

NEXTGEN ATTENDING (PRECEPTOR) SIGNOFF DEMONSTRATION

This demonstration reviews some recommendations for Attending physician signoff of resident notes. Workflow may vary depending upon departmental policies, & whether the primary care exemption is observed.

This has been prepared with EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Specialty ▾ Pediatrics

Visit Type ▾ Well child

Intake
Histories
SOAP
Finalize
Checkout

Birth History
Order Management
Document Library
Procedures
Tobacco Cessation

Care Guidelines | Global Days

Panel Control: Toggle Cycle

On the Finalize template there is a checkbox to allow residents to submit the note to the supervising physician. They will select the clinic attending at the time, & a task will be generated, notifying the attending of that signoff request.

General

Established patient
 New patient
 PE type: Multi-system Single system
 E&M Guidelines 997: Web

Today's Assessment

#	Diagnosis
1	ROUTINE CHILD HEALTH EXAM V20.2
2	Other atp

Add
Edit
Sort
Remove

Provider Sign Off

Physician Sign Off Request:
 Submit to supervising physician for review

Evaluation and Management Coding

Medical Decision Making [View MDM Guidelines](#) | [View Risk Table](#)

Straight forward
 Low complexity
 Moderate complexity
 High complexity

Counseling

Counseled greater than 50% of time and documented content

Total visit time (minutes): [Counseling Details](#)

Total counsel time (minutes):

Work Flow [Duffy, Robert L]

Appointments 02/26/2014 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
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Tasks All Tasks

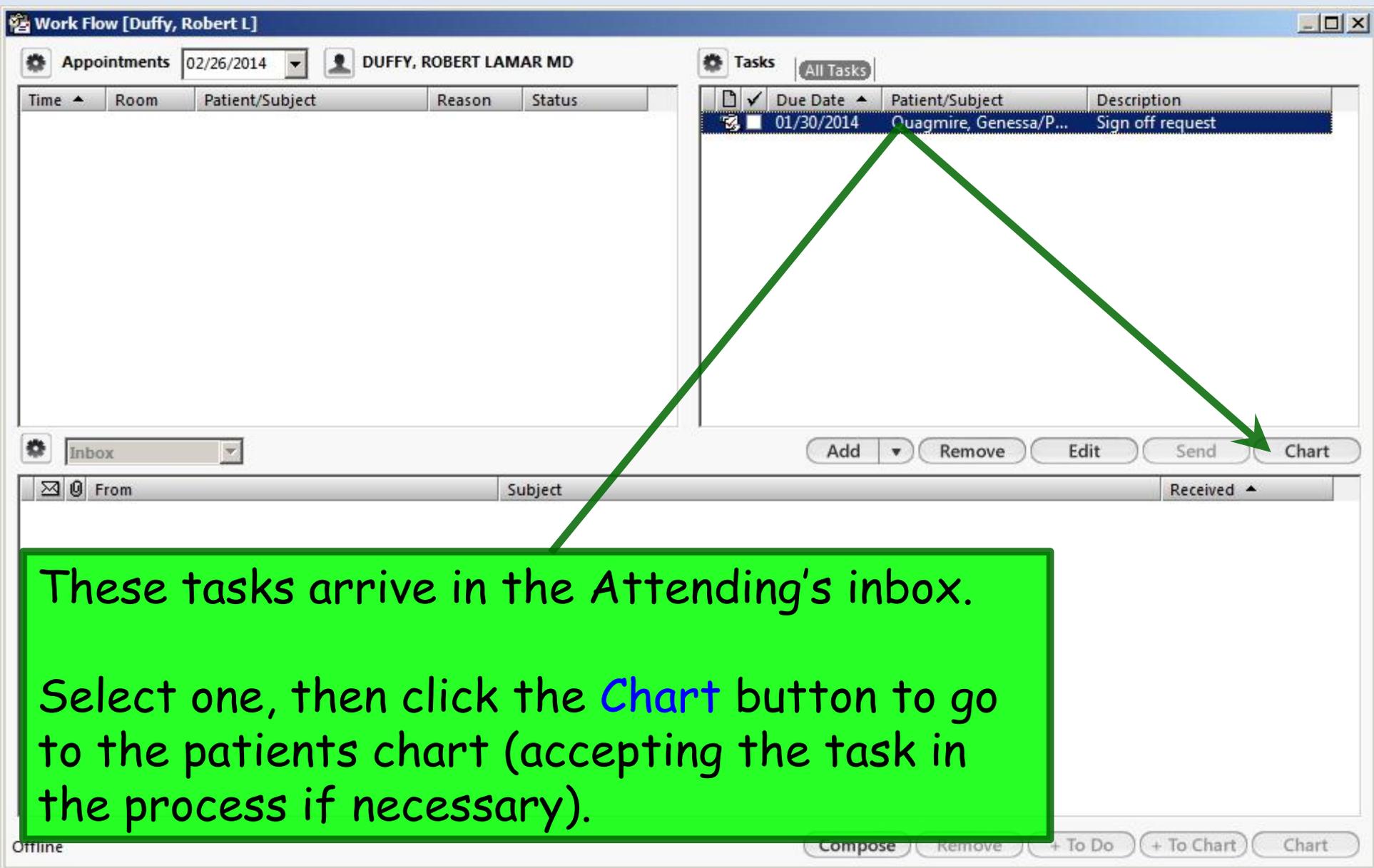
Due Date	Patient/Subject	Description
01/30/2014	Quagmire, Genessa/P...	Sign off request

