update your phrase, or you can delete it.
You can also copy an existing phrase, modify it, & save it with a new name or different My Phrase Type.

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!

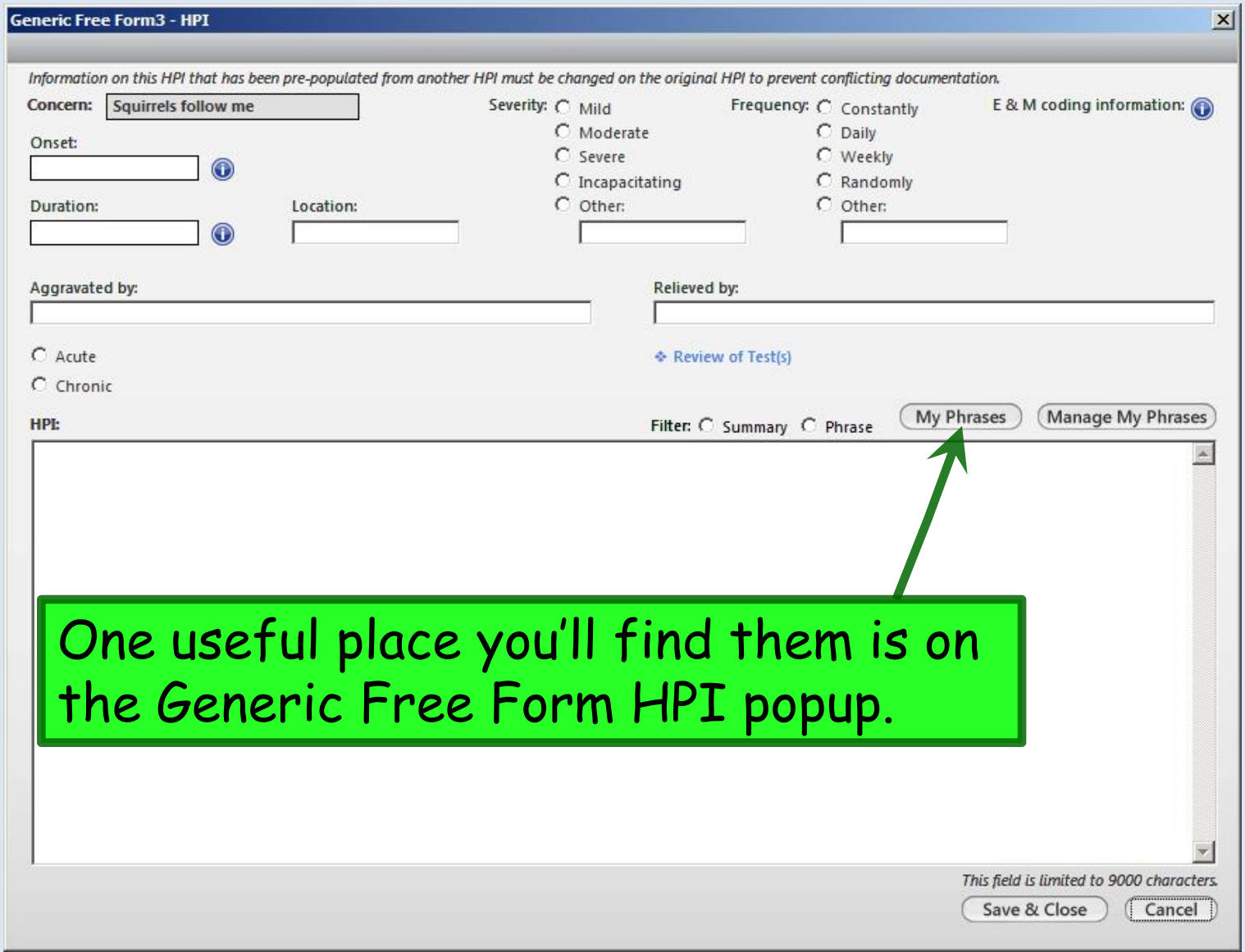
If you keep telling yourself you'll find some time to sit down & create your perfect list of My Phrases, you'll never do it, & you'll never cover everything you'll need them for.

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.

