

NEXTGEN USER PERSONALIZATION DEMONSTRATION

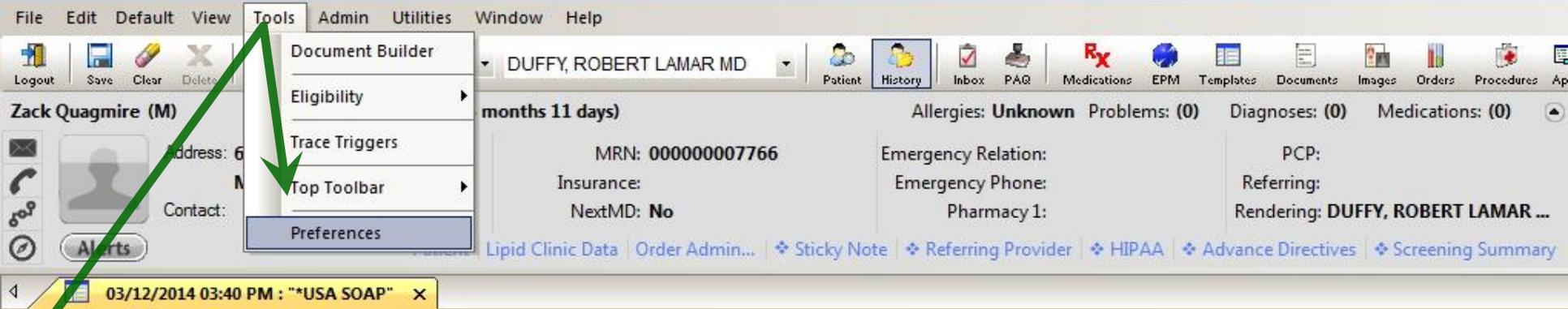
This demonstration reviews some options the user has to modify things in NextGen to meet personal preferences & speed along your documentation.

This has been prepared for EHR 5.8 & KBM 8.3, but you may see some screen shots of earlier versions in the background when they are not germane to the point being illustrated. Subsequent updates may display cosmetic & functional changes.

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

User Preferences

There are several initial preferences you'll want to set up on the Tools menu.



NextGen provides many opportunities for the user to personalize the appearance & functionality of the program, enhancing efficiency & simplifying data entry.

First, we'll look at some of the initial user preferences. What follows are some general recommendations. Some details will differ among specialties, & may depend upon whether the user is a provider, nurse, or front office staff.

Click [Tools|Preferences](#), & we'll go through the various tabs you see there.

Preferences [X]

General | Main Toolbar | Medical Records | Templates | Medications | Formulary | Reference [◀] [▶]

Patient Selection

View By:

Initial field:

Show appointments for entire day

Orders

View Labs:

Initial View:

View results only

Logout after

minute(s)

Lock for current user

Synchronization Settings

Suspend patient synchronization

Prompt for encounter auto creation

Knowledgebase

Display KBM Help

Notifications

Receive Out of Office Notifications

Initial Module

These are the initial settings recommended for most users. If you select **Work Flow** as your **Initial Module**, you'll see the **Inbox/Appointment List** as soon as you log on to NextGen. If you don't want to see this, leave it blank.

Preferences

General **Main Toolbar** Medical Records Templates Medications Formulary Reference

General

Default View: **Encounters**

Show module buttons (templates, documents, images, ...) [Set As Default](#)

Flatten Category View

Patient's Encounters

NOTE: Changes for this section will occur when the main toolbar is reloaded.

[Encounter Display](#)

Expand Most Recent

View Case Management

Filter

Clinical Encounters

Billable Encounters

Optical Encounters

NextGen ICS Images

Open in NextGen ICS

XML Documents

Use default style sheet

Path: [Browse...](#)

These are the stock settings,
but also click **Encounter Display**.

OK

Cancel

Apply

These are the stock settings, but also click the **Remarks** checkbox if it is not already selected.

Customize Encounter Display

Date/Time

- 03/06/2006
- 03-06-2006
- 03.06.2006
- 03/06/06
- 03-06-06
- 03.06.06
- 3/6/06
- 3-6-06
- 3.6.06
- 2006/03/06
- 2006-03-06
- 2006.03.06
- 06/03/06
- 06-03-06

Time

- 02:59 PM
- 14:59

Encounter Date
 Billable Date

Provider

- First M. Last Degree
- FL Degree
- FML
- Last, F
- Last, FM**
- F. M. L. Degree
- First Last Degree
- Description

Location
 Remarks

Display Order

| | | | |
|-------------|-----------|------------|------------|
| {Date/Time} | {Remarks} | {Provider} | {Location} |
|-------------|-----------|------------|------------|

< >

Sample display:
03/06/2006 02:59 PM Remarks Last, FM

Default OK Cancel

Under Display Order, click on the individual items, & use the < and > buttons to move items left or right.

