# 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

AGENDA

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# Topics to be Reviewed
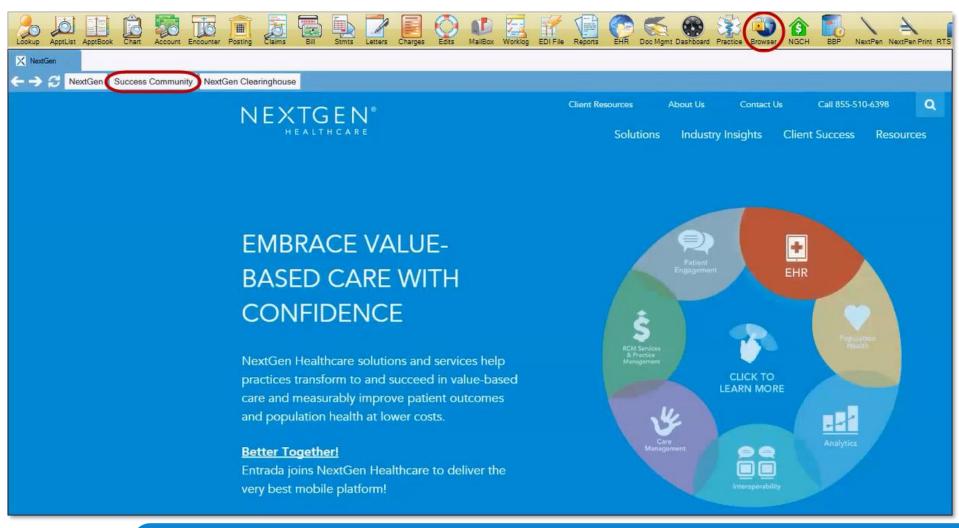
› Masking SSN

› Suffix on Lookup screens

› Veteran Status, Smoker Indicators

› Marketing Plans behavior

› Payer / Specialty Copays

AGENDA
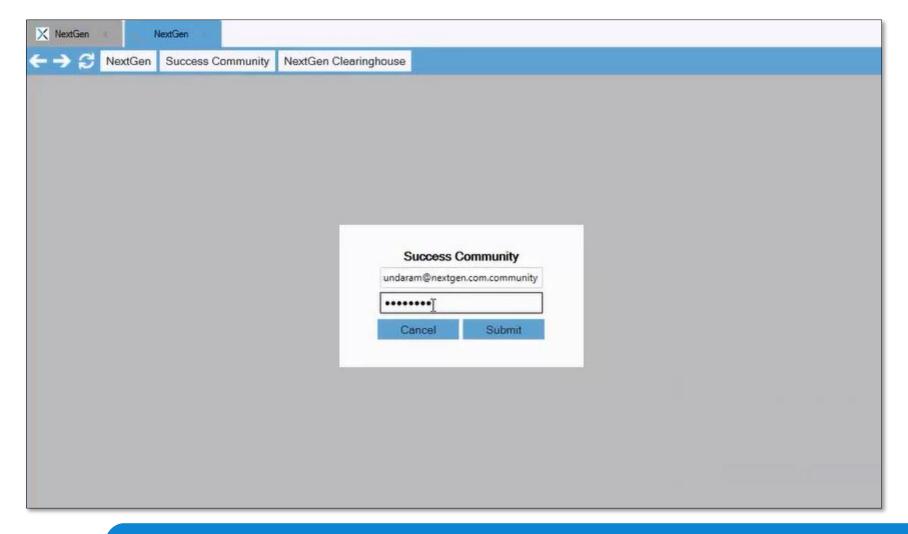
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# Access Success Community in PM

› Allow seamless access to Success Community from PM.

› Success Community tab added to the PM toolbar Browser window.

