

NextGen[®] Practice Management 5.9 Upgrade Training

Demographics Enhancements

5.9/8.4

Topics to be Reviewed

- › SSO Phase III – Success Community link in PM
- › Redesign of the Demographics window
- › Collection of SOGI Data, Race, and Ethnicity
- › Privacy Notice Alert



Topics to be Reviewed

- › Masking SSN
- › Suffix on Lookup screens
- › Veteran Status, Smoker Indicators
- › Marketing Plans behavior
- › Payer / Specialty Copays



Access Success Community in PM

- › Allow seamless access to Success Community from PM.
- › Success Community tab added to the PM toolbar
Browser window.
- › Success Community link added to the PM > Help >
About menu option.



Access Success Community in PM

The screenshot shows a web browser window with the NextGen Healthcare website. The browser's address bar contains the URL 'NextGen Success Community', with 'Success Community' circled in red. The website header features the NextGen Healthcare logo and navigation links: Client Resources, About Us, Contact Us, Call 855-510-6398, Solutions, Industry Insights, Client Success, and Resources. The main content area has a blue background with the text 'EMBRACE VALUE-BASED CARE WITH CONFIDENCE'. Below this, it states: 'NextGen Healthcare solutions and services help practices transform to and succeed in value-based care and measurably improve patient outcomes and population health at lower costs.' A 'Better Together!' section mentions 'Entrada joins NextGen Healthcare to deliver the very best mobile platform!'. On the right, a circular graphic contains icons for Patient Engagement, EHR, Population Health, Analytics, Interoperability, and Care Management, with a central 'CLICK TO LEARN MORE' button.

Access Success Community in PM

The screenshot shows a web browser window with two tabs labeled 'NextGen'. The address bar contains three tabs: 'NextGen', 'Success Community', and 'NextGen Clearinghouse'. The main content area is a light gray background with a white login form centered. The form is titled 'Success Community' and contains the following elements:

- A text input field with the email address 'undaram@nextgen.com.community' entered.
- A password input field with masked characters '.....' and a cursor at the end.
- Two buttons: 'Cancel' and 'Submit'.

Access Success Community in PM

The screenshot displays the NextGen Success Community web application. At the top, there is a navigation bar with the NextGen logo and 'Success Community' text. Below this is a search bar and links for 'Profile' and 'Log Out'. A secondary navigation bar contains menu items: Home, Cases, Knowledge, Known Issues, Services, Ideas, Chatter, and My Account. The main content area is divided into several sections:

- ANNOUNCEMENTS:** A section with an orange header and a 'VIEW MORE >' link.
- LINKS:** A section with a teal header containing links to 'NextGen Certified Professional (NCP)', 'UGM', and 'What's Next Newsletter'.
- LATEST IDEAS:** A section with a green header containing links to 'Encounter search in EHR' and 'I want to SSO from MediTouch community', along with a 'SUBMIT AN IDEA!' button and a 'VIEW MORE >' link.
- LATEST ARTICLES:** A section with a grey header featuring an article titled 'Article for Displaying Internally Stored Image' and a 'VIEW MORE >' link.
- ACTIVE CASES:** A section with a grey header, a 'CREATE CASE' button, and text stating 'You currently do not have any open cases. Click View More to see your service case history.' with a 'VIEW ALL CASES >' link.
- UPCOMING WEBINARS:** A section with a grey header and a 'VIEW MORE >' link.
- HOT TOPICS:** A section with a blue header and a 'VIEW MORE >' link.
- MY PROFILE:** A section with a blue header showing a user profile for 'Santhosh Somasundaram' from 'My Company'.
- MY ACCOUNT TEAM:** A section with a blue header showing a team member 'Sales Contact Lance Sulton' with an 'E-mail' icon.

At the bottom of the page, there is a footer with 'NextGen.com | Blog | Legal Notices', '© 2017 QSI Management, LLC. All Rights Reserved.', and a row of social media icons for Facebook, Twitter, LinkedIn, Google+, YouTube, and a Blog icon.