Customize Encounter Display

Date/Time

03/06/2006
03-06-2006
03.06.2006
03/06/06
03-06-06
03.06.06
3/6/06
3-6-06
3.6.06
2006/03/06
2006-03-06
2006.03.06
06/03/06
06-03-06

Time

02:59 PM
14:59

Encounter Date
 Billable Date

Provider

First M. Last Degree
FL Degree
FML
Last, F
Last, FM
F. M. L. Degree
First Last Degree
Description

Location
 Remarks

Display Order

{Date/Time} {Remarks} {Provider} {Location}

< >

Default OK Cancel

The recommended display order is:
{Date/Time} {Remarks} {Provider} {Location}.

Preferences

General | Main Toolbar | **Medical Records** | Templates | Medications | Formulary | Reference

Location



USA FAMILY MEDICINE

Clear

Default to last selected

Use link between Location and Provider

Provider



ROBERT LAMAR DUFFY

Clear

Default to last selected

Users who work in only one location should click the **location selection icon** to pick the location from the ensuing popup. Those who work in multiple locations should leave this blank, though you may choose to select **Default to last selected**, especially if you often work in the same location several days in a row.

OK

Cancel

Apply

Preferences

General | Main Toolbar | **Medical Records** | Templates | Medications | Formulary | Reference

