Load NextGen – Using Terminal Server

- Double click Terminal Server Icon on Desktop

- Type in station login and password
- Application Launcher Displays
- Click EPM
- Type in Pin Number

- Advisor Screen appears

Load NextGen –
Not Using Terminal Server

- Double click NextGen 5 Icon
- Click EPM on Application Launcher
- Type in Pin # and press Enter
- Advisor Screen appears

EPM Menu & Toolbar

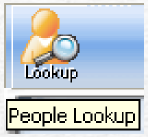
- This is the Main EPM Menu:

- This is the Main EPM Toolbar:

- The Toolbar has ICONS (pictures)

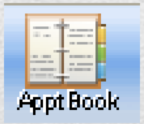
EPM Toolbar Icons:

- **People Lookup**
  - Only change demographics here – don't use to lookup patients

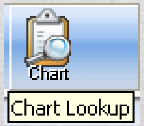


- **Appt List**
  - Use to look up appointments or print forms

- **Appt Book**
  - Use to schedule appointments



- **Chart Lookup**
  - Use to look up patients or People



- **Reports**
  - Use to print reports

"Chart" (Patient) vs. "Globe" (person)

- Patient's have charts and medical record numbers.

 Doe, Jane Med Rec Nbr M123456

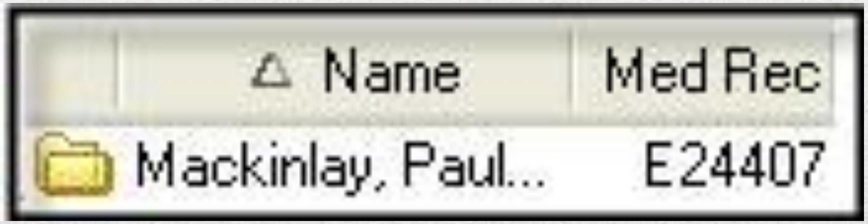
- "People" aren't patients. They have a globe and no medical record #.

 Doe, Jonathan

- A "Person" (globe) exists for a number of reasons
  - Upcoming new patient appointment
  - Subscriber to an insurance
  - Guarantor on an account/chart or Contact on account/chart
  - Cancelled an upcoming new patient appointment

Charts

- Chart Prefixes (Charts show folders):
  - Jersey City –
  - Millburn –

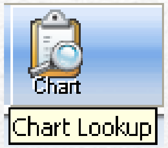


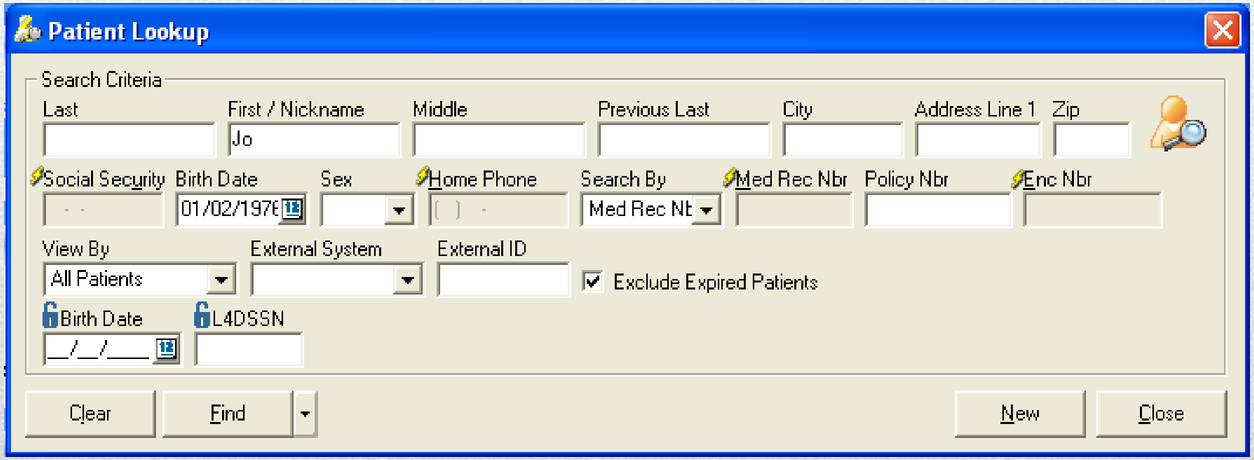
Important Info

- ALWAYS use DOB to search for Pts
- ALWAYS check the town after entering a zip – it might need to be changed
- Red Field is Required field R = R
- NO punctuation in demographics & insurance (in appt OK)
- ONLY use CAPS for:
  - Chart #
  - Insurance ID#
  - Referral #
- Pt doesn’t know or refuses to give SS# input all 0’s (note – Tab to field and then HOLD DOWN the zero Key)
- Will bring up the last patient’s chart you were in  (at bottom of screen)

Look up Patient

- click Chart Look Up icon on top EPM toolbar





- Type in 1st few letters of first name, TAB to date of birth, type in DOB- Press Enter
- If says Not found – Probably New Pt
- **Lightning bolt fields will take you directly into patient chart**

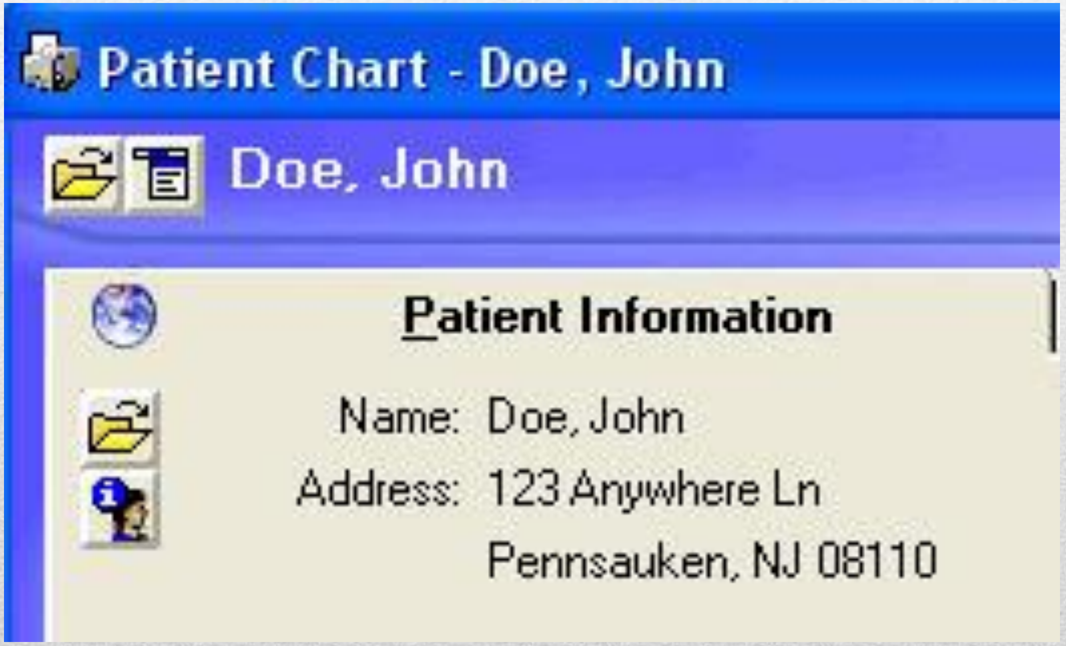
Access Previous Patient

- In Chart Lookup Screen, click Find, then Access Previous Patient to view the last chart you viewed.