Access Success Community in PM

The screenshot shows a window titled "PM" with a close button in the top right corner. The window is divided into two columns of configuration fields. The left column includes: Enterprise (NextGen Medical Enterprise), Practice (.NEXTGEN Medical Practice (Hor...)), User (Stenger, Stacy (177)), Security Group (Administrators, Administrators, A...), and Microsoft SQL Server (NG59X_KBMX). The right column includes: File Version (5.9.0.72), Version Details (NextGen EPM), KBM Version (8.3.0.14.8), Medication Version (05 - 2013), and a link to www.nextgen.com/NextGen SelfService/Success Community. A red arrow points to this link. Below the link is the text "RTE XML Log". At the bottom left, there is a section for "All SQL Log" with the text "SQL Logging is Disabled" and a copyright notice: "© 1995-2017 NextGen Healthcare Information Systems, Inc. All rights reserved. Unauthorized duplication or distribution is prohibited." At the bottom right is the "NEXTGEN HEALTHCARE INFORMATION SYSTEMS" logo.

PM

Enterprise:
NextGen Medical Enterprise

Practice:
.NEXTGEN Medical Practice (Hor...

User:
Stenger, Stacy (177)

Security Group:
Administrators, Administrators, A...

Microsoft SQL Server:
NG59X_KBMX

All SQL Log
SQL Logging is Disabled
© 1995-2017 NextGen Healthcare Information Systems, Inc. All rights reserved. Unauthorized duplication or distribution is prohibited.

File Version:
5.9.0.72

Version Details:
NextGen EPM

KBM Version:
8.3.0.14.8

Medication Version:
05 - 2013

www.nextgen.com/NextGen SelfService/Success Community

RTE XML Log

NEXTGEN
HEALTHCARE INFORMATION SYSTEMS

Demographics Updates



- Redesigned demographics window provides a cleaner look and feel.
- New Medicare QPP and Medicaid Meaningful Use Stage 3 Certification Requirements fields, plus room to grow.
- Provides access to items typically available only after a chart has already been created.

Prior to 5.9:

Modify Patient Information

Prefix: Mrs. Last: Demographics First: Daisy Middle: D Suffix: Previous Last: Smith Nickname: David

Social Security: 545-45-4545 Birth Date: 05/11/1979 Age: 37 yrs. Sex: Fema Medical Record: 539 Exempt from Person Merge:

Demographi | Status | Client Defin... | Provider | Privacy | Employer | Relations/R... | UDS | Ext | History

Street: 1975 Demographics Drive Address Type: Home Billing Address: Secondary Address: PO Box 4915 Address Type: Firm/Busin

City: Highland Village State: TX (Texa) Zip: 75077- City: Flora Vista State: NM (New) Zip: 87415-

Country: USA County: DENTON Community Cd: Country: United States County: SAN JUAN Mother's Maiden Name: Jones

Race: American Ind Pref Language: English Religion: Protestant Church: Ethnicity: Not Hispanic Contact Preference: Daytime Hour

Marital Status: Life Partne Student Status: Not a Stu Veteran: Enterprise Chart: Smoker: Expired: Expired Date: Int1 Hm Phn: 011610213116 Int1 Wk Phn: 011610228224 Int1 Zip: 7400

Primary Care Provider: Primary, Peter Primary Dental Provider: Rowse, Susan

Phone/Email & Notifications

Notifications: Opt out Email Phone call Portal SMS (Text) Voice reminders

	Telephone Number / E-Mail	Comment	Notifications
1. Home Phone	(972) 558-5858		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
2. Day Phone	() - Ext		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
3. Alternate Phone	(972) 447-4747 Ext: 80817	Work	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
4. Secondary Hm Phone	(972) 232-3232	Partner's Cell Phone	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
5. Cell Phone	(972) 334-3434		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
6. E-Mail	daisy@gmail.com		<input checked="" type="checkbox"/>

