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NextGen® Patient Portal
5.9/8.4 Training:
Portal Enhancements

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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

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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;
<u>AND</u>

(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 Programing Interface (API) in the MIPS eligible clinician's CEHRT.

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Medicaid MU & Providing Patient Electronic Access

<u>Measure 1:</u>

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
<u>AND</u>

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
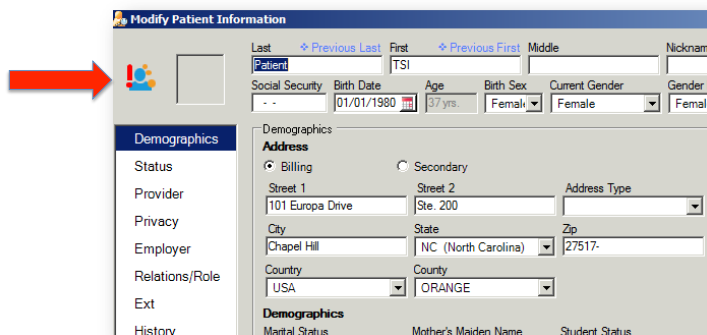
*Increased from 50 percent to 80 percent

*Timely Access = 48 hours

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Patient Portal Enrollment Indicators

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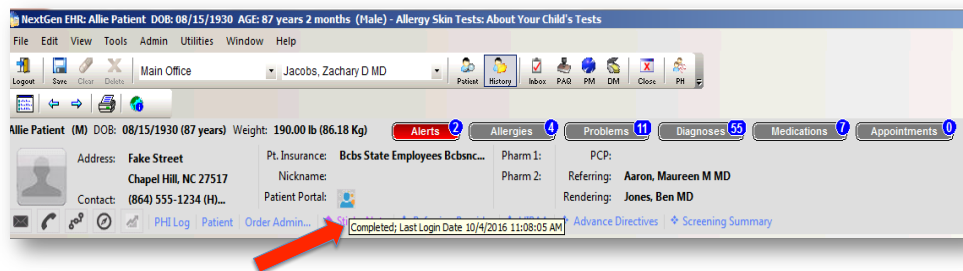   - New icons reflect different enrollment statuses

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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

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Patient Portal Enrollment Indicators

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

NEW!

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.

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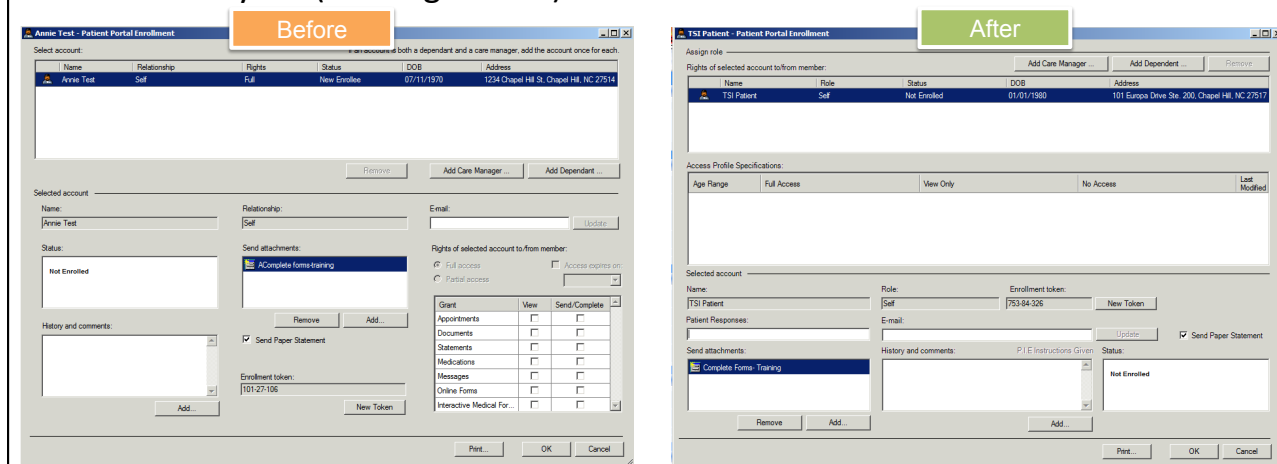800.354.4205 info@tsihealthcare.com tsihealthcare.com

