

tsi healthcareSM

NextGen[®] Patient Portal
5.9/8.4 Training:
Portal Enhancements



Agenda

- MIPS/MU & Providing Patient Electronic Access
 - Portal Enrollment Updates
- MIPS/MU & Patient Education
 - Ability to upload multiple Healthwise education articles to portal at once
- MIPS/MU & View, Download, and Transmit
 - Ability to send a CCDA to another email address from Patient Portal
- MIPS/MU & Secure Electronic Messaging
 - Contains Clinical Information
 - Ability to CC patients on a direct message
- Other Enhancements

MIPS & Providing Patient Electronic Access

For at least one unique patient seen by the MIPS eligible clinician:

- (1) The patient (or the patient-authorized representative) is provided timely access to view online, download, and transmit his or her health information;
AND
- (2) The MIPS eligible clinician ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the Application Programming Interface (API) in the MIPS eligible clinician's CEHRT.



Medicaid MU & Providing Patient Electronic Access

Measure 1:

1) For more than **80 percent*** of all unique patients seen by the EP: 1) The patient (or the patient-authorized representative) is provided **timely*** access to view online, download, and transmit his or her health information

AND

2) The provider ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the Application Programming Interface (API) in the provider's CEHRT

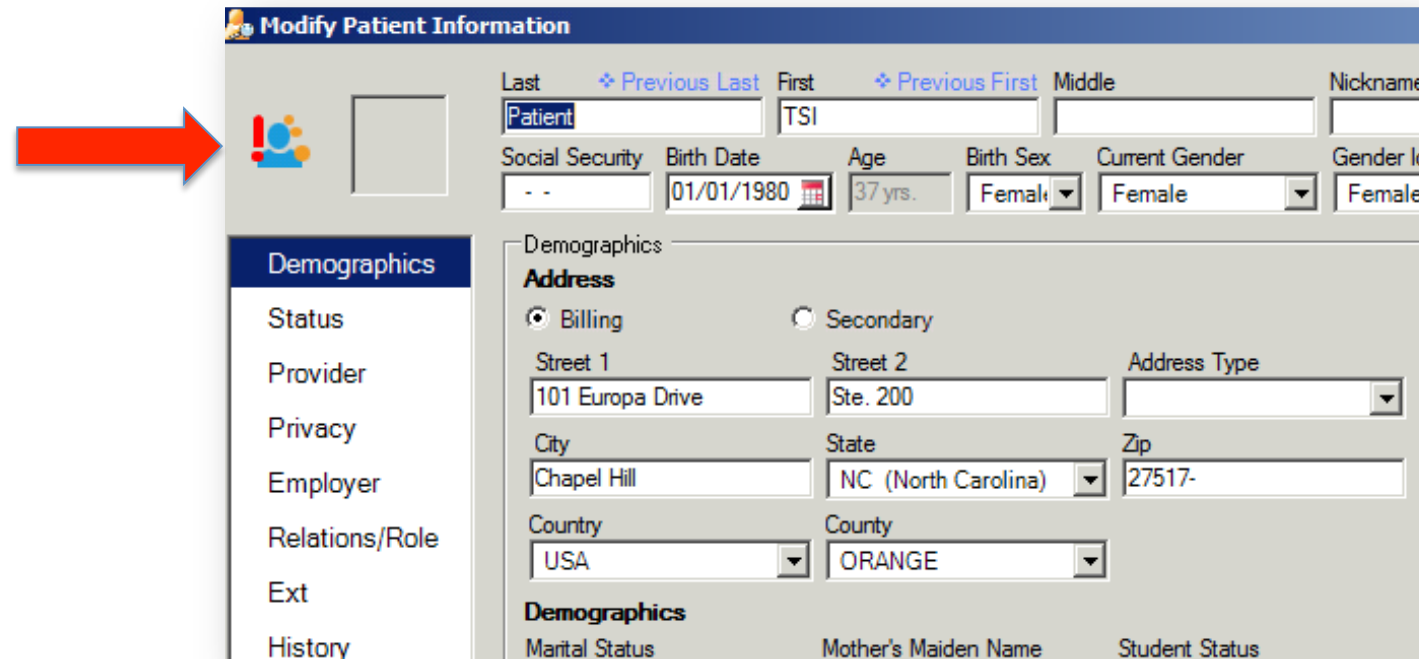
*Increased from 50 percent to 80 percent

*Timely Access = 48 hours



Patient Portal Enrollment Indicators

- New Portal Enrollment Icons
 - Portal enrollment icon will now display on the demographics screen in PM
 - New icons reflect different enrollment statuses



The screenshot shows the 'Modify Patient Information' interface. A red arrow points to a new enrollment icon (a blue circle with a white exclamation mark) located in the top left corner of the form. The form contains the following fields:

Last	Previous Last	First	Previous First	Middle	Nickname
Patient		TSI			

Social Security	Birth Date	Age	Birth Sex	Current Gender	Gender Id
--	01/01/1980	37 yrs.	Female	Female	Female