Generate System Alert:

Insurance Account OK Cancel

As of 5.9:

Modify Patient Information

Demographics |
 Status |
 Client Defined |
 Provider |
 Privacy |
 Employer |
 Relations/Role |
 UDS |
 Ext |
 History |
 Pharmacy |
 Chart Details

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge

Demographics

Address

Billing | Secondary

Street 1: 1975 Demographics Drive | Street 2: | Address Type: | City: Highland Village | State: TX (Texas) | Zip: 75077- | Country: USA | County: DENTON

Demographics

Marital Status: Life Partner | Mother's Maiden Name: Smith | Student Status: Not a Student

Race: American Indian or Alas | Ethnicity: Not Hispanic or Latino | Pref Language: English

Religion: Protestant | Church: | Community Cd: Adel (Dallas, IA)

Primary Care Provider: Primary MD, Peter C | Primary Dental Provider: Rogers MD, Manuel | Expired | Expired Date:

Veteran | Smoker | Enterprise Chart

Available Insurance

Payer Name	Available	Plan Nbr	Policy Nbr	Group Name	Group Nbr	Effective Date	Expired Date
Patient							
Aetna HMO	✓		9865327...		4414		

Contact Information

Generate System Alert | International

Contact Method	Number/Address	Notifications
1. Home Phone	(972) 558-5858	<input type="checkbox"/> N/A
2. Day Phone	() -	<input checked="" type="checkbox"/> N/A
3. Alternate Phone	(972) 447-4747 80817	<input type="checkbox"/> N/A
4. Secondary Phone	(972) 232-3232	<input type="checkbox"/> N/A
5. Cell Phone	(972) 334-3434	<input type="checkbox"/> N/A
6. E-Mail	daisy@gmail.com	<input type="checkbox"/> N/A

Preferred Contact: Cell Phone | Notifications: Email;Phone Call;SMS

Account | OK | Cancel

Status tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Status

Patient Status: Employee

Patient Status Change Reason:

Immunization Registry Information

Registry	Patient Status Designation	Status Eff Date	Status Exp Date	Publicity Code	Publicity Eff Date
AmericanMedical	Active	02/07/2017			

Immunization Home Location: North Central Office

Patient Status Designation and Immunization Home Location will be reported to the Immunization Registry for Practices that are configured to report this information. Selections are stored when chosen on patients with a chart created.

Account OK Cancel

Client Defined tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Client Defined

Enterprise Level Client Defined

Transportation Needed? No

Interpretor needed? Sign Language

Account

OK Cancel

Provider tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Provider

Pref Name	Prim	Provider Name	Specialty	Eff Date	Exp Date	Exp Reason
Cardiologist	Y	Cover MD, Mary E		03/27/2017		
Cardiologist	N	Heart MD, Thomas M		12/06/2010	03/01/2017	Patient Changed Insurance
Internal Medicine	Y	Bones MD, Edward S		11/27/2014		
Surgeon	Y	Cutter MD, Dexter M		09/06/2016		

Account | OK | Cancel

Privacy tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Privacy

Privacy Notice Issued to Patient: 04/17/2017

Privacy Notice Received from Patient: 04/17/2017

Privacy Notice Reason: Signed By Patient

Privacy Notice Notes: [Empty text area]

Consent: [Text area containing: Privacy Notice Information is stored at the practice level and is only available when a chart exists or is created.]

