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A First Look at NextGen[®] 5.9 and KBM 8.4

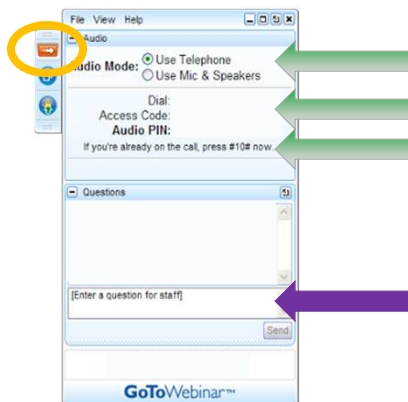
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Reminders

- Today's session is being recorded. If you do not want to participate, please log off now.
- As a reminder, PDF slides of the presentation are available on our website at tsihealthcare.com/upgrade.

Today's Presenters



Britney Walden

- Manager, Quality Program Services
- 7+ years of Healthcare and Health IT experience
- Provides and oversees federal policy assistance to TSI Healthcare clients



Cheryl Snively

- Senior EPM Support Manager
- 20+ years of Healthcare and Health IT experience
- NextGen Certified Professional



Dawn Decelles

- EHR Implementations Specialist
- 17+ years of Healthcare and Health IT experience
- NextGen Certified Professional

Today's Presenters



Allie Henderson

- TSI Healthcare's Add On Modules Manager
- 5+ years of Health IT experience
- Oversees the implementation, training, and support of NextGen Population Health, Patient Portal, HQM, and PhoneTree



Alerie Stiles

- TSI Healthcare's Director of Specialties
- 10+ years of Health IT experience
- Works directly with Pulmonary & Sleep Medicine Physicians to collect feedback to improve workflows within the EHR

Upgrade Overview

Upgrade Overview

• What?

- 2015 Certified EHR Technology (CEHRT)= NextGen Version 5.9 & KBM 8.4
- An opportunity to re-evaluate and improve workflow

• Who?

- Practices participating in:
 - The Merit-Based Incentive Payment System (MIPS)
 - Medicaid Meaningful Use
 - Federally Qualified Health Centers (FQHC)
 - Rural Health Clinics (RHC)
 - ACOs

Upgrade Overview

• Why?

- To fulfill various regulatory requirements including the *“Medicare and Medicaid Programs; MIPS, Electronic Health Record Incentive Program-Stage 3 and Modifications to Meaningful Use in 2015 Through 2017”* Final Rule

• When?

- Per CMS, practices participating in Medicaid MU **must** be using a 2015 CEHRT **for at least 90 days** of the 2018 reporting period
- CMS has proposed that eligible clinicians participating in the Merit-Based Incentive Payment System (MIPS) should upgrade to the 2015 Certified EHR Technology (CEHRT) before the 2019 reporting year.
- TSI Healthcare recommends that you upgrade before May 1, 2018

Upgrade Overview

- Unlike previous upgrades, NextGen 5.9/8.4 is a combined release
- Benefits:
 - Single go-live
 - Minimize system downtime
 - Streamline training and testing

Upgrade Process



- Step 1: Build A Team & Plan
- Step 2: Prepare for Your Upgrade
- Step 3: Confirm Hardware Specifications
- Step 4: Super User Training
- Step 5: Setup Form
- Step 6: Client Testing
- Step 7: Checklist Submission & Review
- Step 8: End User Training
- Step 9: Verification & Go-Live Approval
- Step 10: Production Environment (NGProd) Upgrade

Early Adopter Program

Early Adopter Program

- With the introduction of NextGen version 5.9 & KBM 8.4, TSI Healthcare is now offering clients the option of becoming an Early Adopter (previously known as “beta”).
- By choosing to be an Early Adopter of the 5.9/8.4 release, you will be prioritized at the front of the upgrade queue once your Super User Training is complete and your Setup Form has been received.

Special Considerations

1. Do you have EHR template and/or document customizations?
 - (If Yes, these will most likely need to be rebuilt in the new KBM. Be aware that this will extend the timeline for your 5.9/8.4 upgrade.)
2. Do you want to report more than 6 months of data for MIPS in 2018?
3. Is it important to your providers to earn the 5 point bonus for MIPS reporting on 2015 CEHRT as opposed to staying on the 2014 CEHRT?