Demographics

Address

Billing Secondary

Street 1	Street 2	Address Type
101 Europa Drive	Ste. 200	

City	State	Zip
Chapel Hill	NC (North Carolina)	27517-


Country	County
USA	ORANGE

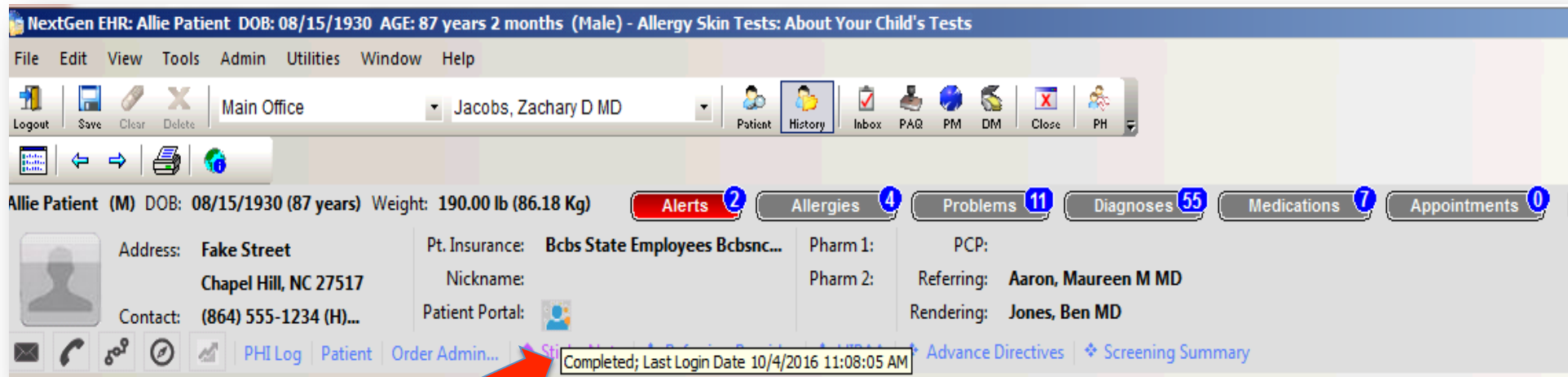
Demographics

Marital Status	Mother's Maiden Name	Student Status

Patient Portal Enrollment Indicators









- New Portal Enrollment Icons

- Portal enrollment icon  will also display on the patient information tool bar in PM and EHR
- Hovering over the icon will provide you with additional information
- Clicking on the icon will launch the patient portal enrollment screen



Patient Portal Enrollment Indicators

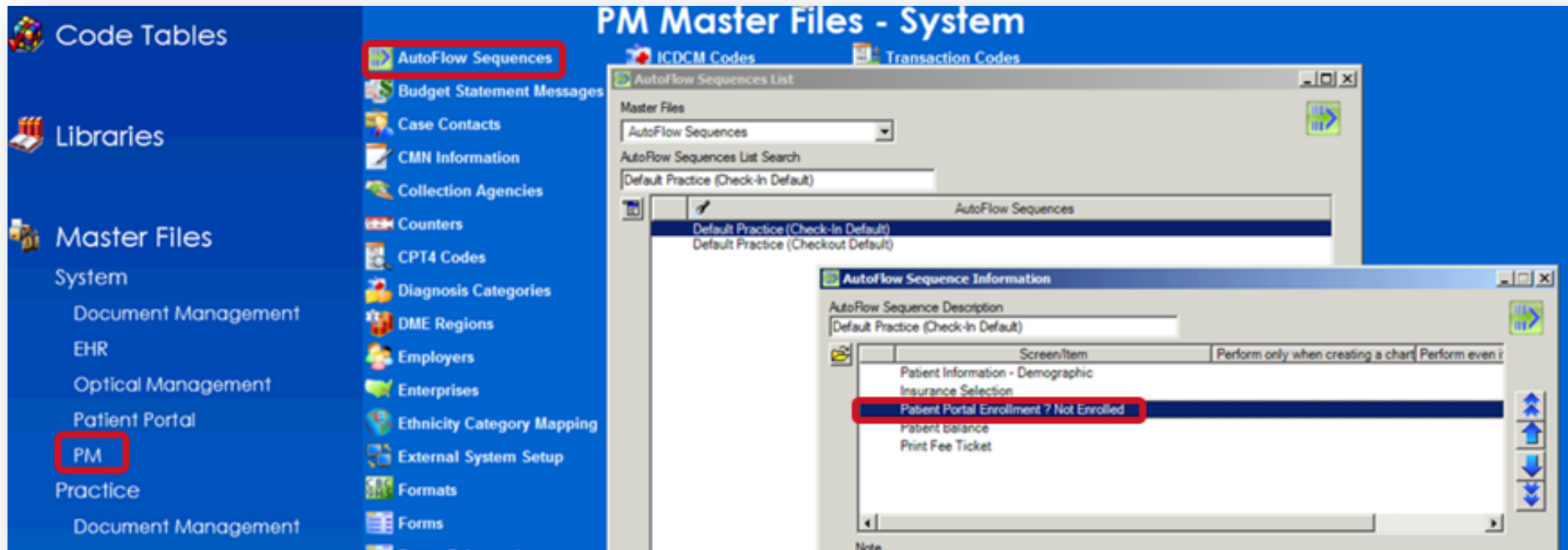
- New Portal Enrollment Icon statuses
 - There are several new versions of the portal enrollment icon that reflect more specific statuses:

Icon	Tool Tip	Indicates that
	Not Enrolled	The patient is not enrolled in NextGen Patient Portal.
	Pending	The patient has a pending enrollment request and has no guardians.
	Pending Self Enrollment	Self-enrollment process has been discussed with patient.
	Pending with Guardian	Person has a pending enrollment, at least with one guardian.
	Pending Auto Enrollment	Person has temporary logon completed (through bulk enrollment) but has not logged on yet to activate the account.
	Completed; Last Login Date MM/DD/YYYY	The patient has completed enrollment.
	Completed with Guardian; Last Login Date MM/DD/YYYY	Person has completed enrollment through at least one guardian who is enrolled in NextGen Patient Portal.
	Account Locked; Last Login Date MM/DD/YYYY	The account has been locked out and an email notification has been sent.



Patient Portal Enrollments

- Ability to incorporate Patient Portal enrollments in AutoFlow
 - TSI TIP: Feature became available in UD3 and is recommended so that enrollments are not accidentally missed as a part of check-in or check-out
 - Must be configured in File Maintenance → System Master Files → PM → AutoFlow Sequences



Patient Portal Enrollments

- New layout (starting in UD3) of Patient Portal Enrollment screen

Before

Annie Test - Patient Portal Enrollment

Select account: If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
Annie Test	Self	Full	New Enrollee	07/11/1970	1234 Chapel Hill St, Chapel Hill, NC 27514

Remove Add Care Manager ... Add Dependant ...

Selected account

Name: Annie Test Relationship: Self E-mail: Update

Status: Not Enrolled

Send attachments: AComplete forms-training

Rights of selected account to/from member:

Full access Access expires on: []

Partial access

Grant	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical For...	<input type="checkbox"/>	<input type="checkbox"/>

Remove Add...

Send Paper Statement

Enrollment token: 101-27-106 New Token

Add...