Account | OK | Cancel

Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation

Employer tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Demographics
Status
Client Defined
Provider
Privacy
Employer
Relations/Role
UDS
Ext
History
Pharmacy
Chart Details

Employer

Name	Prim	Address	County	Occupation	Employment Status	Work Phone	Retired
Abacus Accounting	Y	9855 Abacus Ave Garland, TX 75045	DALLAS	accounting	Employed Full-time	(972) 444-8888	

Account OK Cancel

Relations/Role tab:

Note: Contact, Guarantor, and Head of Household is stored at the practice level and will therefore only be saved upon chart creation

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1

Relations/Role

Name	Relationship
Contact, Connie C	Friend

Contact
 Contact, Connie C
 7819 N Contact Court
 Harrisburg, PA 17106
 H (215) 389-7867
 D (215) 424-3444

Guarantor
 Demographics, David D
 1975 Demographics Drive
 Highland Village, TX 75077
 USA
 H (972) 558-5858
 W

Head of Household

Name	Relationship	Support Role
Kindred, Kenny	Extended Family	Next of Kin

Birth Mother's Full Name
 Last Name: Watson | First Name: Theresa | Middle Name: N | Maiden Name: Smith

Account | OK | Cancel

Head of Household, Guarantor and Contact information is stored at the practice level and is only available when the chart exists or is created

Please note the demographic information for support roles and relationships are stored as separate records within the application. Therefore any modifications made to one record will not update corresponding demographic records for the other.

UDS tab:

Note: Head of Household is stored at the practice level and will therefore only be saved upon chart creation

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: |

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1

UDS

Homeless Status: Not Homeless | School Based Hlth Center: No | Tribal Affiliation: Aleknagik Natives Lim | Descendancy: |

Migrant Worker Status: Not A Farm Worker | Blood Quantum: Indian But Less Than 1 | Primary Medical Coverage: Aetna HMO | Self Pay:

Language Barrier: No | IHS Eligibility Status: Pending Verification | Consent to Treat: | Consent to Treat Date: |

Public Housing Pri Care: No | Veteran Status: No | Classification/Beneficiary: Military

Sliding Fee Schedule Verification

Sliding Fee Sched	Eff Date	Exp Date
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Head of Household: Demographics . David

Family Information

Family Size	Annual Income	Ref	Verify Date	Eff Date	Exp Date
2	\$125,000.00		04/17/2017	04/17/2017	04/17/2018

Account | OK | Cancel

The head of household must be set before you can enter family size and income. The head of household can only be set for patients (a chart exists). Changes to the Family Information will affect the patient head of household settings.

Ext tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female;Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

Ext

External ID	External System	Creator	Create Date
-------------	-----------------	---------	-------------

Other ID Number: 0002745112

Account | OK | Cancel

History tab:

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female- | Sexual Orientation: Straight or heteros- | Preferred Pronoun: He, Him, His | Exempt from Person Merge:

History

Person History

Date/Time	Creator	Description	Old Information	New Information
04/25/2017 5:39 P	Stenger, Stacy	Employer Added	<none>	Abacus Accounting
04/25/2017 5:27 P	Stenger, Stacy	Patient Status Changed	Drug Seeker	Employee
04/25/2017 5:23 P	Stenger, Stacy	Immunization Registry Information Added	<none>	Code : Active ; Effective Date : 02/07/2017 ; Registry : America..
04/25/2017 4:52 P	Stenger, Stacy	Patient Status Changed	<none>	Drug Seeker
04/25/2017 4:51 P	Stenger, Stacy	Chart UD4 from: <none> to: 98777777	<none>	98777777
04/25/2017 4:51 P	Stenger, Stacy	Chart UD3 from: <none> to: (972) 232-3232	<none>	(972) 232-3232
04/25/2017 4:51 P	Stenger, Stacy	Chart UD2 from: <none> to: Partner	<none>	Partner
04/25/2017 4:51 P	Stenger, Stacy	Chart UD1 from: <none> to: Ted	<none>	Ted
04/25/2017 9:12 A	Stenger, Stacy	Prefix Changed	Mrs	Mr
04/25/2017 9:05 A	Stenger, Stacy	Previous First Name Changed	Donna	Daisy
04/25/2017 8:56 A	Stenger, Stacy	Int'l Zip Changed	<none>	7011
04/25/2017 8:56 A	Stenger, Stacy	Int'l Work Phone Changed	<none>	0116102236689
04/25/2017 8:56 A	Stenger, Stacy	Int'l Home Phone Changed	<none>	0116102131166
04/25/2017 8:56 A	Stenger, Stacy	Secondary Address Type Changed	<none>	Firm/Business
04/25/2017 8:56 A	Stenger, Stacy	Secondary County Changed	<none>	SAN JUAN
04/25/2017 8:56 A	Stenger, Stacy	Secondary Country Changed	<none>	USA
04/25/2017 8:56 A	Stenger, Stacy	Secondary Zip Changed	<none>	87415
04/25/2017 8:56 A	Stenger, Stacy	Secondary State Changed	<none>	NM (New Mexico)
04/25/2017 8:56 A	Stenger, Stacy	Secondary City Changed	<none>	FLORA VISTA
04/25/2017 8:56 A	Stenger, Stacy	Secondary Address1 Changed	<none>	PO Box 4915
04/25/2017 8:56 A	Stenger, Stacy	Nickname Changed	David	Daisy
04/25/2017 8:56 A	Stenger, Stacy	Previous First Name Changed	<none>	Donna
04/25/2017 8:56 A	Stenger, Stacy	Previous Last Name Changed	<none>	Jones
04/25/2017 8:56 A	Stenger, Stacy	First Name Changed	Daisy	David