Our Commitment to Your Upgrade Success

- TSI Healthcare is dedicated to ensuring you have a smooth transition process by providing:
 - Dedicated Upgrade Specialists
 - Live and recorded webinars
 - Workflow education and training
 - Online resource center featuring a step-by-step guide



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Your Role for Upgrade Success

- Read all emails from TSI Healthcare regarding the upgrade
- Complete all phases of the upgrade within the designated time frame
- Communicate with your upgrade specialist
 - TSI Healthcare is here to ensure your upgrade is successful, therefore communication is key

Practice Management (PM) Upgrade Highlights

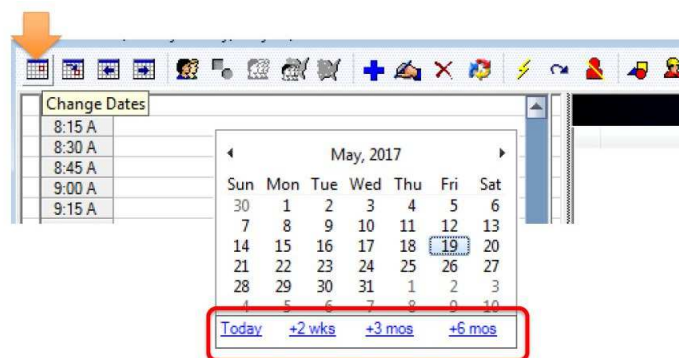
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1. Skip Around in Appointment Book



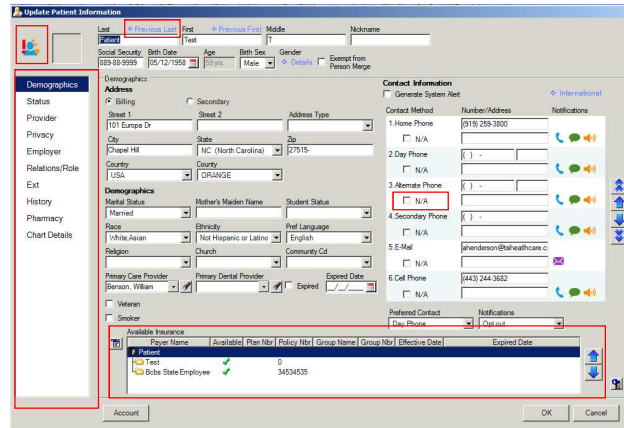
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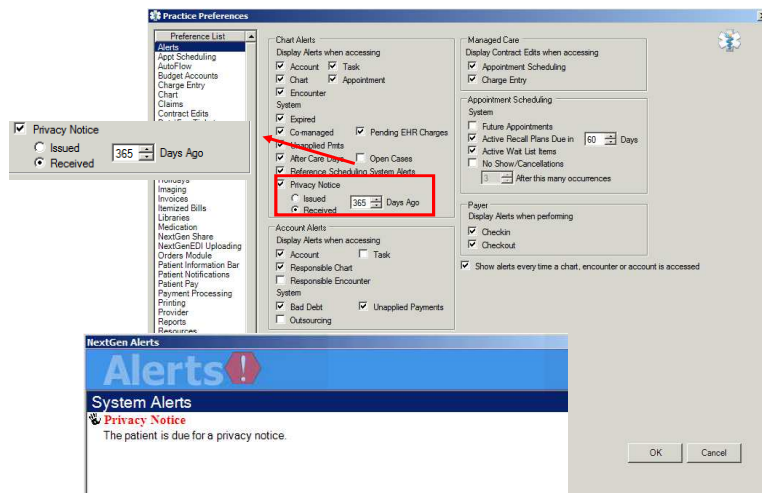
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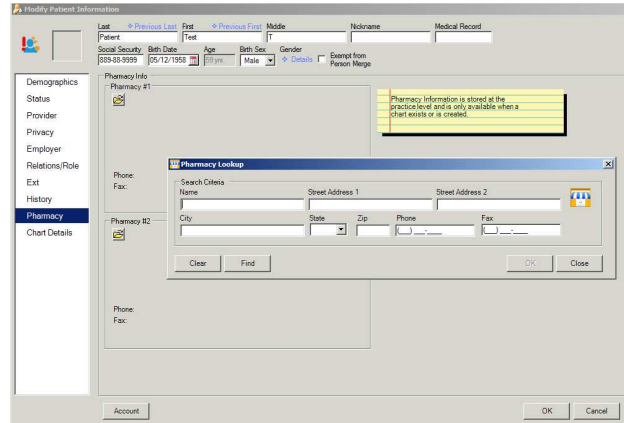
2. Demographics Enhancements



