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## NextGen 5.9/8.4 Upgrade EHR Training

Clinical Reconciliation Module

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## Agenda

- MIPS/MU – Clinical Reconciliation
- Clinical Reconciliation Module
  - How to access
  - General Workflow
  - New additions to clinical reconciliation module in 5.9/8.4
    - Vital Signs
    - Family History
    - Social History
    - Implantable devices

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## MIPS/MU and Clinical Reconciliation

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## MIPS/MU & Clinical Reconciliation

For at least one transition of care or referral received or patient encounter in which the MIPS eligible clinician has never before encountered the patient, the MIPS eligible clinician performs clinical information reconciliation.

The MIPS eligible clinician must implement clinical information reconciliation for the following three clinical information sets: (1) Medication. Review of the patient's medication, including the name, dosage, frequency, and route of each medication. (2) Medication allergy. Review of the patient's known medication allergies. (3) Current Problem list. Review of the patient's current and active diagnoses.

- Reconciliation can also be completed manually from the templates, for more information please review the Measure Whitepaper located on QP Central

### Medicaid Meaningful Use:

- Health Information Exchange, Measure 2
- Threshold: greater than **80 percent** of transitions of care or referrals and encounters in which the provider has never encountered the patient
  - Brand new measure, in previous years only medication reconciliation was required!!



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## Options for accessing clinical reconciliation

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## Options for Accessing Clinical Reconciliation

### 1. From the Transitioning Into Care template, select “Clinical Reconciliation”

- New in 5.9/8.4! Most practices will already be accessing this template to associate a CCD or request for a CCD to an encounter

Transitioning Into Care

Transitioning into care ⓘ

**Clinical Reconciliation**

Received/Requested Summary of Care: Summary of Care documents: The last 18 months of Summary of Care documents display in the grid.

	Document Date	Document Description	Provider/Recipient	Request Date	Request User	Practice
+ Summary of Care Received	10/29/2017	Continuity of Care Document (C-CDA R2.1) (Encounter date: 10/29/2017 04:34 PM)	Ben Jones MD	01/23/2018	Allie zTSI Henderson	TSI Medical Practice
Summary of Care Requests						

(Add Selected)

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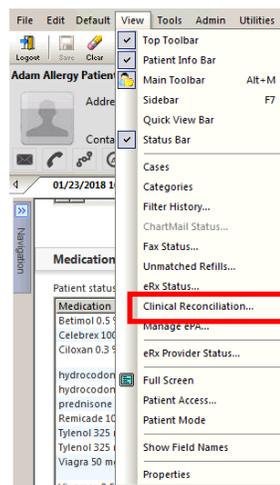
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## Options for Accessing Clinical Reconciliation

### 2. From the View Menu

- Select “Clinical Reconciliation”



## Options for Accessing Clinical Reconciliation

### 3. From the Medication Reconciliation template, select “Electronic Reconciliation”

**Medication Review**

How to conduct a medication review: ⓘ

Panel Control: [Toggle] [Cycle]

**Reconciliation Type**

Manual reconciliation:  Manual medication reconciliation completed

Electronic reconciliation: **Electronic Reconciliation** (highlighted with a red box)

**Medication Module**

Double click grid to add/edit Medication Module.

Medication Name	Sig Desc	Last Refilled
Betimol 0.5 % eye drops	instill 1 drop by ophthalmic route 2 times every day into affected eye(s)	09/18/2017
Celebrex 100 mg capsule	take 1 capsule by oral route 2 times every day	09/18/2017
Ciloxan 0.3 % eye drops	instill 1 drop by ophthalmic route every 2 hours for 2 days into affected eye(s) while awake then 1 drop every 4 hrs while awake for 5 days	09/18/2017
hydrocodone 5 mg-acetaminophen 163 mg/7.5 mL (7.5 mL) oral solution	take 15 milliliter by oral route every 4 hours as needed	/ /
hydrocodone 7.5 mg-acetaminophen 325	take 1 tablet by oral route every 6 hours as needed for pain	06/05/2017

## Options for Accessing Clinical Reconciliation

### 4. From within the specific module (i.e. Medications Module, Problems Module, etc.)

- Note: when accessing clinical reconciliation from within a specific module you will only be allowed to reconcile the information specific to that module



