



tsi healthcareSM

NextGen[®] Share
5.9/8.4 Training:
Sending Direct Messages

Agenda

- MIPS/MU & Health Information Exchange
- Overview of Sending Direct Messages
- Updates to Referrals Order Template
- Updates to Medical Summary Utility
- Other Enhancements

MIPS/MU and Health Information Exchange

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MIPS/MU & Health Information Exchange

For at least one transition of care or referral, the MIPS eligible clinician that transitions or refers their patient to another setting of care or health care clinician —(1) creates a summary of care record using CEHRT; and (2) electronically exchanges the summary of care record.

Medicaid Meaningful Use:

- Health Information Exchange, Measure 1
- Threshold: greater than **50 percent** of transitions of care and referrals
 - Previous threshold was greater than 10%



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MIPS/MU & Health Information Exchange

*Important note from CMS Measure Specifications: A MIPS eligible clinician must verify that the fields for **current problem list**, **current medication list**, and **current medication allergy list** are not blank and include the most recent information known by the MIPS eligible clinician as of the time of generating the summary of care document or include a notation of no current problem, medication and/or medication allergies

- If your clinical team is not routinely documenting the patients problems on the problem list, ensure they start doing this as soon as possible



Workflow Options for Sending Direct Messages

Workflow A – Referrals Order Template

- Fully EHR-integrated workflow
- Fewer clicks
- Message delivery notifications
- Contains CCD with current encounter data

Workflow B – Medical Summary Utility (MSU)

- Not EHR-dependent once referral is documented
 - Great option for admin staff, referral coordinators, etc.
- Message preview capabilities
- Contains CCD with user selected data
 - Allows greater level of control over encounter data sent

Referrals Order Template in 5.9/8.4

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New Referrals Order Template Layout

Before

Referrals Order

Assessments My Plan A/P Details Referrals Office Procedures Co-sign Orders

Insurance name: [Bdts Zehn Employees Bldg] Policy #: [2142343]

Te: Specialty/specialist name/site Obstetric Therapies/Rehabilitation Exclusion DME

Specialty: Provider name: Address Detail Location: Internal referral:

Authorization required: No Yes

Diagnosis:

Description	Code	Description	Code
1. <input type="text"/>	<input type="text"/>	4. <input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>		

Services requested: Consult Evaluate and treat Follow-up and treat Assume care Surgery Diagnostic testing

Clinical Indications: Reason for referral: Time limit: Timeframe:

Clinical Information/Comments:

Instructions: Patient referral/instructions given

Attachments:

Continuity of Care Document/Record sent

Code	Diagnosis	Order	Order Comments	Comments
4.1				

After

Referrals Order

Assessments My Plan A/P Details Referrals Office Procedures Co-sign Orders

Insurance name: Policy #:

Te: Specialty/specialist name/site Obstetric Therapies/Rehabilitation Exclusion DME

Specialty: Provider name: Address Detail Location: Internal referral:

Authorization required: No Yes

Diagnosis:

Description	Code	Description	Code
1. <input type="text"/>	<input type="text"/>	3. <input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	4. <input type="text"/>	<input type="text"/>

Services requested: Consult Evaluate and treat Follow-up and treat Assume care Surgery Diagnostic testing

Clinical Indications: Reason for referral: Time limit: Timeframe:

Clinical Information/Comments:

Attachments:

Instructions: Patient referral/instructions given

Summary of Care/Record sent

Referrals ordered: Incomplete Completed (highlight row to update)

Status	Ordered Date	Done	Code	Diagnosis	Order	Referral	Reason
4.1							

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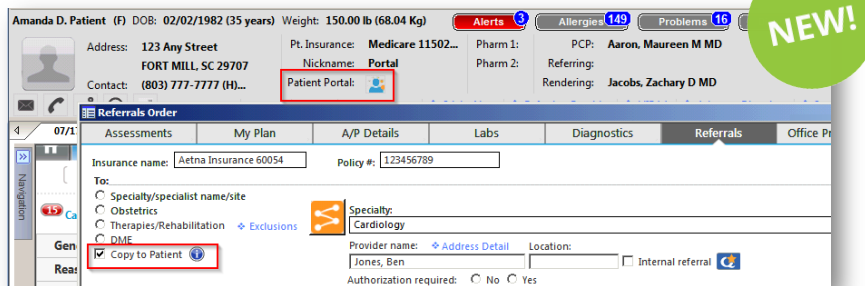
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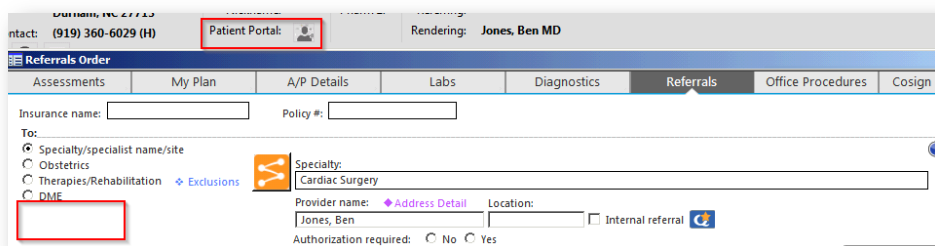
Referrals Order Template Enhancements: Copy to Patient