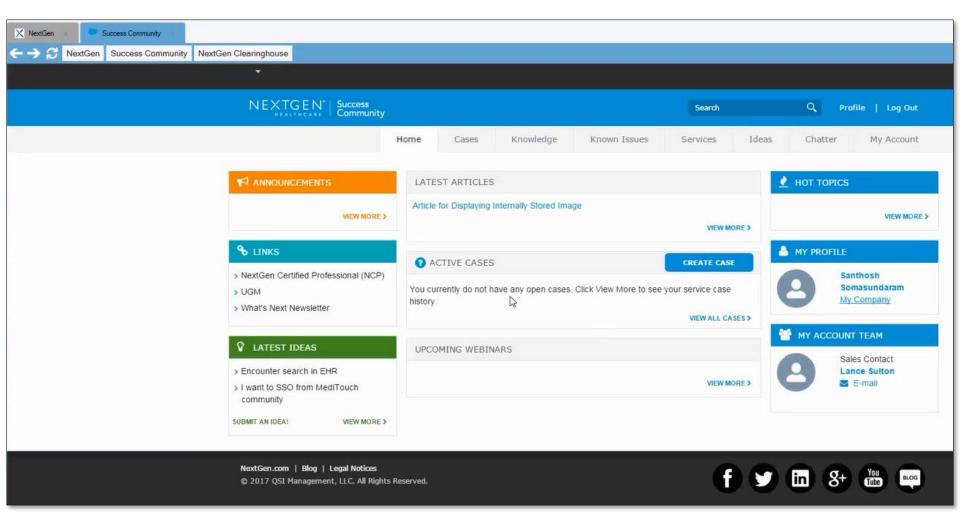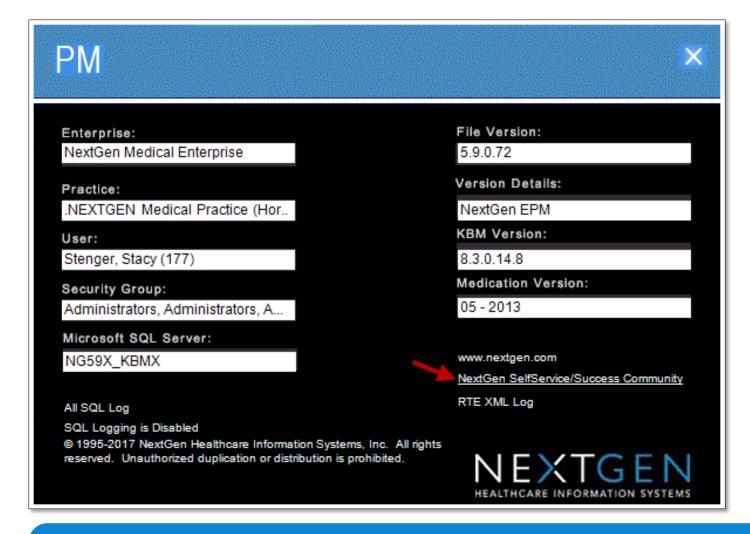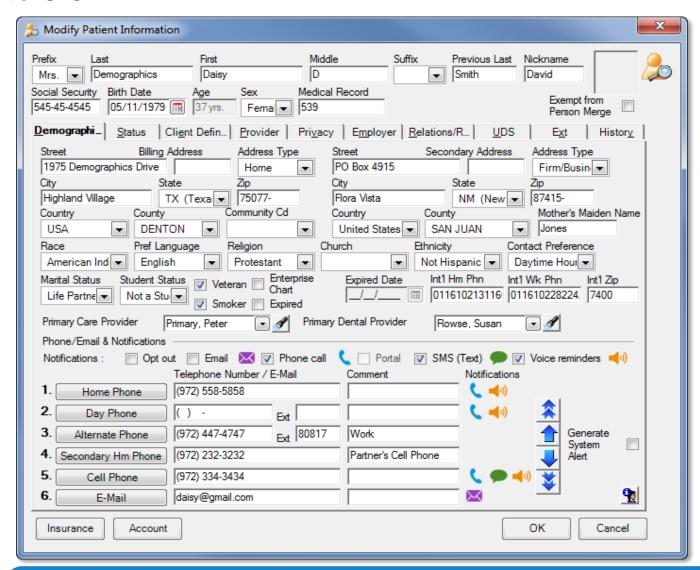› Success Community link added to the PM > Help > About menu option.