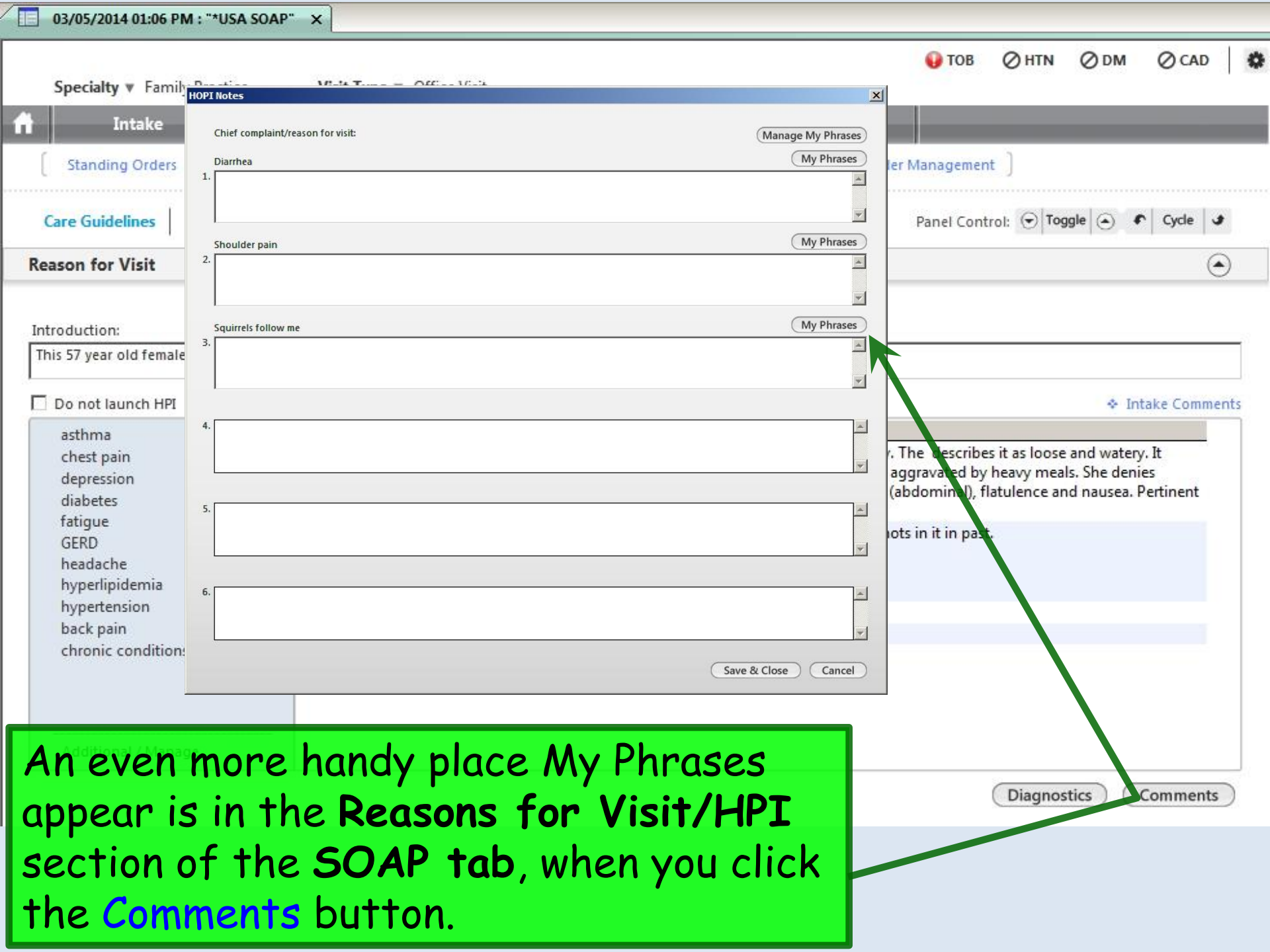


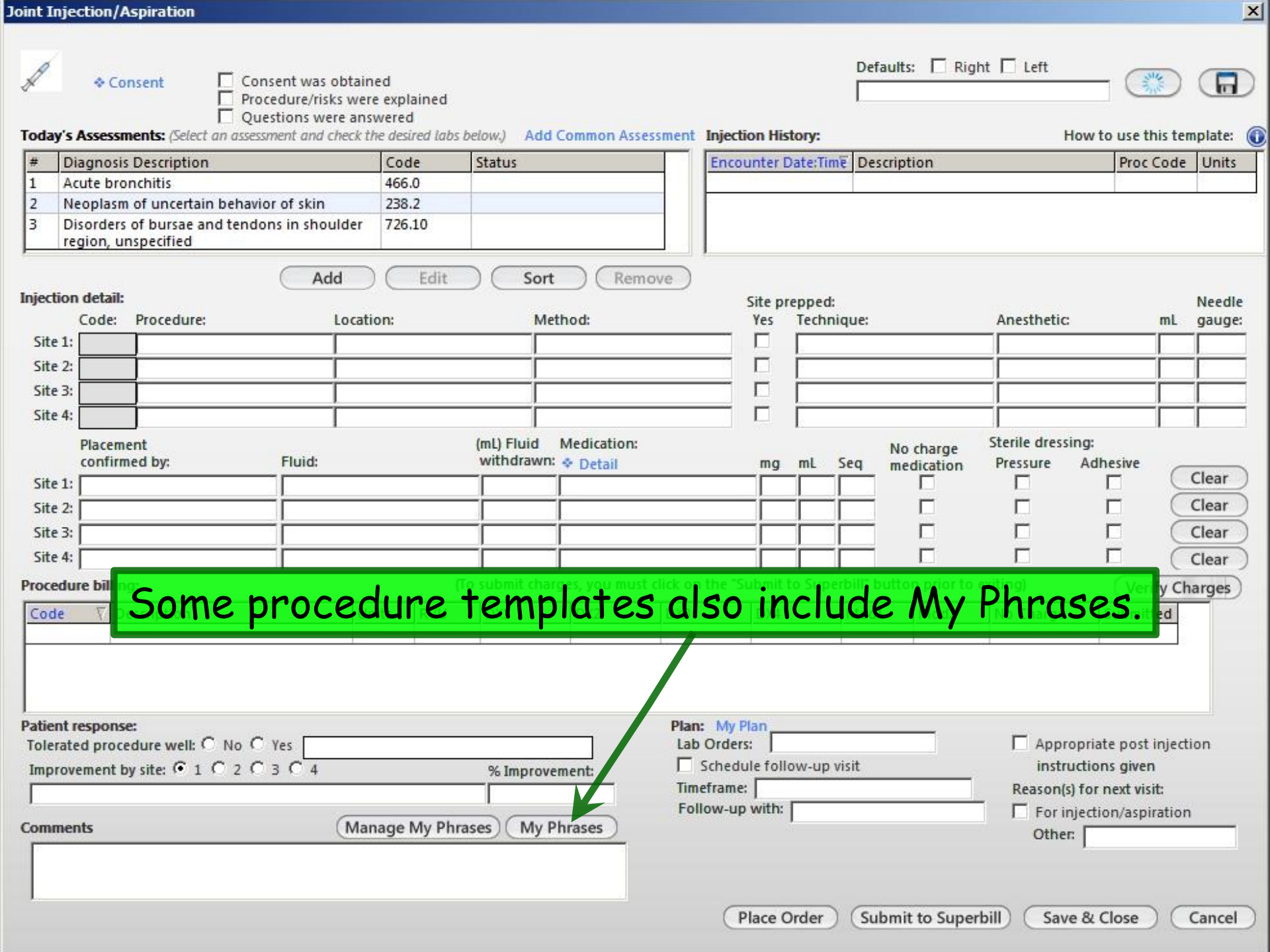
Back in **Plan Details**, to use your phrase, select the diagnosis &click the My Phrases button for the appropriate section, then double-click the Allergic rhinitis phrase.