- When sending a referral to another provider, if the patient is enrolled in Patient Portal, the user can select the checkbox on the Referrals Order template to “Copy to Patient”
 - This will cc the patient on the direct message being sent to another provider and the patient will receive the notification in their patient portal
 - This will ALSO count towards the MIPS/MU secure messaging requirement



Referrals Order Template Enhancements: Copy to Patient

- When sending a referral to another provider, if the patient is not enrolled in Patient Portal, the “Copy to Patient” option will not be available



Referrals Order Template Enhancements

- The Clinical Information Comments and Attachments sections function the same but are repositioned on the template for easier view

The screenshot shows the 'Referrals Order' form with various tabs at the top: Assessments, My Plan, A/P Details, Labs, Diagnostics, Referrals, Office Procedures, and Cosign Orders. The 'Referrals' tab is active. The form includes fields for Insurance name, Policy #, To: (Specialty/specialist name/site), Speciality (Anesthesiology), Therapies/Rehabilitation, Exclusions, DME, Copy to Patient, Provider name (Benson, William), Address Detail, Location, Internal referral, Authorization required (No/Yes), Add Assessment, and Add Common assessment. The Diagnosis section has four rows for Description and Code. Services requested include Consult, Evaluate and treat, Follow-up and treat, Assume care, Surgery, and Diagnostic testing. Clinical indications include Reason for referral, Time limit, and Timeframe. The Clinical Information/Comments and Attachments sections are highlighted with a red box. Below these are Instructions (Patient referral/instructions given, Summary of Care/Record sent), Referrals ordered (Incomplete/Completed), and a table with columns: Status, Ordered Date, Done, Code, Diagnosis, Order, Referral, Reason. At the bottom are buttons for Close, Share, Quick Task, and Send Task.

Referrals Order Template Enhancements

- “Incomplete” & “Completed” radio buttons allow users to toggle between referrals based on the order status
- Reminder: CMS 50 (closing the referral loop) focuses on “completed” orders
 - The provider the patient is referred to provides a report back to the referring provider
 - In NextGen, this is captured by a user “completing” the referral order

This screenshot is similar to the one above but includes a green circular callout bubble with the word 'NEW!' in white. The 'Referrals ordered' section, which contains radio buttons for 'Incomplete' and 'Completed', is highlighted with a red box. The rest of the form structure is identical to the previous screenshot.

Referrals Order Template Enhancements

- Update** - with the desired referral order highlighted in 8.4, users will be able to modify aspects of an existing referral
 - This includes adding a provider to referral from the NG Share directory.
 - Once changes are made the user will click "update" to save changes
- Remove** - will allow users to delete the highlighted referral
- Clear All** – will allow the user to clear all fields that have been documented and start the documentation over

The screenshot shows the 'Referrals Order' form with several tabs: Assessments, My Plan, A/P Details, Labs, Diagnostics, Referrals, and Office Procedures. The 'Referrals' tab is active. The form includes fields for Insurance name, Policy #, To: (Specialty/specialist name/site, Obstetrics, Therapies/Rehabilitation, Exclusions, DME, Copy to Patient), Specialty (Anesthesiology), Provider name (Benson, William), Location, Internal referral, Authorization required, and Diagnosis (Description, Code, R53.01). There are also sections for Services requested, Clinical indications, Reason for referral, Clinical Information/Comments, Attachments, Instructions, and Referrals ordered. At the bottom, there is a table with columns: Status, Ordered Date, Done, Code, Diagnosis, Order, Referral, Reason. The 'Update', 'Remove', and 'Clear All' buttons are highlighted in a red box.