Account

OK Cancel

Pharmacy tab:



Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical ID: 495

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His

Pharmacy Info

Pharmacy #1
CVS Austin
2927 Guadalupe St
Austin, TX 78705
Phone: (512) 555-2323
Fax:

Pharmacy #2
Walgreens
Polly Prescription
6523 W Prescription Pl
Phoenix, AZ 85032
Phone: (602) 555-6523
Fax: (602) 555-3256

Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation

Account | OK | Cancel

Chart Details tab:



Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical ID: 495

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs. | Birth Sex: Female | Current Gender: Male | Gender Identity: Female:Female-1 | Sexual Orientation: Straight or heteros | Preferred Pronoun: He, Him, His

Chart Details

Default Rendering Physician: Abbott MD (IM), Matthew IM | Default Referring Physician: Newman, Kathleen | Print Statements

Emergency Contact Name: Ted | Emergency Contact Relationship: Partner | Emergency Contact Phone #: (972) 232-3232 | Driver License #: 98777777

Marketing Plan: Radio/TV | Marketing Data: | Marketing Comments:

Load these user note descriptions into comments:

Co-Managed Patient | Co-Managed Physician:

Note: Chart Detail Information is stored at the practice level and is only available when a chart exists or is created.

Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation

Account | OK | Cancel

Default Phone Number / Email Order

- › Default Notification Order added to Practice Preferences.
- › Allows phone number and email fields to be arranged in a default display order within the demographics window.



Default Phone Number / Email Order

Practice Preferences > Patient Notifications

Practice Preferences

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data/Fee Ticket
- EHR
- Encounters
- External
- Forms
- General
- Holidays
- Imaging
- Invoices
- Itemized Bills
- Libraries
- Medication
- NextGen Share
- NextGenEDI Uploading
- Orders Module
- Patient Information Bar
- Patient Notifications**
- Patient Pay
- Payment Processing
- Printing
- Provider
- Reports
- Resources

Default Notification Order

1	Cell Phone	↑↑
2	Day Phone	↑
3	E-Mail	↓
4	Home Phone	↓↓
5	Alternate Phone	↓↓
6	Secondary Hm Phone	↓↓

Notifications used in this Practice

Notification Preferences	Contact Method
<input checked="" type="checkbox"/> Email	Email
<input checked="" type="checkbox"/> Phone Call	Alternate Phone;Cell
<input checked="" type="checkbox"/> Portal	Patient Portal
<input checked="" type="checkbox"/> SMS (Text)	Alternate Phone;Cell
<input checked="" type="checkbox"/> Voice Reminders	Alternate Phone;Cell

Display and Require Patient Notification Preferences selections on Person Demographic Records.

Default selected Patient Notification Preferences to Person Demographic Records.