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 accidently missed as a part of check-in or check-out
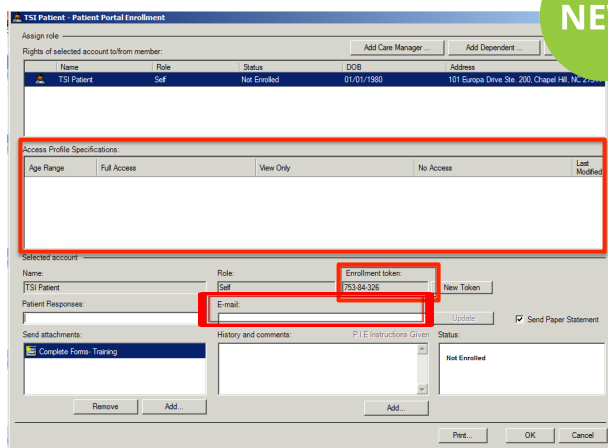 - Must be configured in File Maintenance → System Master Files → PM → AutoFlow Sequences
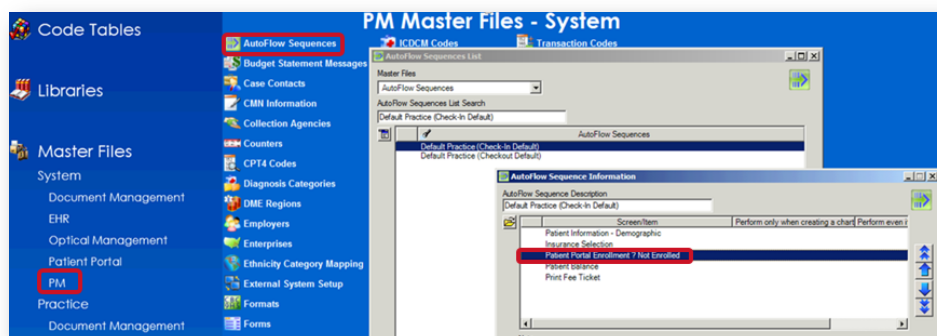
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Patient Portal Enrollments

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

Before / After

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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!

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Patient Portal Enrollments

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

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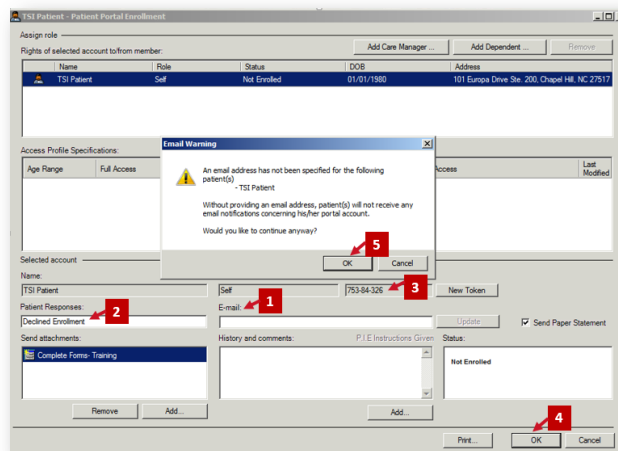info@tsihealthcare.com
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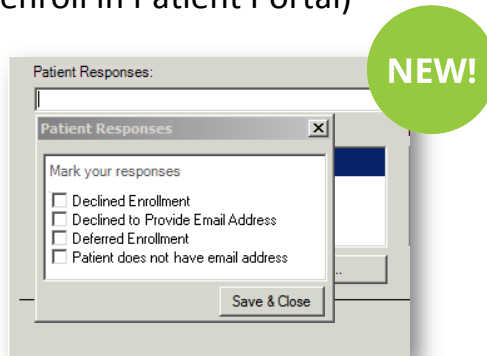
Patient Portal Enrollments

- 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

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Patient Portal Enrollments

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

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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.