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.



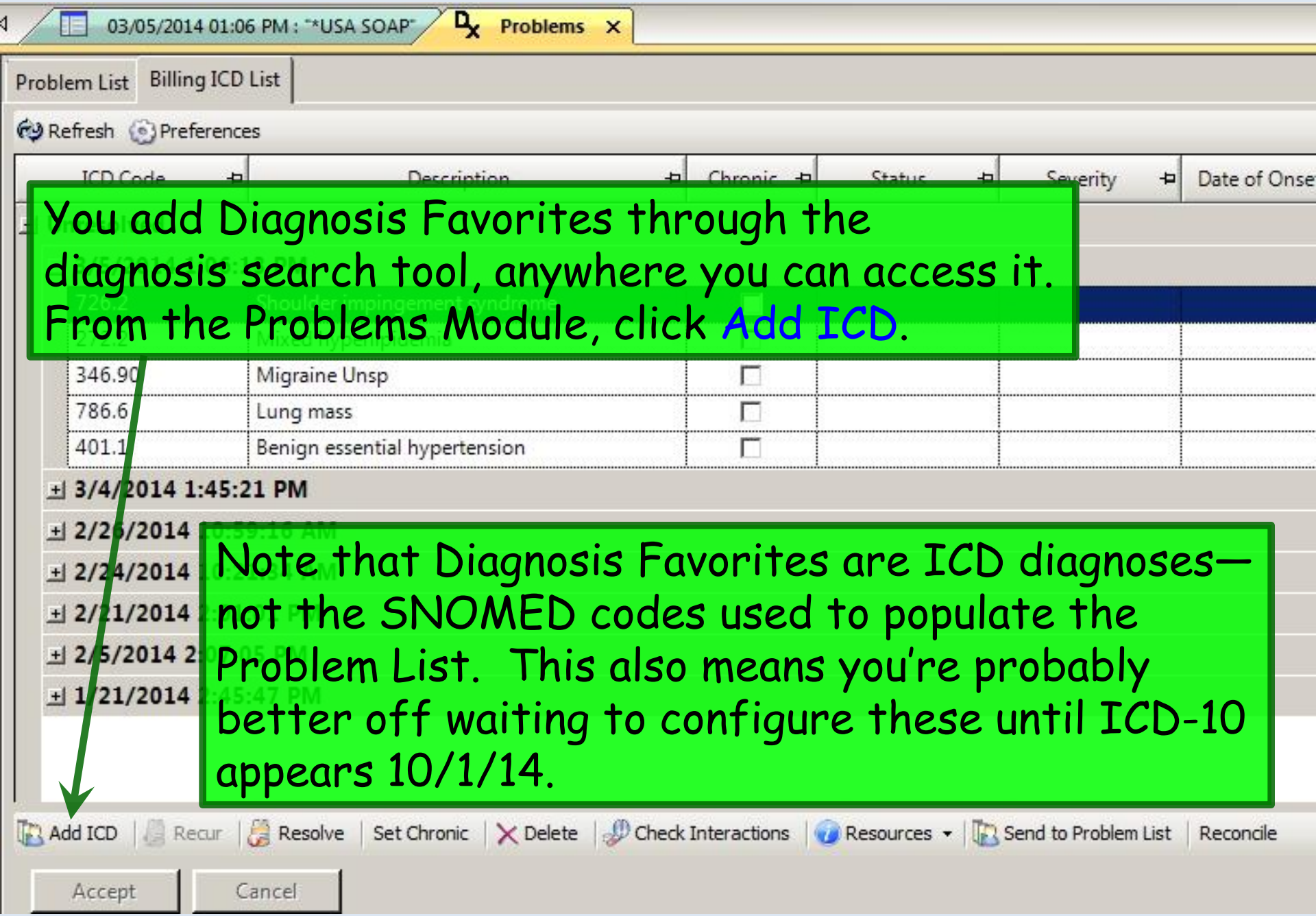
One useful place you'll find them is on the Generic Free Form HPI popup.


