



tsihealthcareSM

NextGen[®] Practice Management
5.9 Upgrade
Appointments & Recall Enhancements
Demographics Enhancements

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Topics to be Reviewed



Appointments

- Calendar quick advance functionality

Appointment Recalls

- Enhanced Recall Plan management in PM
- Patient Status added to the Patient Recall report

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Patient Portal

- Review of portal icon definitions
- New layout of enrollment screen & additional options
- Review of getting “credit” for patients not wishing to enroll

Demographics

Redesign of the Demographics window – Had become crowded

- Collection of additional information to be used moving forward for Federally Qualified Centers and Medicare Quality Payment Program
- Privacy Notice Alert
- Masking SSN enhancements



Appointments & Recall Enhancements

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Calendar Quick Advance

- 'Change Dates' calendar offers quick advance options to quickly jump forward 2 weeks, 3 months, or 6 months.

May, 2017						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
Today	+2 wks	+3 mos	+6 mos			

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Managing Appointment Recalls in PM

- Allows users to view/print letters from recall window
- Archive letter functionality (if activated) will allow viewing moving forward
- Patient Status column added to General > Patient Recall report to inform users that certain patients may not need to be contacted.

Reminder – you can stop recalls from the Recall Report



Patient Portal

Patient Portal Enrollment Indicators

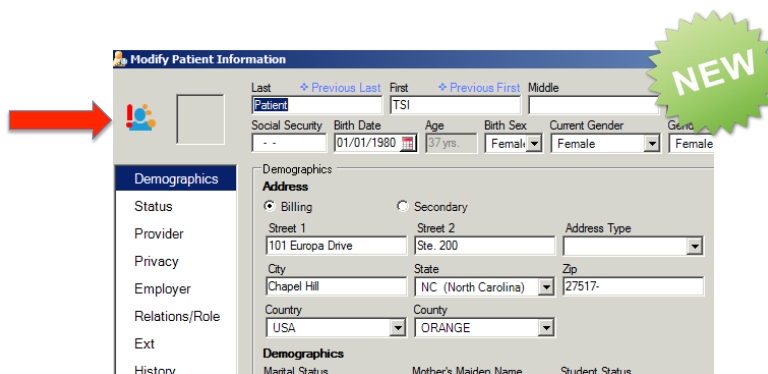
- Portal Enrollment Icon statuses

There are several new icons 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 Enrollment Indicators

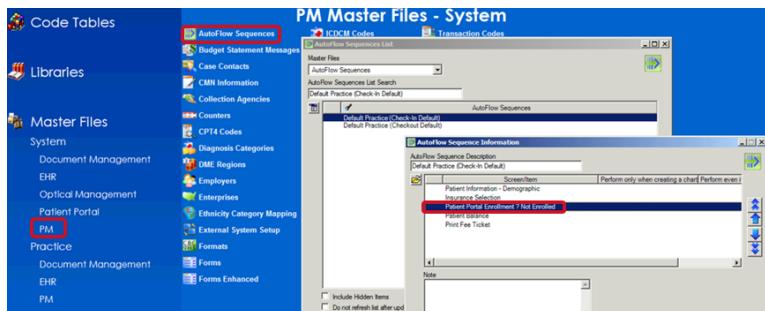
- New Portal Enrollment Icons
 - Portal enrollment icon will now display on the demographics screen



Patient Portal Enrollments now available for Autoflow

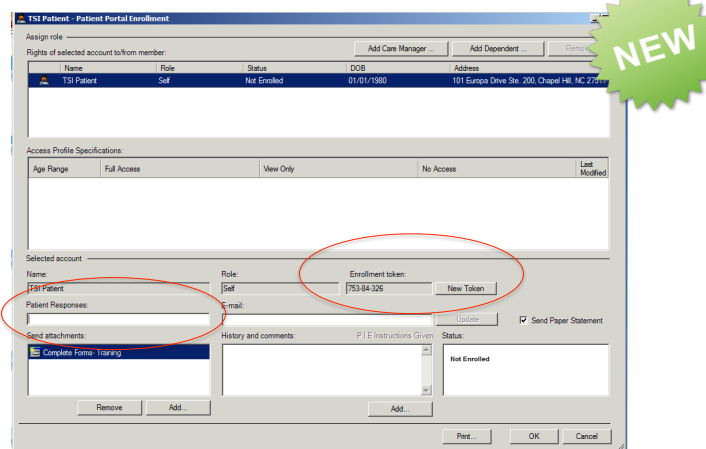
TSI TIP: It is recommended that practices utilize this feature so enrollments are not accidentally missed