REVIEW: Integrated Workflow to Send Direct Messages

Step 1: Launch the NextGen Share Provider Directory to search & discover connected providers

The screenshot shows the 'Referrals Order' form with the 'Referrals' tab active. A red box highlights the 'Specialty' dropdown menu, which is currently set to 'Anesthesiology'. A red arrow points from the 'Step 1' text to this dropdown. The form includes fields for Insurance name, Policy #, To: (Specialty/specialist name/site, Obstetrics, Therapies/Rehabilitation, Exclusions, DME, Copy to Patient), Specialty (Anesthesiology), Provider name (Benson, William), Location, Internal referral, Authorization required, and Diagnosis (Description, Code, R53.01). There are also sections for Services requested, Clinical indications, Reason for referral, Clinical Information/Comments, Attachments, Instructions, and Referrals ordered. At the bottom, there is a table with columns: Status, Ordered Date, Done, Code, Diagnosis, Order, Referral, Reason.

NextGen Share Provider Directory

NextGen Share Search

Search
Use the search options below to find Providers and Organizations

Provider Directories to Search
 My EHR
 Share

Name (Last, First or Organization)

Specialty

Location (City, State or Zip)

Vivas, Jaime
 Directory: My EHR
 Specialty: Rheumatology
 Organization: Jaime L Vivas MD
 Email: jaime.vivas.p1@direct.vivas.nextgensha...
 Phone: 706-660-1712
 Address: 2300 Manchester Expressway, Suite Columbus, GA 31904-6803

Abril MD, Annette
 Directory: My EHR
 Specialty: Rheumatology
 Organization: Arthritis Assoc Of Kings...
 Email: annette.abril@direct.aak.nextgenshare...
 Phone: 423-392-8840
 Address: Three Sheridan Square Kingsport, TN 37660-7370

Benson, William
 Directory: My EHR
 Organization: TSI Medical Practice
 Email: william.benson.p1@direct.tshealthcare...
 Phone: 919-929-8251
 Address: 13630 Gardenia Path Chapel Hill, NC 27517

Annotations:
 Favorites: Add/Remove by clicking the *star* once
 Recently Used: Most recent selections, regardless of favorite status

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REVIEW: Integrated Workflow to Send Direct Messages

Step 1: Launch NG Share Provider Directory to search & discover connected providers

Step 2: Check "Copy to Patient" if patient is enrolled in portal

Step 3: Add diagnosis and complete any other referral fields

Step 6: Highlight the referral order

Referrals Orders

Assessments My Plan A/P Details Labs Diagnostics Referrals Office Procedures Cosign Orders

Insurance name: Medicare 11502 Policy #: 999999999a

To: Specialty/specialist name/code
 Pulmonology

Provider name: Jones, Ben Location: Internal referral

Diagnosis:
 1. Chronic obstructive pulmonary disease, unspecified (J44.9)
 2. []

Services requested:
 Consult Evaluate and treat Follow-up and treat Assume care Surgery Diagnostic testing

Clinical indications:
 Reason for referral: [] Time limit: [] Timeframe: []

Clinical Information/Comments: [] Attachments: []

Instructions:
 Patient referral/instructions given
 Summary of Care/Record sent

Referrals ordered: Incomplete Completed (Highlight row to update)

Status	Ordered Date	Done	Code	Diagnosis	Order	Referral	Reason
ordered	10/29/2017		J44.9	Chronic obstructive pulmonary disease, unspecified	Referrals: Pulmonology, Jones, Ben	processed	

Buttons: Add, Update, Remove, Clear All, Share, Quick Task, Send Task

Step 4: Add Attachments (optional step)

Step 5: Click "Add" to save to Referrals Ordered grid

Step 7: Click Share to send referral through Direct network and count towards MU & MIPS ACI

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Medical Summary Utility in 5.9/8.4

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Medical Summary Utility (MSU) Enhancements

- Ability to “copy to patient” from the MSU as well
 - This feature allows you to send a copy of the direct message to the patients portal account

The screenshot shows the 'Medical Summary' application window. At the top, it displays patient information for 'Adam Allergy Patient (M)' with Person # 8, SSN 999-99-9999, and address 123 TSI Street, Chapel Hill, NC 27517. Below this is a list of medical events with checkboxes and dates. The 'Destination' section includes fields for 'General Export Information' such as Title, Referral Reason, On Behalf Of (Dr. Zachary D. Jacobs, MD), and CQM Provider (Dr. Zachary D. Jacobs, MD). A 'Destination/Endpoint' dropdown is set to 'NextGen Share', and a 'Copy To Patient' button is highlighted with a red box. The 'Export As' dropdown is set to 'New'. A green circular badge with the text 'NEW!' is positioned in the upper right corner of the screenshot.