Inbox

From	Subject	Received
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Chart

Offline Compose Remove + To Do + To Chart Chart



These tasks arrive in the Attending's inbox.
Select one, then click the **Chart** button to go to the patients chart (accepting the task in the process if necessary).

The chart will open to the **Finalize** tab.

Click the **Visit Note (master_im in this case)** to review it.

The screenshot displays a medical software interface. The main window is titled "01/30/2014 09:20 AM : '*Finalize'" and shows a navigation bar with tabs: Intake, Histories, SOAP, **Finalize**, and Checkout. Below the navigation bar are sections for "Care Guidelines", "Global Days", and "General" (Established patient, New patient, PE Type: Multi system, Single system, E&M Guidelines1997: Web). The "Today's Assessment" section contains a table with the following data:

#	Diagnosis Description	Code	Status
1	ROUTIN CHILD HEALTH EXAM	V20.2	
2	Other atopic dermatitis and related conditions	691.8	

At the bottom of the main window, there is a "Provider Sign Off" section with a "Physician Sign Off Request:" and a checked checkbox "Submit to supervising physician for review".

The "Patient History" sidebar on the right shows a list of documents: Patient Portal, Patient Portal, Preceptor Not, Pregnancy/Bi, Review of Sys, USApreceptor, Chart_Note, intake_note, **master_im**, Patient Plan, preceptor_not, Req: X-ray, ch, Medication Al, Medication, Problem, Procedure. A green arrow points from the text above to the "master_im" entry.

At the bottom of the screen, the taskbar shows "Ready" and several application icons: NGDevl, USA Health Services Foundation, rlduffy, CAP, NUM, SCRL, 02/26/2014.

NextGen EHR: Genessa Quagmire MRN: 000000007763 DOB: 01/01/2013 (Male) AGE: 13 months 25 days - 01/30/2014 09:20 AM : Document "master_im"

File Edit View Tools Admin Utilities Insert Format Table Window Help

Logout Save Clear Delete USA FAMILY MEDICINE DUFFY, ROBERT LAMAR MD Patient History Inbox PAR Medications EPM Templates Documents Images Orders Procedures Apps Close

Genessa Quagmire (M) DOB: 01/01/2013 (13 months 25 days) Weight: 23.00 lb (10.43 Kg) Allergies: (1) Problems: (2) Diagnoses: (3) Medications: (2)

Address: 555 Bee Hive Drive Mobile, AL 36604 MRN: 000000007763 Emergency Relation: PCP: MCFADEN, THOMAS G MD
Insurance: Emergency Phone: Referring:
Contact: NextMD: No Pharmacy 1: LINCOLN PHARM... Rendering: DUFFY, ROBERT LAMAR ...

Alerts Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

01/30/2014 09:20 AM: "Finalize" 01/30/2014 09:20 AM: Document "master_im"

Patient History

TX Text

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**Scroll through the note to review it, then open the Template Module.
(Many users will wish to have the Template Module button on the Menu Bar as shown above.)**

This 12 month old male presents for rash and Well child check.