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# Access Success Community in PM

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# 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.
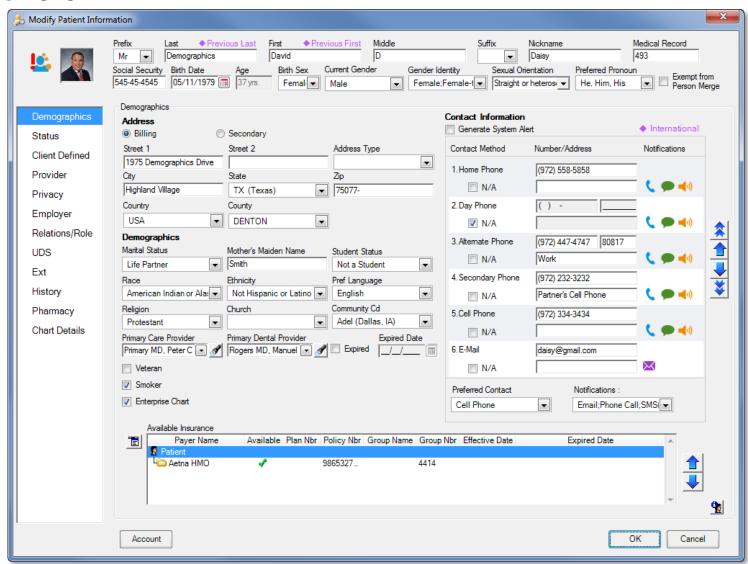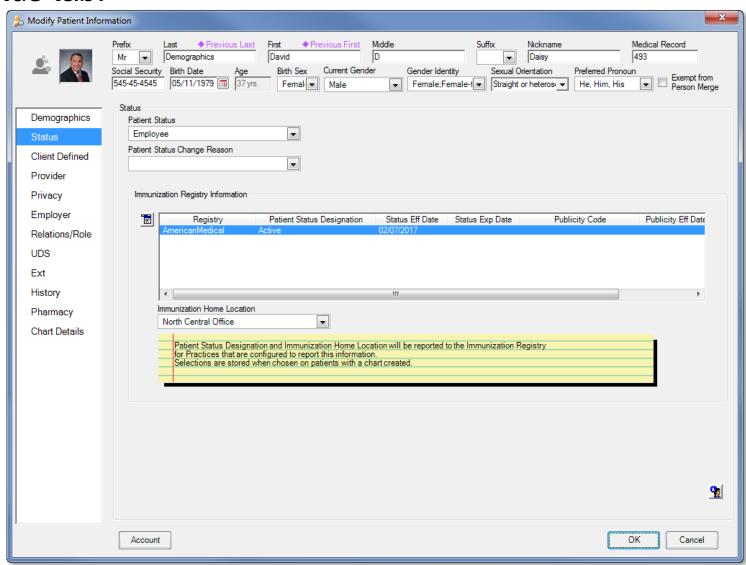
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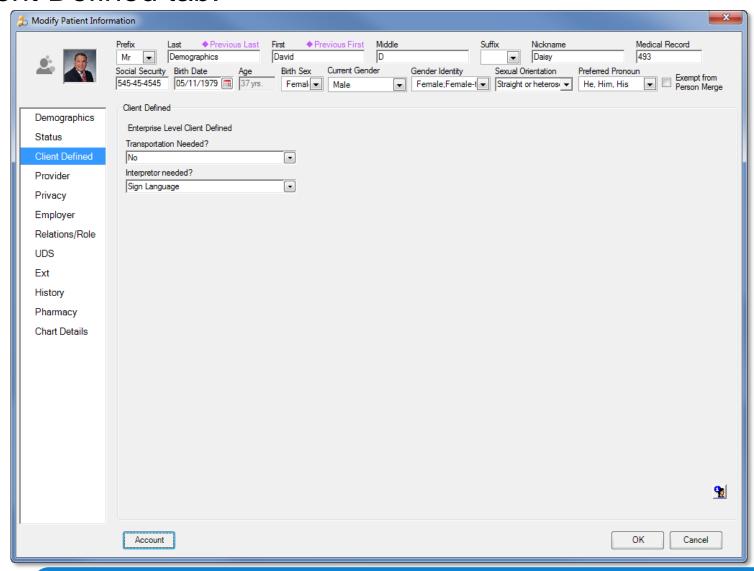# Prior to 5.9:

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# As of 5.9:

# Status tab:

# Client Defined tab:

# Provider tab:

# Privacy tab:

# Employer tab:

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# 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

# UDS tab:



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

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# Ext tab:

# History tab:

# Pharmacy tab:



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

# Chart Details tab:



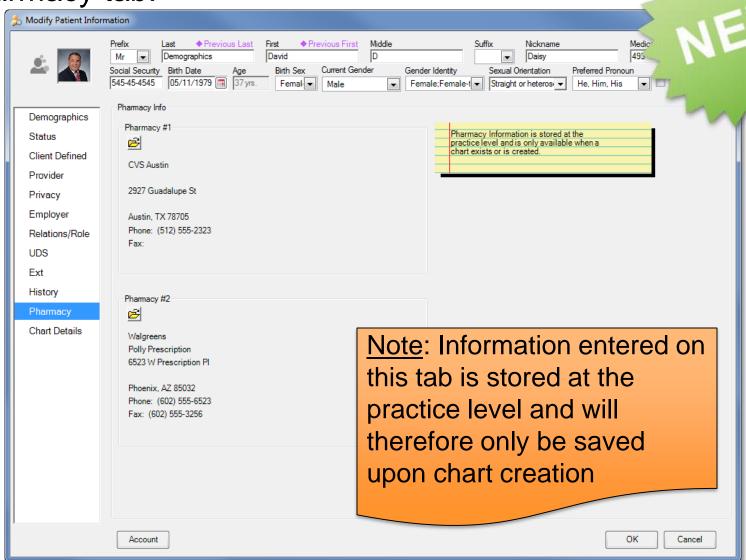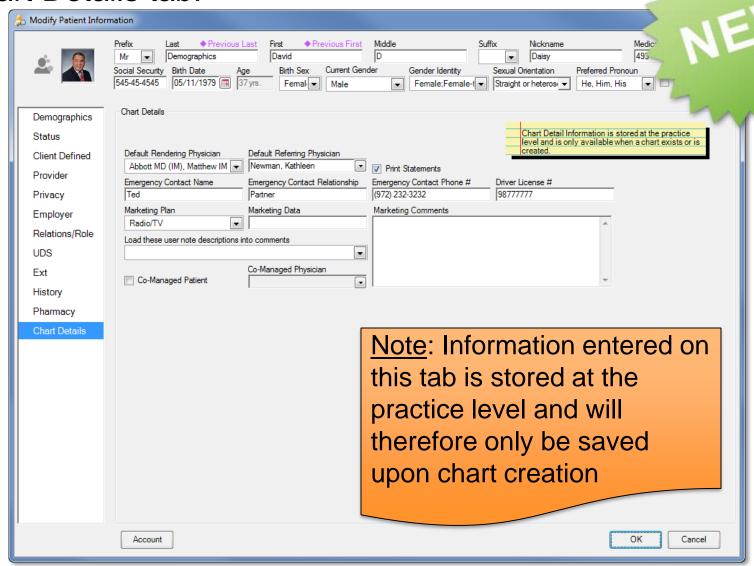Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation
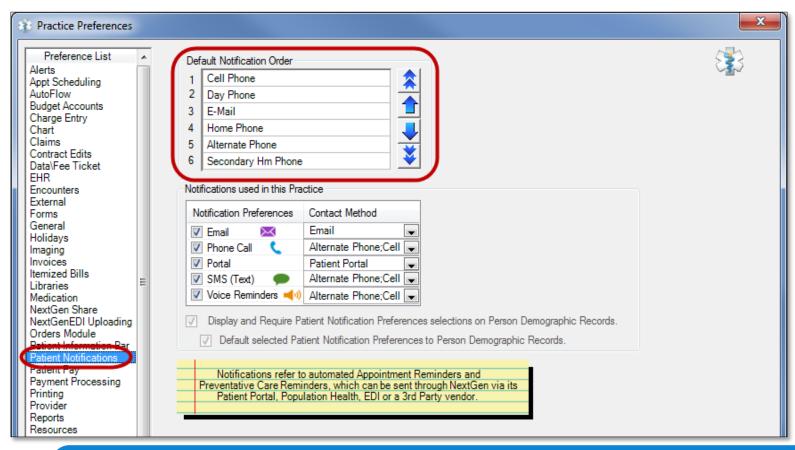
# Default Phone Number / Email Order