03/05/2014 01:06 PM : "*USA SOAP"
TOB
HTN
DM
CAD
Specialty
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 conditions
Panel Control:
Toggle
Cycle
Intake Comments
Diagnostics
Comments
HOPI 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
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.

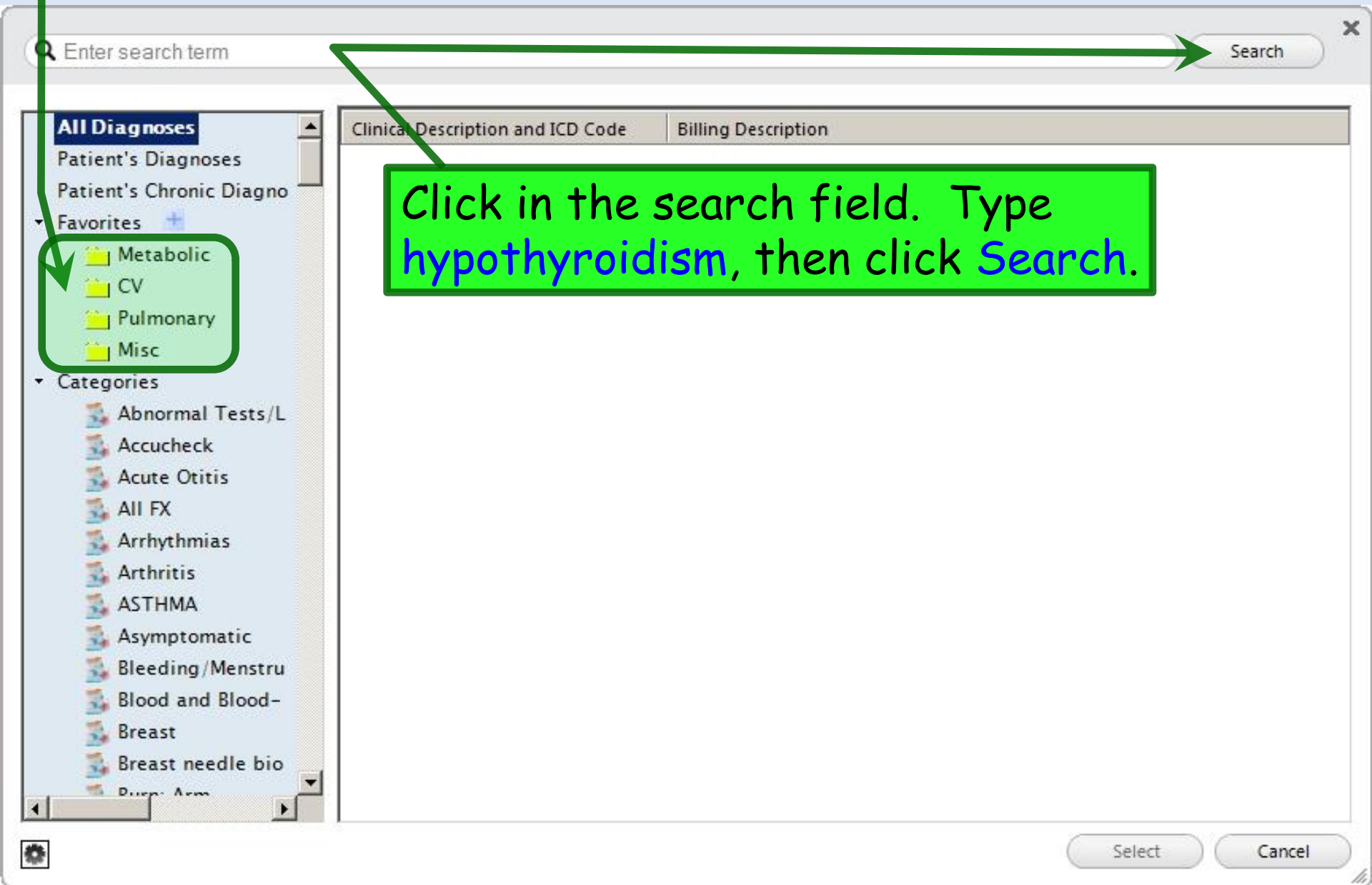

Joint Injection/Aspiration
Consent
Consent was obtained
Procedure/risks were explained
Questions were answered
Defaults: Right Left
Today's Assessments: (Select an assessment and check the desired labs below.) Add Common Assessment
Injection History:
How to use this template:
Diagnosis Description Code 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 prepped: Yes Technique: Anesthetic: mL Needle gauge:
Site 1:
Site 2:
Site 3:
Site 4:
Placement confirmed by: Fluid: (mL) Fluid withdrawn: Medication: Detail mg mL Seq
No charge medication
Sterile dressing: Pressure Adhesive
Clear
Clear
Clear
Clear
Procedure bil
Verify Charges
Code
Some procedure templates also include My Phrases.
Patient response:
Tolerated procedure well: No Yes
Improvement by site: 1 2 3 4
% Improvement:
Comments
Manage My Phrases
My Phrases
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:
Place Order
Submit to Superbill
Save & Close
Cancel

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.