- Must be added to AutoFlow sequence in File Maintenance → System Master Files → PM → AutoFlow Sequences



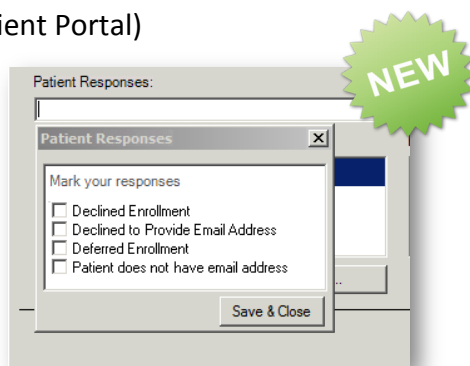
Patient Portal Enrollments

- New layout of Patient Portal Enrollment screen



Patient Portal Enrollments

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

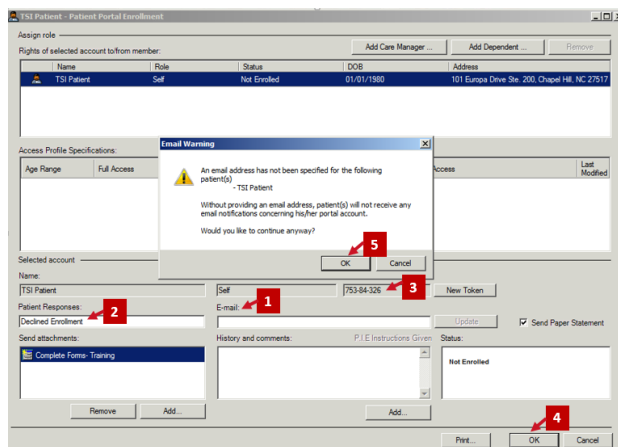


Patient Portal Enrollments

- 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:



Demographics Enhancements

Demographics Updates



- Redesigned demographics window provides a cleaner look.
- Provides ability to access additional areas (Contact, Guarantor, Chart Details & Pharmacy)
- New fields added to document "SOGI" as needed for Federally Qualified Centers, Medicare Quality Payment Programs & Medicaid Meaningful Use moving forward

Prior to 5.9:

Modify Patient Information

Last: Patient, First: Test, Middle: T, Previous Last: , Nickname:

Social Security: 889-88-9999, Birth Date: 04/15/1945, Age: 72 yrs, Sex: Male, Medical Record:

Demographics | Status | Provider | Privacy | Employer | Relations/Role | Ext | History

Street: 101 Europa Drive, Billing Address: , Address Type: , Street: , Secondary Address: , Address Type:

City: Chapel Hill, State: NC (North), Zip: 27517, City: , State: , Zip: -

Country: , County: , Community Cd: , Country: , County: , Mother's Maiden Name:

Race: White, Pref Language: English, Religion: , Church: , Ethnicity: Not Hispanic

Marital Status: Married, Student Status: , Veteran: , Expired Date: / /, Int1 Hm Phn: , Int1 Wk Phn: , Int1 Zip:

Primary Care Provider: , Primary Dental Provider:

1. Home Phone: (800) 354-4205, Comment:

2. Day Phone: () - , Ext:

3. Alternate Phone: () - , Ext:

4. Secondary Hm Phone: () -

5. E-Mail:

6. Cell Phone: (423) 817-3293

Generate System Alert:

Insurance | Account | OK | Cancel

As of 5.9:

Modify Patient Information

Last: [Patient] First: [Test] Middle: [T] Nickname: [] Medical Record: []

Social Security: 889-88-9999 Birth Date: 05/12/1958 Age: 59 yrs Birth Sex: Male Exempt from Person Merge: []

Demographics

Address

Billing: [] Secondary: []

Street 1: 101 Europa Dr Street 2: [] Address Type: []

City: Chapel Hill State: NC (North Carolina) Zip: 27515

Country: USA County: ORANGE

Demographics

Marital Status: Married Mother's Maiden Name: [] Student Status: []