- **Access Previous Patient appears in other areas in NextGen

Pick Patient (Open patient chart)

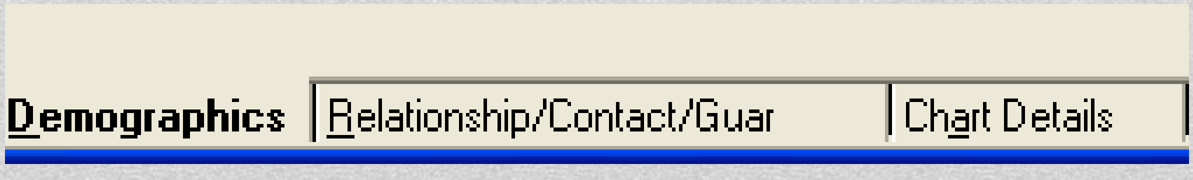
- After search – double click on patient's chart – Chart will Open



Patient Chart

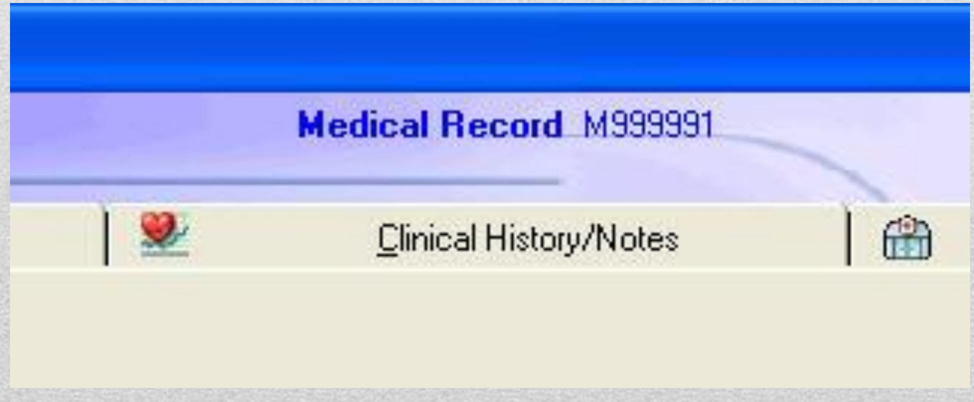
- First Tab on Chart is patient Information

- Sub-tabs are demographics, Relationship/contact/guarantor, & Chart Details



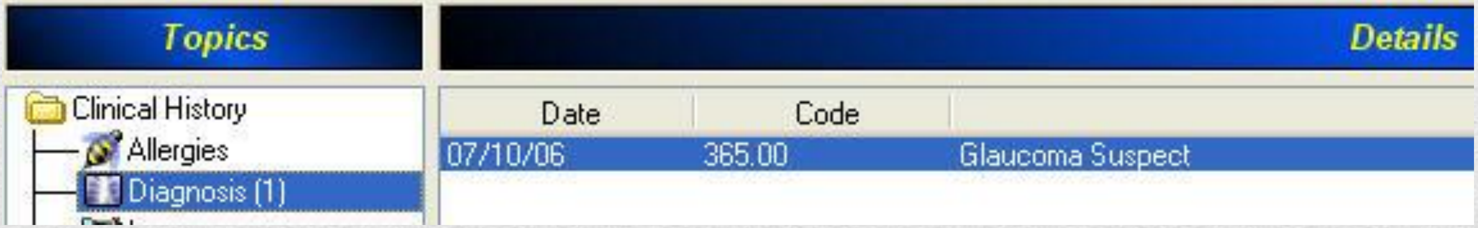
Clinical History/Notes Tab

- Clinical History/Notes Tab contains the following important information:
  - Appointment History
  - Diagnosis History
  - Procedure History (if checking procedure history is needed)
  - “Chart” history (who opened chart)
  - Notes & Alerts



Diagnosis History

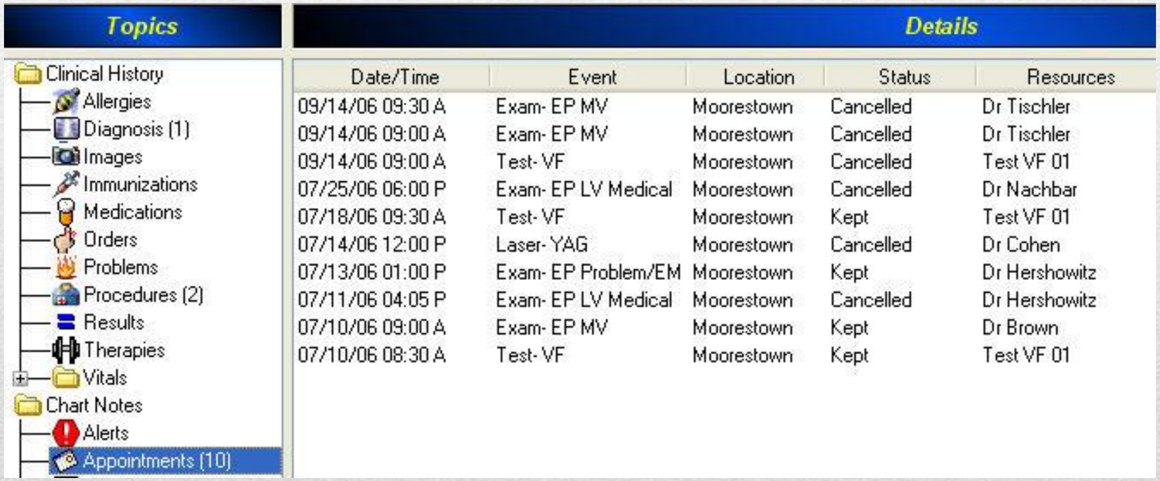
- Diagnosis is listed under “Topics”. Highlight Diagnosis and see the “Details”.



- All Routine exams will be coded with V72.0.
- Go here to see if patient has permanent medical DX

Appointment History

- Appointment history is listed under “Chart Notes”

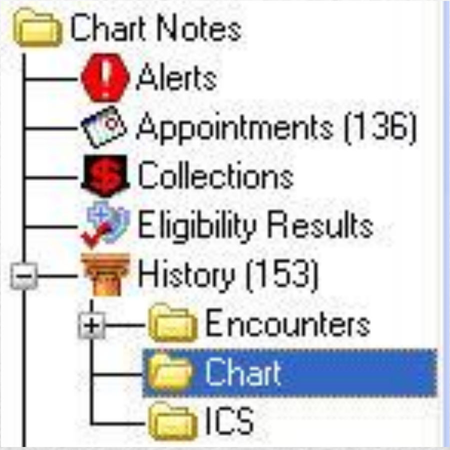


Date/Time	Event	Location	Status	Resources
09/14/06 09:30 A	Exam- EP MV	Moorestown	Cancelled	Dr Tischler
09/14/06 09:00 A	Exam- EP MV	Moorestown	Cancelled	Dr Tischler
09/14/06 09:00 A	Test- VF	Moorestown	Cancelled	Test VF 01
07/25/06 06:00 P	Exam- EP LV Medical	Moorestown	Cancelled	Dr Nachbar
07/18/06 09:30 A	Test- VF	Moorestown	Kept	Test VF 01
07/14/06 12:00 P	Laser- YAG	Moorestown	Cancelled	Dr Cohen
07/13/06 01:00 P	Exam- EP Problem/EM	Moorestown	Kept	Dr Hershowitz
07/11/06 04:05 P	Exam- EP LV Medical	Moorestown	Cancelled	Dr Hershowitz
07/10/06 09:00 A	Exam- EP MV	Moorestown	Kept	Dr Brown
07/10/06 08:30 A	Test- VF	Moorestown	Kept	Test VF 01