Location



USA FAMILY MEDICINE

Clear

Default to last selected

Use link between Location and Provider

Provider



ROBERT LAMAR DUFFY

Clear

Default to last selected

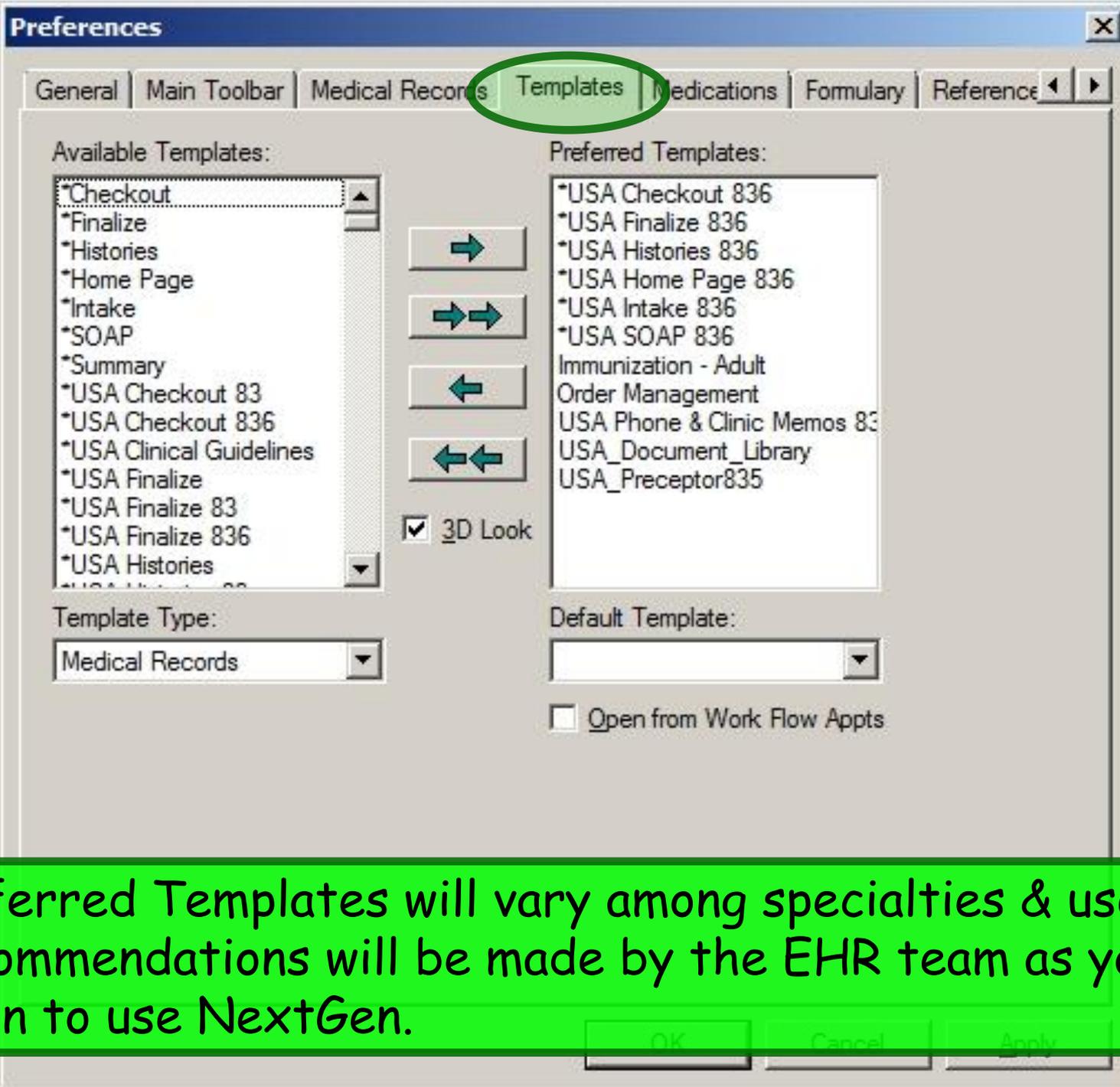


Providers should select **themselves** as the **Provider**. (Clicking this button will give you a popup to select provider.) Other staff, such as nurses, may leave this **blank**, though you may choose to select **Default to last selected**, especially if you often work with the same provider several days in a row.

OK

Cancel

Apply



Preferred Templates will vary among specialties & users. Recommendations will be made by the EHR team as you begin to use NextGen.

These are recommended initial settings for everyone.

General | Main Toolbar | Medical Records | Templates | Medications | Formulary | Reference

Printing and Faxing

Prescription Printer Kyocera FS-2100DN#:8

Source: []

Use Medication Verification Prescribed Elsewhere

View

<All> [DUR]