Print... OK Cancel

After

TSI Patient - Patient Portal Enrollment

Assign role

Rights of selected account to/from member: Add Care Manager ... Add Dependent ... Remove

Name	Role	Status	DOB	Address
TSI Patient	Self	Not Enrolled	01/01/1980	101 Europa Drive Ste. 200, Chapel Hill, NC 27517

Access Profile Specifications:

Age Range	Full Access	View Only	No Access	Last Modified

Selected account

Name: TSI Patient Role: Self Enrollment token: 753-84-326 New Token

Patient Responses: E-mail: Update Send Paper Statement

Send attachments: Complete Forms- Training

History and comments: P.I.E Instructions Given Status: Not Enrolled

Remove Add... Add...

Print... OK Cancel

Patient Portal Enrollments

- New layout (starting in UD3) of Patient Portal Enrollment screen
 - Shift of care manager fields to top of enrollment screen
 - Relocation of enrollment token and email fields

NEW!

TSI Patient - Patient Portal Enrollment

Assign role

Rights of selected account to/from member:

Name	Role	Status	DOB	Address
TSI Patient	Self	Not Enrolled	01/01/1980	101 Europa Drive Ste. 200, Chapel Hill, NC 27517

Access Profile Specifications:

Age Range	Full Access	View Only	No Access	Last Modified

Selected account

Name: TSI Patient Role: Self Enrollment token: 753-84-326 New Token

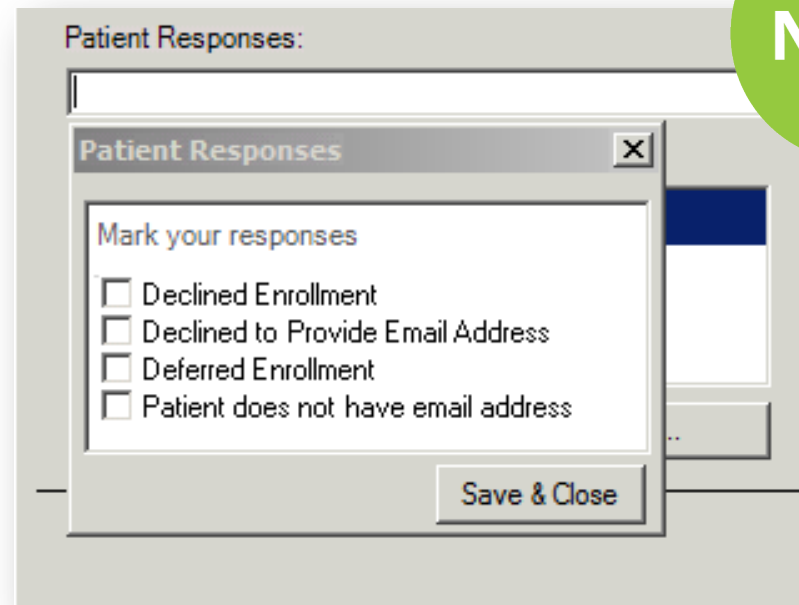
Patient Responses: E-mail: Update Send Paper Statement

Send attachments: Complete Forms- Training History and comments: P.I.E Instructions Given Status: Not Enrolled

Remove Add... Add... Print... OK Cancel

Patient Portal Enrollments

- New field for documenting “Patient Responses” (i.e. why a patient does not wish to enroll in Patient Portal)



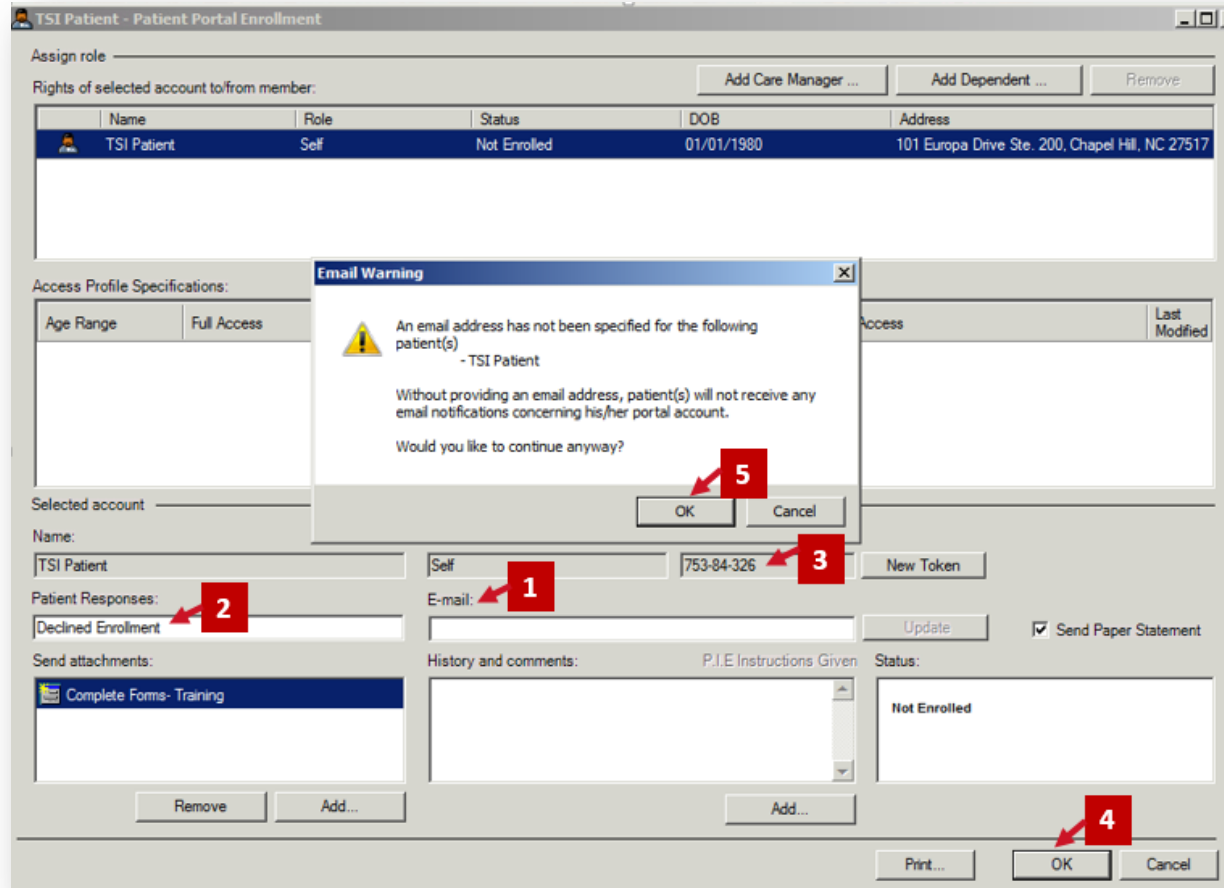
The image shows a screenshot of a software interface. At the top, there is a text input field labeled "Patient Responses:". Below it, a dialog box titled "Patient Responses" is open. The dialog box contains the heading "Mark your responses" and four checkboxes with corresponding labels: "Declined Enrollment", "Declined to Provide Email Address", "Deferred Enrollment", and "Patient does not have email address". A "Save & Close" button is located at the bottom right of the dialog box. A green circular callout with the word "NEW!" in white text is positioned to the right of the dialog box.

