# NextGen Version 6.2021.1 Upgrade – Setup Form

This worksheet will be used to collect necessary information for TSI to assist with your NextGen Version 6.2021.1 setup. The setup will be completed in your Test environment so that you can become comfortable with the changes prior to placing in your Production environment. Please fill out each section that applies to your practice and submit to the TSI Helpdesk upon completion either via email (helpdesk@tsihealthcare.com) or fax (888-808-6156).

Practice Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Person Completing This Form: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### General Information

1. **Office Hours** – In preparation for scheduling your Production upgrade, we are gathering information on your weekly schedule. Please answer the following:
	1. Are there any days of the week (Monday – Friday) that your office is closed?
		* NO
		* YES (If YES, please list day(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
	2. Are there are days of the week that your office closes early (prior to 5:00 PM)?
		* NO
		* YES (If YES, please list day/time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
	3. Is your office open on the weekend?
		* NO
		* YES (If YES, please list weekend hours: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
2. **EHR**
3. **Sensitive Encounters** (pg. 4 EHR Overview Document)

*Encounters can now be marked as sensitive to notify users and/or suppress sensitive information from being shared through Patient Portal, referrals, NG Outreach, and patient statements. Only users with appropriate permissions will have the ability to mark encounters as sensitive. Encounter marked as sensitive in EHR will display a sensitive encounter icon in EPM.*

* 1. Please list Security Groups that should have access to mark encounters sensitive below:

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| --- |
| **Security Groups (i.e. Administrators, Clinical Staff, Providers, etc.)** |
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### Configure Blood Pressure Range of Values and Alerts (pg. 10 EHR Overview Document)

*Out of range values and alerts can be configured for systolic and diastolic values for both adult and pediatric patients. High blood pressure alerts for an adult patient can be configured based on the specialty. (Viewable only from the Vitals pop-up template)*

* 1. Are there any new BP range or alert description you would like to add to your BP range and alerts that need to be added to your current configuration?
		+ YES
		+ NO
	2. If yes, please specify new alert parameters below:

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| --- | --- | --- | --- | --- | --- |
| **Gender** | **Age From** | **Age To** | **Syst From** | **Diast From**  | **BP/Systolic Alert** |
| *All* | *Ex. 13 yrs.* | *18 yrs.* | *120* | *80* | *BP is out of expected range* |
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1. **Configurable BMI Alerts (pg. 10 EHR Overview Document)**

*Vital signs have been enhanced to allows for adult BMI alert configuration (in addition to existing default BMI alerts), which will be visible on the Vital Signs and BMI popup templates.*

* 1. Are there any new adult BMI alerts that need to be added to your current BMI alert configuration?
		+ YES
		+ NO
	2. If yes, please specify new alert parameters below:

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| --- | --- | --- | --- | --- |
| **Age From** | **Age To** | **BMI From** | **BMI To** | **Alert Description** |
| *Ex. 70 yrs.* | *99 yrs.* | *31* | *50* | *Very overweight* |
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1. **APSO – Assessment, Plan, Subjective, Objective Document (pg. 11 EHR Overview Document)**

*For users to quickly view a patient’s progress, a new APSO document has been added under the View menu. From this menu, click on APSO View Bar and the Current APSO and Previous APSO tabs will display. (not available for CARD or OPH Specialties)*

* 1. Would you like to configure for your practice?
		+ YES
		+ NO
1. **Patient Information Bar**
	1. ***Co-Managing Provider template******(pg. 13 EHR Overview Document)*** *Add Co-Managing Provider template link to Patient Info Bar? (only 6 total links available – may need to replace an existing demographics template link in order to add)*
		* YES
		* NO
2. **Prescription Drug Monitoring Program (PDMP) Review Documented on Master Document**

**(pg. 15 EHR Overview Document)**

*When the PDMP is viewed by a provider within a specified number of days from the current encounter, documentation stating the PDMP report has been accessed will now be visible on your specialty’s Master Document (i.e. Master\_IM, Chart\_Note, OPH\_chart\_note, etc.).*

* 1. Do you want your practice’s Master Document to display a statement confirming the PDMP report has been accessed by the provider?
		+ YES
		+ NO
	2. If yes, how many days in advance of a patient’s visit should a PDMP review statement display on the Master Document?

\_\_\_\_\_\_\_\_\_ Days in Advance

1. **PDMP Viewed via State Portal button (pg. 15 EHR Overview Document)** *can be added to the Medications Module allowing providers to document that the state’s PDMP portal was checked before prescribing a controlled substance.*

Enable State PDMP?

