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.
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.
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.

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

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).
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.
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.
These are the stock settings. When done, click **OK** to apply your selections.
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.
Note the Panel Controls at the top.

One Toggle Button lets you expand all panels, as you see here.
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...
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.
Another thing you can do is cycle through the panels, bringing them to the top & expanding them one at a time.

For example, I’ll click Cycle Up...
...and now the **Medical/Surgical/Interim** history section is at the top.

<table>
<thead>
<tr>
<th>Disease/Disorder</th>
<th>Side</th>
<th>Onset Date</th>
<th>Management</th>
<th>Side</th>
<th>Date</th>
<th>Encounter Type</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carpal tunnel syndrome</td>
<td>right</td>
<td>1970</td>
<td>Carpal tunnel release</td>
<td>right</td>
<td>2001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appendicitis</td>
<td></td>
<td></td>
<td>Appendectomy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Social**

**Family**

**Diagnostic Studies**

**Problem List** **3**
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.
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.
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.
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.

Leave the other selections as they are. Click Add, then Save & Close.
When you wish to recall this preset in the future, click the **Open** icon, & select your preset.
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.
Select the preset you wish to change, then click **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.
Remember that each heading will take you to a more detailed ROS for that system. Here we'll click on **Neurological**.
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.
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:
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**.)
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.
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.
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.
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.
C-Reactive Protein drops off the list.

For demonstration purposes, let’s add a TSH. Click the 1st 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.
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.
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.)
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.
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.”
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.
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.
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.
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.
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.)
In the future, on any patient for whom you select a headache diagnosis, your order set will appear automatically.
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.
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.

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**.
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.
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.
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.

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.
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.
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.
Some procedure templates also include My Phrases.
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.
Click in the search field. Type **hypothyroidism**, then click **Search**.

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

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.

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.

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.
This concludes the NextGen User Personalization demonstration.

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

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