› 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.

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# Default Phone Number / Email Order

Practice Preferences > Patient Notifications

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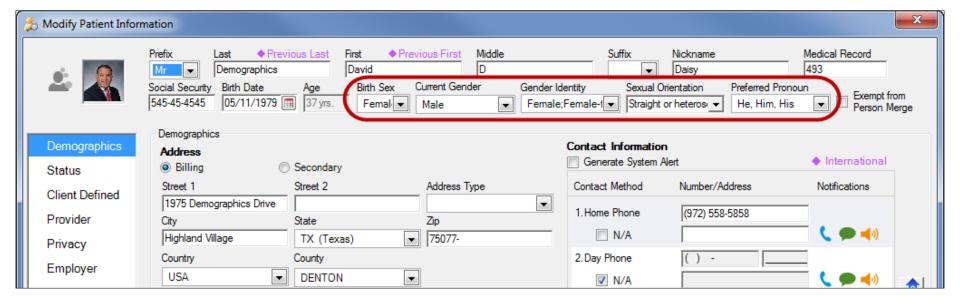HEALTHCARE

# Collection of SOGI Data

›  SOGI = <u>S</u>exual <u>O</u>rientation <u>G</u>ender <u>I</u>dentity

›  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.

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# Collection of SOGI Data

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# Collection of Race/Ethnicity Data

› Medicare QPP and Medicaid Meaningful Use Stage 3 requires collection of multiple ethnicities.

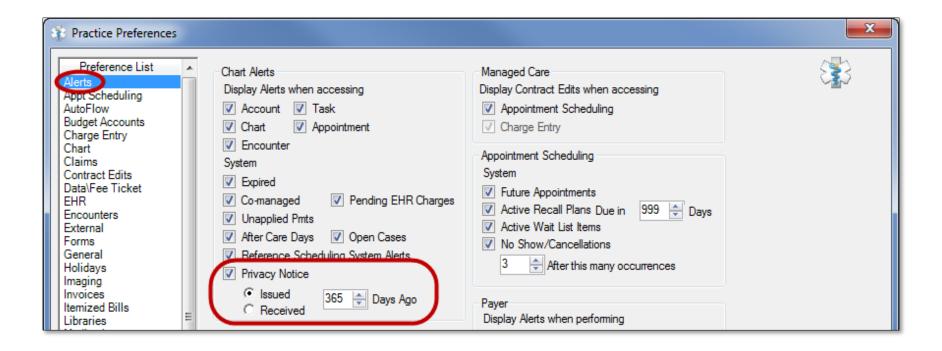› Allows race and ethnicity data to be aggregated into U.S. government defined categories.

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# Privacy Notice Alert

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

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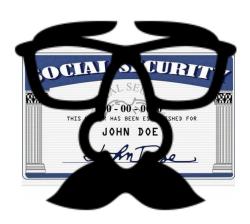
# Privacy Notice Alert

Practice Preferences > Alerts tab:

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# Masking Social Security Number

› Expanded 'Display L4SSN' to include all lookups, display areas, and reports.

› Added security option to unmask the SSN.

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# Masking Social Security Number

Practice Preferences > General tab (prior to 5.9):

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# Masking Social Security Number

Practice Preferences > General tab (as of 5.9):

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# <u>Not</u> 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

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# Add Suffix to Lookup Screens

› Name Suffix added as a search field in lookups.

› Displays in search results as column.

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# 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.

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# 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.

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# 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.

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# 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.

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