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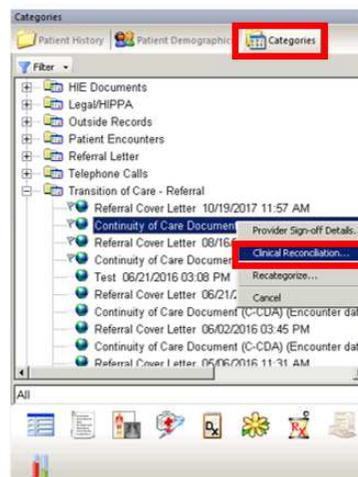
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## Options for Accessing Clinical Reconciliation

### 5. From the patient history toolbar

- Select the categories tab
- Find the folder where the CCD lives
- Right click and select "clinical reconciliation"



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## Clinical Reconciliation Module

The screenshot displays the Clinical Reconciliation Module interface. It features a 'Data Share' sidebar on the left with 'Continuity of Care Document (CCDA) (Date Ra)' entries. The main area is divided into 'EHR' and 'Import' sections, each with a table of medication entries. Below these is a 'Reconciliation Summary' table and a 'Match' button.

EHR		Import		
Action	Match	Allergy Name	Reaction (Severity)	Intolerance
Keep		CELECOXIB	Acute abdominal pain	<input checked="" type="checkbox"/>
Keep		METHAZOLAMIDE	Aggressive behavior	<input type="checkbox"/>

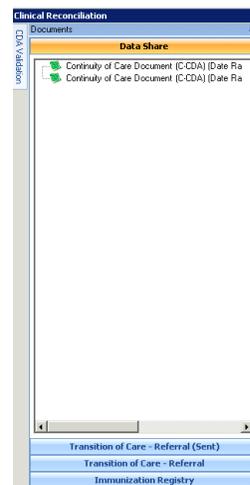
  

Reconciliation Summary							
Allergy Name	Causative Agent	Reaction (Severity)	Intolerance	Identified	Resolved	Last Modified	Status
<b>Add new item</b>							
Penicillin V			<input type="checkbox"/>	06/02/2017		02/02/2018	Active Name: Rosetta Int
<b>Unchanged - no action performed</b>							
CELECOXIB	CELEBREX	Acute abdominal pain	<input type="checkbox"/>			01/12/2018	Unresolved Organization Nan

## General Workflow Overview

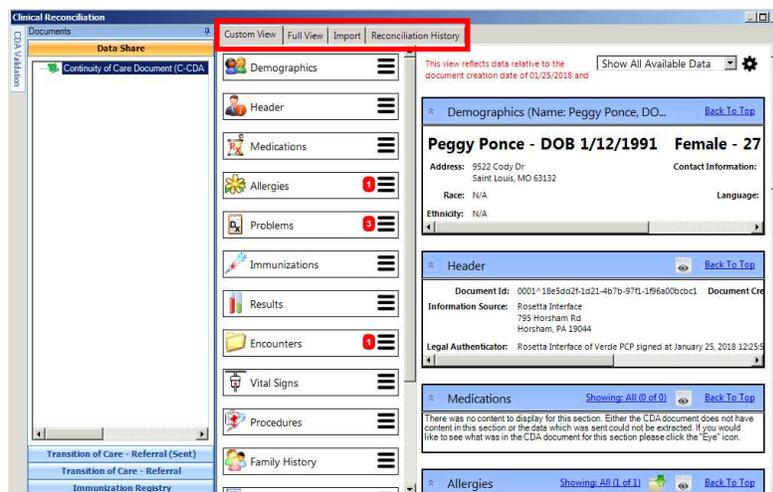
## General Workflow - 1. Select the CCD to Reconcile

- From the documents panel you are able to select the specific document you would like to reconcile
- The Documents panel will be grouped by external system such as:
  - Transition of Care – Referral
    - Direct Messages sent from another provider
  - DataShare: Documents requested via the Carequality NRLS service
    - A new Add-On that will be available later in 2018
  - Immunization Registry: For practices that are connected to their state immunization registry