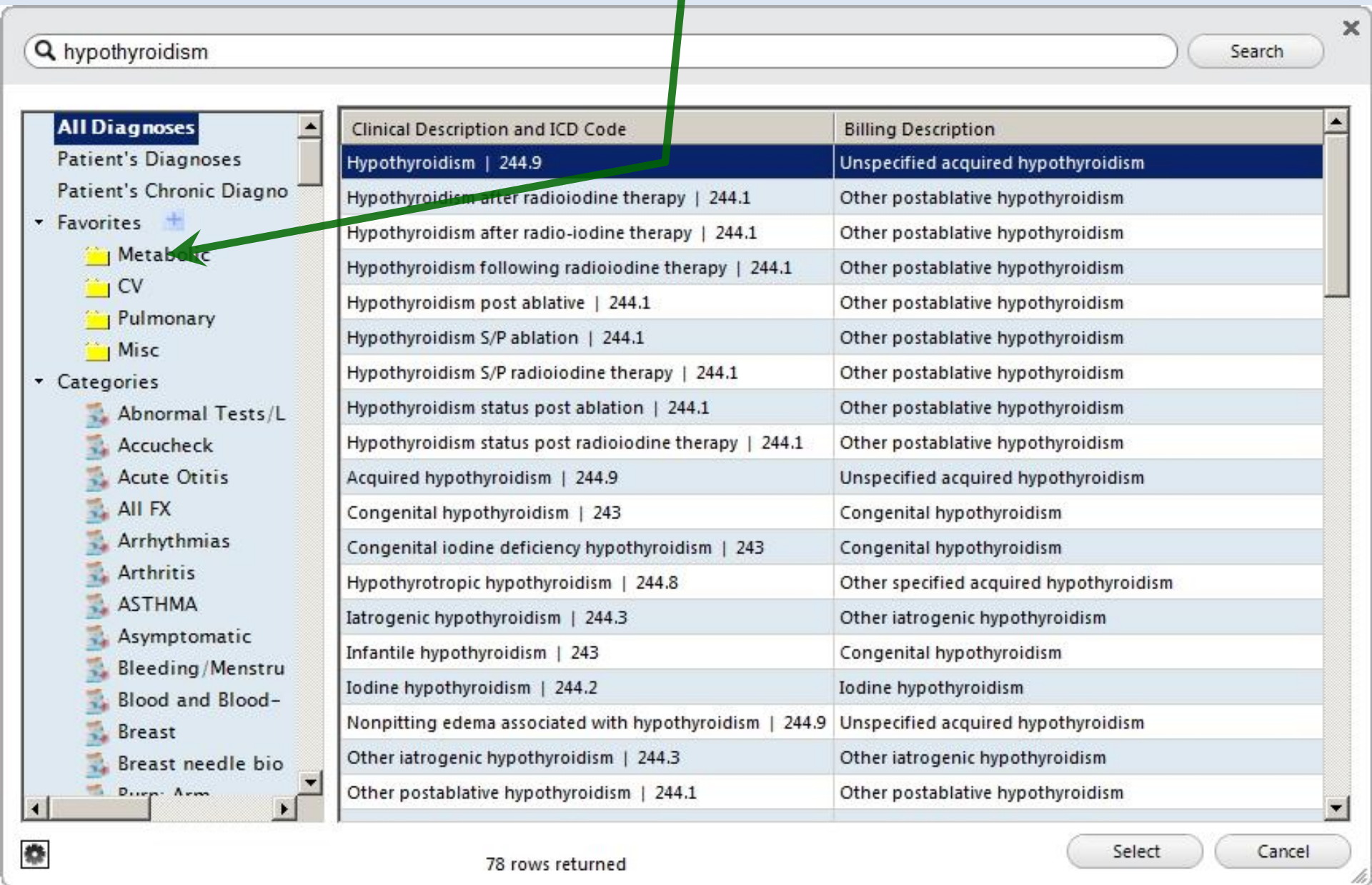

03/05/2014 01:06 PM : *USA SOAP
Problems
Problem List
Billing ICD List
Refresh
Preferences
ICD Code
Description
Chronic
Status
Severity
Date of Onse
346.90
Migraine Unsp
786.6
Lung mass
401.1
Benign essential hypertension
3/4/2014 1:45:21 PM
2/26/2014
2/24/2014
2/21/2014
2/5/2014
1/21/2014
You add Diagnosis 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.
Add ICD
Recur
Resolve
Set Chronic
Delete
Check Interactions
Resources
Send to Problem List
Reconcile
Accept
Cancel