Sig

Always Round Decimal Total Prescription Quantity

Refills

Display DEA Refill Limit Warning

PDR® BRIEF

Enable PDR® BRIEF

Tall Man

Display Tall Man Medication Names

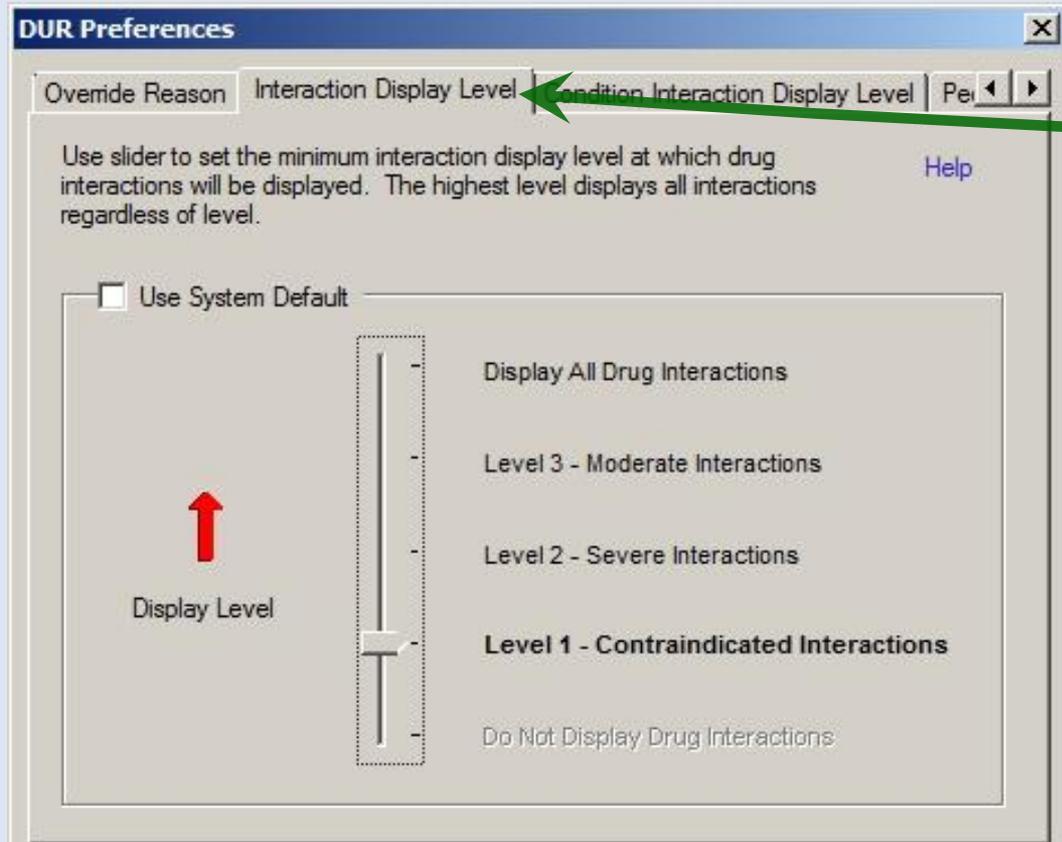
Prescribing Delegates

Limit Prescribing to Selected Delegates

OK Cancel Apply

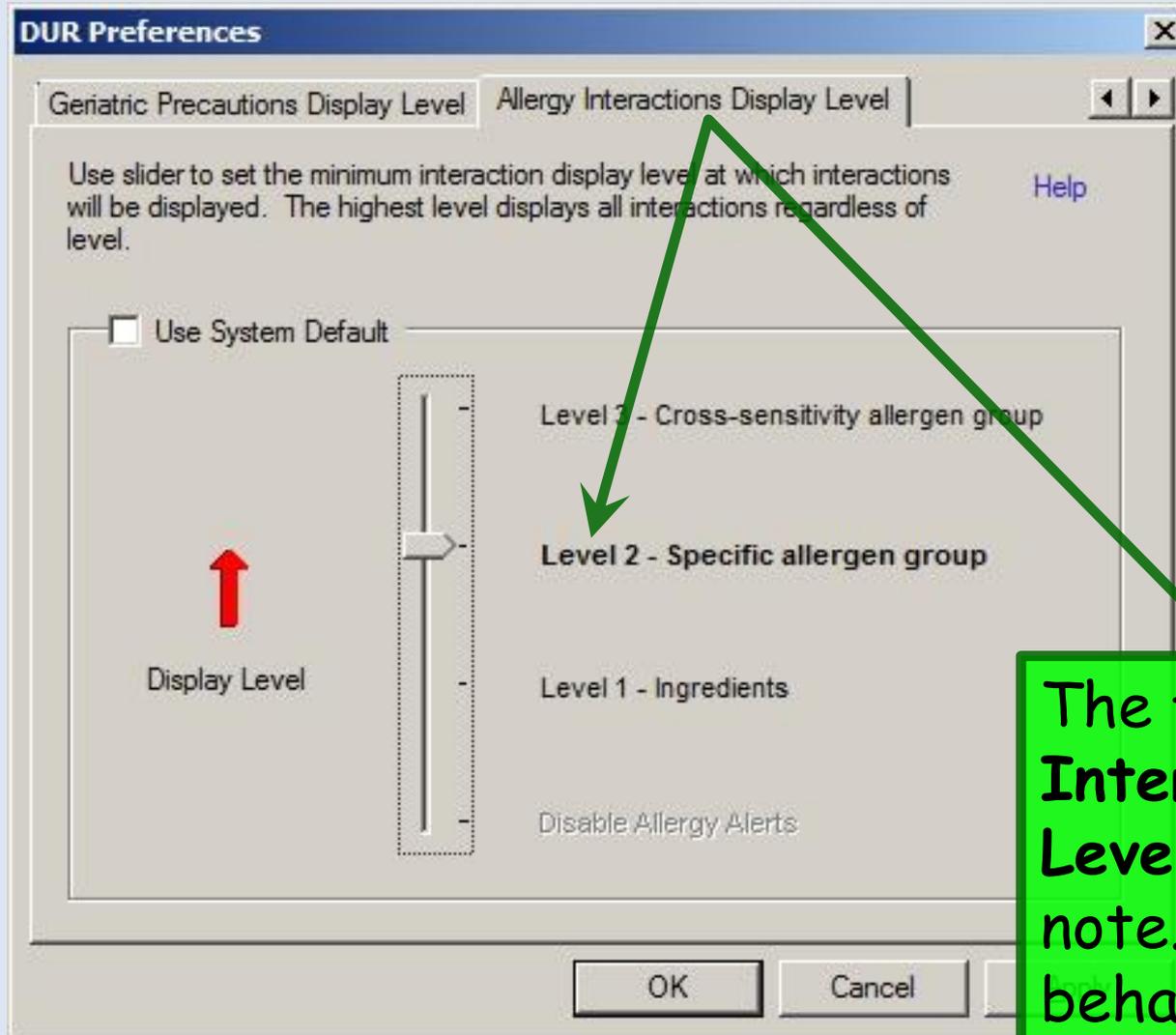
Note you can select a default printer for prescriptions. Since most clinics will have a designated printer for prescriptions, selecting it here can save you a few clicks whenever you have to print a prescription (e.g., a controlled substance).

Also click **DUR**.
(Drug Utilization Review.)



Drug interaction warnings in NextGen can be intrusive, running the risk of warning fatigue. Default settings will generally be low, but you can adjust them as preferred to anything other than off.

The 1st tab, **Override Reason** needs no entries.
The next tabs are:
Interaction Display Level
Condition Interaction Display Level
Pediatric Precautions Display Level
Geriatric Precautions Display Level



The final tab, **Allergy Interaction Display Level**, merits a special note. As of a change in behavior observed circa March 2014, we recommend selecting **Level 2** here.

Preferences

General | Main Toolbar | Medical Records | Templates | Medications | **Fomulary** | Documents

General

Use Fomulary as default medication search

View Options

Notes
 Fomulary Status

Drug Information

Display (Chemical Name)
 Display Only Drugs
 Display OTC Meds
 On Fomulary Only

Fomulary Status

Text & Images
 Images Only
 Text Only

These are the recommended settings. While **Fomulary Search** could be useful as a default, if you find your patients often don't have formulary information available, or formulary searches slow down your workflow too much, you may not wish to use this as your default.