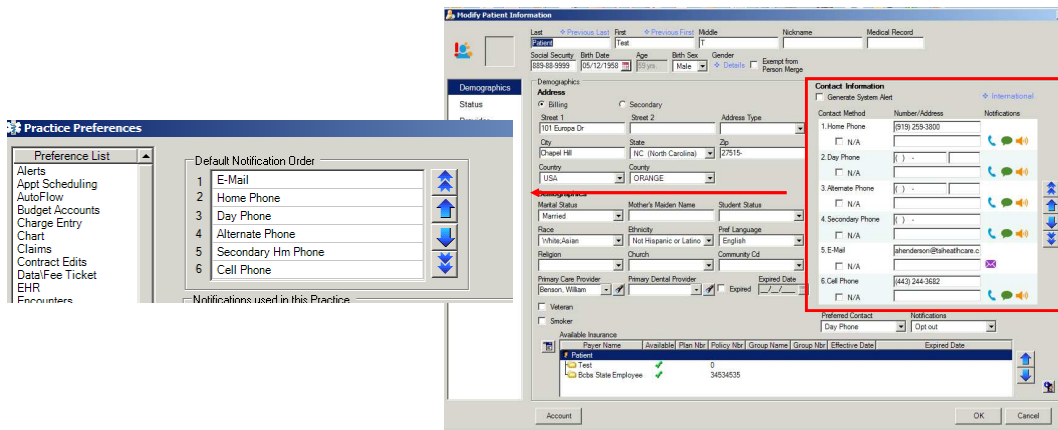
3. Set Follow-up Date for Patient Privacy Settings



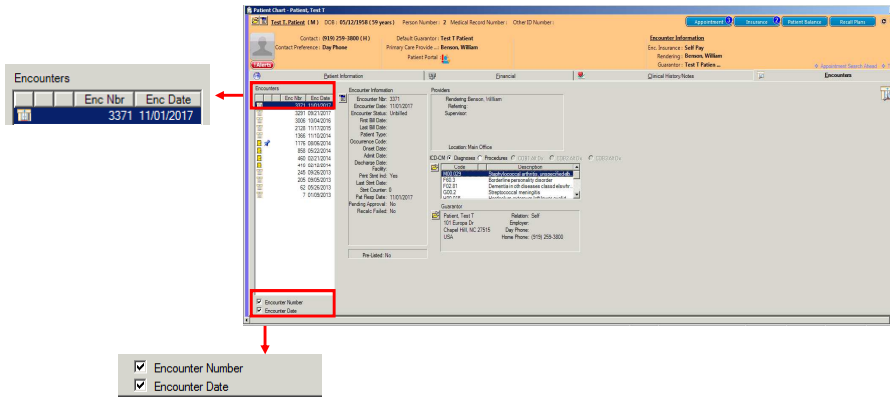
4. Add Pharmacy Information in Patient Demographics



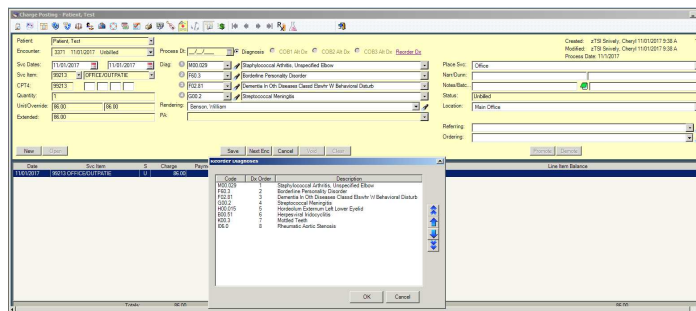
5. Default Order of Patient Phone Number on Demographics Screen



