Introduction

This guide provides step-by-step instructions on how to send and receive referrals and summary of care records through NextGen Share.

Structured Clinical Messaging For Transitions of Care

With the capabilities of NextGen Share, providers can easily share clinical data with other providers during referrals and transitions of care through a secure electronic messaging system. Just as the medical industry transitioned away from faxing prescriptions to e-Prescribing, it is now shifting from faxing referrals and summary of care records towards electronically transmitting them through Direct messaging.

Nationwide Direct Messaging Network

Not only does NextGen Share increase the ease and efficiency of sending referrals and summary of care records, but it also expands a provider’s network of medical colleagues. As a certified and accredited vendor, our NextGen Share module establishes a secure connection between all providers who have an accredited Direct messaging system, regardless of EHR brand. NextGen Share users have access to a Provider Directory (similar to an address book), which allows them to search, discover and connect to all external providers, organizations and specialists who have a Direct address (similar to email) in the NextGen Share network. NextGen providers can electronically send structured data to non-NextGen providers, so long as they are using a certified and accredited Direct messaging module.

Integrated Workflow: Referrals and Transitions of Care

NextGen Share’s integration into the referral workflow streamlines the process of referring a patient to another provider. This Direct messaging module can also be utilized when transitioning a patient back to a primary care provider (PCP) or when updating a PCP on the latest information about your mutual patient. From within the Referrals template in the Orders module, there are four easy steps:

1. Search and select the recipient from the Provider Directory
2. Compose referral by filling out necessary fields in Referrals template
3. Attach up to eight supporting clinical documents (patient images, lab results, etc.)
4. Click “Share” to send

Once the “Share” button is selected, the system automatically does the following:

- Generates referral package, which includes:
  1. “C-CDA” (nationally standardized file type) with patient’s relevant clinical and historical data
  2. Cover letter that names the sending provider, receiving provider, key issues, notes and attachments
  3. PDF version of all attached clinical documents
- Electronically transmits referral package through the Direct network into recipient’s EHR
- Counts positively in the numerator for MU2 Core Objective 15: Summary of Care
NextGen Share Network

Using the NextGen Share Provider Directory, providers can search, discover and connect to external providers and practices who use Direct messaging. However, there is a difference between who is immediately searchable in this Provider Directory versus who is ultimately reachable through Direct messaging.

**Searchable**
The out-of-the-box NextGen Share Provider Directory contains all providers and organizations who are in the immediate NextGen Share network. These are providers who:

- Use NextGen Share
- Use a Direct messaging system with whom NextGen has “Directory Sharing Agreement”
  - *NextGen currently shares Direct messaging directories with Allscripts, MedAllies, and others. NextGen continues to form Directory Sharing Agreements with more partners, and thus the number of providers in the immediate NextGen Share network who are initially searchable in your Provider Directory keeps growing.*

**Reachable**
While the out-of-the-box NextGen Share Provider Directory only contains providers in the immediate NextGen Share network, you can send a Direct message to any provider or practice who uses a Direct Trust accredited Direct messaging system.

TSI Healthcare can add any external provider who uses an accredited Direct messaging system to your Provider Directory. Thereafter, you will be able to search and discover their Direct address in your Provider Directory and exchange clinical information with them via Direct messaging.

⚠️ **TSI Tip: Adding External Providers to Provider Directory**
If you would like TSI Healthcare to add a provider who is outside of the NextGen Share network to your directory, please open the following ticket with the TSI Helpdesk. Be sure to list each provider’s name, Direct address, and practice name:

*Please add the following provider(s) to our NextGen Share Direct messaging Provider Directory:*
  - Provider Name, Practice Name, Direct Messaging Address
  - Provider #2 Name, Practice Name, Direct Messaging Address

**Please note: It may take up to 5 business days for the requested provider(s) to be verified by NextGen and appear in your directory.**
Sending Referrals & Summary of Care Records

The process of sending a referral or summary of care record to another provider via Direct messaging is very similar to the existing referral order workflow. You are able to identify the recipient, create the referral, attach documents and send the referral order all directly from the Referrals Order template.

Access the Referrals Order Template
The Referrals Order template can be accessed from several locations in NextGen.

Intake Template

Option 1: My Plan
1. Click on the My Plan active text.
2. Select the Referrals tab from the top menu.
3. The Referrals Order template appears.

Option 2: Orders Section
1. Navigate to the Orders section.
2. In the left-hand column, select Referrals.
3. Click Add. The Referrals Order template appears.

