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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

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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

AGENDA

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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.

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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

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Patient Portal

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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.

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Patient Portal Enrollment Indicators

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

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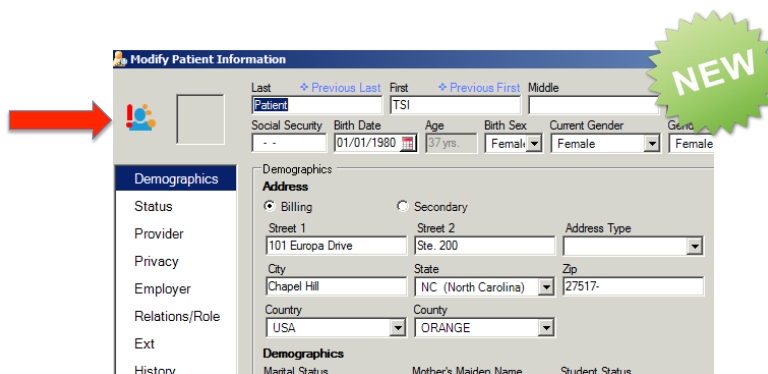
Patient Portal Enrollments now available for Autoflow

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

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

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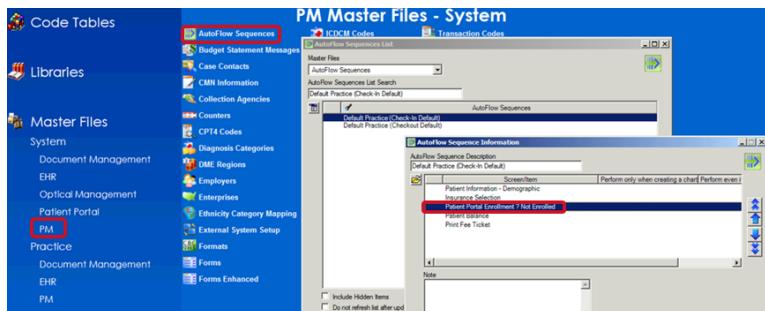
Patient Portal Enrollments

- New layout of Patient Portal Enrollment screen

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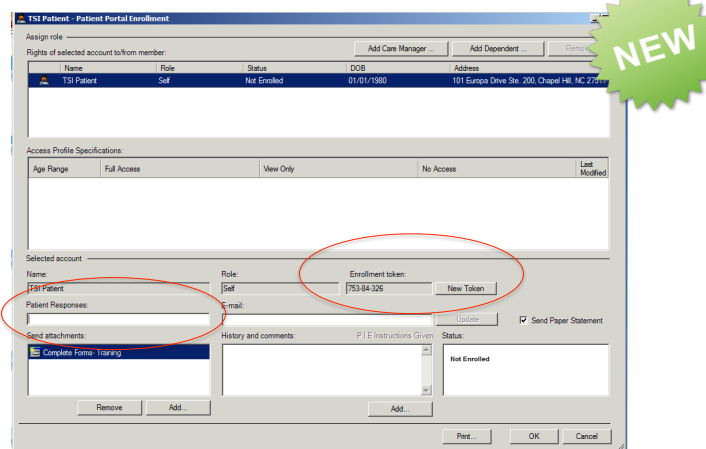
Patient Portal Enrollments

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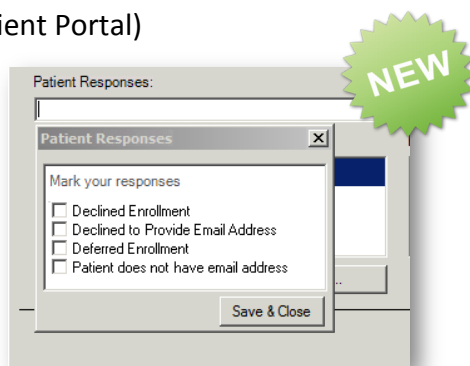
Patient Portal Enrollments

- 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:
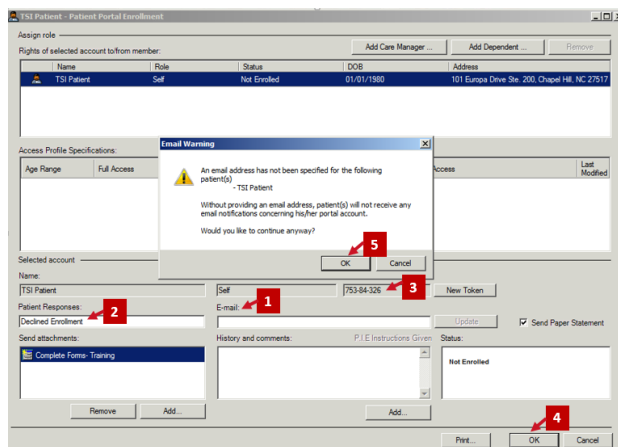
Demographics Enhancements

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

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Prior to 5.9:

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As of 5.9:

Status "tab":

Privacy "tab":

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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

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Pharmacy tab:

Chart Details tab:

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

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Sexual Orientation & Gender Identity Data
Displayed on Demographics or Privatized or on UDS "tab" (settings housed in Enterprise Preferences)

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UDS tab ("SOGI"):

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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.