Patient Portal Enrollments

- If a patient does not wish to enroll in portal:
 1. Leave the email address field blank (if an email is not already documented)
 2. Document the appropriate patient response
 3. Still give the patient their token number in the event they change their mind
 4. Click “Ok”
 5. Click “Ok” to the invalid email warning
 - Patient will update to the status of “enrollment pending”
 - Provider will receive credit for MIPS/MU

Patient Portal Enrollments

- If a patient does not wish to enroll in portal:



MIPS & Patient Education

- The MIPS eligible clinician must use clinically relevant information from CEHRT to identify patient-specific educational resources and provide **electronic access** to those materials to at least one unique patient seen by the MIPS eligible clinician.



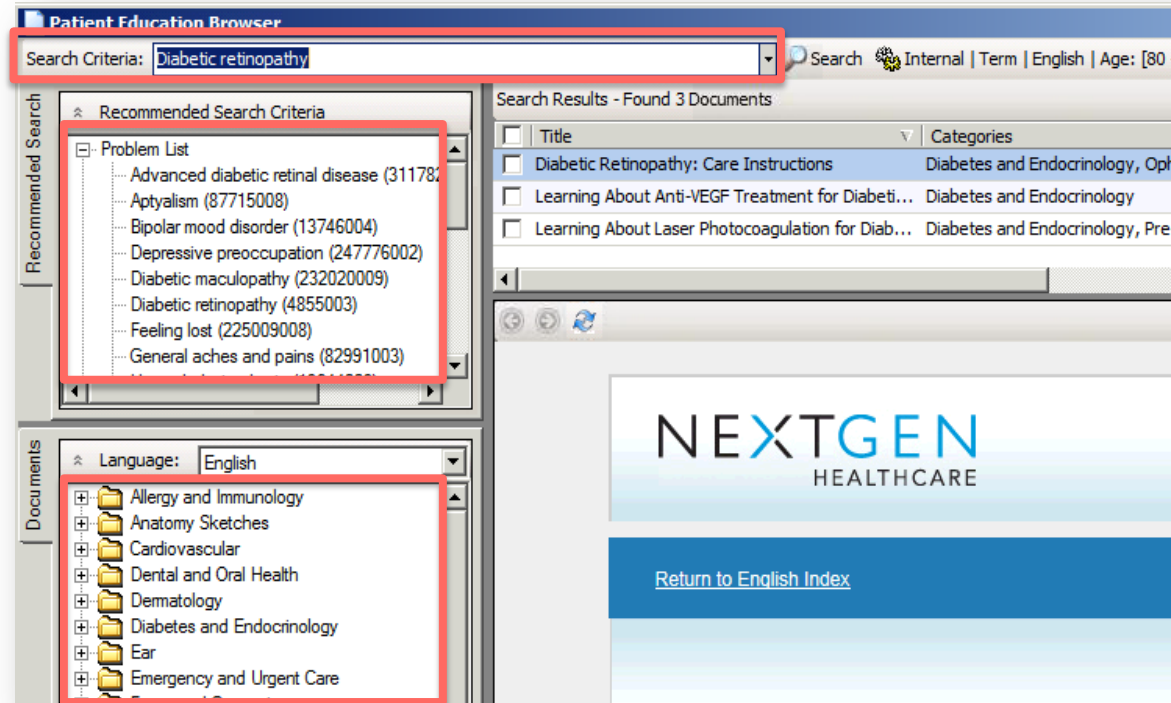
Medicaid MU & Patient Education

- The patient education requirement is now Measure 2 of the Patient Electronic Access measure:
- Measure 2:** The EP must use clinically relevant information from CEHRT to identify patient-specific educational resources and provide **electronic** access to those materials to more than **35 percent** of unique patients seen by the EP during the EHR reporting period.
 - Increased from 10% to 35%
 - Now patient education must be provided electronically



Ability to upload multiple patient education documents

- Providers that are licensed for Healthwise Patient Education now have the capability to upload multiple patient education documents to the portal at once
- Once the patient education module is launched the user can utilize:
 - The search bar
 - Recommended search criteria list
 - Expand the desired folders based on specialty



Ability to upload multiple patient education documents

NEW!

- After the document has been reviewed, the user can:
 - Select the checkbox beside the article name
 - Select the “Add to Cart” option
 - To remove an article simply click “Remove from Cart”
- Once all documents are in the cart select the “Send to Patient Portal” option

The screenshot displays the 'Patient Education Browser' interface. The search criteria are 'Diabetic retinopathy'. The search results show three documents, with 'Diabetic Retinopathy: Care Instructions' selected. The interface includes a 'Recommended Search' section with a 'Problem List' and a 'Documents' section with a category tree. The 'Selected Documents' table at the bottom shows the selected document with columns for Print, Title, Encounter, Source, Cpt Codes, ICD Codes, and Search Text. At the bottom right, there are buttons for 'Add to Cart', 'Remove from Cart', 'Print', 'Send to Patient Portal', and 'Save to E'. A green circle with 'NEW!' is overlaid on the top right of the screenshot.