History of Present Illness:

1. rash
Onset: 29 days ago. Severity is moderate. The problem has not changed. It occurs intermittently. Location is face.
Additional information: Itching & red..
2. Well child check
Also due for Well Child Check; aside from rash, no new problems or issues to discuss.

PROBLEM LIST:

Problem Description	Onset Date	Chronic	Notes
Atopic dermatitis		Y	

Ready

NGDevI USA Health Services Foundation rlduffy CAP NUM SCRL 02/26/2014

NextGen EHR: EUGENIA QUAGMIRE MRN: 000900044677 DOB: 01/03/1959 (Female) AGE: 55 years 5 months - 05/28/2014 10:08 AM : Document "Master_Im"

File Edit View Tools Admin Utilities Insert Format Table Window Help

Logout Save Clear Delete USA Family Medicine DUFFY, ROBERT LAMAR MD Patient History Inbox PAQ Medications Templates Documents Images Orders Procedures EPM

EUGENIA QUAGMIRE (F) DOB: 01/03/1959 (55 years) Weight: 166.00 lb (75.30 Kg) Allergies: (2) Problems: (4) Diagnoses: (35) Medications: (2)

Address: 22 Two Tooth Trail MOBILE, AL 36604 MRN: 000900044677 Insurance: Aetna NextMD: Yes Emergency Relation: Emergency Phone: Pharmacy 1: CAFFEYS PHARM... PCP: DUFFY, ROBERT LAMAR ... Referring: Rendering: MORGAN, AARON M MD

Alerts OBGYN Details Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

05/28/2014 10:08 AM : "USA Finalize 836" 05/28/2014 10:08 AM : Document "Master_Im" x

TX Text

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Select Template

Medical Records Demographics

- *USA Checkout 836
- *USA Finalize 836
- *USA Histories 836
- *USA Home Page 836
- *USA Intake 836
- *USA SOAP 836
- Immunization - Adult
- Order Management
- USA Document Library
- USA Phone & Clinic Memos 836
- USA Preceptor835

show
 All
 Preferred Categories

OK Cancel

Patient History

- 05/28/2014 10:08 AM
- *USA Checkout 836
- *USA Clinical Guide
- *USA Finalize 836
- *USA Histories 836
- *USA Home Page 8
- *USA Intake 836
- *USA SOAP 836
- Cardiac Studies
- Order Management
- Telephone Call
- USA Phone & Clinic
- USA Preceptor835
- intake_note
- Master_Im
- Master_Im835USA
- Master_Im836STOC

PATIENT: EUGENIA QUAGMIRE
DATE OF BIRTH: 01/03/1959
DATE: 05/28/2014 10:08 AM
VISIT TYPE: Office Visit
TODAY'S PROVIDER: ROBERT L. DUFFY MD
PCP: ROBERT LAMAR DUFFY MD

USA Family M
1504 Springhill Av
Mobile, AL 366

Double-click on USA Preceptor835.
(This is one of the Preferred Templates we recommend for Attendings.)

tableted, extended release

Ready NGTest USA Health Services Foundation rlduffy CAP NUM SCRL 06/10/2014

Resident: AARON M MORGAN MD
Historian:

Chief complaint(s):
sore throat

Histories:
 PMH Reviewed Reviewed questionnaires
 HPI Reviewed Reviewed vital signs

Histories reviewed/accepted by:
 Accept histories as presented: 05/28/2014 10:45 PM Robert L. Duffy
 Reviewed histories, comments noted:

The Preceptor template opens. This template provides the Attending with the opportunity to document as much or as little supervision as desired, dictated by department policy, or mandated by the patient's insurance.

