

NextGen[®] Practice Management 5.9 Upgrade Training

Appointment and Recall Enhancements

5.9/8.4

Topics to be Reviewed



- › Calendar quick advance functionality
- › Enhanced Recall Plan management in PM/EHR/KBM
- › Task EHR or PM from Recalls
- › Patient Status added to the Patient Recall report
- › Include EHR Follow Ups in appointment window
- › EDI appointment reminder information in the 'Edit Appointment' window

Calendar Quick Advance

- › ‘Change Dates’ calendar offers quick advance options to quickly jump forward 2 weeks, 3 months, or 6 months.

May, 2017						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
Today	+2 wks	+3 mos	+6 mos			

Managing Recalls in PM, EHR, and KBM

- › Expanded PM recall plan functionality to EHR/KBM.
- › Allows ordering clinicians to manage recalls from the patient's clinical record.
- › Allows users to view/print letters from recall window; archive letter functionality.
- › Create PM/EHR tasks from recall window.



Patient Status on Patient Recall Report

- › Patient Status column added the General > Patient Recall report to inform users that certain patients may not need to be contacted.



EHR Follow Ups in Appt Window

- › ‘Follow Ups’ section added to the ‘Recalls/Waitlist’ tab of the ‘Add/Edit Appointment’ window.



EHR Follow Ups in Appt Window

Follow up entered in KBM:

The screenshot shows an EHR interface with a navigation bar at the top containing tabs for Intake, Histories, SOAP, Finalize, and Checkout. Below the navigation bar are links for Demographics, Order Management, Document Library, and Tobacco Cessation. The main content area is titled 'Today's Orders' and features a sidebar on the left with categories like Labs, Diagnostics, Referrals, Office Services, Surgical Procedures, Follow up (1), Medications, and Patient Education. The 'Follow up (1)' category is circled in red. The main table displays a single appointment row, which is also circled in red. The table has columns for Follow up, Reason, Timeframe, Appt Date, and Appt Time.

Follow up	Reason	Timeframe	Appt Date	Appt Time
follow-up visit with Penny Forman Wound check/ dressing change in 1 Week	Wound check/ dressing change	in 1 Week	//	

EHR Follow Ups in Appt Window

Follow up displays in Appointment on Recall/Waitlist tab:

The screenshot shows the 'Edit Appointment' window in an EHR system. The window is divided into several sections:

- Appointment Details:** Date: 04/06/2017, Time: 11:00 A, Event/Event Chain: Surgery, Duration: 60, Resources: Dr Penny Forman, DDS JGKHenderson, Bob, Dr. JGKBrowne, Sarah, Service Location: Another Practice Location, Description: Salinas, Mark.
- Recalls:** A table with columns: Recall Plan, Date Added, Last Date, Return Date, Event. One entry is visible: 'No Letters For R...' on 06/10/16, last date 06/10/16, return date 07/10/16, event 'Est Patie...'
- Follow Ups:** A table with columns: Follow Up, Timeframe, Appt Date, Appt Time. One entry is visible: 'follow-up visit with Penny Fo...' in 1 Week. This section is circled in red.
- Waitlists:** A table with columns: Begin Date, Begin Time, End Date, End Time, Event, Reso. Active Follow ups: 1.

The 'Recall/Waitlist' tab is selected in the right-hand navigation pane, which also includes 'Patient', 'History', 'Recall/Waitlist', 'DDF', 'Ins/Diag', and 'Task/Pr...'. The 'Recall/Waitlist' tab is also circled in red.

EHR Follow Ups in Appt Window

After scheduling follow up, user updates KBM:

The screenshot shows the 'Edit Appointment' window with the following details:

- Appointment Details:** Date: 04/13/2017, Time: 11:00 A, Event/Event Chain: *Wound Check, Duration: 15.
- Resources:** Dr Penny Formman (selected), DDS JGKHenderson, Bob, Dr. JGKBrowne, Sarah.
- Service Location:** Another Practice Location.
- Description:** Salinas, Mark.
- Details:** Procedure with Resident, Appointment Kept, Cancelled Reason.
- Recalls:** Table with columns: Recall Plan, Date Added, Last Date, Return Date, Event. Row: No Letters For R..., 06/10/16, 06/10/16, 07/10/16, Est. Patie..
- Follow Ups:** Table with columns: Follow Up, Timeframe, Appt Date, Appt Time. Row: follow-up visit with Penny Fo, in 1 Week. A button 'Update KBM with PM Appt Date...' is visible over the table.
- Waitlists:** Table with columns: Begin Date, Begin Time, End Date, End Time, Event, Reso.

EHR Follow Ups in Appt Window

KBM and PM updated with Follow Up Appt Date/Time:

Specialty: Internal Medicine | Visit Type: Office Visit

Intake | Histories | SOAP | Finalize | **Checkout**

Demographics | Order Management | Document Library | Tobacco Cessation

Care Guidelines | Global Days | Panel Control: Toggle Cycle

Today's Orders

Follow up	Reason	Timeframe	Appt Date	Appt Time
follow-up visit with Penny Forman	Wound check/ dressing change	in 1 Week	04/13/2017	11:00 AM

Active Recall Plans:

Follow Up	Timeframe	Appt Date	Appt Time
follow-up visit with Penny Fo...	in 1 Week	04/13/2017	11:00 AM

Waitlists | Active Follow ups: 1

Considerations



- › The follow up appointment in PM must be saved before ‘Update KBM with PM Appt Date’ can be selected.
- › After updating KBM, no confirmation displays in PM.
- › To view updated appt date/time in the PM appt, the screen has to be refreshed (change tabs or close and re-open the screen).
- › ‘Follow Ups’ section displays only scheduled appts

EDI Appointment Reminder Information

- › Appointment screen enhanced to display EDI reminder information on a new 'Reminders' tab.



EDI Appointment Reminder Information

Edit Appointment > Reminders tab:

The screenshot displays the 'Edit Appointment' interface. On the left, there are several form fields: Date (03/09/2017), Time (11:00 A), Event/Event Chain (Office Visit), Duration (15), Resources (John (15 min), Malcolm (15 min), MNJU (15 min)), Service Location (Amul Facility Location), Description (Gabby, Mark), and Details. Below these are checkboxes for 'Procedure with Resident', 'Appointment Kept', 'Cancelled', and 'Confirmed'. The main area on the right is the 'Reminders' tab, which contains a table with the following data:

Type	Date/Time	Results	By	Method
Appointment Reminder	03/07/2017 12:57pm	SMS/Email sent	EDI Patient Messaging	Text

A red arrow points to the 'Reminders' tab in the bottom right corner of the window.

EDI Appointment Reminder Information

› EDI Reminder Methods: Phone, Text, or Email

› EDI Reminder Results:

- SMS/Email sent
- SMS/Email response: Confirm
- SMS/Email response: Cancel
- Not attempted, contact QSI
- Busy signal received
- Phone number had no answer
- Phone number was wrong number
- Disconnect/Hung up before message delivered
- Call INCOMPLETE; no contact made
- Left message with person
- Delivered; Patient reminded but did not confirm
- Appointment confirmed
- Patient wants to reschedule appointment
- Left message with answering machine
- Transferred to office



Thankyou