Notifications refer to automated Appointment Reminders and Preventative Care Reminders, which can be sent through NextGen via its Patient Portal, Population Health, EDI or a 3rd Party vendor.

Collection of SOGI Data



- › SOGI = Sexual Orientation Gender Intity
- › Record and track sexual orientation, gender identity, birth sex, current gender, and preferred pronoun.
- › Improves communication, cultural competence, and patient/family-centered care for LGBT population.
- › Submit SOGI data to state and federal registries as required by Medicare QPP and Medicaid Meaningful Use Stage 3 Certification Requirements.

Collection of SOGI Data

Modify Patient Information

Prefix: Mr | Last: Demographics | First: David | Middle: D | Suffix: | Nickname: Daisy | Medical Record: 493

Social Security: 545-45-4545 | Birth Date: 05/11/1979 | Age: 37 yrs.

Birth Sex: Female | **Current Gender:** Male | **Gender Identity:** Female:Female- | **Sexual Orientation:** Straight or heteros | **Preferred Pronoun:** He, Him, His

Demographics

Address

Billing Secondary

Street 1: 1975 Demographics Drive | Street 2: | Address Type: | City: Highland Village | State: TX (Texas) | Zip: 75077- | Country: USA | County: DENTON

Contact Information

Generate System Alert International

Contact Method	Number/Address	Notifications
1. Home Phone	(972) 558-5858	<input type="checkbox"/> N/A
2. Day Phone	() -	<input checked="" type="checkbox"/> N/A

Collection of Race/Ethnicity Data

- Medicare QPP and Medicaid Meaningful Use Stage 3 requires collection of multiple ethnicities.
- Allows race and ethnicity data to be aggregated into U.S. government defined categories.