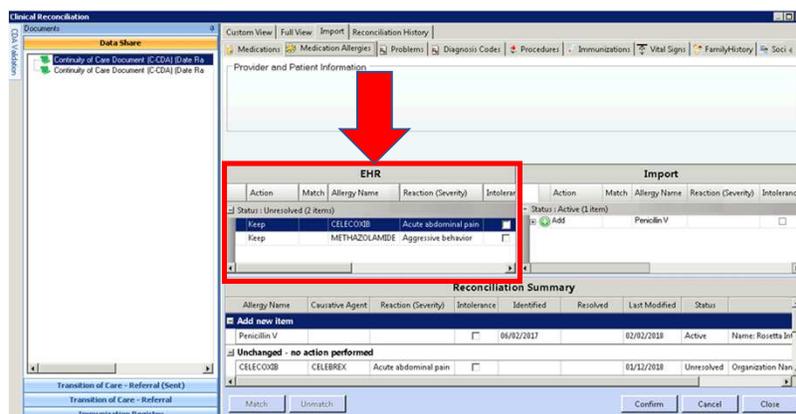
## General Workflow – 2. Navigate to the Import tab

- From within the clinical reconciliation module you are able to toggle between various views of the Continuity of Care Document
  - **Custom View** – user specific views
  - **Full View** – standard CCD view
  - **Import** – actionable view
  - **Reconciliation History** – summary of actions performed



## General Workflow - 2. Navigate to the Import tab

- The clinical reconciliation module allows you to view:
  - Existing clinical data for the patient from your EHR



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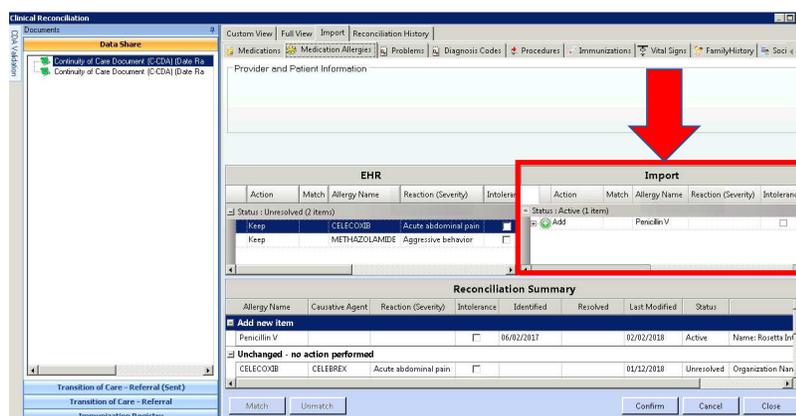
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## General Workflow - 2. Navigate to the Import tab

- The clinical reconciliation module allows you to view:
  - Items that were included on the imported CCD



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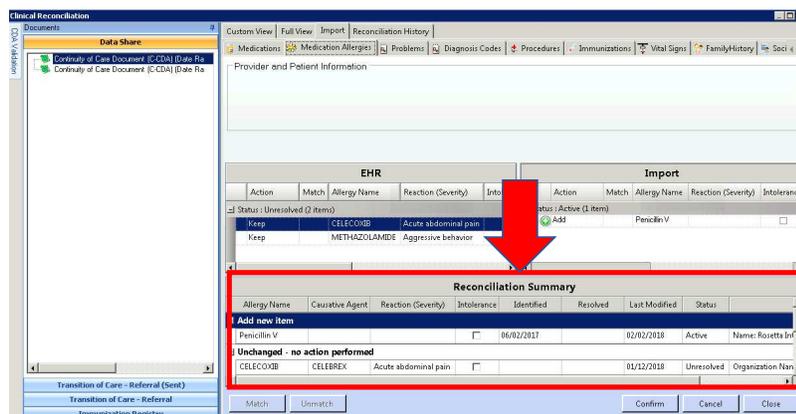
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## General Workflow - 2. Navigate to the Import tab

- The clinical reconciliation module allows you to view:
  - Reconciliation summary
  - Summary of actions that will take affect



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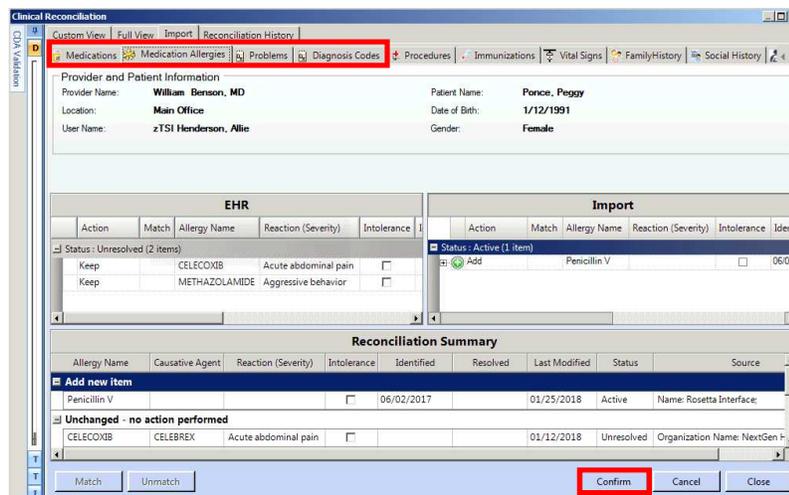
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## General Workflow – 3. Start with meds and work to the right