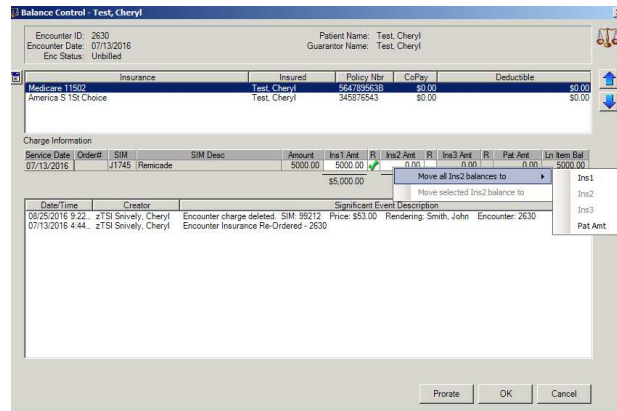
6. Encounter Number and DOS on Encounters Tab



7. See & Add More Dx Codes on the Charge Entry Screen



8. Increased Balance Control Functionality

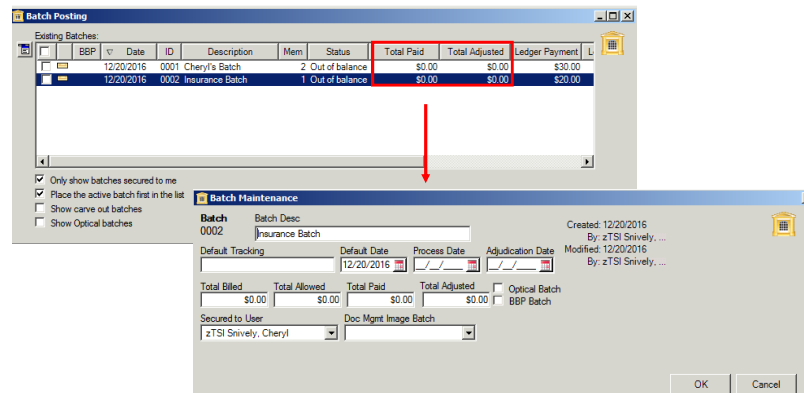


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9. Batch Enhancements – Total Paid and Ability to Search

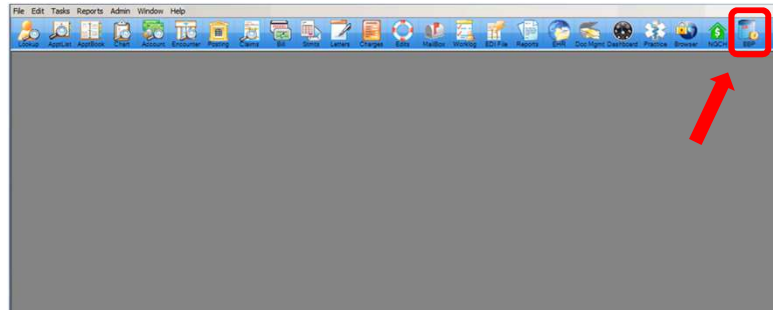


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10. Access the BBP from PM Toolbar



Electronic Health Records (EHR) Upgrade Highlights

1. Send, Receive, and Track the Status of Electronic Prior Authorizations for Medication

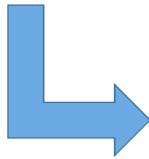
very day [Edit Sq...](#) [Remove Sq](#)

Refills: 5 Dispense As Written Prescribed Elsewhere Problem:

lisinopril
(Prinivil)

[Initiate ePA](#) [Accept](#) [Cancel](#)

Electronic Prior Authorization (ePA) is disabled for this medication because generic will be dispensed, PA not required.



Task	Patient	DOB	Due	Created	Description
Complete Prior Auth Criteria	Whiteside, Kara	10/11/1952	08/13/2013 09:30	04/19/2017	Celebrex 200 mg capsule
Prior Auth Approved	Whiteside, Kara	10/11/1952		04/17/2017	Advair Diskus 250 mcg-50 mcg/dose powder for inhalation
Complete Prior Auth Criteria	Whiteside, Kara	10/11/1952	08/13/2013 09:30	04/17/2017	Imitrex 20 mg/actuation nasal spray

1. Send, Receive, and Track the Status of Electronic Prior Authorizations for Medication Continued...

Nasonex 50 mcg/actuation Spray

Sig: spray 2 spray by intranasal route 1 time every day in each nostril [Edit Sq...](#) [Remove Sq](#)

PRN Reason: **ePA Validation** [Accept](#) [Cancel](#)