Print	Title	Encounter	Source	Cpt Codes	ICD Codes	Search Text
<input checked="" type="checkbox"/>	Diabetic Retinopathy: Care Instructions	10/15/2017 5:00:00 PM	Healthwise		E08.21, E10, E10.1, E10.10, E10.11, E10.2, E1...	Diabetic retino

MIPS & View, Download, or Transmit (VDT)

During the performance period, at least one unique patient (or patient-authorized representatives) seen by the MIPS eligible clinician actively engages with the EHR made accessible by the MIPS eligible clinician. A MIPS eligible clinician may meet the measure by either:

- (1) view, download or transmit to a third party their health information;
- (2) access their health information through the use of an API that can be used by applications chosen by the patient and configured to the API in the MIPS eligible clinician's CEHRT;
- (3) a combination of (1) and (2).



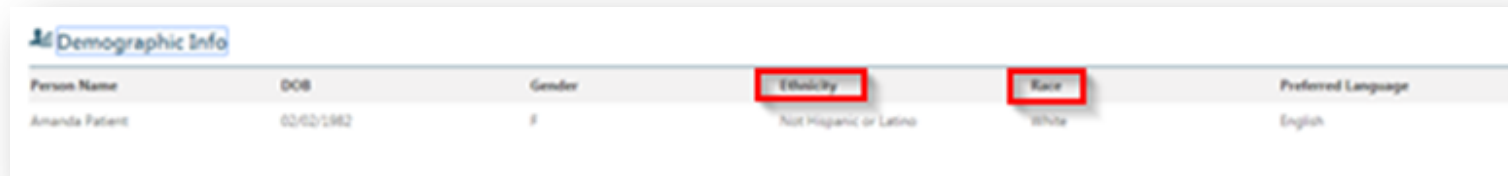
Medicaid MU & View, Download, or Transmit (VDT)

- The View, Download, or Transmit option is now **Measure 1** of the Coordination of Care through Patient Engagement Requirement
- **Measure 1**: For an EHR reporting period in 2017 and 2018 , **more than 5 percent** of all unique patients (or their authorized representatives) seen by the EP actively engage with the electronic health record made accessible by the provider and either
 - (1) view, download or transmit to a third party their health information;
 - (2) access their health information through the use of an API that can be used by applications chosen by the patient and configured to the API in the MIPS eligible clinician's CEHRT;
 - (3) a combination of (1) and (2).



New PHR Option: New items on View My Chart and CCDA

- Two new sections on the CCDA pertaining to:
 - Medical Equipment
 - Goals
- In the demographics section, race and ethnicity will now display

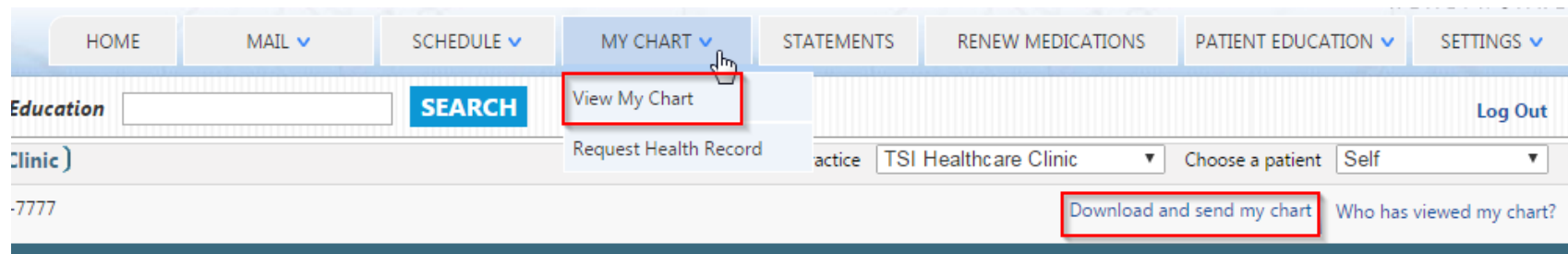


Demographic Info					
Person Name	DOB	Gender	Ethnicity	Race	Preferred Language
Amanda Patient	02/02/1982	F	Not Hispanic or Latino	White	English

- Eventually Pulse Ox will also be included in the vitals section

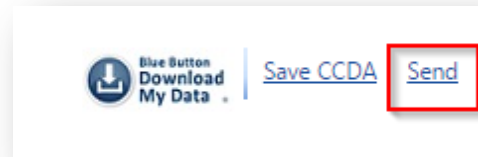
New PHR Option: Ability to send CCDA to someone else

- Patients now have the ability to send a secure email with their CCDA document to anyone they choose via email. They will secure it with a password that must be provided to the recipient.
- From Nextmd.com → View my Chart → Download and send my chart

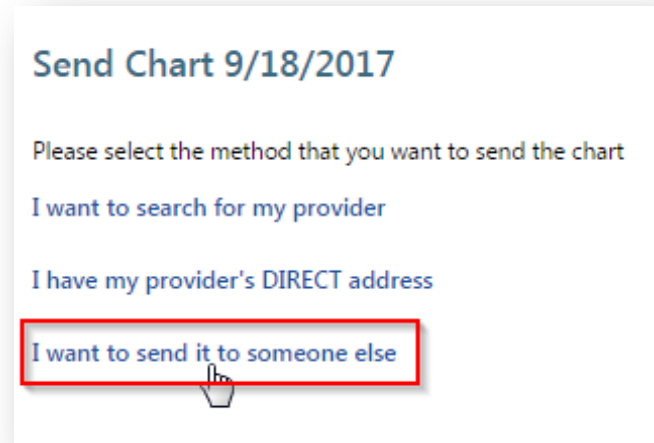


New PHR Option: Ability to send CCDA to someone else

- Then select the “Send” option in the right corner



- Then choose the “I want to send it to someone else”



New PHR Option: Ability to send CCDA to someone else

- Patients would enter the email address of the person or persons they would like to send the PHR to and then provide the password they create to the recipient(s).

Back to Send My Chart 9/18/2017 > I want to send it to someone else

* Enter email address(es):
drachow@tsihealthcare.com
Maximum allowed 250 characters. Multiple email addresses must be separated by commas.

Subject:
CCD Document Being Sent on behalf of Amanda Patient From NextGen Patient Portal

Message:
Here is a copy of my personal health record for you to file.
Maximum allowed 250 characters.