Race: White/Asian Ethnicity: Declined to specify Pref Language: English

Religion: [] Church: [] Community Cd: []

Primary Care Provider: Benson, William Primary Dental Provider: [] Exired Date: []

Veteran Smoker

Contact Information

Generate System Alert [International](#)

Contact Method	Number/Address	Notifications
1. Home Phone	(919) 259-3800	<input type="checkbox"/> N/A
2. Day Phone	() - []	<input type="checkbox"/> N/A
3. Alternate Phone	() - []	<input type="checkbox"/> N/A
4. Secondary Phone	() - []	<input type="checkbox"/> N/A
5. E-Mail	ahenderson@tsihealthcare.c	<input type="checkbox"/> N/A
6. Cell Phone	() - []	<input type="checkbox"/> N/A

Preferred Contact: [] Notifications: [] Day Phone: [] Opt out: []

Available Insurance

Payer Name	Available	Plan Nbr	Policy Nbr	Group Name	Group Nbr	Effective Date	Expired Date
Robert							
Bob Test							
Bcbs State Employee	✓		0				34534535

Account [] OK [] Cancel []

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Status "tab":

Modify Patient Information

Last: [Patient] First: [Test] Middle: [T] Nickname: [] Medical Record: []

Social Security: 889-88-9999 Birth Date: 05/12/1958 Age: 59 yrs Birth Sex: Male Exempt from Person Merge: []

Demographics

Status

Patient Status: []

Patient Status Change Reason: []

Immunization Registry Information

Registry	Patient Status Designation	Status Eff Date	Status Exp Date	Publicity Code	Publicity Eff Date

Immunization Home Location: []

Patient Status Designation and Immunization Home Location will be reported to the Immunization Registry for Practices that are configured to report this information.
 Selections are stored when chosen on patients with a chart created.

Account [] OK [] Cancel []

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Privacy "tab":

Relations/Role tab:

Note: Contact, Guarantor, and Head of Household is stored at the practice level and will therefore only be saved upon chart creation

Pharmacy tab:

NEW

Pharmacy Info

Pharmacy #1
 CVS Austin
 2927 Guadalupe St
 Austin, TX 78705
 Phone: (512) 555-2323
 Fax:

Pharmacy #2
 Walgreens
 Polly Prescription
 6523 W Prescription Pl
 Phoenix, AZ 85032
 Phone: (602) 555-6523
 Fax: (602) 555-3256

Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation
****Pharmacy now option in AutoFlow****

Chart Details tab:

NEW

Chart Details

Default Rendering Physician: Abbott MD (M), Matthew IM
 Default Referring Physician: Newman, Kathleen
 Emergency Contact Name: Ted
 Emergency Contact Relationship: Partner
 Emergency Contact Phone #: (972) 232-3232
 Driver License #: S8777777

Note: Information entered on this tab is stored at the practice level and will therefore only be saved upon chart creation

Sexual Orientation & Gender Identity (SOGI) Data

- **SOGI = Sexual Orientation, Gender Identity**
- New fields to track this along with current gender and preferred pronoun.
- Allows for submission of data to state and federal registries.
- Improves communication, cultural competence, and patient/family-centered care for LGBT population.
- Additional columns available in Chart Lookup for SOGI
- These have been added to NextGen Scheduling & other reports.



Options for these fields (via Enterprise Prefs) to “live” on Demographics as open fields (or privatized) or on UDS Tab (no privatization option) – Default upon upgrade will be as open fields on Demographics

Sexual Orientation & Gender Identity Data

Displayed on Demographics or Privatized or on UDS “tab” (settings housed in Enterprise Preferences)

Modify Patient Information

Prefix: [Mr.] | Demographics | Last: [David] | First: [David] | Middle: [D] | Nickname: [Daisy] | Medical Record: [493]

Social Security: [545-45-4545] | Birth Date: [05/11/1979] | Age: [37 yrs.] | Birth Sex: [Female] | Current Gender: [Male] | Gender Identity: [Female;Female-] | Sexual Orientation: [Straight or heteros] | Preferred Pronoun: [He, Him, His] | Exempt from Person Merge: []

Demographics

Address

Street 1: [1975 Demographics Drive] | Street 2: [] | Address Type: []

City: [Highland Village] | State: [TX (Texas)] | Zip: [75077]