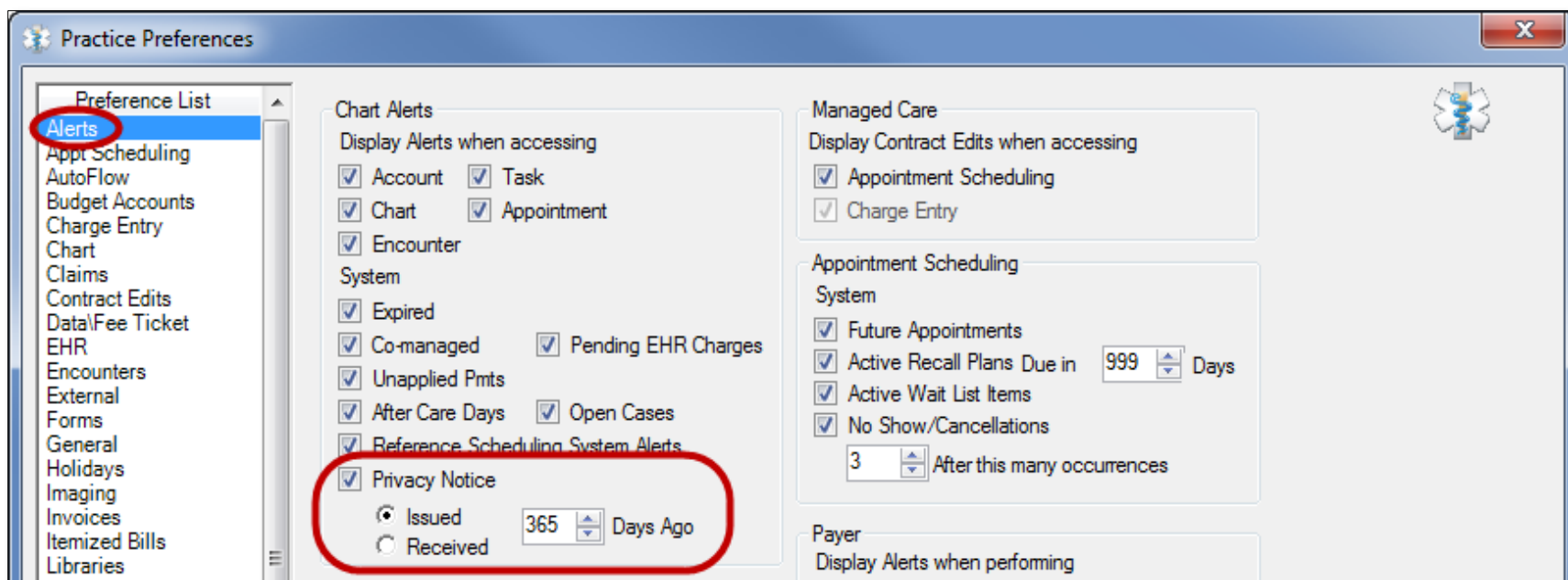
Privacy Notice Alert

- Privacy Notice alert settings can be configured when the privacy notice hasn't been issued/received within a specified period.



Privacy Notice Alert

Practice Preferences > Alerts tab:



Masking Social Security Number

- › Expanded 'Display L4SSN' to include all lookups, display areas, and reports.
- › Added security option to unmask the SSN.



Masking Social Security Number

Practice Preferences > General tab (prior to 5.9):

Practice Preferences

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data\Fee Ticket
- EHR
- Encounters
- External
- Forms
- General**

General Options

- Check for duplicate SSN
- Check for duplicate last name, birth date, sex
- Auto-closing
- Privatize patient list
- Display city on person lookup
- Enable APG
- Prompt for password when application is restored from minimized session
- Enable outsourcing
- Allow alphanumeric characters in SSN
- Exclude expired patients default
- Enable Case Management
- Allow encounter payers to be edited when case is attached
- Display contact preference
- Display L4SSN on person lookup results
- Display phonetic search
- Check for duplicate payer name, address, or contact phone
- Exclude all unknown SSNs
- Force the selection of an existing payer name, address, or contact phone

Default Area Code:

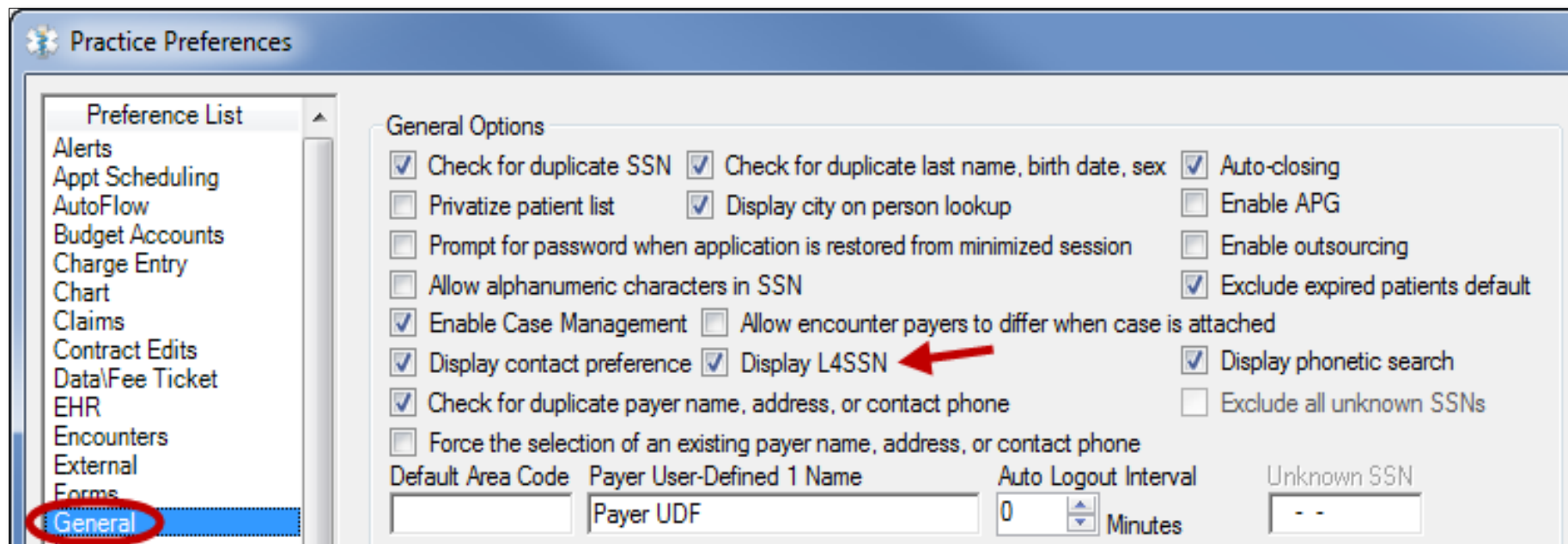
Payer User-Defined 1 Name:

Auto Logout Interval: 0 Minutes

Unknown SSN:

Masking Social Security Number

Practice Preferences > General tab (as of 5.9):



Practice Preferences

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data\Fee Ticket
- EHR
- Encounters
- External
- Forms
- General**

General Options

- Check for duplicate SSN
- Check for duplicate last name, birth date, sex
- Auto-closing
- Privatize patient list
- Display city on person lookup
- Enable APG
- Prompt for password when application is restored from minimized session
- Enable outsourcing
- Allow alphanumeric characters in SSN
- Exclude expired patients default
- Enable Case Management
- Allow encounter payers to differ when case is attached
- Display contact preference
- Display L4SSN
- Display phonetic search
- Check for duplicate payer name, address, or contact phone
- Exclude all unknown SSNs
- Force the selection of an existing payer name, address, or contact phone

Default Area Code: [] Payer User-Defined 1 Name: Payer UDF Auto Logout Interval: 0 Minutes Unknown SSN: --

Not impacted by 'Display L4SSN':

- › Social Security search field in lookup screens
- › **Add Person/Patient/Relationship/Head of Household**
- › Account, Encounter, Claim Request lookup results
- › Any free-text fields (policy #, user-defined fields, etc.)
- › Scanned images
- › Advanced Audit
- › SSN field in forms, labels, and letters Data Repositories
- › Patient Data Sheets, Fee Tickets
- › Employer Statements

Add Suffix to Lookup Screens

- › Name Suffix added as a search field in lookups.
- › Displays in search results as column.



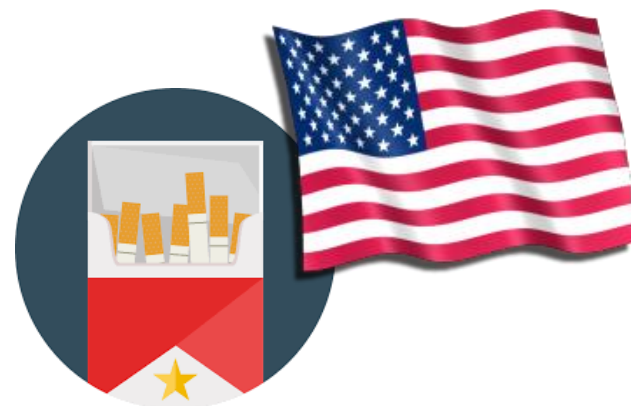
Veteran Status Updates

- Hidden Veteran Statuses will longer auto-populate in the patient's chart.
- If required, Veteran Status will no longer automatically default; user forced to make a selection.



Display Veteran & Smoker Indicators

- Option to hide the 'Veteran' check box, instead utilize Veteran Status drop-down.
- Option to hide the 'Smoker' check box, forcing user to open the medical record to view the data.



Marketing Plans

- Chart-level marketing plans automatically default to encounters; hidden plans populate new encounters.
- New option added to determine behavior of hidden marketing plans.



Payer / Specialty Copays

- Allows the addition of a new payer copay without having to save and re-open the record.
- Recognize a default \$0.00 encounter copay, instead of the practice-level copay.





Thankyou