The password entered will be used to password protect the chart file attached to the email. You must communicate to the recipient separately. It will NOT be included in the email.

* Password:

✓ Use 8 or more characters
✓ Must include at least one numeric digit

* Retype Password:

SEND MY CHART

MIPS & Secure Messaging

For at least one unique patient seen by the MIPS eligible clinician during the performance period, a secure message was sent using the electronic messaging function of CEHRT to the patient (or the patient-authorized representative), or in response to a secure message sent by the patient (or the patient-authorized representative).



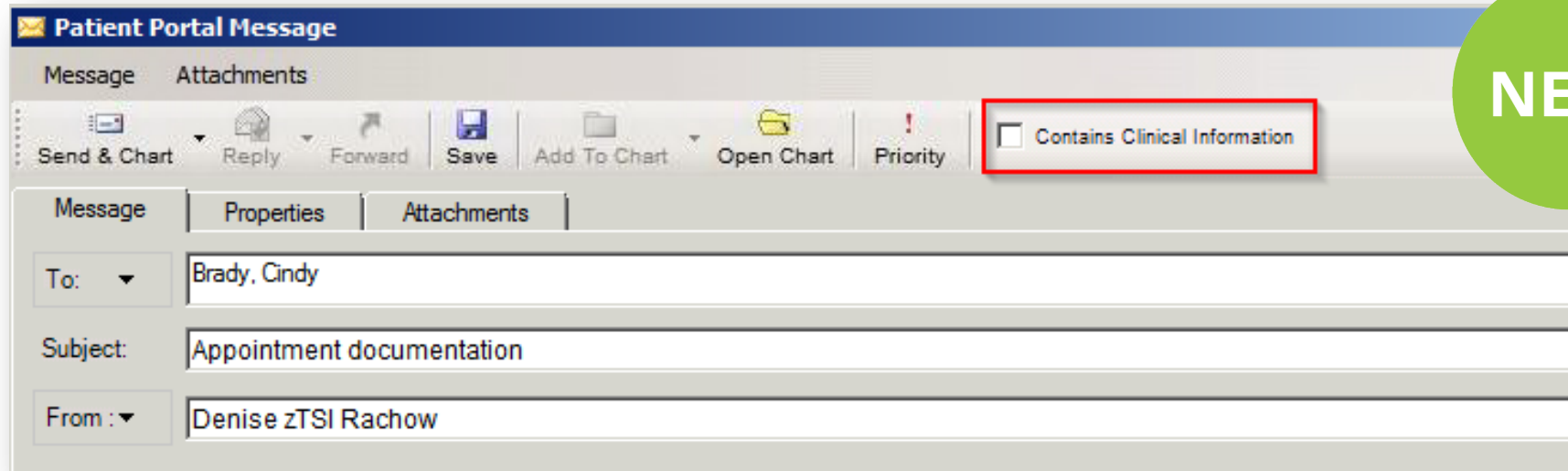
Medicaid MU & Secure Messaging

- The secure messaging measure is now **Measure 2** of the Coordination of Care through Patient Engagement Requirement
- Measure 2: For an EHR reporting period in 2017 and 2018, more than **5 percent** of all unique patients seen by the EP during the EHR reporting period, a secure message was sent using the electronic messaging function of CEHRT to the patient (or the patient authorized representative), or in response to a secure message sent by the patient or their authorized representative.



Portal Inbox New Option: Contains Clinical Information

- The workflow for sending a message to a patient's portal account remains the same however now you can mark a message as containing clinical information from PM if the message qualifies.
- Only messages that are initiated by the practice that have the "contains clinical information" box selected will count towards the MIPS secure message requirement

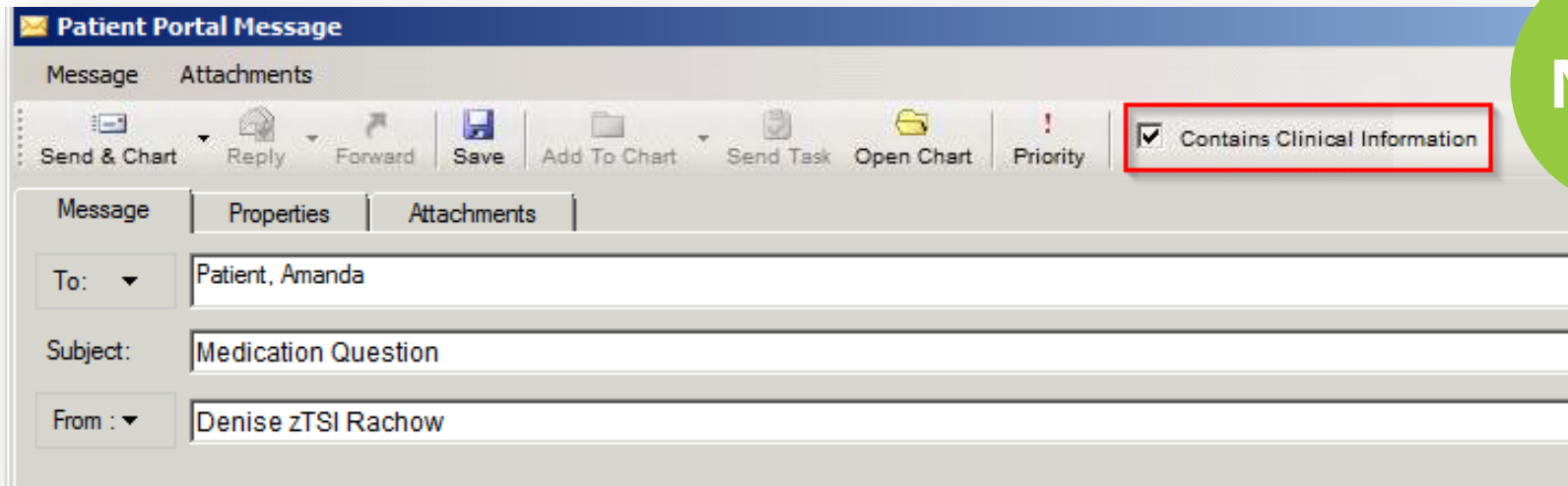


The screenshot displays a 'Patient Portal Message' window. At the top, there are tabs for 'Message' and 'Attachments'. Below these are several action buttons: 'Send & Chart', 'Reply', 'Forward', 'Save', 'Add To Chart', 'Open Chart', and 'Priority'. A red rectangular box highlights a checkbox labeled 'Contains Clinical Information'. Below the buttons are three input fields: 'To:' with the value 'Brady, Cindy', 'Subject:' with the value 'Appointment documentation', and 'From:' with the value 'Denise zTSI Rachow'. A green circular callout with the text 'NEW!' is positioned to the right of the 'Contains Clinical Information' checkbox.