- Shows upcoming, kept, cancelled, DNKA’d appts

“Chart” History

- Chart History is listed under Topics - “Chart Notes” and then “History”



10/04/2006 3:03 P	Matonick, Kira	Appointment accessed: 10/04/2006 9:00 A
09/20/2006 4:37 P	Sanchez, Veronica	Chart accessed
09/20/2006 4:35 P	Sanchez, Veronica	Chart accessed
09/20/2006 4:15 P	Sanchez, Veronica	Chart accessed
09/20/2006 4:14 P	Sanchez, Veronica	Privacy Notice Information Change--Issued Date:

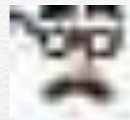
- Shows all activity within that chart

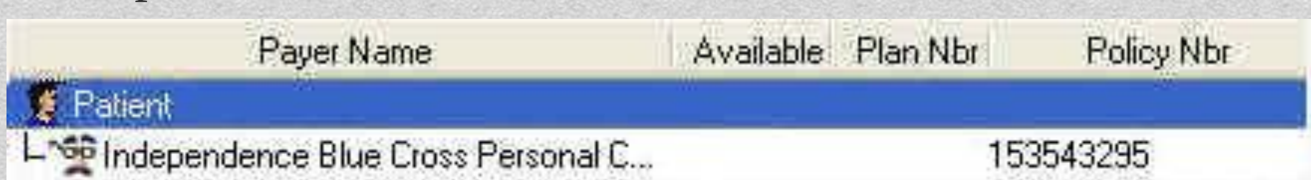
“Alerts”

- Alert History (user created alert) is listed under Topics - “Chart Notes” and then “Alerts”

- Alerts always show when patient chart opened – **Always pay attention to alerts.**

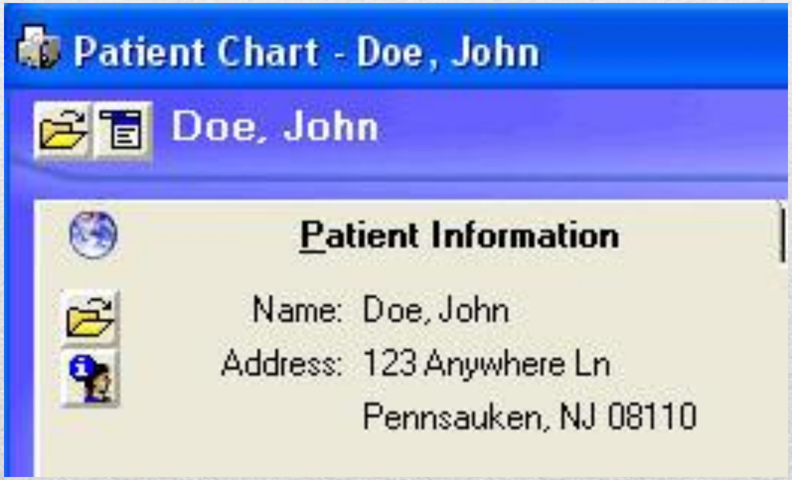
Hidden Items

- Information can be hidden in NextGen (right click& hide)
- Funny Face means Hidden 
- Information is hidden in relations, insurance, other places
- For relationships, it means it no longer active (ex: divorce)
- In Insurance-means error
- example of hidden Insurance which error

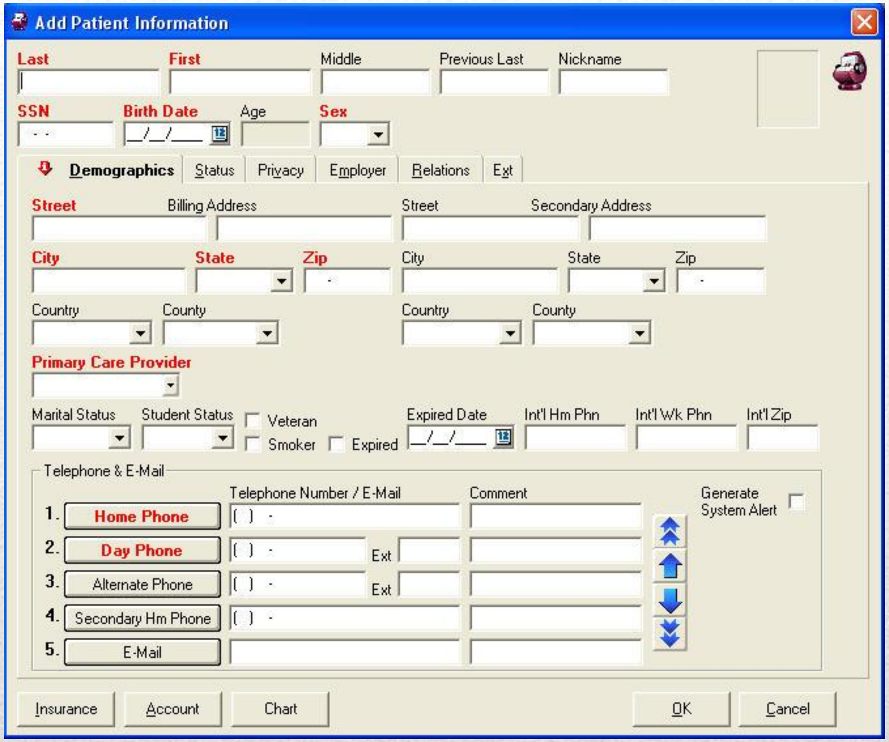


Opening / Changing Demographics

- In Patient chart – click on the OPEN FOLDER
- Icon on the first tab (demographics tab)



Patient Information: Demographics Tab



- Established patients will have demographics in, you change them – But if any are missing – all red fields are required (example is blank demo screen) Note – NO punctuation in demographics

Update Multiple Patient Addresses

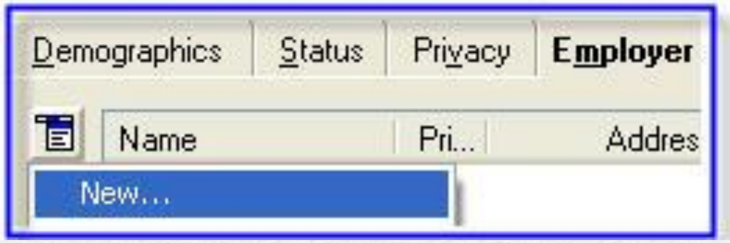
- For relations system will ask to update all addresses if there is a change
- Double check to make sure not divorced spouse
- Click boxes for patients to update – click OK
- Will update all patients' addresses'

Family Doctor/Referring Doctor

- Always pick family doctor (required)
- If doctor not found
  - Choose “Pending entry”
- If patient has no family doctor
  - Choose “None, No Primary Care Physician”
- If patient does not remember / doesn’t know
  - Choose “Unknown”

Patient Information: Employer Tab Add (1)

- Norton & New



- Look Up Employer

- Not Found – Norton & New

Patient Information: Employer Tab Add (2)

- Type in Name & Town (or full address & phone if patient has)

- Click OK

Relation Tab: Adding Relation (1)

- Add relation if:
  - patient not the subscriber to insurance
  - patient is a child
  - patient requires a contact person

- Add-
  Norton & New
  OR
  Right-click & New

- Relationship Lookup Window (see if person already exists in system

Relation Tab: Adding Relation (2)

- If you find person – double-click on them.