- Start from the left and work your way to the right across the screen
  - At a minimum Medications, Medication Allergies, or Diagnosis Codes
- Review and update the actions in the import section, EHR section, and then unmatch/match items as necessary
- Confirm the actions to save the actions



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## General Workflow 4. Review and update actions from import

The clinical reconciliation module will attempt to make suggested actions

- **Add** = new item that does not currently exist in EHR
- **Ignore** = duplicate item

Additional Actions

- **Replace** = allows you to replace an existing item in EHR with an item that was included on the CCD

02/02/2018 05:31 PM : HIE Document "Continuity of Care Document (C-DA) (Date Range: 2016-02-03 00:00:00 to 2018-02-...)"

Custom View | Full View | Import | Reconciliation History

Medications | Medication Allergies | Problems | Diagnosis Codes | Procedures | Immunizations | Vital Signs | Family History | Social History | Implantable Devices

Provider and Patient Information  
 Provider Name: Zachary D Jacobs, MD | Patient Name: Ponce, Peggy  
 Location: Main Office | Date of Birth: 1/12/1991  
 User Name: zTSI Henderson, Allie | Gender: Female

EHR						Import						
Action	Match	Allergy Name	Reaction (Severity)	Intolerance	Identified	Action	Match	Allergy Name	Reaction (Severity)	Intolerance	Identified	Res
Keep		CELECOXIB	Acute abdominal pain	<input type="checkbox"/>		- Status: Active (1 Item)						
Keep		METHAZOLAMIDE	Aggressive behavior	<input type="checkbox"/>		Add		Penicillin V		<input type="checkbox"/>	06/02/2017	

Reconciliation Summary

Allergy Name	Causative Agent	Reaction (Severity)	Intolerance	Identified	Resolved	Last Modified	Status	Source
Penicillin V			<input type="checkbox"/>	06/02/2017	02/02/2018	Active	Name: Rosetta Interface;	

Unchanged - no action performed

Match | Unmatch | Confirm | Cancel | Close

## General Workflow - 5. Review and update actions from EHR

The clinical reconciliation module will attempt to make suggested actions

- **Keep** = leave item as is within EHR

Additional Actions

- **Delete** = remove an item from EHR
- **Stop** = Stop a particular medication
- **Resolve** = Resolve a particular allergy or problem

02/02/2018 05:31 PM : HIE Document "Continuity of Care Document (C-DA) (Date Range: 2016-02-03 00:00:00 to 2018-02-...)"

Custom View | Full View | Import | Reconciliation History

Medications | Medication Allergies | Problems | Diagnosis Codes | Procedures | Immunizations | Vital Signs | Family History | Social History | Implantable Devices

Provider and Patient Information  
 Provider Name: Zachary D Jacobs, MD | Patient Name: Ponce, Peggy  
 Location: Main Office | Date of Birth: 1/12/1991  
 User Name: zTSI Henderson, Allie | Gender: Female

EHR						Import						
Action	Match	Allergy Name	Reaction (Severity)	Intolerance	Identified	Action	Match	Allergy Name	Reaction (Severity)	Intolerance	Identified	Res
Keep		CELECOXIB	Acute abdominal pain	<input type="checkbox"/>		- Status: Active (1 Item)						
Keep		METHAZOLAMIDE	Aggressive behavior	<input type="checkbox"/>		Add		Penicillin V		<input type="checkbox"/>	06/02/2017	