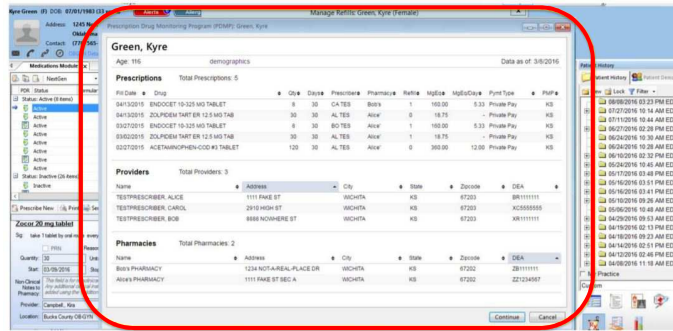
Quantity: Units: Prior authorization cannot be sent electronically, due to the following errors:

Start: 01/19/2016 Stop: For Med Nasonex 50 mcg/actuation Spray - Quantity must be entered when ePrescribing.

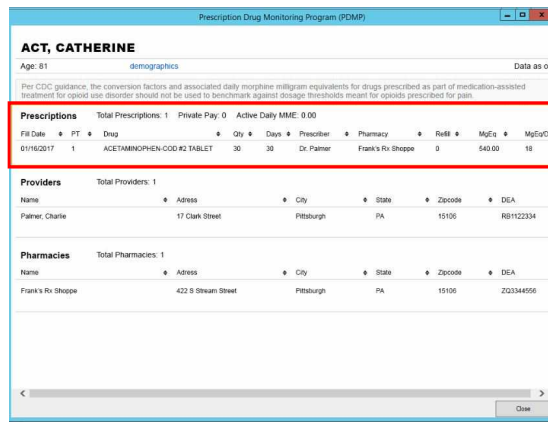
Non-Clinical Notes to Pharmacy: *This field is for non-clinical use. Any additional clinical notes added using the 'Additional'* Correct the above error(s) and reinitiate ePA.

New [Accept](#) [Reject](#) [Remove](#) [Reassign](#) [Chart](#) [Orders](#) [Manage ePA](#)

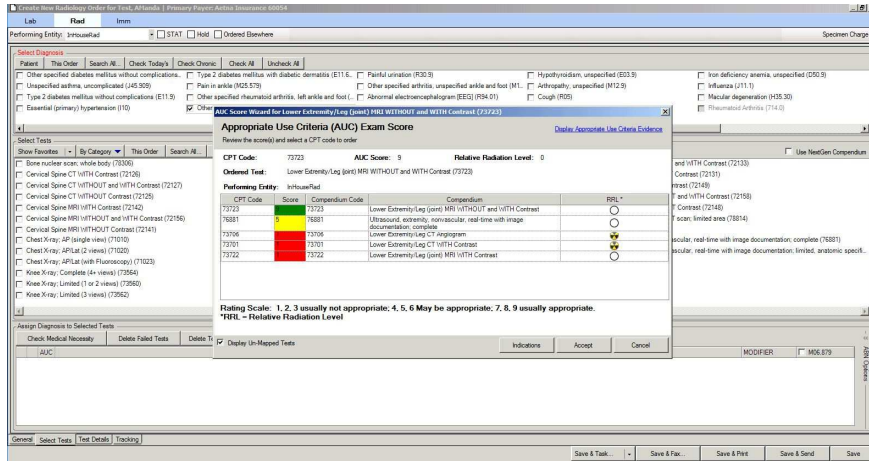
2. Two-Way Communication With State Controlled Medication Database PDMP



2. Two-Way Communication With State Controlled Medication Database PDMP Continued...



3. Clinical Decision Support for Advanced Radiology

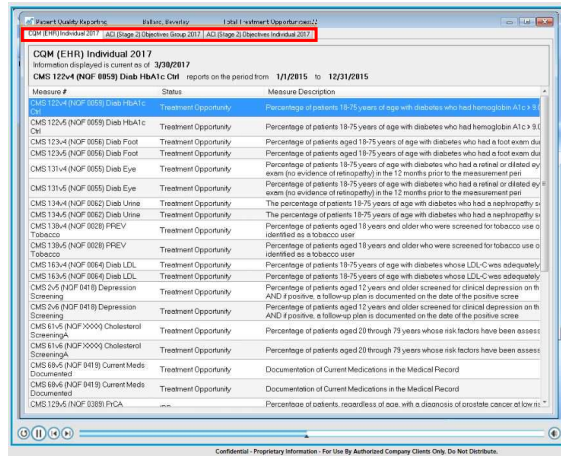


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4. View HQM Quality Measures and ACI Within Patient Chart