OK

Cancel

Apply

Preferences



Main Toolbar

Medical Records

Templates

Medications

Fomulary

Reference

Docum



External Provider Reference

Diagnosis & Problem Modules

Procedure Module

Medication Module

<http://www.epocrates.com/>

Medication Allergy Module

Order Module - Lab Results

A variety of decision support links are available at several spots in NextGen. Those will be set up at the system level, but if individual users wish to use different sites, you can specify those links here.

OK

Cancel

Apply

Preferences

Medical Records | Templates | Medications | Formulary | Reference | Documents



Machine Settings

Document Type Viewers

RTF Documents: TX Text

Text Documents: TX Text

Word Documents: TX Text

Unknown Documents: High Edit

Generating

Default Generator:

Default Printer:

User Settings

Use spell checking for TX Text viewer

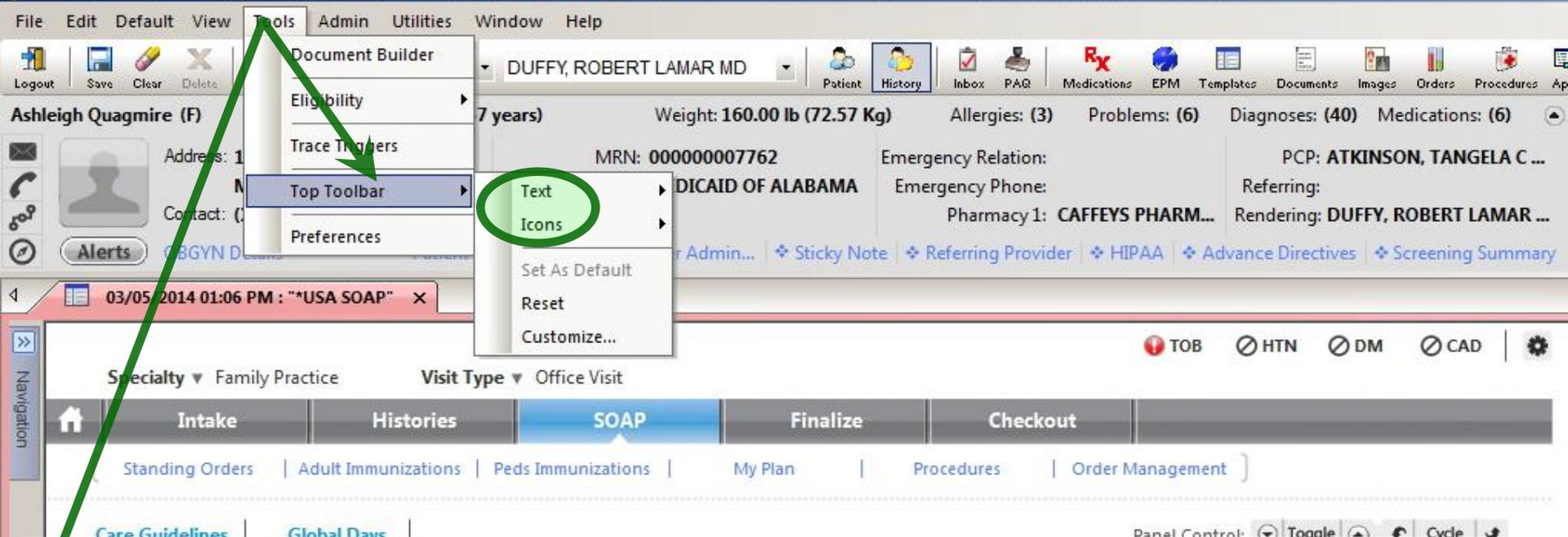
Default TX Text View: Normal View

These are the stock settings.
When done, click **OK** to apply your selections.

OK

Cancel

Apply



You can modify the appearance of the toolbar at the top of the program window. **Text & Icons** allow a few modifications.

For **Text** we recommend **Below**.

For **Icons** we recommend **Small**.

The screenshot displays the NextGen EHR interface for patient Ashleigh Quagmire. The 'Tools' menu is open, showing options like 'Document Builder', 'Eligibility', 'Trace Triggers', 'Top Toolbar', and 'Preferences'. The 'Top Toolbar' sub-menu is also open, listing 'Text', 'Icons', 'Set As Default', 'Reset', and 'Customize...'. A green arrow points from the 'Tools' menu to the 'Customize...' option. The 'Customize...' option is circled in green. The interface also shows patient information, a top toolbar with various icons, and a navigation pane with tabs for 'Intake', 'Histories', 'SOAP', 'Finalize', and 'Checkout'.

To select the icons you wish to have on the top toolbar, click [Tools|Top Toolbar|Customize](#). (You can also reach this by right-clicking on the toolbar itself.)