Reconciliation Summary

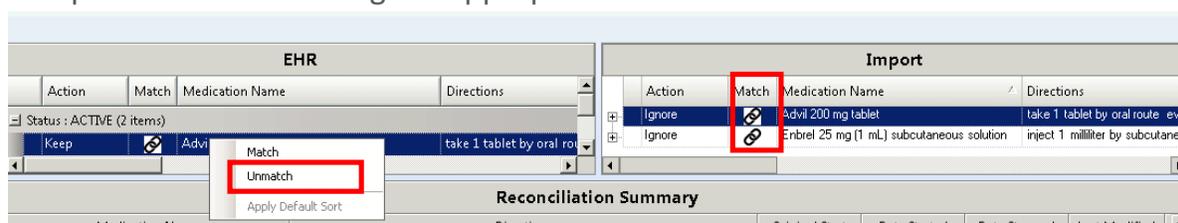
Allergy Name	Causative Agent	Reaction (Severity)	Intolerance	Identified	Resolved	Last Modified	Status	Source
Penicillin V			<input type="checkbox"/>	06/02/2017	02/02/2018	Active	Name: Rosetta Interface;	

Unchanged - no action performed

Match | Unmatch | Confirm | Cancel | Close

## General Workflow – Matching

- Items that have a status of Ignore in the Import section may also have a paperclip beside them to indicate they match with an item in the Import section
- If an action in the EHR section needs to be changed for an item with a paperclip beside it, you must right click and Unmatch the item then proceed with selecting the appropriate action



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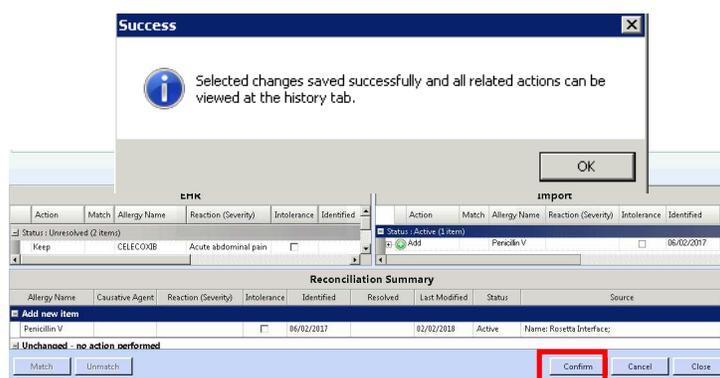
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## General Workflow – 6. Confirm Changes

- After you have reviewed and updated the actions in a section, click “confirm”
- The document will render and a “success” pop up will appear letting you know the changes have saved successfully, click “ok”



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## Clinical Reconciliation – General Workflow Recap

- Launch the clinical reconciliation module
- Select the CCD you would like to reconcile from the documents panel
- Navigate to the Import view
- Start with the Medications tab and work your way across
- Review and update actions as necessary in each section
- Confirm the actions
- Move to next tab

## Clinical Reconciliation - Reconciliation History

- Saves a record of any actions that were confirmed including the
  - Date of confirmation
  - User that confirmed
  - Action performed

Custom View   Full View   Import   Reconciliation History					
History					
Date	Performed By	Action Performed	Clinical Type	Clinical Description	
02/06/2018	ahenderson	Confirm Clicked	Problem		
02/06/2018	ahenderson	Add new item	Problem	Hepatic failure (20170602)	
02/06/2018	ahenderson	Ignore item	Problem		
02/06/2018	ahenderson	Add new item	Problem	Chest pain (20170602)	

## Clinical Reconciliation – New 5.9 Features

- In 5.9/8.4 you now have the ability to also reconcile additional sections of the CCD, including Vital Signs, Family History, Social History, and Implantable devices
- *Note: If you are going to reconcile Implantable Devices, you must reconcile the Procedures section first as the implantable device must be linked to a procedure*

The screenshot shows the 'Reconciliation History' window with the 'Vital Signs' tab selected. The interface includes fields for Provider and Patient Information, a warning note about unit conversion, and two tables for comparing EHR and Import data. A 'Reconciliation Summary' table is also visible at the bottom.

## New 5.9 Features – Vital Signs

- If no encounter exists for the vitals signs date a new encounter will be created
- The system will automatically convert the English or Metric values if any are missing

The screenshot shows the 'Reconciliation Summary' table with the following data:

Date	Time	BP	Temp C	Temp F	Height cm	Height in	Weight lb	Weight kg	Resp Rate	Pulse	Pulse Ox	Head Circ cm	Head Circ in	BMI	BSA
<b>Add new item</b>															
06/04/2017	6:13 PM	125/83	37.00	98.600	170.18	67.000	157.000	71.214	19	82				24.59	1.935
<b>Unchanged - no action performed</b>															
05/04/2017	8:53 PM	124/82	37.00	98.60	170	67.00	157.00	71.214	20	82				24.59	
05/22/2017	12:59 PM	125/82	37.00	98.60	170	67.00	155.00	70.307	19	82				24.28	