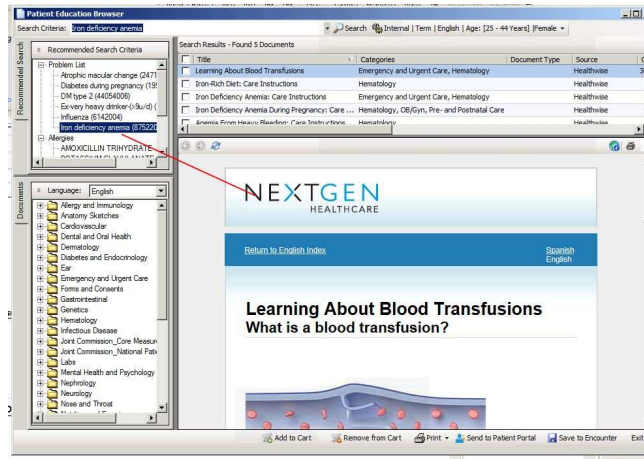


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5. Find & Add Patient Education Items to Chart & Portal Easier

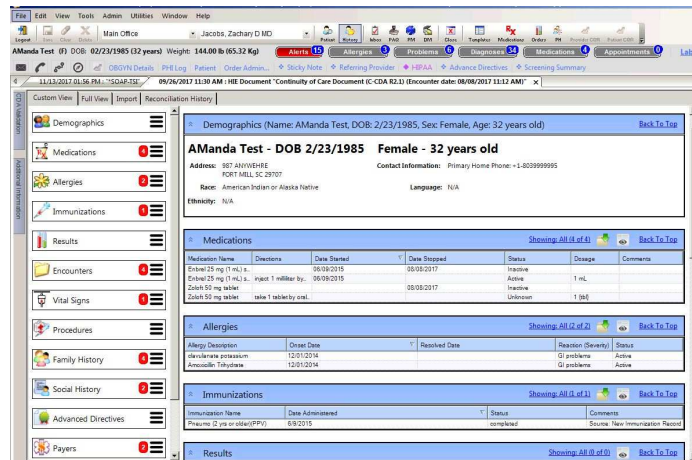


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6. Import Additional Discrete Data Sections From a CCDa Into a Patient Chart



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7. Send Corrected Lab & Diagnostic Results to Patient Portal

Results [reported results - formatted]

Show Normal (N) Results Flag Show Compressed Results MU Compatible Refresh

Horsham, PA, 19044 Horsham, PA, 19044
 Person # 114
 Sex: F
 DOB: 03/21/1998

Ordering: Anderson MD (FP), Barry Performing #: LabCorp Location: Westside Medical Clinic
 Tests Ordered: Lipid Panel (W503756)

Lipid Panel (Collection Date: 07/17/2017 14:58, Status: Correction to results)

Component	Result	Units	Flag	Range	Comment
Cholesterol, Total	220	mg/dl	H	0-200	
HDL	42	mg/dL		35-60	
LDL	100	mg/dL	H	65-180	
Triglycerides	100	mg/dL	H	45-155	

Formatted Results:

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8. Improved Immunization Forecasting With Dose Validation

Status: HPV08 Zzett (F) DOB: 02/12/2002 (14 years)

Address: 123 Main St
 Blue Bell, PA 19422

Pt. Insurance: Patient Portal
 Enc. Insurance:

OB/GYN Medication History Demographics

Patient Demographics Order Module

Results Orders Summary Immunizations

Show Ages Given Show Chronological

Immunization	Status	Dose 1
HPV	Current	08/11/2016 02/11/2017

Create New Immunization Order for Zzett, Status: HPV08

NextGen - Age/Interval Warning

No further doses are required for vaccine HPV.

Previous Dose: Gardasil
 CVX: 165 / CPT: 90651
 Admin Date: 02/11/2017 (0 day(s) ago)
 Age Given: 14 year(s) 11 month(s)

Do you still want to order Gardasil ?