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

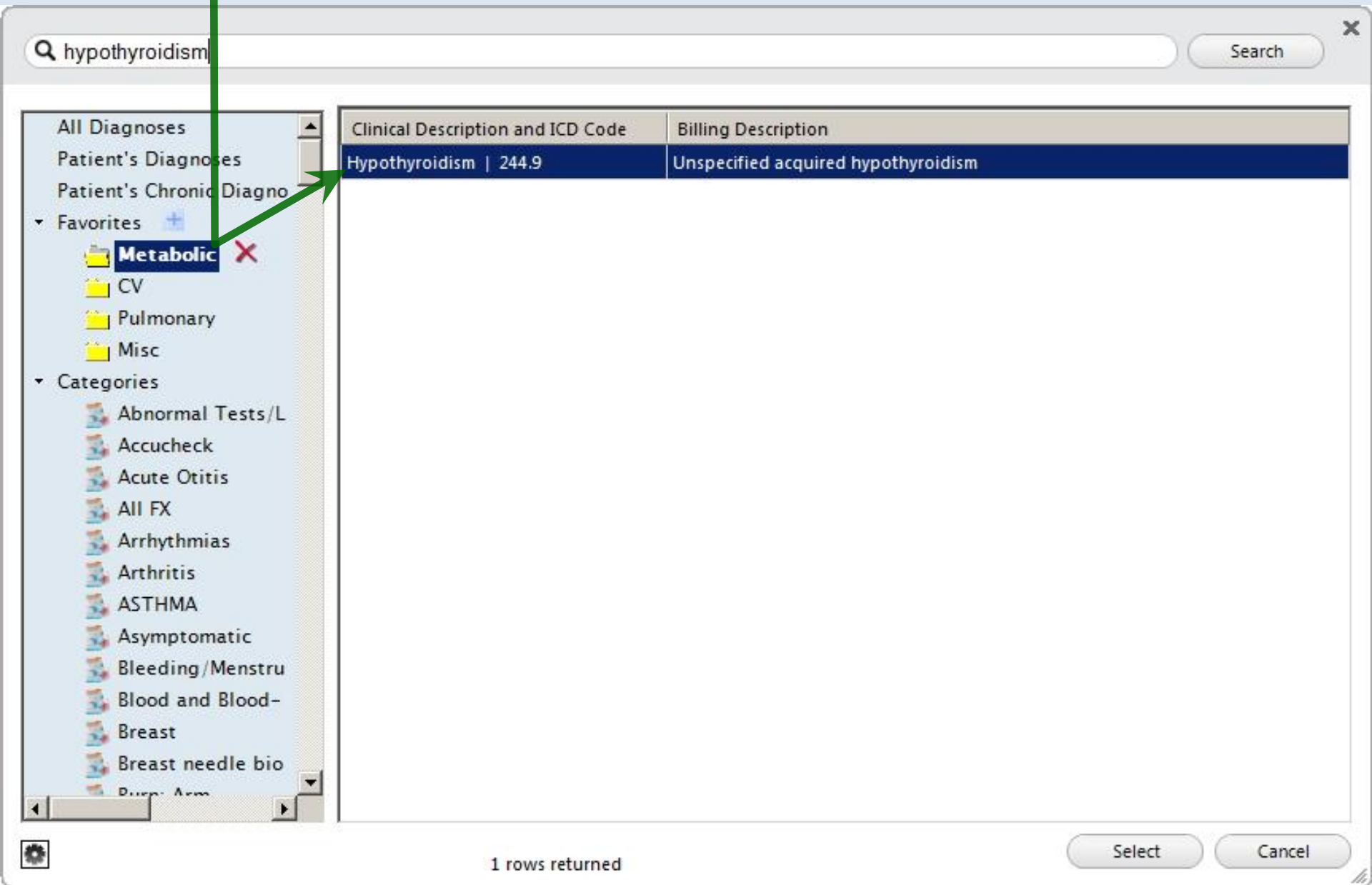


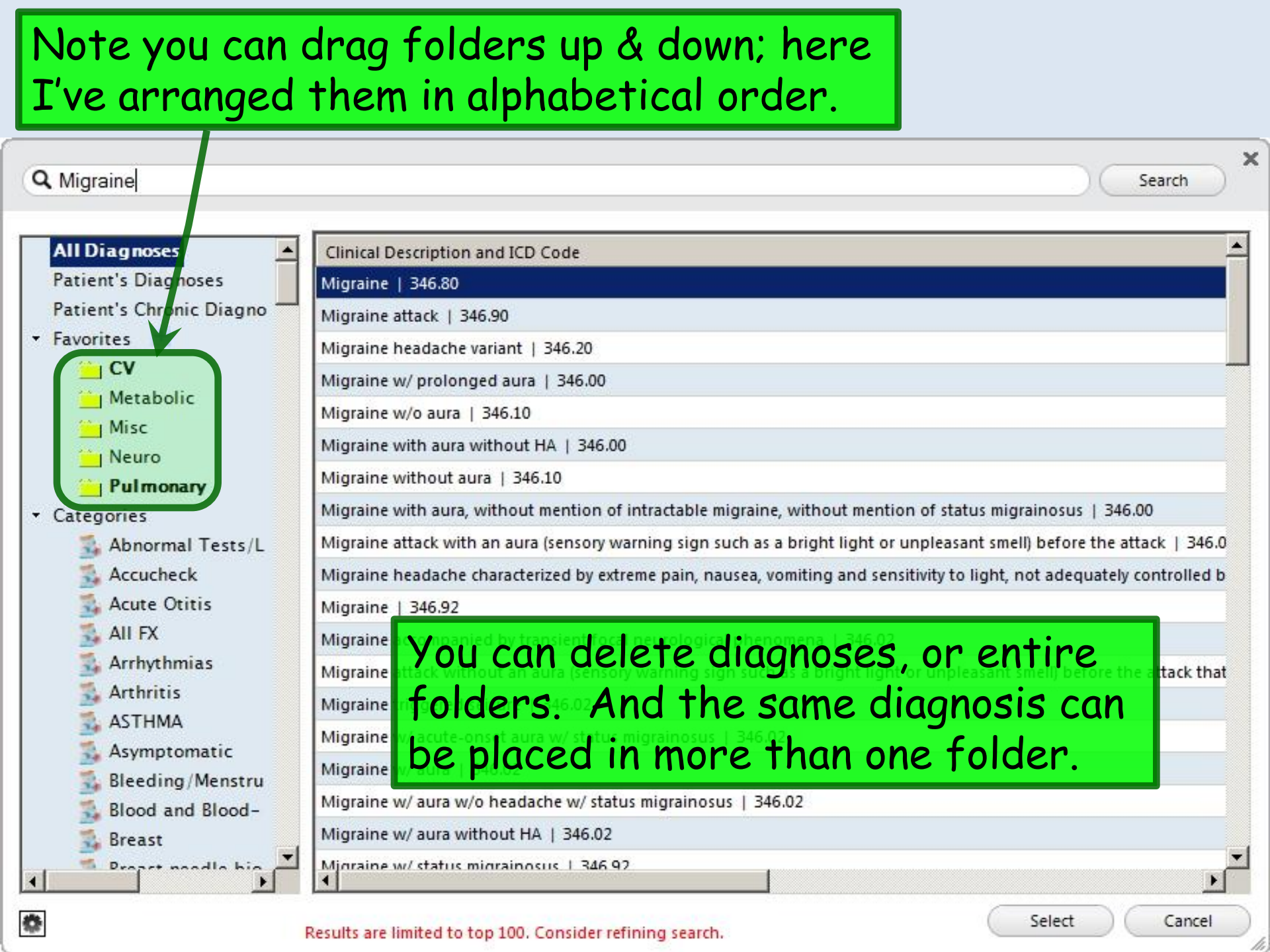
Click in the search field. Type hypothyroidism, then click Search.