Country: [USA] | County: [DENTON]

Contact Information

Generate System Alert: [] | International: []

Contact Method: [] | Number/Address: [] | Notifications: []

1. Home Phone: [] | (972) 558-5858

2. Day Phone: [] | () - []

Patient

Last: [David] | First: [David] | Middle: [D] | Nickname: [] | Medical Record: []

Social Security: [889-88-9999] | Birth Date: [05/12/1958] | Age: [59 yrs.] | Birth Sex: [Male] | Gender: [] | Exempt from Person Merge: []

Demographics

Address

Street 1: [101 Europa Dr] | Street 2: [] | Address Type: []

City: [Chapel Hill] | State: [NC (North Carolina)] | Zip: [27515-]

Contact Information

Generate System Alert: [] | International: []

Contact Method: [] | Number/Address: [] | Notifications: []

1. Home Phone: [] | (919) 259-3800

2. Day Phone: [] | () - []

UDS tab (“SOGI”):

NEW

The head of household must be set before you can enter family size and income. The head of household can only be set for patients (a chart exists). Changes to the Family Information will affect the patient head of household settings.

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Default Phone Number / Email Order

Default Notification Order added to Practice Preferences

- Allows phone number and email fields to be arranged in a default display order within the demographics window.

Note: Making this change will only affect NEW charts moving forward.



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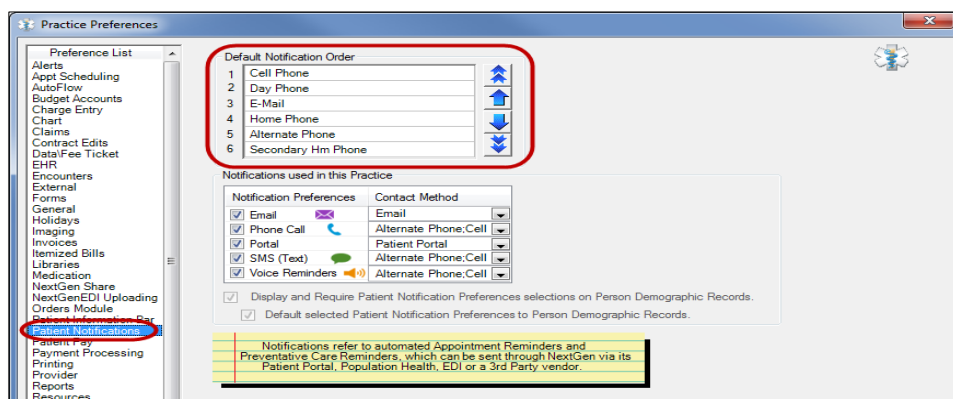
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Default Phone Number / Email Order

Admin > Practice Preferences > Patient Notifications



Practice Preferences

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data/Fee Ticket
- EHR
- Encounters
- External Forms
- General
- Holidays
- Imaging
- Invoices
- Itemized Bills
- Libraries
- Medication
- NextGen Share
- NextGenEDI Uploading
- Orders Module
- Patient Notifications**
- Payment Processing
- Printing
- Provider Reports
- Resources

Default Notification Order

- Cell Phone
- Day Phone
- E-Mail
- Home Phone
- Alternate Phone
- Secondary Hm Phone

Notifications used in this Practice

Notification Preferences	Contact Method
<input checked="" type="checkbox"/> Email	Email
<input checked="" type="checkbox"/> Phone Call	Alternate Phone:Cell
<input checked="" type="checkbox"/> Portal	Patient Portal
<input checked="" type="checkbox"/> SMS (Text)	Alternate Phone:Cell
<input checked="" type="checkbox"/> Voice Reminders	Alternate Phone:Cell

Display and Require Patient Notification Preferences selections on Person Demographic Records.
 Default selected Patient Notification Preferences to Person Demographic Records.

Notifications refer to automated Appointment Reminders and Preventative Care Reminders, which can be sent through NextGen via its Patient Portal, Population Health, EDI or a 3rd Party vendor.

Race & Ethnicity

- Medicare QPP and Medicaid Meaningful Use requires collection of multiple ethnicities (option in Demographics to select multiples).
- Allows race and ethnicity data to be aggregated into U.S. government defined categories (set-up behind the scenes in File Maintenance Code Tables).