- If Record not found

- Click "New" button At bottom and enter relation info

Relation Tab: Adding Relation (3)

- You have either double clicked on an existing patient or created New
- Add all information as seen below, pick type of relation

- Ask if address same:
  - If same click copy
  - If not – type in

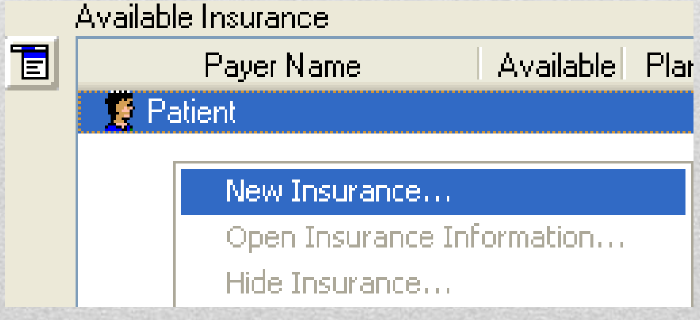
Adding Insurance

- **Patient** is subscriber:
  - Add insurance to PATIENT
    - In PATIENT information, click INSURANCE button

- **Relation** is subscriber:
  - Add insurance to RELATION
    - In RELATIONSHIP information, click Insurance button

Insurance Listing Window

- After you press the insurance button (either in the patient or in the relation) this window appears
- NOTE this is tricky Window – Even if you are adding insurance to RELATION it will still say patient…
- Right click the patient OR Norton and New to search for the Insurance



Payer Lookup Window

- Type first few letters of Ins. name & press Enter
- **Don’t Tab to Insurance type**
- Confirm name & plan– confirm Ins. address
- ****Note** – if Ins. name correct but address not – still choose (**double-click**), change address in next screen & email Billing with new info:

Cannot Locate Insurance

- Add any relationships
- Schedule Appointment
- In Details Field Type:
  - Insurance Name
  - Insurance ID#s (self & subscriber if relation)
  - Insurance group# (if avail.)
  - Phone number for provider services
- In Insurance Field Type an abbreviation of the name
- In Authorization Field
  - Type whatever info is necessary

Insurance Maintenance Window

- Double-click on insurance and Insurance Maintenance Window appears.

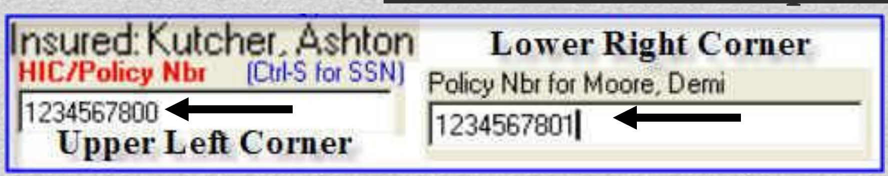
Enter the "HIC/Policy No." as well as a "Group" number, if needed, for the subscriber.

For SELF subscriber

you only have **one** area

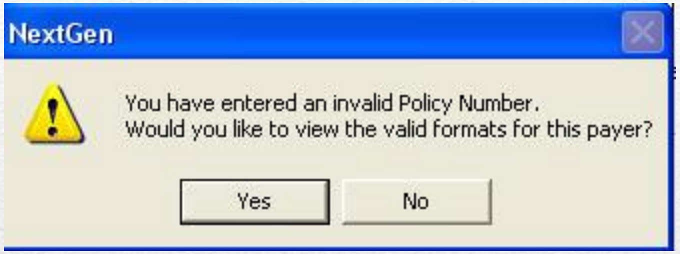
to enter info

For **RELATION** - enter Subs ID# AND **Dependen**t ID#



HIC/Policy Nbr Invalid

- An incorrect ID will generate an alert. **Keep In Mind:**



- New ID#'s (without SS)
- Must have "Prefixes" (ex: YHQ)
- Must have "Suffixes" (A, B, C, 00,01,02)
- CANNOT go by the old ID# in Medic
- You HAVE to confirm with patient –Have them read card!

Payer Website Tab (should use NaviNet training here)

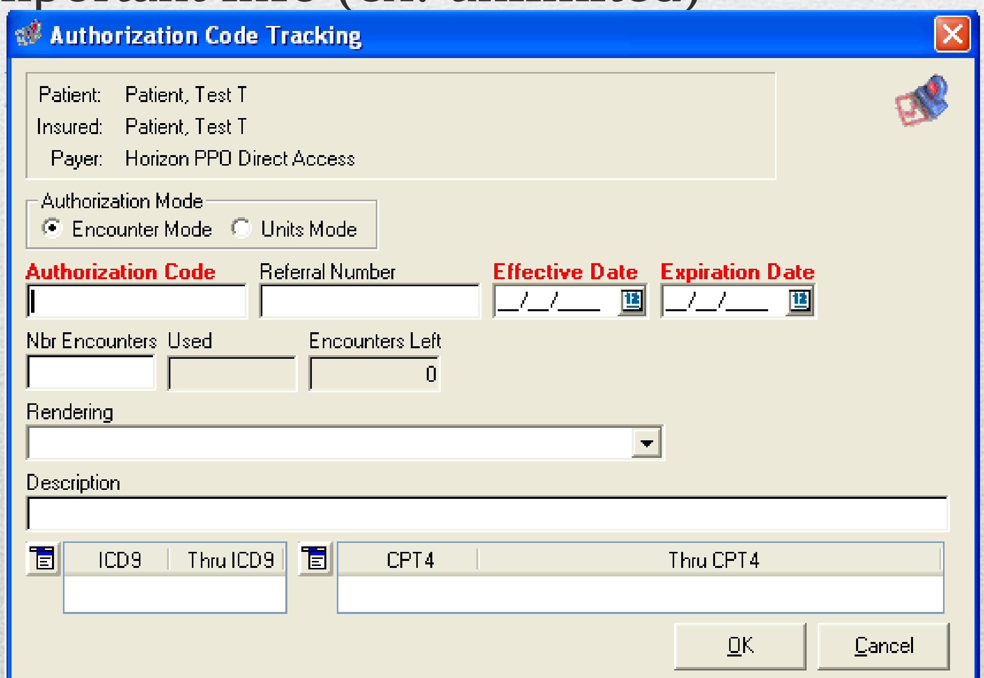
- Some insurances have a direct link to the insurance website –

Adding Authorizations & Referrals

- Click the Authorization Tab in the Insurance Maintenance Window
- Right click and choose new authorization