SOAP/Provider/Dictation Template

Assessment/Plan Section
1. Navigate to the Assessment/Plan section.
2. In the left-hand column, select Referrals. The Referrals Order template appears.

Checkout Template

Today’s Orders Section
1. In the left-hand column, select Referrals.
2. Click Add. The Referrals Order template appears.
Search and Select Recipient from Provider Directory

The first step in sending a Direct message is to search the Provider Directory to locate your intended recipient. This directory is accessed directly from the Referrals Order template. You can search providers by location, name, organization or specialty. Once you find and select the desired recipient from the Directory search results, that provider’s information populates the Referrals Order template. The order is then ready to be completed and transmitted electronically.

Each time you search your directory and select a provider, that provider’s information is saved in a local EHR directory. Thus, if you wish to search for a provider whom you have selected in a previous search, you have the option of searching just your local directory rather than the entire Direct messaging directory. Searching only the local directory produces a shorter list of results that may make it easier to locate the desired specialist.

To search for a provider:

1. Click on the orange NextGen Share button to launch the Provider Directory.

2. If you wish to search the local directory, check the My EHR check box.

   TSI TIP: Search just the local directory if you are searching for a provider whom you have previously discovered for a quicker, easier search.

   If you wish to search the entire NextGen Share network, check the Share checkbox.

3. You can search this directory by provider name, organization, specialty or location. Enter the desired criteria into the appropriate field. Select Search.

4. All matching results will populate in the screen on the right. Each page only displays four results at a time, so you must scroll through the pages by selecting Next or Previous until you locate your desired recipient.

   TSI TIP: If you cannot find a provider in the Provider Directory, please confirm that they use Direct messaging. If so, TSI Healthcare can add their Direct address to your directory. Please open a ticket with helpdesk@tsihealthcare.com that lists the provider name, practice name, Direct address and EHR system for each provider you wish to add. It may take up to 3 business days for them to appear in your directory.

5. Select the intended recipient’s name from the results. The Provider Search pop-up closes. The selected provider’s information will populate the appropriate fields on the Referrals Order template.
Compose Referral

Once you have selected the recipient provider from the Provider Directory, you are ready to compose the referral by completing the fields on the Referrals Order template. At a minimum, your staff must complete the **Diagnosis** field.

1. In the **Diagnosis** section, select a blank **Description** field. Choose a diagnosis from the list. The **Descriptions** and **Code** fields are populated with selected information.
2. The remaining fields are optional and are to be completed as necessary by your practice.

Add Attachments

NextGen Share will transmit up to eight attachments with your referral. These attachments are converted into PDFs.

1. Select the **Details** button above the **Attachments** grid.
2. Click a blank **Attachment** field in the Referral Attachments pop-up.
3. Select the document that you wish to attach. Click **OK**.

   *NOTE: The list of attachment options comes from documents saved to this patient’s encounters*

4. To add additional attachments, repeat steps 1-3. When you are finished, Click **Save and Close**.
Send Referral

Once you select the recipient from the Provider Directory, add necessary attachments, complete the referral order form and add it to the **Referrals ordered this encounter** grid, you can send the referral to your recipient via Direct messaging.

To send the referral:

1. Next to **Referrals ordered this encounter**, click the **Add** button.

2. If you want another staff member to send the referral, select their name on the Task Recipient pop-up. If you want to send the referral now, click **OK** and then **Yes** to confirm.

3. The referral will be added to the **Referrals ordered this encounter** grid. The referral is now ready to be transmitted via the Direct messaging network.

4. Highlight the referral that you want to transmit in the **Referrals ordered this encounter** grid. If the recipient was selected from the NextGen Share Provider Directory, the **Share** button is enabled.

5. Select **Share**. In the background, the system automatically:
   - Creates a cover letter that names the sending provider, receiving provider, key issues and attachments
   - Generates a Continuity of Care document (CCD) that contains patient’s relevant clinical & historical data
   - Converts all attachments into PDFs
   - Electronically transmits the referral messages an all attachments into the recipients EHR.
   - Counts this referral/transition in the numerator for MU2 Core 15: Measure 1 & Measure 2
To check status of sent referral:
Once you send a referral through NextGen Share, the system adds information about the transmittal in the **Comments** field of the **Referrals ordered this encounter** grid. It may take several minutes for this information to appear. The status information includes a note that the referral was sent, time and date stamp, any error notifications, and a message that indicates when the referral is received by the recipient provider’s system.
The system also places an entry—**Transition of Care- Referral (Sent)**—for the referral in the **Categories** tab of the **Patient History** panel. This folder includes all documents sent with the referral.