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

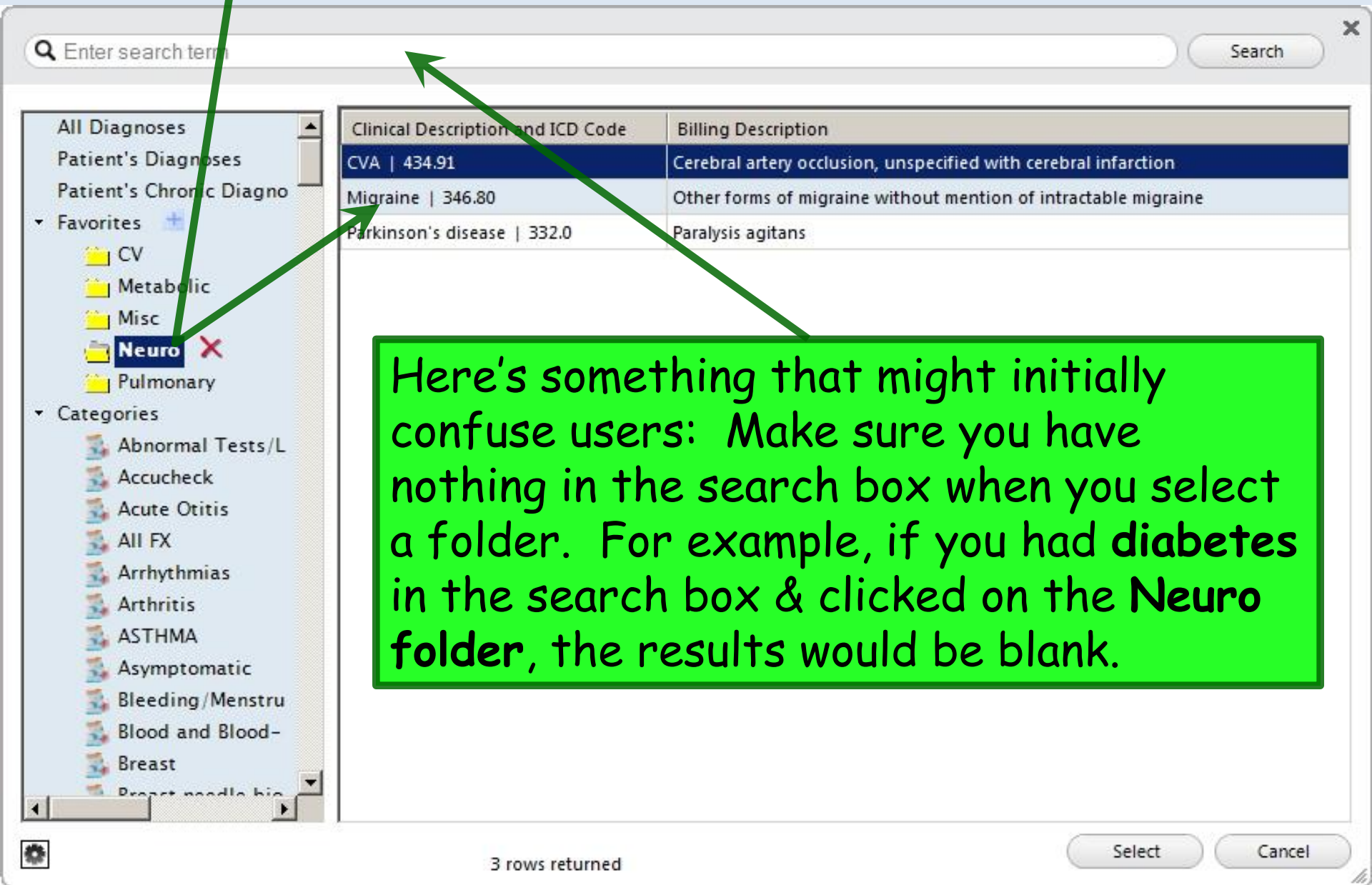


Now when you click on the Metabolic folder, you see the Hypothyroidism diagnosis.