Authorization Code Tracking Window

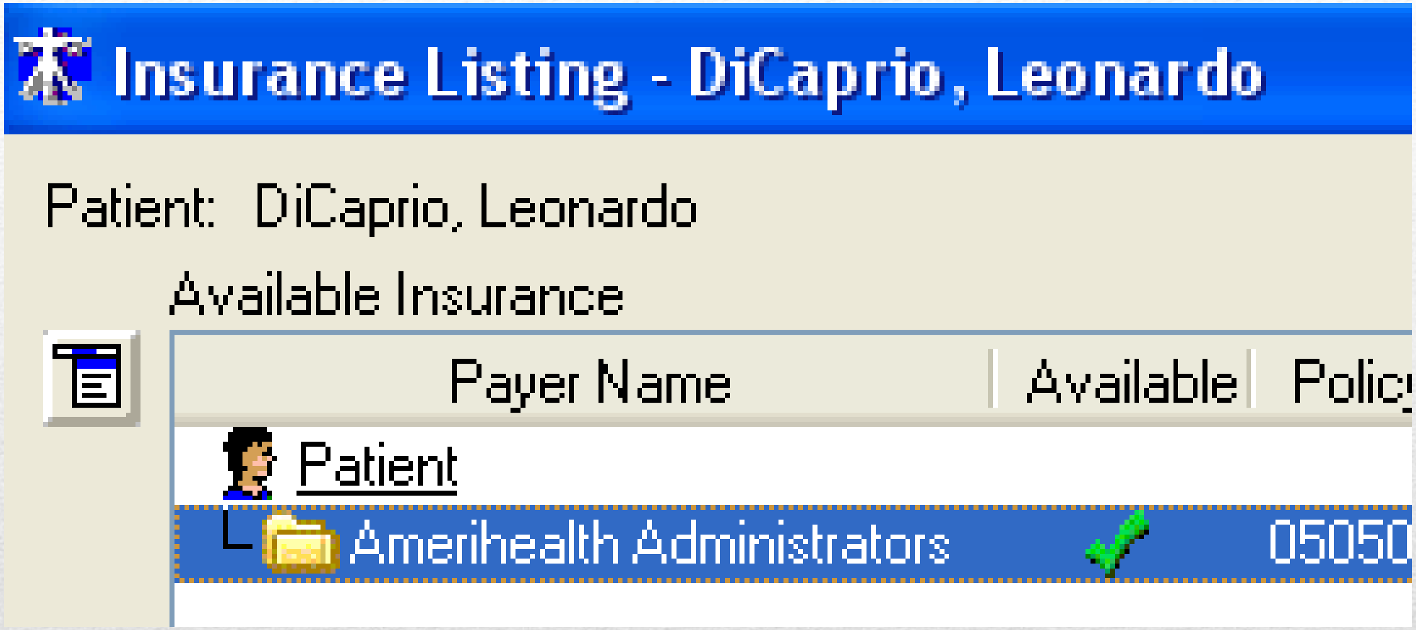
- Type in auth code (referral # or auth#), effective date, expiration date and number of visits. Do not use any other fields
- **ALWAYS type patient name in description** along with any other important info (ex: unlimited)



Special Auth Instructions – Vision Insurances

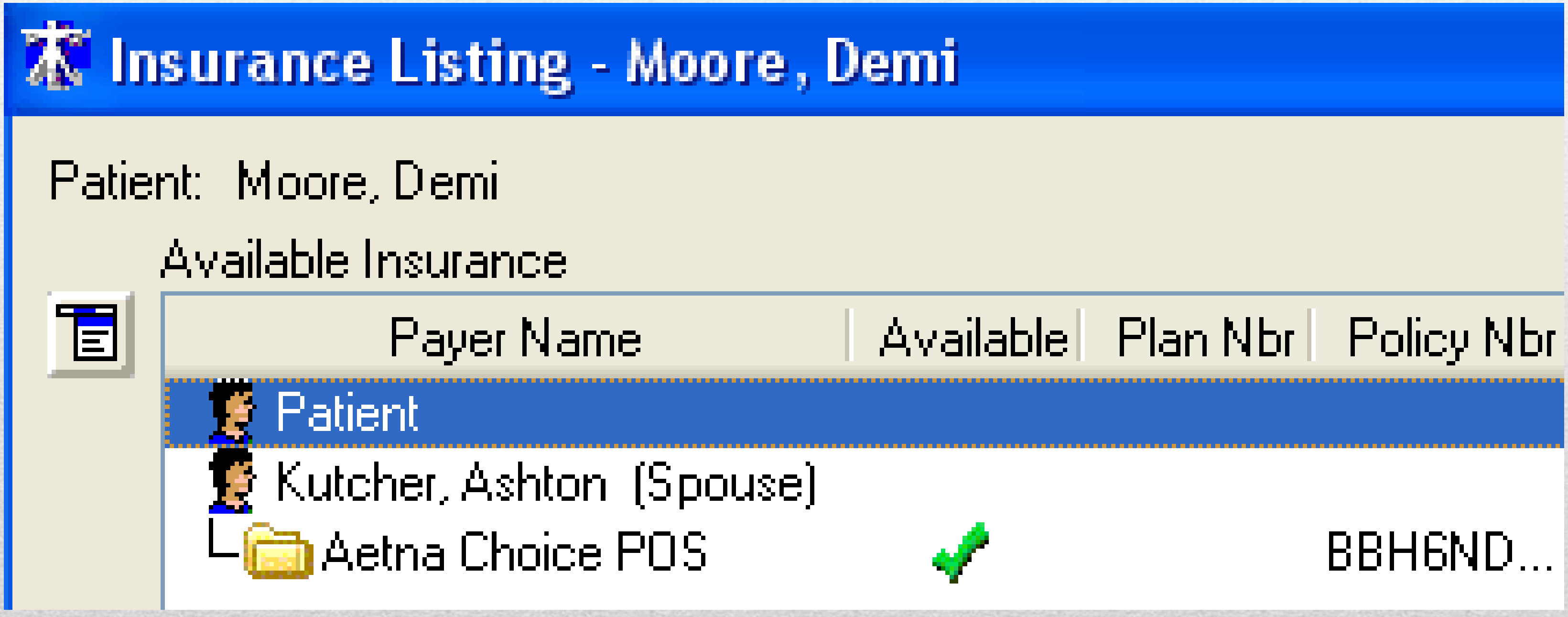
- **Davis Vision & VSP:**
  - Obtain two auths (if pt has benefit)
  - Add two different auths
  - Descriptions will say
    - Exam Only Jane
    - Materials Jane

- **Vision Care Plan:**
  - Type in authorization number on voucher
  - If pt. Eligible for Exam + Materials # of encounters is 2
  - Expiration is same day
  - Description will say:
    - Exam and Materials Jane



Existing Insurance- Self Subscriber

Existing Insurance-
Someone ELSE is Subscriber



"Active", "Active Available", "Inactive/Archived" Insurance

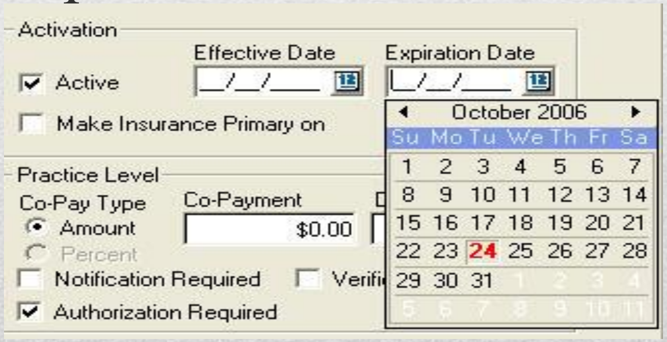
- Active insurance displays as a folder

- Active "Available" insurance displays as a folder with a checkmark

- Inactive/Archived insurance displays as a folder with a red X

- If insurance has changed, uncheck the green mark to make 'unavailable'.