If NextGen Share experiences an error, the system:
- Adds a note to the **Orders Comments** field to indicate the transmission failed
- Un-checks the CCD sent field in the Referrals Order template
- Posts a message to the sending provider’s Inbox to notify the provider of failure
Message Routing
Incoming referrals through NextGen Share are routed to two primary locations in NextGen. The message’s end location is determined by whether or not the demographics on the referral document match with any patient in your NextGen EHR.

Location 1: Provider’s EHR Inbox
If the demographics on the incoming referral match exactly with an existing patient in your EHR, the message will go directly into the EHR. All documents will attach itself to the patient’s record and the receiving provider will receive a task notification in the EHR Inbox.

Location 2: Rosetta Holding Tank
If the demographics on the incoming referral do not match exactly with an existing patient in your NextGen EHR, the referral and attachments will be routed to the Rosetta Holding Tank. Most of the time this will occur for new patients, though referrals for established patients may occasionally be routed to the Rosetta Holding Tank as well. This occurs in cases where there is any discrepancy in the patient demographics on the referral vs. in your EHR.

The staff member in charge of new patient coordination should be responsible for managing the Rosetta Holding Tank and should follow the processes already in place (Ex: confirm with provider he will accept this new patient).

To send referral message out of Rosetta Holding Tank into the provider’s Inbox:

1. Login to Rosetta Holding Tank from NextGen launch screen. Highlight the Direct message referral you wish to send to the provider’s EHR Inbox. (Note: TypeMessage will be “HIEDocument”)

2. First confirm if this referral is for a new or an established patient whose demographics did not match properly. Click Match demographics. Search patient’s name in Patient Lookup screen. If this search is unsuccessful, search by DOB to ensure patient does not already exist in EHR.
   a) If match is successful → referral is for an established patient who already exists in NextGen
      i. Select the patient and click Commit to send referral to recipient provider’s EHR Inbox.
      ii. Call patient to schedule appointment
      iii. View referral CCD and import data into patient’s chart (see next section)
   b) If match is unsuccessful → referral is for a new patient and must be created in NextGen. Follow the remaining instructions.
NOTE: TSI Healthcare recommends that your practice export the referral CCD out of the Rosetta Holding Tank into the patient’s chart in EHR before the patient’s appointment. This way, your providers and staff can reconcile the clinical data listed on the CCD with the patient during their encounter.

3. Open CCD. Contact patient using phone number provided on CCD to schedule their appointment.
   ① TSI Tip: Calling a patient while the message is still in Rosetta Holding Tank will help your practice avoid creating ghost patients. You are able to confirm the patient wants to actually schedule an appointment before you create them as a patient and open their chart in NextGen.

4. If patient wishes to schedule an appointment:
   a) Create a patient in NextGen Practice Management using demographics on CCD
   b) Create a new chart for the patient in NextGen EHR using demographics on CCD

5. Within the Rosetta Holding Tank, click Match demographics and search for the newly created patient.

6. Highlight patient and select Commit.

7. The referral message will be sent out of the Rosetta Holding Tank and matched to the patient’s record in the EHR. The recipient provider will receive a task notification in their Inbox.

8. Import referral CCD data into patient’s chart (see Clinical Reconciliation section)

Routing Rules
You can configure a set of routing rules for your incoming Direct messages to assist with your practice’s referral coordination workflow. These rules will apply both to incoming referrals that are automatically sent to the provider’s EHR Inbox, and to those that are manually sent out of the Rosetta Holding Tank to the provider’s Inbox.

Order Result Notifications
- Assign certain staff members to be notified of the receipt of incoming NextGen Share messages sent to specific providers in their own EHR Inbox
- Staff who are actually responsible for coordinating the referral will receive a task in their Inbox
- Ex: Nurse Nancy is the referral coordinator for Dr. Smith and is assigned to receive his NextGen Share notifications. Whenever Dr. Smith receives an incoming referral through NextGen Share, a task will appear in both Dr. Smith’s and Nurse Nancy’s Inbox. Once Nurse Nancy has completed the task, it will disappear from both Inboxes.
Assigned Provider

- Any user who is linked to a specific provider in the “Assigned Provider” field will receive the incoming NextGen Share tasks in their own EHR Inbox
- Ex: Medical Assistant Meredith’s “Assigned Provider” is Dr. Jones. When Dr. Jones receives a NextGen Share referral, the task will go to his Inbox and MA Meredith’s Inbox.