Medication	Dose	Qty	Refills	Start	Stop	Last Refill
ranitidine 150 mg tablet	1 twice daily	60	5	//	//	//
verapamil ER (SR) 240 mg tablet, extended release	1 daily	90	3	03/31/2014	//	//

At a minimum, you will want to click **Accept assessments and plan as presented.**

Physical Exam: Performed Present
Non-immunization orders: [Immunizations](#) [Cosign/review Orders](#)

Performed procedure(s) Present for procedure(s)

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Diagnosis
HQ-2)

Comments:

Date	Time	Preceptor	Comments

E-signature: Robert L. Duffy 05/28/2014 10:46 PM

Accept assessments and plan as presented. Resident-Attending discussion took place Attending saw patient
 Reviewed assessments and plan, comments noted

Resident: AARON M MORGAN MD
Historian:

Chief complaint(s):
sore throat

PMH Reviewed Reviewed questionnaires
 HPI Reviewed Reviewed vital signs
 ROS Reviewed

Accept histories as presented: 05/28/2014 10:45 PM Robert L. Duffy
 Reviewed histories, comments noted:
 Reviewed labs/diagnostics:

Today's vital signs: ! Vital Signs Outside Normal Range

Time	Wt lbs	Ht In	BMI	Wt kg	Ht cm	BP	Pulse	Resp	TempF	TempC	O-sat	Pain level	Comments
10:38 PM	166.00	67.50	25.62	75.296	171.45	141/90	78	12	98.6	37.0		5/10	

Medications:

Medication	Sig	Qty	Refills	Start	Stop	Last Refilled
ranitidine 150 mg tablet	1 twice daily	60	5	//	//	//
verapamil ER (SR) 240 mg tablet extended release	1 daily	90	3	03/31/2014	//	//

Physical Exam

Performed physical exam Reviewed physical exam, accepted as presented
 Present for physical exam Reviewed physical exam, comments noted

Performed procedure(s) Present for procedure(s)

Non-Immunization orders:

[Immunizations](#) [Cosign/review Orders](#)

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Empty text area for notes or additional information.

Accept assessments and plan as presented.
 Reviewed assessments and plan, comments noted

Res... place Attending saw patient

Select other checkboxes as desired to document your level of review and/or participation in the encounter. Use the History Bar or links on this template to further review documentation as necessary.

Resident: AARON M MORGAN MD
Historian:

Chief Complaint: sore
You'll note several areas where you can add comments.

HPI Reviewed Reviewed vital signs

ROS Reviewed

Reviewed labs/diagnostics:

Today's vital signs: Vital Signs Outside Normal Range

Time	Wt lbs	Ht In	BMI	Wt kg	Ht cm	BP	Pulse	Resp	TempF	TempC	O-sat	Pain level	Comments
10:38 PM	166.00	67.50	25.62	75.296	171.45	141/90	78	12	98.6	37.0		5/10	

Medications:

Medication	Sig	Qty	Refills	Start	Stop	Last Refilled
ranitidine 150 mg tablet	1 twice daily	60	5	//	//	//
verapamil ER (SR) 240 mg tablet, extended release	1 daily	90	3	03/01/2014	//	//

In this example, we'll add a comment to the Assessment/Plan section. Click Add.

Physical Exam

Performed physical exam Reviewed
 Present for physical exam Reviewed

Performed procedure(s) Present for procedure(s)

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Comments:

Date	Time	Preceptor	Comments

Add

E-signature: Robert L. Duffy 05/28/2014 10:46 PM

Add Edit Remove

Accept assessments and plan as presented.

Reviewed assessments and plan, comments noted

Resident-Attending discussion took place

Attending saw patient

Generate Document

Resident: AARON M MORGAN MD
Historian:

Chief complaint(s):
sore throat

Histories:
 PMH Reviewed Reviewed questionnaires
 HPI Reviewed Reviewed vital signs

Histories reviewed/accepted by:
05/28/2014 10:45 PM Robert L. Duffy
Beverly Crusher

Type your comments, then click Save & Close.

Today's vital signs: Vital Signs Outside Normal Range

Time	Wt lbs	Ht In	BMI	Wt kg	Ht cm	BP	Pulse	Resp	TempF	TempC	O-sat	Pain level	Comments
10:38 PM	166.00	67.50	25.62	75.296	171.45	141/90	78	12	98.6	37.0		5/10	

Medications:
Medication
ranitidine 150 mg tablet
verapamil ER (SR) 240 mg tablet, extended release

Physical Exam
 Performed physical exam Reviewed physical exam, accepted as
 Present for physical exam Reviewed physical exam, comments noted

Performed procedure(s) Present for procedure(s)

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Add Edit Remove

Accept assessments and plan as presented.
 Reviewed assessments and plan, comments noted

Resident-Attending discussion took place Attending saw patient

Generate Document

Preceptor Comments

Yada Yada Yada.