NEW!

Portal Inbox New Option: Contains Clinical Information

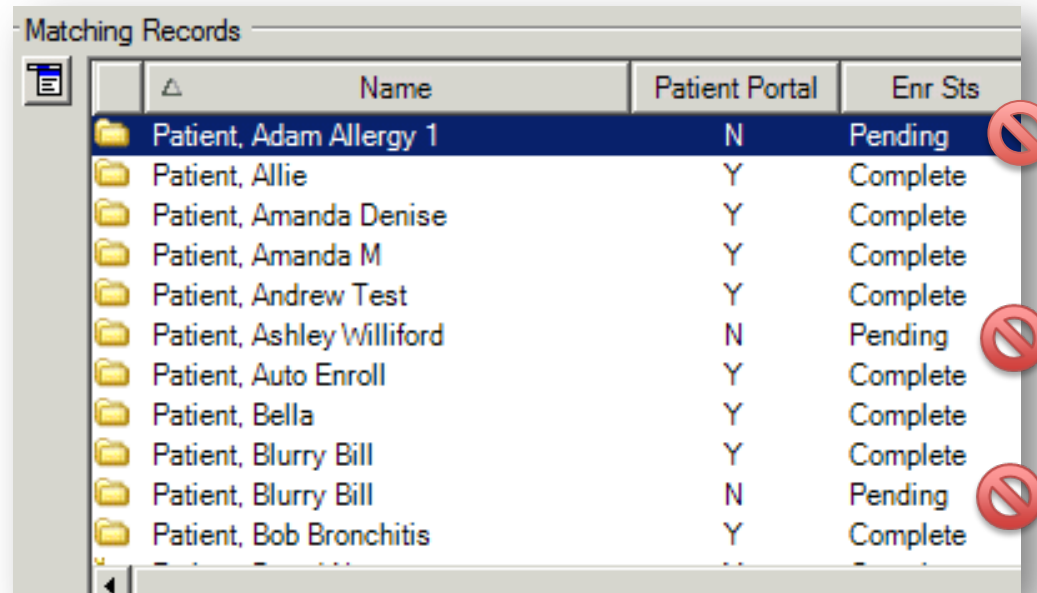
- From EHR, the Contains Clinical Information box will be automatically selected
 - Since the message is being sent from the clinical side of NextGen its assumed the message will be clinical in nature
 - If the message is not clinical the user should unselect the box prior to sending



NEW!

Update to Portal message delivery

- In 5.9/8.4 the ability to send messages to patients that are pending enrollment (i.e. you've offered them a token/credentials but they have not completed their enrollment) will no longer be available.
- Patients must complete their enrollment to receive a message.



	Name	Patient Portal	Enr Sts
	Patient, Adam Allergy 1	N	Pending
	Patient, Allie	Y	Complete
	Patient, Amanda Denise	Y	Complete
	Patient, Amanda M	Y	Complete
	Patient, Andrew Test	Y	Complete
	Patient, Ashley Williford	N	Pending
	Patient, Auto Enroll	Y	Complete
	Patient, Bella	Y	Complete
	Patient, Blurry Bill	Y	Complete
	Patient, Blurry Bill	N	Pending
	Patient, Bob Bronchitis	Y	Complete

New Referral Option: 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 count towards MIPS/MU secure messaging requirement

NEW!

Amanda D. Patient (F) DOB: 02/02/1982 (35 years) Weight: 150.00 lb (68.04 Kg) Alerts 3 Allergies 149 Problems 16

Address: 123 Any Street
FORT MILL, SC 29707
Contact: (803) 777-7777 (H)...

Pt. Insurance: Medicare 11502... Pharm 1: PCP: Aaron, Maureen M MD
Nickname: Portal Pharm 2: Referring:
Patient Portal: Rendering: Jacobs, Zachary D MD

Referrals Order

Assessments My Plan A/P Details Labs Diagnostics Referrals Office Pr

Insurance name: Aetna Insurance 60054 Policy #: 123456789

To:

Specialty/specialist name/site
 Obstetrics
 Therapies/Rehabilitation Exclusions
 DME

Copy to Patient


Specialty: Cardiology

Provider name: Address Detail Location:
Jones, Ben Internal referral

Authorization required: No Yes

New Referral Option: 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

Durham, NC 27715
Contact: (919) 360-6029 (H) Patient Portal:  Rendering: Jones, Ben MD


Referrals Order

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


Insurance name: Policy #:

To:

- Specialty/specialist name/site
- Obstetrics
- Therapies/Rehabilitation [Exclusions](#)
- DME

 Specialty:

Provider name: [Address Detail](#) Location:

Internal referral 

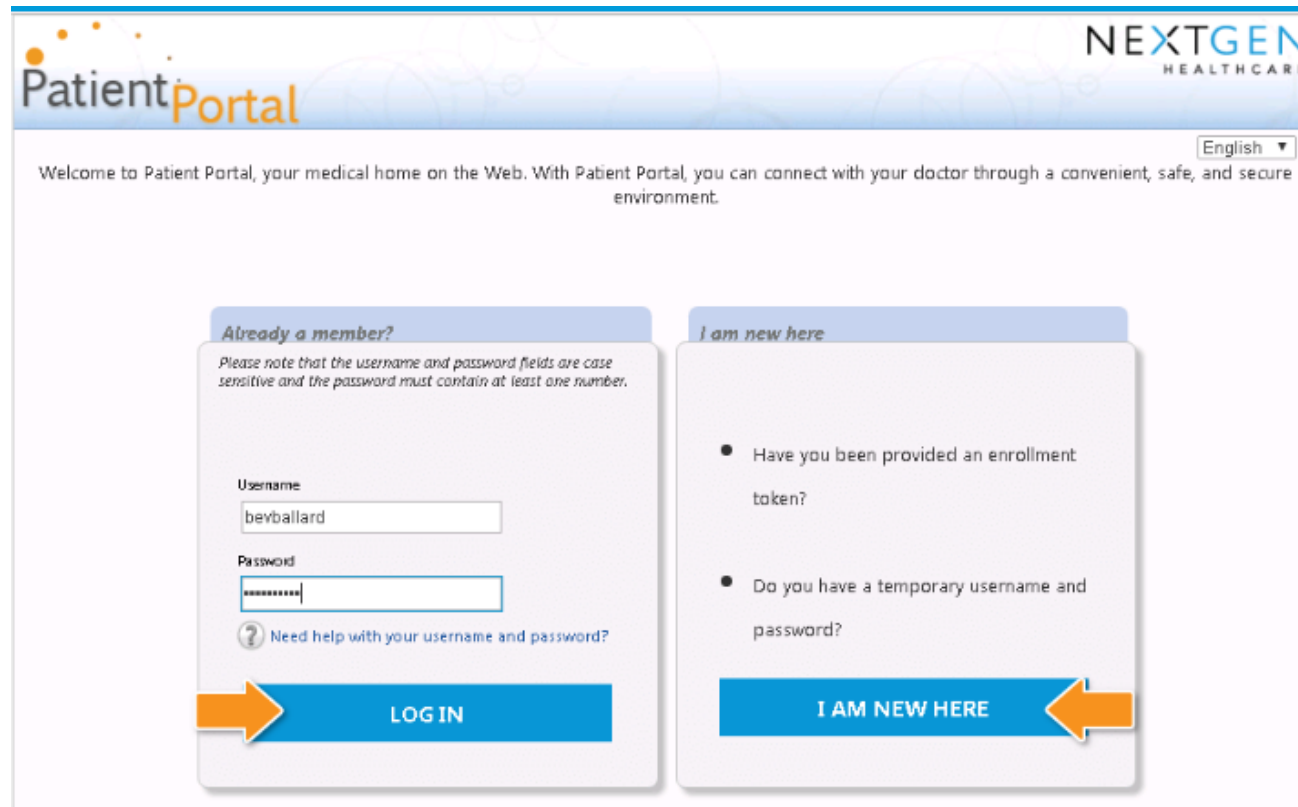
Authorization required: No Yes

Additional Enhancements: Portal 2.4 Website

- Portal 2.4 was released on the weekend of September 16th
 - Portal (i.e. nextmd.com) updates are pushed out to all users (no requests required)
- This update included new features to prepare for 2015 MU/MIPS reporting as well as Web Content Accessibility Guidelines (WCAG) 2.0A

Additional Enhancements: Portal 2.4 Changes

- Web Content Accessibility Guidelines (WCAG) 2.0A
 - Updated color scheme to darker colors for visually impaired patients



The screenshot displays the Patient Portal login interface. At the top left is the 'PatientPortal' logo, and at the top right is the 'NEXTGEN HEALTHCARE' logo. A language dropdown menu is set to 'English'. Below the header, a welcome message reads: 'Welcome to Patient Portal, your medical home on the Web. With Patient Portal, you can connect with your doctor through a convenient, safe, and secure environment.'

There are two main sections for user authentication:

- Already a member?**: This section includes a note: 'Please note that the username and password fields are case sensitive and the password must contain at least one number.' It features a 'Username' field with the text 'bevballard', a 'Password' field with masked characters, and a link: '? Need help with your username and password?'. A blue button labeled 'LOGIN' is highlighted with an orange arrow pointing to it from the left.
- I am new here**: This section contains two bullet points: 'Have you been provided an enrollment token?' and 'Do you have a temporary username and password?'. A blue button labeled 'I AM NEW HERE' is highlighted with an orange arrow pointing to it from the right.

Additional Enhancements: Portal 2.4 Changes

- Web Content Accessibility Guidelines (WCAG) 2.0A
 - Added caret drop down beside the tabs that have multiple options
 - Added new icons

The screenshot displays the Patient Portal interface for TSI Healthcare Clinic. At the top, the 'Patient Portal' logo is on the left, and the 'NEXTGEN HEALTHCARE' logo is on the right. A navigation bar contains several tabs: HOME, MAIL (with a dropdown arrow), SCHEDULE (with a dropdown arrow), MY CHART (with a dropdown arrow), STATEMENTS, RENEW MEDICATIONS, PATIENT EDUCATION (with a dropdown arrow), and SETTINGS (with a dropdown arrow). Below the navigation bar, a welcome message reads 'Welcome Patient Test! Last logged in: 10/19/2017, 4:19 PM'. A search bar is located to the right of the welcome message, with a blue arrow pointing to the dropdown arrow on the 'MAIL' tab. The main content area is divided into several sections: 'PRACTICES' with a list of 'TSI Healthcare Clinic' and a 'View Profile Page' link; a large text area with a welcome message and a disclaimer; 'Inbox' with three email entries; 'Upcoming Appointments' with a 'Schedule an Appointment' link and a message to contact the physician's office; 'Reminders' with the message 'There are no reminders'; 'Results'; and 'Medications'.

Additional Enhancements: Portal 2.4 Changes

- Web Content Accessibility Guidelines (WCAG) 2.0A
 - Added better visuals when required information is not completed


2) Select Message Category and Recipient

Please select the appropriate message category and recipient from the drop down lists below. Asterisk (*) denotes required field.


***Category:**


***To:**

*** Subject:**

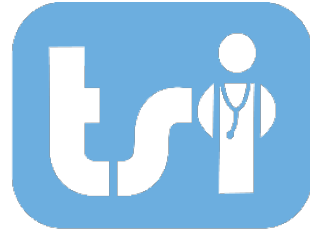
 Please enter a subject

*** Message:**

 Please enter a message

 *Disclaimer: If this is a true medical emergency, please contact your Emergency Medical Services (911) or call your nearest hospital or medical practice. Email communications will be answered within 3 business days. By clicking submit you acknowledge that you will not receive immediate responses to email communications. TSI Healthcare Clinic is not responsible for illness or injury from your choice to not seek emergency treatment.

SUBMIT



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