Patient Name: Petrovich Quagmire
Gender: M
Specialty: Family Practice
Visit Type:

Intake Histories
Sticky Note | Refe

Reason for Visit

Introduction:
The patient is a 58 year old male.

 Do not launch HPI
abdominal pain Reason for Visit

Customize Top Toolbar

Available toolbar buttons:

- Separator
- ICS
- Problems
- Referral
- Equipment

Current toolbar buttons:

- Delete
- Separator
- Location
- Provider
- Separator
- Patient
- History
- Separator
- Inbox
- PAQ
- Separator
- Medications
- Templates

Text options: Show Text Labels
Icon options: Small Icons

Buttons: Add ->, <- Remove, Move Up, Move Down, Reset, Close

Use the **Add & Remove** buttons to move buttons to & from your toolbar. You can rearrange them on your toolbar with the **Move Up & Move Down** buttons. In this example, note that I've placed several buttons that are on the **History Bar** "tic tack toe" board on my toolbar so they'll always be easy to get to directly.

Collapsible Panels

In an EHR, you'd like to be able to see as much information as possible, with as few clicks as possible, while also having a screen that is clean & not confusingly "busy." It is very difficult to simultaneously accommodate all those goals, especially taking into account the variety of screen sizes that may be used.

NextGen has now introduced the concept of "collapsible panels," which helps meet these goals, while also giving the user the ability to customize the desired view on the fly.

Let's look at the Histories Tab. Notice that there's a lot of information here, & you can use the scrollbar to move up & down to view it all.

Specialty Family Practice Visit Type Office Visit

Intake **Histories** SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days **History Review** Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

| Last Addressed | Problem Description | Onset Date | Chronic | Secondary | Status | Provider | Location | Notes |
|----------------|-------------------------------|------------|---------|-----------|--------|---------------------|---------------------|-------|
| | Postmenopausal | 01/29/2014 | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| | Allergic rhinitis | | N | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| 02/05/2014 | Benign essential hypertension | | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |

Add Edit

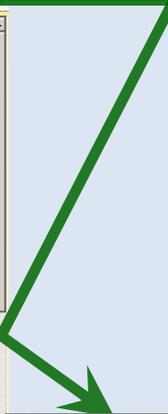
Medical/Surgical/Interim

No relevant past medical/surgical history History Review

| Disease/Disorder | Side | Onset Date | Management | Side | Date | Encounter Type | Outcome |
|------------------------|-------|------------|-----------------------|-------|------|----------------|---------|
| Carpal tunnel syndrome | right | | Carpal tunnel release | right | 2001 | | |
| Appendicitis | | 1970 | Appendectomy | | to/ | | |

Refresh Interim History Add Edit Remove

Diagnostic Studies



02/20/2014 09:22 AM: "Histories" x

Diagnostic Studies

Display: All Specialty

| Status | Order | Ordered | Interpretation | Result/Report | Date Performed | Completed | Ordering Comments |
|--------|-------|---------|----------------|---------------|----------------|-----------|-------------------|
|--------|-------|---------|----------------|---------------|----------------|-----------|-------------------|

Add

Social

(last updated 02/09/2014) Last documented All

History Review

| Substances | Encounter Date | Tobacco Use | Tobacco Type | Smoking Status | Usage Per Day | Pack Years | Date Quit |
|------------|----------------|-------------|--------------|----------------|---------------|------------|------------|
| Tobacco | 02/20/2014 | Yes | Cigarette | Former smoker | 1 Packs | | 01/01/1997 |

| Encounter Date/Time | 02/20/2014 09:22 AM | 01/21/2014 02:45 PM |
|------------------------|---------------------|---------------------|
| Passive Smoke Exposure | No/Never | No/Never |

Confidential History Add

Family

No relevant family history Adopted - no family history known History Review

| Relationship | Family Member Name | Deceased | Age at Death | Condition | Onset Age | Cause of Death | Comments |
|--------------|--------------------|----------|--------------|------------|-----------|----------------|----------|
| Mother | | | | Depression | | N | |

Now you have several other alternatives to navigate & customize your view. Notice that each section is now a panel, giving you several display options.

Care Guidelines | Global Days | History Review

Panel Control:

Problem List 3

Show chronic Show my tracked problem

No active problems Reviewed

| Last Addressed | Problem Description | Onset Date | Chronic | Secondary | Status | Provider | Location | Notes |
|----------------|-------------------------------|------------|---------|-----------|--------|------------------------|------------------------|-------|
| | Postmenopausal | 01/29/2014 | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| | Allergic rhinitis | | N | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| 02/05/2014 | Benign essential hypertension | | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |

Add

Edit

Medical/Surgical/Interim

No relevant past medical/surgical history

[History Review](#)

| Disease/Disorder | Side | Onset Date | Management | Side | Date | Encounter Type | Outcome |
|------------------------|-------|------------|-----------------------|-------|------|----------------|---------|
| Carpal tunnel syndrome | right | | Carpal tunnel release | right | 2001 | | |
| Appendicitis | | 1970 | Appendectomy | | to/} | | |

Diagnostic Studies

Specialty Family Pract

Note the Panel Controls at the top.