## New 5.9 Features – Family History

- Items included on the CCD can be added via the import section
- Due to coding concerns from a quality reporting standpoint, updates cannot be made to data in the EHR section
  - These items will remain with a status of Keep

Provider and Patient Information

Provider Name: Andrew S Needles, MD      Patient Name: Calhoon, Reiss  
 Location: Family Practice Location      Date of Birth: 9/4/1988  
 User Name: Admin, NEXTGEN Y      Gender: Female

EHR							Import						
Action	Match	Rela	Family Me	Decea	Age at Death	Condition	Action	Match	Rela	Family Me	Decea	Age at Death	Condition
Status: Unresolved (3 items)							Status: completed (2 items)						
Keep						Family history of Ast	Add						Family history of COPD
Keep						Family history of Gla	Add						Family history of Hyper
Keep						Family history of Hy							

Reconciliation Summary

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Status
Add new item							
				Family history of Hypertension		N	completed
				Family history of COPD		N	completed
Unchanged - no action performed							
				Family history of Asthma		N	Unknown

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## New 5.9 Features – Social History

- Smoking status, social history observation, and tobacco use status can be reconciled if details are entered
  - Ex. The type of alcohol or amount of intake must be entered
- The import section will always have a default status of ignore so that the most recent value does not get overwritten accidentally
  - A warning pop-up will appear that you must acknowledge

Provider and Patient Information

Provider Name: Andrew S Needles, MD      Patient Name: Calhoon, Reiss  
 Location: Family Practice Location      Date of Birth: 9/4/1988  
 User Name: Admin, NEXTGEN Y      Gender: Female

EHR							Import						
Action	Match	Social History	Started	Stopped	Last	Condition	Action	Match	Social History	Started	Stopped	Last Modified	Condition
Status: Unresolved (5 items)							Status: completed (1 item)						
Keep		Alcohol					Ignore		SmokingStatus	08/04/2017		08/04/2017	
Keep		Caffeine											
Keep		Alcohol											

Reconciliation Summary

Social History	Started	Stopped	Last Modified	Usage Info	Description	Status	Source
Unchanged - no action performed							
Alcohol				Y	Unresolved	Unresolved	Organization Name: NextGen Healthcare;
Caffeine				Y	Unresolved	Unresolved	Organization Name: NextGen Healthcare;
Alcohol				Y	Unresolved	Unresolved	Organization Name: NextGen Healthcare;
Caffeine				Y	Unresolved	Unresolved	Organization Name: NextGen Healthcare;

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## New 5.9 Features – Implantable Devices

- Procedures must be reconciled before implantable devices or else the device will not appear in the Import section
- The device will default to “add” if it is new or it will appear as matched based on the Universal Device Identifier (UDI)
  - If the UDI was not included on the incoming CCD it must be manually matched

Provider and Patient Information

Provider Name: Andrew S Needles, MD      Patient Name: Calhoon, Reisa  
 Location: Family Practice Location      Date of Birth: 9/4/1988  
 User Name: Admin, NEXTGEN Y      Gender: Female

Please note: Not all of this data comes from the CCD, some of it comes from the Global Unique Device Identification Database (GUDID).

EHR						Import					
Action	Match	Date Implanted	Linked Procedure	Description	Brand Name	Action	Match	Date Implanted	Linked Procedure	Description	Brand
Keep		08/04/2017	No	Uni Tibial Inset	Uni Tibial Inset	Add		08/07/2017	Yes	Trach Tube U	Summ
Keep		05/22/2017	No	B-P Hip Acet	B-P Total Hip						

Reconciliation Summary				
Date Implanted	Linked Procedure	Description	Brand Name	Model
<b>Add new item</b>				
08/07/2017	Yes	Trach Tube Un-cuffed Sz 3.5mm	Summed	1-1
<b>Unchanged - no action performed</b>				
08/04/2017	No	Uni Tibial Inset 1x14	Uni Tibial Inset	1x

Buttons: Match, Unmatch, Confirm, Cancel, Close

## Clinical Reconciliation – Permissions

- If you would like to modify which users have access to the clinical reconciliation module this can be updated via NextGen System Administrator → Rights → Modules → Discrete Data Import
- The document subcategory controls the users access to the clinical reconciliation module as a whole
- The other subcategories control their associated sections



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