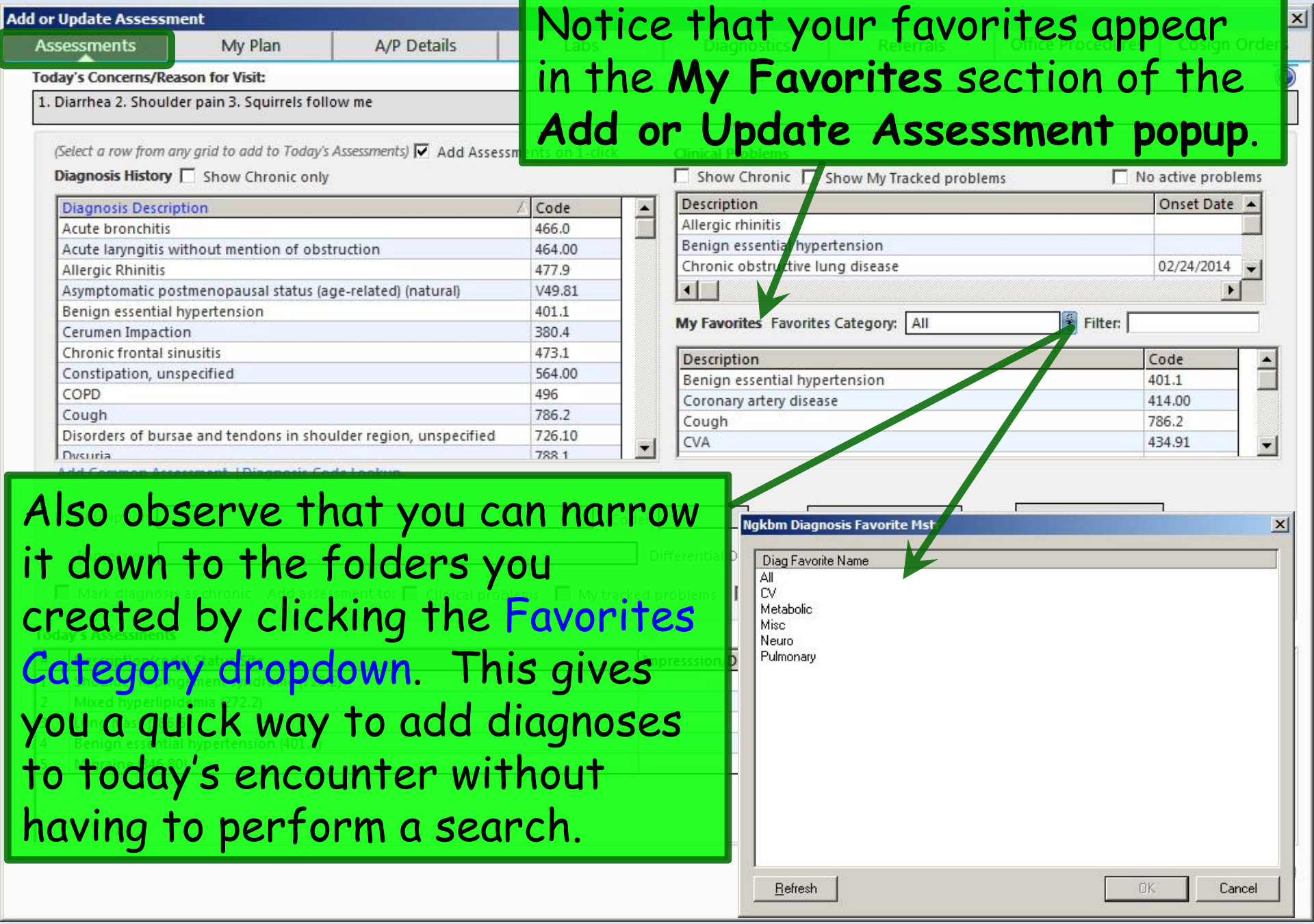



Note you can drag folders up & down; here I've arranged them in alphabetical order.
Migraine
Search
All Diagnoses
Patient's Diagnoses
Patient's Chronic Diagno
Favorites
CV
Metabolic
Misc
Neuro
Pulmonary
Categories
Abnormal Tests/L
Accucheck
Acute Otitis
All FX
Arrhythmias
Arthritis
ASTHMA
Asymptomatic
Bleeding/Menstru
Blood and Blood-
Breast
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 b
Migraine | 346.92
You can delete diagnoses, or entire folders. And the same diagnosis can be placed in more than one folder.
Migraine w/ aura w/o headache w/ status migrainosus | 346.02
Migraine w/ aura without HA | 346.02
Results are limited to top 100. Consider refining search.
Select
Cancel

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



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.


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

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