



## Care Guidelines – Link scanned documents

In 6.2021.1 you can link a scanned document to satisfy a Care Guideline. Upon scanning a specific document type in Document Management this can now update or satisfy a patient's Care Guideline. This feature requires configuration and pre-requisites.

Scan document in the Document Management Application:

1. Scan or import patient's document into the document type
2. Enter Date of Service
3. File and post document into patient's chart

The screenshot shows a window titled "File: Patient, Bella" with the following fields and controls:

- Document Type: Mammogram (dropdown menu)
- Person Nbr: 187 (text input)
- MRN: (empty text input)
- First Name: Bella (text input)
- Last Name: Patient (text input)
- DOB: 07/28/1980 (calendar icon)
- Provider Name: Jacobs, Zachary (dropdown menu)
- Date Of Service: 12/14/2021 (calendar icon)
- Buttons: File (highlighted with a red box), New Doc, Clear, Close



### Care Guidelines View

- In run-time (when template is launched) on Care Guidelines templates, system recognizes entered Date Of Service, as the completed date of the linked Care Guideline(s).
  - System re-calculates and displays due date of guideline based on guideline setup.
  - Able to re-file document, in case of erroneous entry; can change Document type, Patient and Date Of Service.
  - System will act accordingly and satisfy guideline, as per the changes done after re-filing.

Guideline	Next Due	Status	Last Completed	Comments
<input type="checkbox"/> Tdap <i>(Once, 11 Years and up)</i>	12/29/2021	due	//	[comments]
<input type="checkbox"/> Anticholinergics <i>Click to select Goal</i>	12/29/2021	not prescribed	//	[comments]
<input type="checkbox"/> Beta-agonist - Long <i>Click to select Goal</i>	12/29/2021	not prescribed	//	[comments]
<input type="checkbox"/> Beta-agonist - Short <i>Click to select Goal</i>	12/29/2021	not prescribed	//	[comments]
<input type="checkbox"/> Review smoking status <i>Click to select Goal</i>	12/29/2021		//	[comments]
<input type="checkbox"/> DEXA scan <i>(q2 Years, 65 Years and up)</i>	11/03/2023	completed	11/03/2021	[comments]
<input type="checkbox"/> Mammogram <i>(q2 Years, 50 Years- 75 Years)</i>	12/14/2023	completed	12/14/2021	[comments]
<input type="checkbox"/> Colonoscopy <i>(q10 Years, 50 Years- 76 Years)</i>	09/01/2031	completed	09/01/2021	[comments]

### Pre-requisite/Configurations:

- Document Type - must have Date Of Service as a field



The screenshot displays the 'Document Management Master Files - System' window in NextGen File Maintenance. The 'Document Types List' shows 'Colonoscopy' selected. The 'Document Type Information' window is open for 'Colonoscopy', showing a 'Document Type Template' of 'Patient Documents'. A table lists fields with their properties:

Field	Auto Search	Required	Visible	Field Type	EHR/PM Display
Person Nbr	✓	✓	✓	Key	
MRN			✓	Key	
First Name			✓	System	
Last Name			✓	System	
SSN			✓	System	
DOB			✓	System	
Date Of Service		✓	✓	User Defined	

The 'View Category List' on the right shows 'Diagnostics Tests' selected. The 'Security' tab is active at the bottom.

2. Care Guideline Setup Template - requires Document types to be enabled