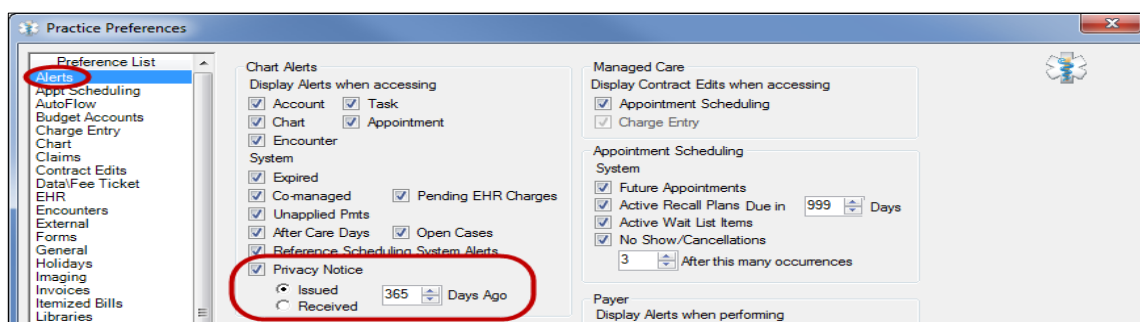
Privacy Notice Alert

- Privacy Notice alert settings can be configured when the privacy notice hasn't been issued/received within a specified period (new setting in Practice Preferences).



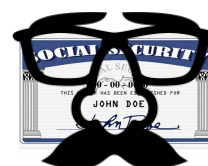
Privacy Notice Alert

Practice Preferences > Alerts tab:



Masking Social Security Number

- Expanded 'Display L4SSN' to include all lookups, display areas, and reports.
- Added security option to unmask the SSN.



Masking Social Security Number

Practice Preferences > General tab (prior to 5.9):

Practice Preferences

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data/Fee Ticket
- EHR
- Encounters
- External
- Forms
- General**

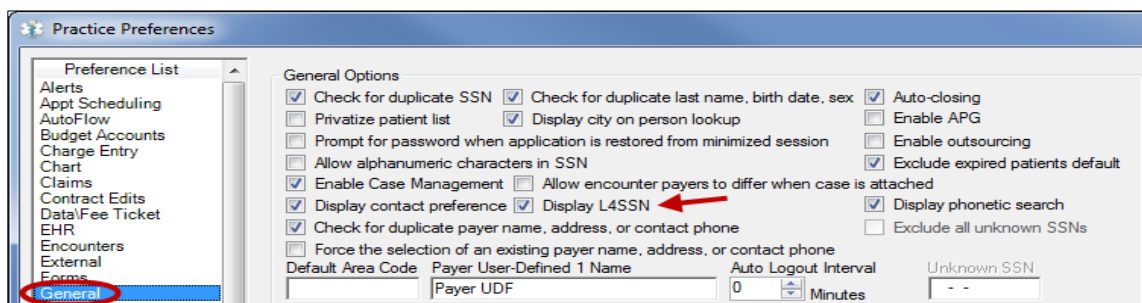
General Options

- Check for duplicate SSN
- Check for duplicate last name, birth date, sex
- Auto-closing
- Privatize patient list
- Display city on person lookup
- Enable APG
- Prompt for password when application is restored from minimized session
- Enable outsourcing
- Allow alphanumeric characters in SSN
- Exclude expired patients default
- Enable Case Management
- Allow encounter payers to be edited when case is attached
- Display contact preference
- Display L4SSN on person lookup results
- Display phonetic search
- Check for duplicate payer name, address, or contact phone
- Exclude all unknown SSNs
- Force the selection of an existing payer name, address, or contact phone

Default Area Code: Payer User-Defined 1 Name: Auto Logout Interval: 0 Minutes Unknown SSN:

Masking Social Security Number

Practice Preferences > General tab (as of 5.9):



Not impacted by 'Display L4SSN':

- Social Security search field in lookup screens
- **Add** Person/Patient/Relationship/Head of Household
- Account, Encounter, Claim Request lookup results
- Any free-text fields (policy #, user-defined fields, etc.)
- Scanned images
- Advanced Audit
- SSN field in forms, labels, and letters Data Repositories
- Patient Data Sheets, Fee Tickets
- Employer Statements



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