Approximate number of characters free: 483

Save & Close Cancel

Comments: Add

Date	Time	Preceptor	Comments

E-signature: Robert L. Duffy 05/28/2014 10:46 PM

Resident: AARON M MORGAN MD

While minor comments, corrections, & additions are appropriate using these comment boxes, keep in mind that they will become part of the patient record, & that even tasks you generate to the resident, while not part of the visit note, will be discoverable.

If you have major issues with the resident's note, discuss them with the resident offline, & have the resident correct & regenerate the note.

Your comments display here.

Chief Complaint

sore throat

Today's vital signs:

Time

10:30 PM

Medications:

Medication

ranitidine 150 mg tablet

verapamil (USP) 240 mg tablet extended release

Physical Exam

Performed physical exam

Present for physical exam

Performed procedure(s)

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Add Edit Remove

Accept assessments and plan as presented.
 Reviewed assessments and plan, comments noted

Resident-Attending discussion took place Attending saw patient

Generate Document

Status	Order	Diagnosis
completed	Patient Health Questionnaire (PHQ-2)	

Comments: Add

Date	Time	Preceptor	Comments
06/10/2014	11:57 AM	Robert L. Duffy	Yada Yada Yada.

E-signature: Robert L. Duffy 05/28/2014 10:46 PM

Resident: AARON M MORGAN MD
Historian:

Chief complaint(s):

sore throat

Histories:

- PMH Reviewed Reviewed questionnaires
- HPI Reviewed Reviewed vital signs
- ROS Reviewed

Histories reviewed/accepted by:

Accept histories as presented: 05/28/2014 10:45 PM Robert L. Duffy

Reviewed histories, comments noted:

Reviewed labs/diagnostics:

Today's vital signs: Vital Signs Outside Normal Range

Time	Wt lbs	Ht In	BMI	Wt kg	Ht cm	BP	Pulse	Resp	TempF	TempC	O-sat	Pain level	Comments
10:38 PM	166.00	67.50	25.62	75.296	171.45	141/90	78	12	98.6	37.0		5/10	

Medications:

Medication	Sig	Qty	Refills	Start	Stop	Last Refilled
ranitidine 150 mg tablet	1 twice daily	60	5	//	//	//
verapamil ER (SR) 240 mg tablet, extended release	1 daily	90	3	03/31/2014	//	//

Physical Exam

- Performed physical exam
- Present for physical exam
- Reviewed physical exam, accepted as presented

When you are done making selections, click E-Signature, then the Generate Document button.

Today's Assessments:

#	Diagnosis Description	Code
1	URI, Acute	465.9

Comments:

Date	Time	Preceptor	Comments
06/10/2014	11:57 AM	Robert L. Duffy	Yada Yada Yada.

E-signature: Robert L. Duffy 05/28/2014 10:46 PM

- Accept assessments and plan as presented.
- Reviewed assessments and plan, comments noted

- Resident-Attending discussion took place
- Attending saw patient

Generate Document

TX Text

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PATIENT: EUGENIA QUAGMIRE
 DATE OF BIRTH: 01/03/1959
 DATE: 05/28/2014 10:08 AM
 VISIT TYPE: Office Visit
 Resident: AARON M MORGAN MD.
 PCP: ROBERT LAMAR DUFFY MD

Chief Complaints

- sore throat

This 55 year old female presents for sore throat.

The preceptor_note document, including your comments, will generate. Since it already has your E-signature, it will not go to your PAQ.

You have completed signoff of this encounter, so you may close the chart.

Allergic rhinitis		Y
Seborrhea	Just a sample note on seborrhea.	Y
Essential hypertension		Y

Past Medical/Surgical History

Disease/Disorder	Onset	Management/Procedure	Date	Comments

Work Flow [Duffy, Robert L]

Appointments 02/26/2014 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
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Tasks All Tasks

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Due Date	Patient/Subject	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/30/2014	Quagmire, Genessa/P...	Sign off request

Back in your task list, click the Completed checkbox.

Inbox

Add Remove Edit Send Chart

From	Subject	Received
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Offline Compose Remove + To Do + To Chart Chart

This concludes the
NextGen Attending Signoff
demonstration.

Ever stop to think, and forget to start again?