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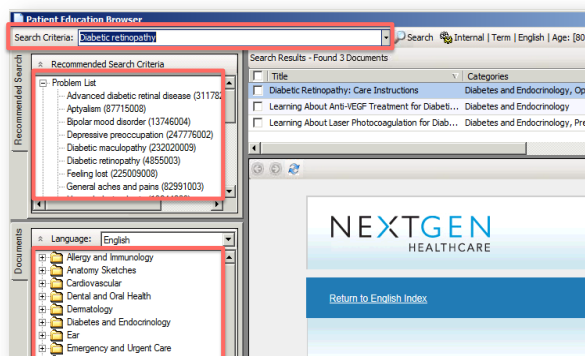Confidential. Do no duplicate.

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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

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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

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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

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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).

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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).

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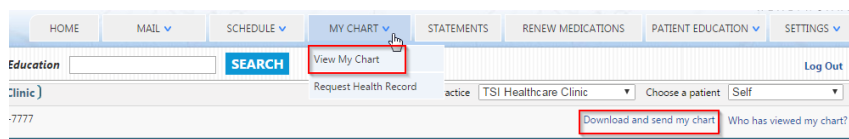
New PHR Option: New items on View My Chart and CCDA

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

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

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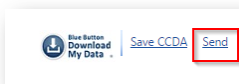info@tsihealthcare.com
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New PHR Option: Ability to send CCDA to someone else

- 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.

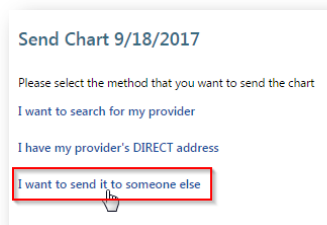- From Nextmd.com → View my Chart → Download and send my chart

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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"

Send Chart 9/18/2017

Please select the method that you want to send the chart
I want to search for my provider
I have my provider's DIRECT address
I want to send it to someone else

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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 Porta|
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

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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).
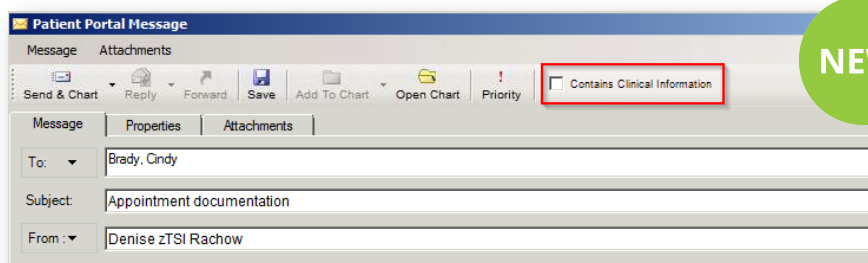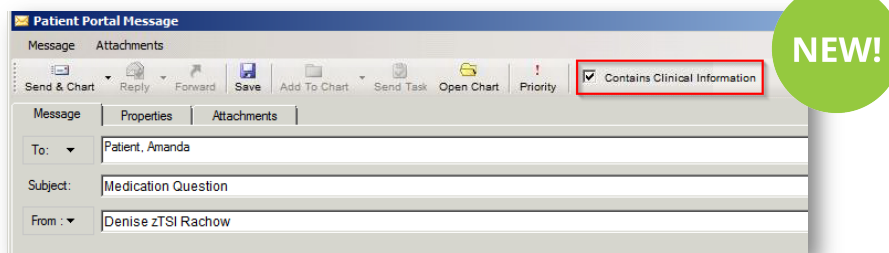
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Medicaid MU & Secure Messaging

• 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.