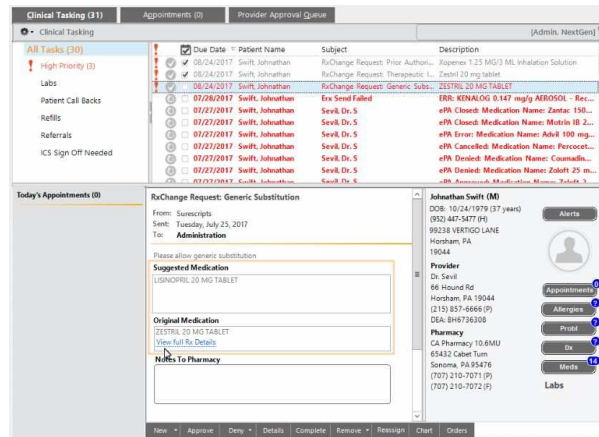
- Click Yes to order the selected vaccine.
- Click No to continue without ordering the selected vaccine.

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9. Receive "Change" E-RX Messages From Patient Pharmacy

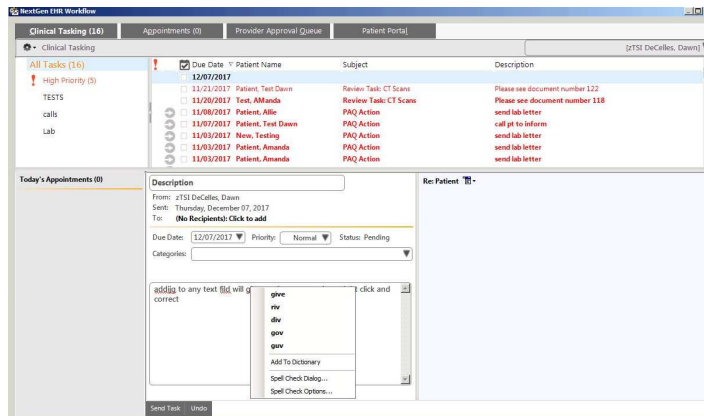


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10. Spell Check Within Templates and Modules



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Add-On Modules Upgrade Highlights

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1. Ability to Copy a Patient on a Direct Message

The screenshot displays a patient record for Amanda D. Patient (F) with DOB 02/02/1982 (35 years) and weight 150.00 lb (68.04 Kg). The interface includes tabs for Alerts, Allergies (149), Problems (16), and Diagnoses (85). A 'Patient Portal' link is highlighted with a red box. Below, the 'Referrals Order' section is visible, with a 'Copy to Patient' checkbox checked and highlighted by a red box. A large blue arrow points from the left towards this checkbox. Other fields include Insurance name (Aetna Insurance 60054), Policy # (123456789), and Specialty (Cardiology).

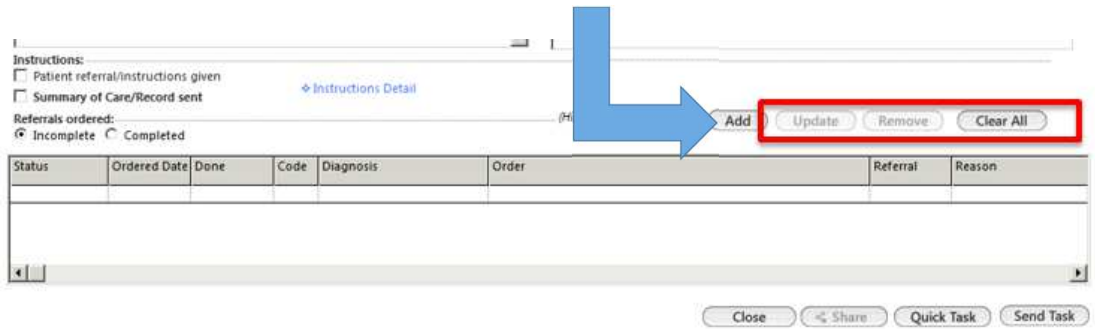
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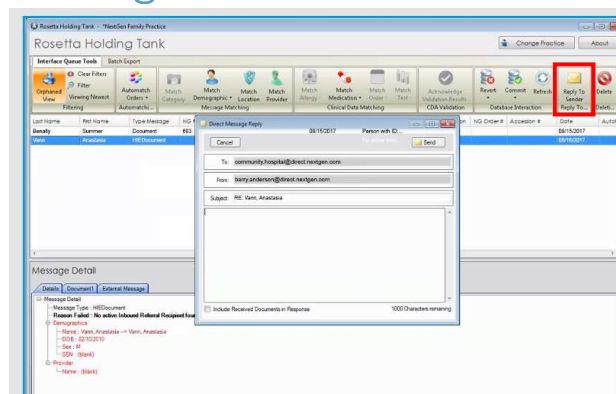
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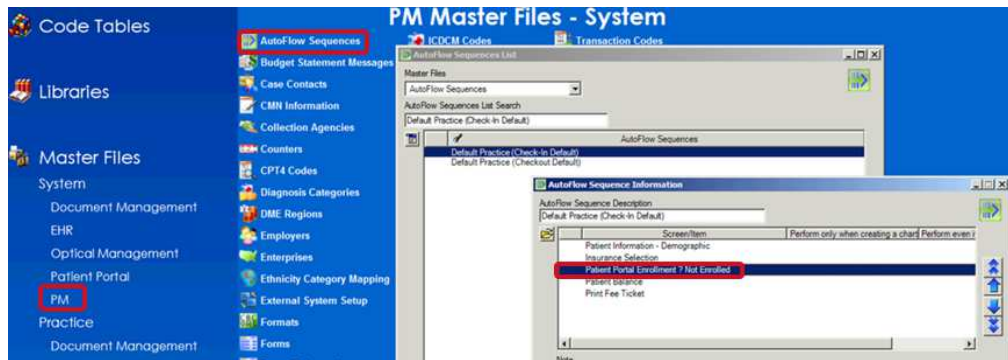
2. Ability to Update, Remove, or Clear All on Referrals Order Template