Intake

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

| Last Addressed | Problem Description | Onset Date | Chronic | Secondary | Status | Provider | Location | Notes |
|----------------|---------------------|------------|---------|-----------|--------|---------------------|---------------------|-------|
| | Postmenopausal | 01/29/2014 | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| 02/05/201 | Allergic rhinitis | | N | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| | | | | | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |

One Toggle Button lets you expand all panels, as you see here.

Medical/Surgical/Interim

No relevant past medical/surgical history

History Review

| Disease/Disorder | Side | Onset Date | Management | Side | Date | Encounter Type | Outcome |
|------------------------|-------|------------|-----------------------|-------|------|----------------|---------|
| Carpal tunnel syndrome | right | | Carpal tunnel release | right | 2001 | | |
| Appendicitis | | 1970 | Appendectomy | | to/} | | |

Refresh Interim History Add Edit Remove

Diagnostic Studies

The other Toggle Button lets you collapse all panels, giving you this appearance.

The screenshot shows a web-based medical application interface. At the top, there is a browser tab with the address "02/20/2014 09:22 AM : '*Histories'". Below the browser bar, there are navigation tabs for "Specialty" (Family Practice) and "Visit Type" (Office Visit). A main navigation bar contains buttons for "Intake", "Histories" (which is highlighted), "SOAP", "Finalize", and "Checkout". Below this, there are sub-navigation options: "Demographics", "Order Management", "Document Library", and "Chart Abstraction". On the right side, there are status indicators for "TOB", "HTN", "DM", and "CAD", along with a settings gear icon. A "Panel Control" section includes a "Toggle" button with a downward arrow, a "Cycle" button with a refresh icon, and a "Toggle" button with an upward arrow. The main content area displays a list of panels: "Problem List" (with a count of 3), "Medical/Surgical/Interim", "Diagnostic Studies", "Family", and "Social". Each panel heading has a small downward arrow icon to its right. The "Family" panel is currently expanded, showing a blue icon with a white cross. An "Intake Note" button is visible at the bottom right.

Each panel heading also has a **Toggle Button**, which gives you a quick way to open & close individual panels. For example, let's expand the **Family History** panel.

Now you can focus on the Family History.

02/20/2014 09:22 AM : "**Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

Problem List 3

Medical/Surgical/Interim

Diagnostic Studies

Family

No relevant family history Adopted - no family history known

| Relationship | Family Member Name | Deceased | Age at Death | Condition | Onset Age | Cause of Death | Comments |
|--------------|--------------------|----------|--------------|------------|-----------|----------------|----------|
| Mother | | | | Depression | | | |

Add Edit Remove

Social

Intake Note

You could use the Toggle Buttons to re-open or re-close all panels.

You can also click on a **Panel Heading** & drag it up or down, to put the panels in the order you prefer.

For example, let's say I don't use **Diagnostic Studies** often, so I'll drag that to the bottom, & I also want to see the **Social History** above the **Family History**. I'll click & drag those headings...

02/20/2014 09:22 AM : "*Histories" x

Specialty ▼ Family Practice Visit Type ▼ Office Visit TOB HTN DM CAD ⚙️

Intake **Histories** SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review Panel Control: ⌵ Toggle ⌶ ↺ Cycle ↻

| | |
|-----------------------------|---|
| Problem List 3 | ⌵ |
| Medical/Surgical/Interim | ⌵ |
| Diagnostic Studies | ⌵ |
| Family 🔍 | ⌵ |
| Social | ⌵ |

Intake Note

...resulting in this appearance.

02/20/2014 09:22 AM : "*Histories" x

Specialty Family Practice Visit Type Office Visit

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

Problem List 3

Medical/Surgical/Interim

Social

Family

Diagnostic Studies

Intake Note

Taking things a step further, let's say I prefer to have the **Problem List & Social** History open, with the other panels closed. I'll click those individual panel heading **Toggles**...

...leading to this appearance.