PAQ

- Incoming NextGen Share referrals can be sent to a provider’s PAQ
- Even when the referral task is compete and disappears from their Inbox, the message will remain in the PAQ for the provider to view and signoff on

**Please open a ticket for the TSI Helpdesk for assistance configuring your practice’s routing rules.

View the Referral CCD and Attachments

Once a Direct message is received in the appropriate Inbox, you are ready to view the referral and attachments.

1. Right-click on the referral task in the Inbox. Select Go to patient’s chart.

2. Click on the Categories panel of the Patient History toolbar. Find Transition of Care - Referral
   - NOTE: If message is sent from non-NextGen system, documents may be found in “HIE Documents” category

3. Open folder to view CCD, attachments and all other contents included in the referral message
Clinical Reconciliation
The CCD you receive for a patient may contain clinical data that is not listed in your patient’s NextGen chart. (Ex: The referring provider prescribed the patient a medication since last time you saw them) Using the Clinical Reconciliation module, you are able to import certain clinical data from the CCD directly into your patient’s chart.

- Medications
- Allergies
- Problems
- Diagnosis Codes
- Procedures

At a minimum, TSI Healthcare suggests that your practice reconcile CCD medications, allergies and problems with the patient during their appointment. These three categories are required to be reconciled in MU3.

Clinical Reconciliation: Who, When & Where to Reconcile CCD Data
Below are three suggested workflows for who should reconcile which parts of the CCD.

The following workflows explain where the designated staff members can access the clinical reconciliation module to reconcile the appropriate data for each of the above scenarios.
Suggested Workflow #1: Clinical staff ➔ medications & allergies
Access the Reconciliation Module via the Medication Reconciliation Pop-Up

1. From the Medications section on Intake/Home Page, click “Reconcile” to open medication reconciliation pop-up

2. Under “Reconciliation Type,” click “E-reconciliation” to launch reconciliation module

Suggested Workflow #2: Provider ➔ medications, allergies & problems
Access the Reconciliation Module via:

Clinical Reconciliation (recommended)

1. Click “View” then “Clinical Reconciliation” in the top menu of EHR to launch the reconciliation module

Medication Reconciliation Pop-Up (alternate)

**See Medication Reconciliation pop-up workflow in “Suggested Workflow #1” section above**
Suggested Workflow #3:
Clinical staff ➔ Medications & Allergies:
Access the Reconciliation Module via the **Medication Reconciliation Pop-Up**

**See Medication Reconciliation pop-up workflow in “Suggested Workflow #1” section above**

Provider ➔ Problems
Access the Reconciliation Module via the **Problems Module**

1. Launch the Problems Module:

2. Once you have launched the Problems Module, click “reconcile” to launch the reconciliation module
Clinical Reconciliation: How to Reconcile & Import CCD Data into your EHR

To import the data from the CCD document included in the referral into the patient’s chart in your EHR:

1. Click View on the main toolbar.
2. Select Clinical Reconciliation. The reconciliation module appears showing the Medications tab.
3. In the Documents panel, select the entry for the C-CDA.

4. Click the Import tab in the top toolbar. Make sure to note which clinical tab is selected (medications, etc.)
   The EHR panel shows the clinical data that is currently in your system for the patient.
   The Import panel shows the clinical data listed on the referral CCD.
   The Reconciliation Summary panel shows what your EHR will contain after you reconcile.

5. In the Import panel, you are able to reconcile the data listed on the CCD with the data in your EHR. The system suggests which items you should import from the CCD into your EHR using the following statuses:
   - **Add** - Item is listed on CCD but not in your EHR. System suggests that you add this item to your patient’s chart, as it does not currently exist.
   - **Ignore** - Item exists on CCD and in your EHR, thus no action is necessary.
   - **Replace** - Replace item in EHR with item listed on CCD.

6. In the EHR Panel, you are able to reconcile the data already listed in your EHR with the patient. This way, if there are certain medications, allergies or problems listed in your EHR that are not on the referral CCD, you can confirm if they are still active with the patient and stop/resolve if necessary.
   - **Keep** – No action taken. This is the default statues for all items in EHR panel. shows the clinical data that is currently in your system for the patient.
   - **Stop** - Stop medication (under Medications tab)
   - **Resolve** - Resolve allergy or problem (under Allergies and Problems tabs)
7. Once you make all necessary status changes, review **Reconciliation Summary** section to confirm what your EHR will list after reconciliation.
8. Click **confirm** to complete the reconciliation.
9. Repeat above steps with other sections of the CCD (Medication Allergies, Problems) as necessary.