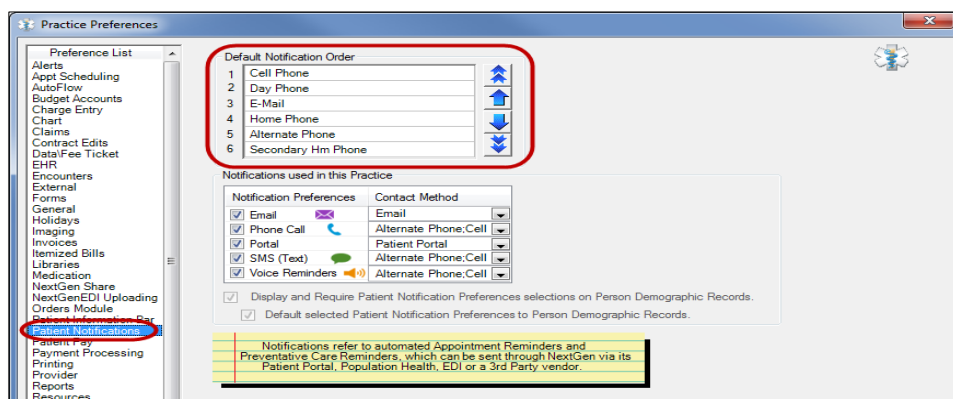© 2017. All Rights Reserved
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Default Phone Number / Email Order

Admin > Practice Preferences > Patient Notifications

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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).

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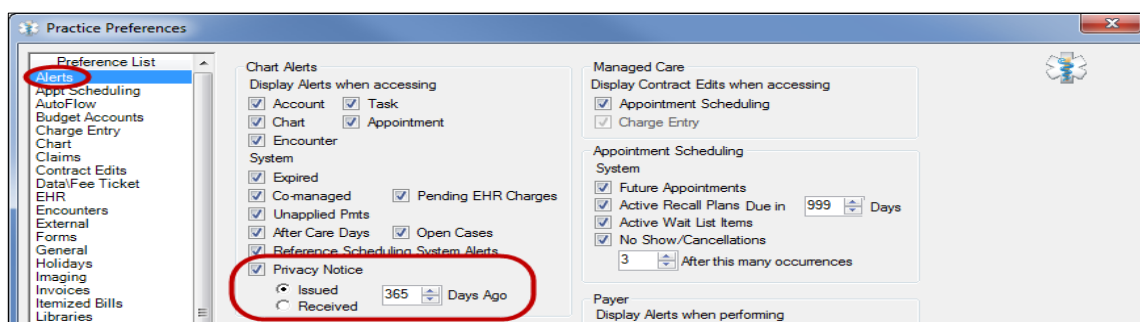info@tsihealthcare.com
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Privacy Notice Alert

- 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).

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Privacy Notice Alert

Practice Preferences > Alerts tab:

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Masking Social Security Number

- Expanded 'Display L4SSN' to include all lookups, display areas, and reports.

- Added security option to unmask the SSN.

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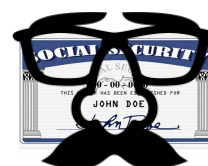
Masking Social Security Number

Practice Preferences > General tab (prior to 5.9):

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Masking Social Security Number

Practice Preferences > General tab (**as of 5.9**):

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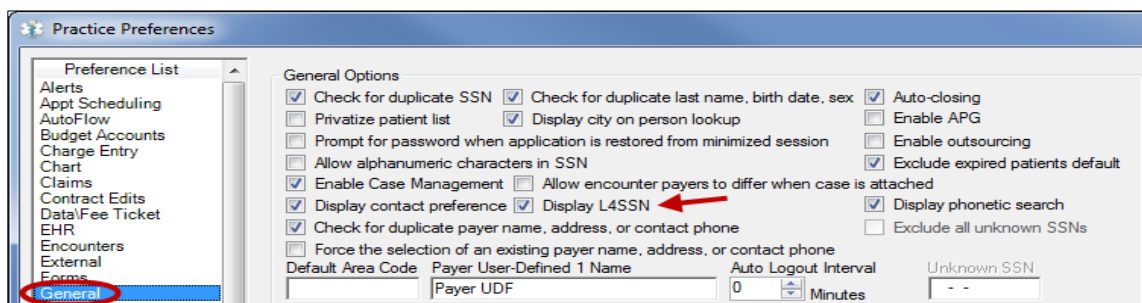
Not impacted by 'Display L4SSN':

- 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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