- open insurance - change expiration to the date patient provides (if unknown – put yesterday's date).Say OK to 'changes are being made to expired plan'.



Archiving or Making Insurance Inactive

Insurance Errors - Hiding

- If you **FIND** or **MAKE** an insurance mistake (example: add wrong insurance, add insurance to patient instead of to the relation)
  - Make unavailable (**uncheck** green checkmark)

  - Right-click Insurance & choose Hide – (Funny face means Hidden)

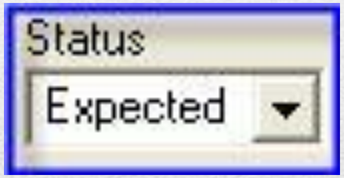
- Whenever you Archive/Inactivate insurance, demote – (move it down) – below any other insurances.
- Highlight insurance
- Use the blue arrow to move down:

Demoting or Moving Insurance

To Confirm/Verify Appt

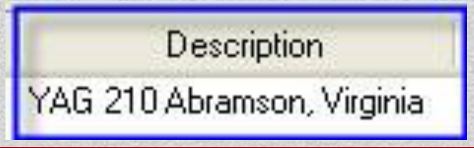
- Appt List Icon on toolbar of Main EPM Window

- Status- expected



- Type last name & first name, Press Enter

- Look at “Description” for a ‘coming early’ time



Appointment Terms (1)

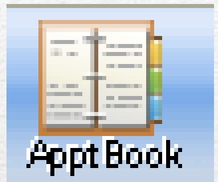
- Resource –
  - Person, Place or thing for which a schedule is created (ex: JN – Nachbar)
- Class –
  - Groups Resources together for search ahead purposes
- Event –
  - Appointment type (ex: LV Routine)
- Event Chain –
  - function chosen to schedule two appointments at one time on different schedules but at different times of the day

Appointment Terms (2)

- Category –
  - colored area on doctor schedule that limits types of appointments in that time frame
- Multiview –
  - Shows multiple doctor schedules in one window
- Weekly Schedule-
  - Shows one doctor schedule for one week
- Appointment Status- Expected, Kept, cancelled, No Show, Rescheduled

Open Appointment Book

- Click Appointment Book Icon from Main EPM Toolbar



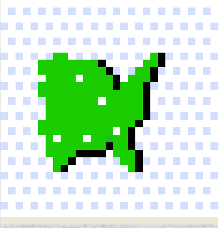
- Scheduler will open on Multiview tab at the bottom of your appointment book window
- You can change back and forth from Multiview to Weekly Schedule.
- **Note-** these aren't really right next to each other

Appointment Book Icons (1)

- Change dates- Click and use arrows to find date – double click on date

- Go to today- if on a different day- takes you to today's schedule

- Forward backward days/weeks - If in multiview- does days, if in weekly schedule –does weeks



- Map Icon – allows you to choose a location and see all the doctors within that location

Appointment Book Icons (2)

- Add appointment- DON’T USE – just right click & choose new for new appt.

- Edit appointment- DON’T USE- just double click on an appointment

- Refresh screen – If you want screen as up to date with current information-click

- Hide/Show patient names- use if you either want to see just appointment type, or name and appointment abbreviation

Appointment Book Icons (3)

- Takes you to user scheduling preferences to make permanent changes

- Flashlight/appointment search ahead- search for appointments but not looking in schedule – system does search

- Go to patient chart- highlight appointment and click this to go to chart

- Exit appointment scheduler- (use red X in upper right corner unless you can't see red X)

- Open Appointment Book
- Find the day you want
  - Use change dates, forward days/ weeks
- Right-Click on the slot
  - pick New

Scheduling An Appointment By Looking At The Day

- Use Flashlight for phone appointments
- Choose event
- Choose either ONE resource, or ONE class
  - Resource = Doctor
  - Class = Group of similar doctors
- Choose time of day, days of week, etc. then click SEARCH
- Appointment list shown – double click on choice for appointment

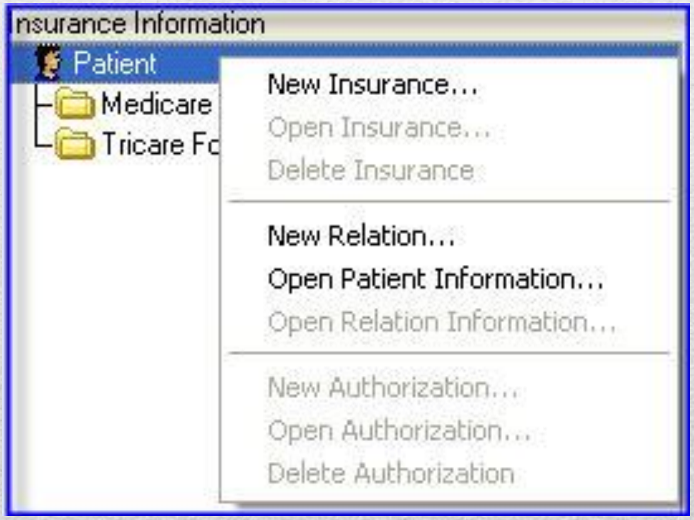
Scheduling Appointment using "Search Ahead"

Appointment Window – Right Side – Patient Tab

- Pick patient using Norton button (upper right hand side of Window)
- Either Access Previous Patient, or Look Up
- Double click when you find patient/person

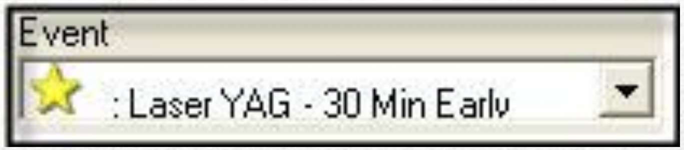
Appointment Window – Right Side – Ins/Diag Tab

- Shows patient name, insurance info, any authorizations
- Right click “patient” to enter patient demographics, insurance, relations, and authorizations

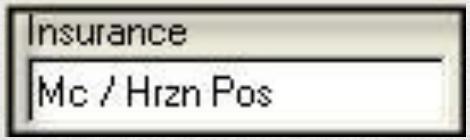


Appointment Window- Left Side

- Pick your ‘event’ or appointment type

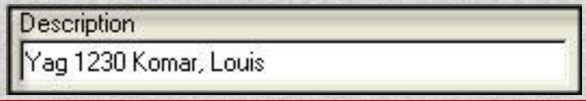


- Type info in insurance & auth fields (standardized)



- Type info in details field (standard abbreviations and other info)

- Type info in description field in front of patient last name if necessary (ex: YAG 330 Doe, John)



Appointment Completion

- Click OK when all information is filled in
- Reminder will come up at the end
  - For Phone appointment – Read to patient
  - For Check-Out appointment- Click Print – Appointment Reminder
  - For Appt you added "Day Of"
    - Print- Fee Ticket
    - Print – Data Sheet Detail

Appointment Chains

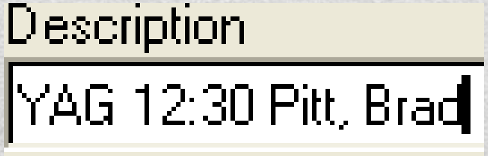
- Chain will make two appointments in ‘succession’ or one right after another in a set order
- Pick a chain by choosing the ‘chain-link’ that names two types of appointments
- EX: 