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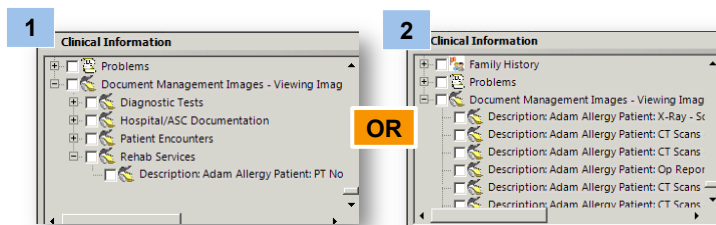
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Medical Summary Utility (MSU) Enhancements

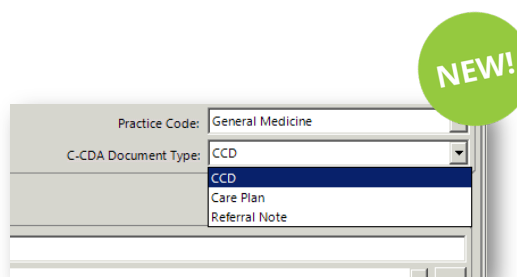
- Ability to modify the way Document Management (i.e. ICS images) are displayed

1. View images based on category folder
- OR
2. View images based on document name ordered most recent to latest



Medical Summary Utility (MSU) Enhancements

- CCD will continue to be the default C-CDA document type exported from the MSU to received MIPS/MU credit.
 - However, the document type can be updated to "Care Plan" or "Referral Note" depending on user needs



REVIEW: Medical Summary Utility (MSU) Workflow

Step 1: Confirm correct patient is loaded, if not Search for Patient

Step 2: Select the box for encounters to include, or select the box by the patients name to send all encounters

Step 3: Enter the title and referral reason

The screenshot shows the 'Medical Summary' application window. At the top, patient information for 'Adam Allergy Patient (M)' is displayed, including SSN and address. Below this, a list of encounters is shown with checkboxes for selection. The 'Destination' section is populated with 'Referral to Dr. Benson' as the title and 'Elevated BP' as the referral reason. The 'On Behalf Of' and 'CQM Provider' fields are both set to 'Zachary D Jacobs, MD'. The 'Direct Information' section shows the referral is sent to 'Benson, William'. A 'Preview' button is visible at the bottom left.

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REVIEW: Medical Summary Utility (MSU) Workflow

Step 4: Ensure the provider that is referring the patient is in the On Behalf Of & CQM Provider fields

Step 5: Click "To" to search for the provider

Step 6: Click in the Associated Referral field to select the appropriate referral. If the referral is not showing ensure a staff member documents the referral in EHR before the record is sent

Step 7: Click "Preview"

This screenshot is similar to the previous one but highlights additional steps. Red boxes and arrows point to the 'On Behalf Of' and 'CQM Provider' dropdowns, the 'To' field in the 'Direct Information' section, and the 'Associated Referral' field. The 'Associated Referral' field contains the text: 'Reason ; Diagnosis: Chronic obstructive pulmonary disease, unspecified; Refer To Physician ; Ordered Date: 20171029; Status: ordered; Display Information: Referrals: Anesthesiology; ...'. The 'Preview' button is highlighted with a red box.

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REVIEW: Medical Summary Utility (MSU) Workflow

Ability to toggle between the Custom View and Full View

Preview Document

File

CDA Content Custom View Full View

Search Q [] Quick Filter [] New Filter []

No filtering is applied

Continuity of Care Document (C-CDA R2.1)

Patient	Adam Allergy Patient
Date of birth	December 27, 1939
Current Gender	Male
Race(s)	White
Ethnicity	Not Hispanic or Latino
Language(s)	English (Preferred)
Contact info	123 TSI Street Chapel Hill, NC 27517, US Mobile Phone: +1-8888888888 Primary Home Phone: +1-224567890 Email: drachow@tsihealthcare.com
Patient IDs	8 2.16.840.1.113883.3.109.3.1280.4.1.1.80210.2.1
Document Id	4fbda3dc-5426-4701-bf8d-f2dc6d7cae3 2.16.840.1.113883.3.109.3.1280.4.1.1.80210.2.2.1
Document Created:	October 30, 2017, 20:31:23 -0400
Performer	Zachary Jacobs, MD 100 Europa Drive Chapel Hill, NC 27517
Author	Zachary D Jacobs
Contact info	100 Europa Drive Chapel Hill, NC 27517 Work Phone: +1-9199298251
Care giver	Thomas Abbott (primary care physician)

Attachments (None Available)

Export Reject/Cancel

Step 8: Click "Export" to send the direct message

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Additional Enhancements

- Upon upgrading to NextGen Version 5.9/8.4 the default CCD-A format will be version CCDA R2.1
- New Sections will be included on the CCD such as:
 - Goals, Health Concerns, Health Status Evaluations, Interventions
 - All pull from the Care Plan template in NextGen EHR
 - Medical Equipment
 - Mental Status
 - Plan of Treatment (section formerly called Plan of Care)





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