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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

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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
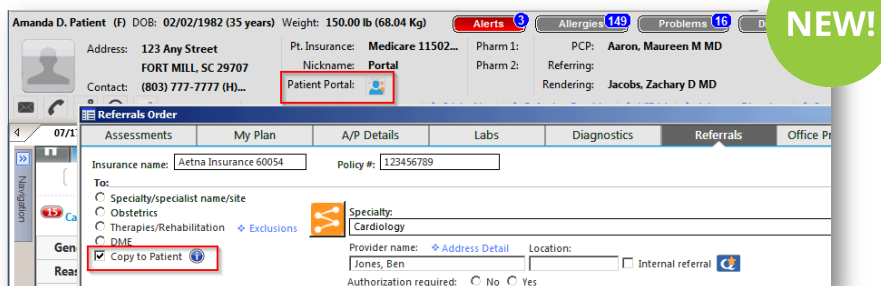 - If the message is not clinical the user should unselect the box prior to sending

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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.

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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
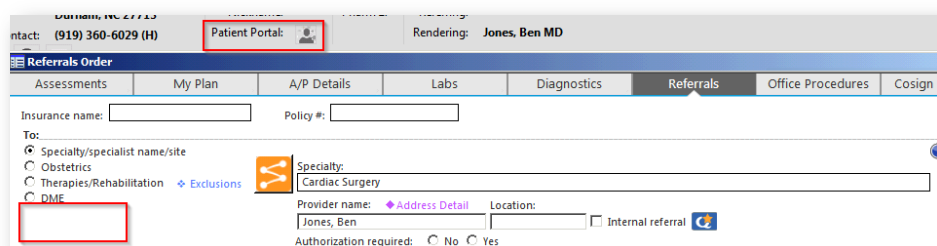 - This will count towards MIPS/MU secure messaging requirement

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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

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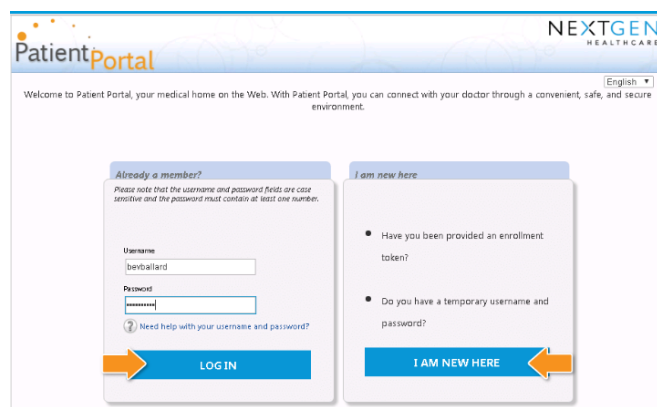
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Additional Enhancements: Portal 2.4 Website

- 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

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Additional Enhancements: Portal 2.4 Changes

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

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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
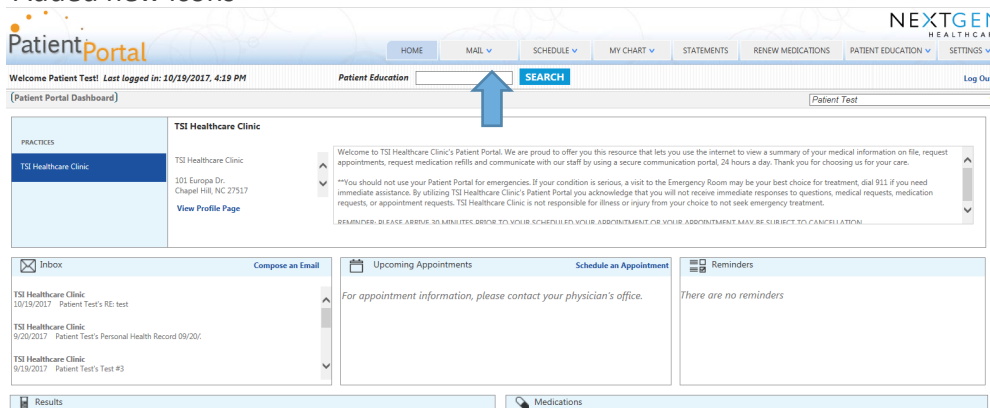
Additional Enhancements: Portal 2.4 Changes

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

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