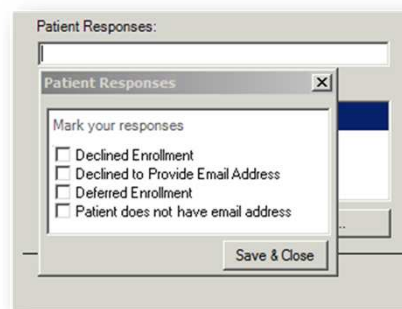
3. Ability to Reply to Sender From Rosetta Holding Tank for Incoming HIE Documents



4. Ability to Incorporate Patient Portal Enrollments in AutoFlow




5. Ability to Document a Patient's Declined Response to Portal Enrollment on Manage Enrollment Screen



2018 Pulmonary & Sleep Medicine Enhancements & Additions

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2018 Pulmonary & Sleep Medicine Enhancements & Additions

- **NEW!** Spell Check Throughout the EHR
- **NEW!** Automatic Electronic Prior Authorization
- **NEW!** Prior Authorization Suite
- Updates to DME Order
- Updates to Workflows for Achieving MIPS Measures
- Additional Features and Enhancements
 - Alerts for patients with previous diagnosis of: Pulmonary Nodule, ILD, IPF, Lung Mass, PH/PAH
 - Alert for patients enrolled in Clinical Trial(s)
 - Lung Cancer Screening Alert & Documentation (updated for 2018)
 - Practice Orders Management Console (updated for 2018)

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AutoFax

- Allows physicians the ability to fax multiple chart notes in one click.
- When the physician signs off on a chart note, the document will automatically fax to all patient physicians.
- Can be configured for other documents as well such as Infusion flow sheet, Referral note, etc.

Next Steps

- Step 1: Review and Sign Upgrade Agreement document
- Step 2: Bookmark www.tsihealthcare.com/upgrade
 - Password: success
 - This will be your online resource center for the NextGen version 5.9 & KBM 8.4 upgrade process.
 - Upgrade Documentation
 - Training Sessions – *Coming Soon!*
 - Next Steps

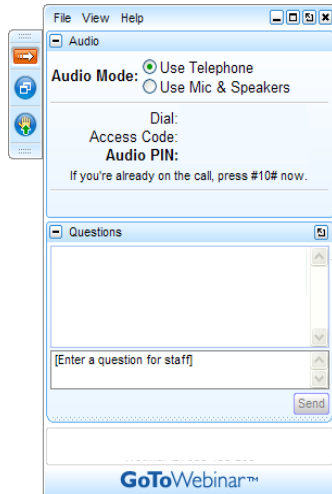
Q&A

Asking Questions:

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- We will attempt to answer all questions.

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