* + - YES
		- NO
1. **Import Lab Results from CCD-A** **(pg. 20 EHR Overview Document)** – Lab results can be imported from a CCD-A if users have the appropriate Security Rights.
	1. List Security Groups that should have access to import Lab results from a CCD-A:

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1. **CPOE Search Bar (pg. 24 EHR Overview Document)**
	1. Enable CPOE Search Bar?
		* YES
		* NO
2. **PRAPARE Template (pg. 26 EHR Overview Document)**

*A new template has been added for the PRAPARE (Protocol for Responding to and Assessing Patients Assets, Risks and Experiences) questionnaire that can be configured to be accessible on the History Summary Panel and Histories template. A new Enable practice defined questions check box has been added to the Practice Config template to enable the practice-defined questions on the PRAPARE form.*

* 1. Do you want to enable the PRAPARE template link to display on the History Summary Panel and Histories template?
		+ YES
		+ NO
	2. Do you want to enable the practice defined questions on the PRAPARE form?
		+ YES
		+ NO
	3. If YES, list the questions to include on the PRAPARE form: (add information about data to add to Crystal Reports?)

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| --- |
| **Practice defined questions:** |
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1. **Screening Tools (pg. 32 EHR Overview Document)**

*Functionality has been added to the Screening Tools template to allow practices to configure additional screening tools with a template or web based popup for any screening tools not currently available on the Screening Tools template, including configuration of score based SNOMED and/or LOINC codes.*

* 1. Does your practice utilize the Screening Tools template?
		+ YES
		+ NO
	2. If yes, please list any additional screening tools to add to the Screening Tools template (if any):

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| --- | --- | --- |
| **Screening Tool** | **Template or Web Based?** | **Popup Template Name or Website URL** |
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1. ***Patient SOGI Detail Updates to the PE, ROS Document Header*** **(pg. 37 EHR Overview Document)**

Does your practice want to enable the following SOGI related features?

1. *Gender Neutral Physical Exam*
	* + YES
		+ N O
2. Gender Neutral Review of Systems
	* + YES
		+ N O
3. Detailed Sexual History tab for documenting confidential sexual history
	* + YES
		+ N O

 The Pronoun used for concatenation field enables you to set the pronoun of the patient either as ‘The patient’ or the system will use the pronoun based on the patient’s birth sex.

* 1. Modify the pronoun for concatenation?
* YES (The patient)

Would your practice like to enable gender related details in document header? (Master\_im Patient Plan only) - check all that apply

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| --- | --- | --- |
| **Item** | **Master Document** | **Patient Plan** |
| Birth Sex |  |  |
| Current Gender |  |  |
| Gender identity |  |  |
| Preferred Name |  |  |
| Preferred Pronoun |  |  |
| Sexual Orientation |  |  |

1. **Automation of CPTII Codes in Coded Results for Reporting (pg. 37 EHR Overview Document)**

Does your practice participate in any quality reporting programs that require claims-based data to be submitted, or report for the Quality category of MIPS via claims-based reporting?

**\*Note:** This is not applicable for practices submitting MIPS or other quality program data through NextGen HQM, another Qualified Registry, or a Specialized Registry (for example: RISE, IRIS, or Pinnacle)

* + - YES
		- N O
1. **Ability to Flag Encounter Containing Substance Use Disorder Information & Disclaimer**

*A new practice level configuration option allows practices to enable the option to flag an encounter as containing substance use disorder information and if enabled, choose from one of two statements that would be displayed on documents if an encounter was marked as such.*

* 1. Does your practice want to enable the ability to flag an encounter as containing substance use disorder information (new checkbox added to templates)?
		+ YES
		+ NO
	2. If you answered yes above, which disclaimer does your practice want to display on documents if an encounter is flagged? Note: Can only choose one option.
		+ *Option 1:* “This information has been disclosed to you from records protected by federal confidentiality rules (42 CFR Part 2). The federal rules prohibit you from making any further disclosure of information in this record that identifies a patient as having or having had a substance use disorder either directly, by reference to publicly available information, or through verification of such identification by another person unless further disclosure is expressly permitted by the written consent of the individual whose information is being disclosed or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose (see 2.3.1). The federal rules restrict any use of the information to investigate or prosecute with regard to a crime any patient with a substance use disorder, except as provided at 2.12©(5) and 2.65.”
		+ *Option 2:* “42 CFR Part 2 prohibits unauthorized disclosure of these records.”
1. **NextPen**

*New NextPen forms have been made available with this release that can be added to your system.*

* 1. If your practice utilizes NextPen, please select from any new forms listed below that you would like to added to your system for use as a NextPen form (choose all that apply):
		+ DAST (Drug and Alcohol Screening Test)
		+ AUDIT-C (Alcohol Use Disorders Identification Test)
		+ PRAPARE (Protocol for Responding to and Assessing Patients Assets, Risks and Experiences)

**Live Interfaces – List all live interfaces associated to your Practice**

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| --- | --- | --- | --- | --- |
| **Interface Name** | **Vendor** | **Direction** | **Import Data** | **Export Data** |
| **Ex: Quest** | **Quest** | **Bidirectional** | **Lab Results** | **Lab Order** |
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**\*\*\*List all to the best of your ability, if you require more space please submit additional page**

**YOU ARE NOW COMPLETE WITH THE SETUP FORM! PLEASE SUBMIT FORM TO TSI HELP DESK VIA EMAIL (****helpdesk@tsihealthcare.com****) or FAX (888-808-6156).**