- Now pick your resources – The Test does the Test, the Doctor does the Exam!
- Pick the RENDERING Physician
- DON’T FORGET ABOUT DESCRIPTION FIELD – input the time of the test (ex VF 330)

Description Field

- MOST important field when making appointment chains, or if patient must come early, type in
- Ex: Chain VF + MV, the description field needs to be changed:

- Ex: Yag Laser



Rendering Physician for Tests

- For any appointments not on an actual doctor schedule, pick a RENDERING physician (it is red = required)
- If test only – then doctor who ORDERED test is rendering
- If test + exam – doctor who is SEEING patient same day is rendering

Cancel Appointment

- Either go to Appt List Icon at top toolbar and Find patient Appointment (OR)
- From Inside Appt Book
- Double Click on the Appointment
- Click the Cancel Check Box and choose a Reason (REASON IS REQUIRED)

Reschedule Appointment

- Just Right-Click an appointment and choose “Cut”
- Now click inside the spot where you want to schedule the patient
- Right click and choose “Paste”
- Make any necessary changes
- MUST choose a reason for the reschedule

Block Doctor Schedule

- Click in slot where you want to begin to block
- Calculate time in minutes
- Right click – new – pick event Block
- Increase time increment to calculated time physician needs blocked

Check-In Appointment

- Right-Click appt, and choose “Check-in, Create Encounter”
- On the “Create Encounter Window”, just click OK (note- only change info for WC/MVA or if a patient is a child and you need to pick the guarantor)
- Take note of any Alerts
- (if you are brought to demographic screen and there is a button that says chart, click to create a new chart)
- Now says, “Encounter Created- Attach Insurance?” – **Say Yes**

Check-In Appointment- NP

- If you are checking in a New Patient:
  - R-Click - Check-in Create Encounter
  - Demo screen will pop up
  - Click CHART Button
  - Backspace out the autogenerated # and type in the real chart # you are giving the patient (USE ALL CAPS FOR THE LETTERS)
  - Now it will say Encounter Created Attach Ins?

Attach Insurance Window- Privacy Notice

- If alert said "**Privacy Notice**", right-click patient and choose "Open Patient Information"

- Click on **Privacy Tab** and Enter info & choose reason, say OK (if a self pay, just skip next steps and say OK)

Attach Insurance Window – Insurance

- Move back any insurance from past visit (blue arrow) to the left
- Now **right-click Insurance** folder(s) on left
  - **Check ID#s** & Address on Card AND **Scan Card**
  - **Enter** any **Auths** (if 2 exist, it will ask you which one to use) AND **Enter copay**
  - NOW **move the insurance(s)** to Right with Blue Arrow & **say OK**
  - Appointment will have line drawn through and say kept

Check- Out Appointment And Reminders (Recalls)

- AS SOON AS patient walks up:
  - say Hello
  - Check out patient in NextGen immediately
- Right-click and choose “Check-Out”
- If Doc said send a card, choose Norton, and add New Recall (if one exists, right click and stop, and then add new)
- Click the **CHECKERED FLAG** Autoflow button
- **NOW you can schedule the appointment!**

Checking Eligibility/Pulling Referrals

- Click report Icon on Top EPM Toolbar
- Choose Scheduling
- Pick Eligibility
- Go to Filter 1 and change the date for which you want to check eligibility
- Click OK
- Report Comes Up with appointments grouped by insurance then by authorization field
- Double click to open appt
- Go to Ins/Diag tab
- Click on Payer Website
- Obtain Elig/Referral & print if necessary
- Type info into Authorization field
- Say OK & Appointment will Update

Print Fee Tickets (Bulk)

- Appt List Icon
- Status Expected
- Input date (to and from should be same)
- Click Find
- Check all boxes using top box in tan area
- Click “resource” column label so it puts in doc/time order
- Click on an Appt (any that is checked) to highlight it in blue
- Right click and print Fee Tickets

Print Data Sheets (Bulk)

- Appt List Icon
- Status Expected
- Input date (to and from should be same)
- Click Find
- Check all boxes using top box in tan area
- Click "resource" column label so it puts in doc/time order
- Click on an Appt (any that is checked) to highlight it in blue
- Right click and print Fee Tickets

Print Daily Front Desk schedules

- Click on the “Reports” Icon on top toolbar
- Click drop down and choose ‘Scheduling’ for “Report Type”
- Double Click your office’s daily schedule
- Click on the “Filter 1” Tab.
- Change to ‘custom date’ for appointment date, and choose your day, or use the drop down and choose date to be printed
- Click OK
- Report will Run
- Click Print – will either print to default printer or you must pick printer

Print Pull List

- Click on the “Reports” Icon on top toolbar
- Click drop down and choose ‘Scheduling’ for “Report Type”
- Double Click your office’s “Pull List”
- Click on the “Filter 1” Tab.
- Change to ‘custom date’ for appointment date, and choose your day, or use the drop down and choose date to be printed
- Click OK
- Report will Run
- Click Print – will either print to default printer or you must pick printer

Print Request List

- Click on the “Reports” Icon on top toolbar
- Click drop down and choose ‘Scheduling’ for “Report Type”
- Double Click your office’s “Request List”
- Click on the “Filter 1” Tab.
- Change to ‘custom date’ for appointment date, and choose your day, or use the drop down and choose date to be printed
- Click OK
- Report will Run
- Click Print – will either print to default printer or you must pick printer

Print Doctor's

- From Main EPM Menu:
  - Reports
  - Scheduling
  - Day Timer
- Change Date to date to be printed
- Click Resources Tab- Open Folder- choose resources
- Click Print

Look up Referring Docs

- Go to Tasks at the top EPM Menu Bar
- Choose File Maintenance
- Type in PIN # again
- File maintenance screen will appear
- Under “Master Files” 

- click EPM 

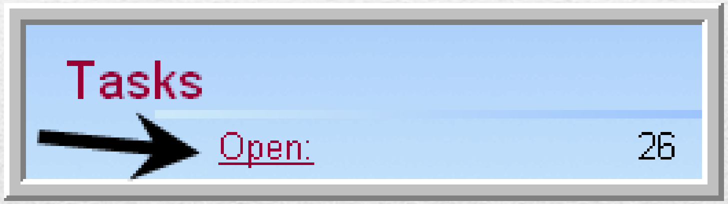
- Click on “Providers” 

- Type in Last name of Doc
- Double click to See Address

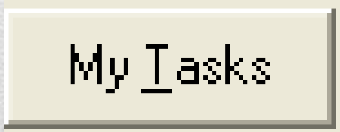
Tasking

- Tasks are used to make requests within departments, between departments, and between offices.
- Tasks are created because some action must be taken by someone. You can even task yourself!
- In all cases except for QA tasks, tasks are not used to ‘share information’ only, we use email for that.

Looking up your Tasks

- There are 3 ways to look up your tasks.
  - From the Advisor


  - From the Worklog

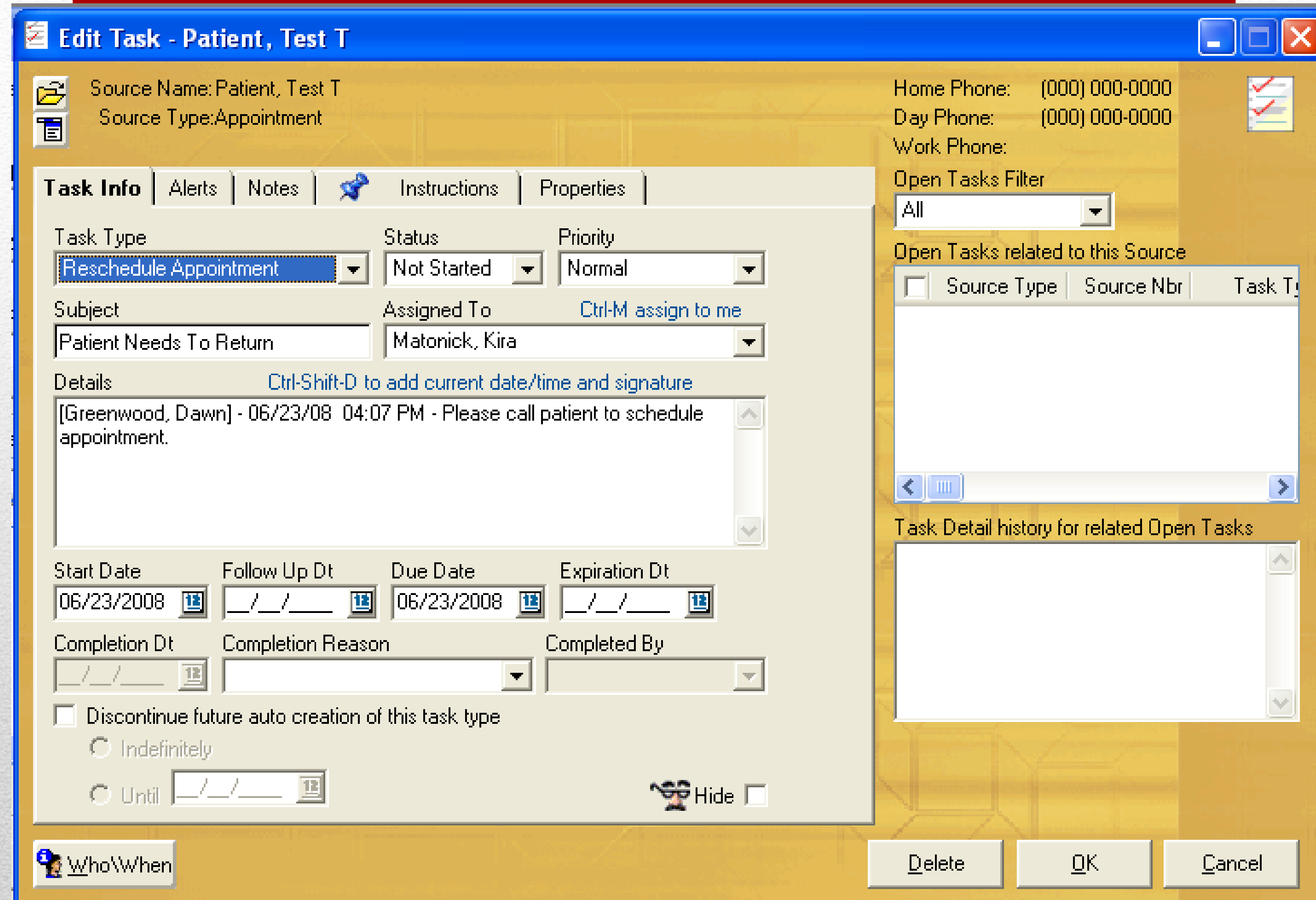



  - From the bottom toolbar


Viewing a Task

- Once you access your tasks, you double-click on one of them to open it.
  - Each task has a ‘source’ type (meaning it was created from a certain place, either an appointment, the chart, an encounter, etc.)

  - Each should have a:
    - Subject
    - Details
    - Start date & Due date

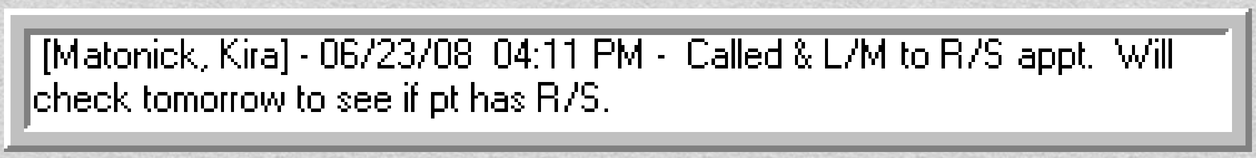

Edit Task - Patient, Test T
Source Name: Patient, Test T
Source Type:Appointment
Home Phone: (000) 000-0000
Day Phone: (000) 000-0000
Work Phone:
Task Info
Alerts
Notes
Instructions
Properties
Open Tasks Filter
All
Open Tasks related to this Source
Source Type
Source Nbr
Task Type
Reschedule Appointment
Status
Not Started
Priority
Normal
Subject
Patient Needs To Return
Assigned To
Ctrl-M assign to me
Matonick, Kira
Details
Ctrl-Shift-D to add current date/time and signature
[Greenwood, Dawn] - 06/23/08 04:07 PM - Please call patient to schedule appointment.
Task Detail history for related Open Tasks
Start Date
06/23/2008
Follow Up Dt
Due Date
06/23/2008
Expiration Dt
Completion Dt
Completion Reason
Completed By
Discontinue future auto creation of this task type
Indefinitely
Until
Hide
Who\When
Delete
OK
Cancel

Working on Tasks

- Once you start a task, change the status to in progress

- If someone else should see this task in their task list, check their name off too. Usually the person who assigned the task will have their name checked off to make sure that you are working on it.

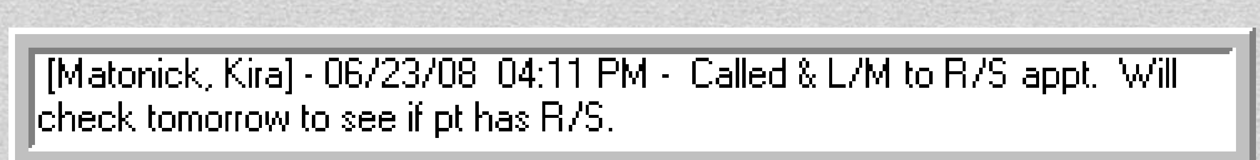
- When you work a task, make comments in the task about what you have done. Your name & date comes before your comment. To do this hold down CTRL + SHIFT + D



Completing Tasks

- Once you are finished with a task, sometimes you will complete it. To complete it, change the status to "completed", and the "completion reason" to "request done.

- Other times you must leave it in progress so another person can view the action you took and then complete it themselves. In this case, just put your notes, and then change it to in progress.



Creating Tasks (Part1)

- You can create a task from:
  - Inside the chart (Clinical Hx/Notes – Tasks)
  - An appointment (right-click- or open -tasks tab)
  - An encounter (right-click)
  - An Account (Notes – tasks tab)

All instances of these require a right-click, and choose "Task". Then choose your task type.

- Each should have a:
  - Subject
  - Details
  - Start date & Due date

Creating Tasks (part2)

- Check off the person or group to whom you are assigning the task. If you need to see a response, make sure to check your own name off too.

- If it has been worked on - the person who worked on the task will have changed the status from “not started” to “in progress” and will have put notes into the task for you to see.

- If you did not need a response – then the task should not be present because they changed it to completed & request done.

- If the information you need is now given to you, you can “complete” the task.

- **BUT** If you must respond back to the person, CTRL + SHIFT + D below their response, type in your comments, and DO NOT COMPLETE THE TASK.