Specialty Family Practice

Visit Type Off

Home Intake **Histories** SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

| Last Addressed | Problem Description | Onset Date | Chronic | Secondary | Status | Provider | Location | Notes |
|----------------|-------------------------------|------------|---------|-----------|--------|---------------------|---------------------|-------|
| | Postmenopausal | 01/29/2014 | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| | Allergic rhinitis | | N | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| 02/05/2014 | Benign essential hypertension | | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |

Refresh Add Edit

Medical/Surgical/Interim

Social

(last updated 02/09/2014)
 Last documented All

History Review

- Substances
 - Tobacco
 - Alcohol/Caffeine
- Statuses
- Lifestyle
- Occupation
- Comment
- Diet History
- Environmental

| Encounter Date | Tobacco Use | Tobacco Type | Smoking Status | Usage Per Day | Pack Years | Date Quit |
|----------------|-------------|--------------|----------------|---------------|------------|------------|
| 02/20/2014 | Yes | Cigarette | Former smoker | 1 Packs | | 01/01/1997 |

| Encounter Date:Time | 02/20/2014 09:22 AM | 01/21/2014 02:45 PM |
|------------------------|---------------------|---------------------|
| Passive Smoke Exposure | No/Never | No/Never |

Another thing you can do is cycle through the panels, bringing them to the top & expanding them one at a time.

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

| Last Addressed | Problem Description | Onset Date | Chronic | Secondary | Status | Provider | Location | Notes |
|----------------|-------------------------------|------------|---------|-----------|--------|------------------------|------------------------|-------|
| | Postmenopausal | 01/29/2014 | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| | Allergic rhinitis | | N | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |
| 02/05/2014 | Benign essential hypertension | | Y | N | | DUFFY, ROBERT LAMAR | USA FAMILY MEDICINE | |

Refresh Add Edit

Medical/Surgical/Interim Social

For example, I'll click Cycle Up...

History Review

(last updated 02/09/2014)
Last documented All

| Encounter Date | Tobacco Use | Tobacco Type | Smoking Status | Usage Per Day | Pack Years | Date Quit |
|----------------|-------------|--------------|----------------|---------------|------------|------------|
| 02/20/2014 | Yes | Cigarette | Former smoker | 1 Packs | | 01/01/1997 |

| Encounter Date:Time | 02/20/2014 09:22 AM | 01/21/2014 02:45 PM |
|------------------------|---------------------|---------------------|
| Passive Smoke Exposure | No/Never | No/Never |

...and now the **Medical/Surgical/Interim** history section is at the top.

02/20/2014 09:22 AM : "...

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD ⚙

Intake **Histories** SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review Panel Control: ⌵ Toggle ⌶ ↺ Cycle ↻

Medical/Surgical/Interim ⌵

No relevant past medical/surgical history [History Review](#)

| Disease/Disorder | Side | Onset Date | Management | Side | Date | Encounter Type | Outcome |
|------------------------|-------|------------|-----------------------|-------|------|----------------|---------|
| Carpal tunnel syndrome | right | | Carpal tunnel release | right | 2001 | | |
| Appendicitis | | 1970 | Appendectomy | | to/} | | |

Refresh Interim History Add Edit Remove

Social Family Diagnostic Studies Problem List 3

Intake Note

And here's a neat bonus: If you navigate away to the SOAP, Finalize, or any other tab, when you come back to Histories, it'll still look the way you left it.

02/20/2014 09:22 AM : "*Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

TOB HTN DM CAD

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

Panel Control: Toggle Cycle

Medical/Surgical/Interim

No relevant past medical/surgical history [History Review](#)

| Disease/Disorder | Side | Onset Date | Management | Side | Date | Encounter Type | Outcome |
|------------------------|-------|------------|-----------------------|-------|------|----------------|---------|
| Carpal tunnel syndrome | right | | Carpal tunnel release | right | 2001 | | |
| Appendicitis | | 1970 | Appendectomy | | to/} | | |

Problem List 3

Intake Note

This combination of options gives you a lot of opportunities to speed up navigation, as well as customize the screen to your preference. And you don't have to do anything ahead of time—just rearrange things as you go. You'll find these options on many templates now.

Of course, to compensate for any improvement, NextGen always introduces a new flaw. Sometimes templates with collapsible panels don't display correctly. In this example, we've already selected specialty & visit type, but here they're blank, & a lot of other stuff we should be seeing below is missing.

06/11/2014 11:51 AM : "*USA SOAP 836"

06/11/2014 11:51 AM : "Order Management" x

Specialty ▼ select a specialty

Visit Type ▼ select a visit type

Care Guidelines

Global Days

Order Management

Panel Control: ▼ Toggle ▲ ↺ Cycle ↻

Sometimes this corrects itself out of the blue when you turn your back on it. But the workaround to straighten things out is to click some random combination of the toggle buttons while whispering the Serenity Prayer.

HPI

You can define one or more HPI presets for a number of different chief complaints, to use as your standard starting points in various clinical situations.

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: diarrhea

Onset: []

Severity: moderate

- Status:
- Resolved
 - Improved
 - No change
 - Worse
 - New onset



Stool frequency: intermittently

- Quality:
- Black/tarry
 - Bloody
 - Foul odor
 - Loose
 - Mucus present
 - Oily
 - Watery
 - Brown Clay colored
 - Green Yellow

- Context:
- AM predominance
 - Antacid use
 - Family member with diarrhea
 - HX of pelvic floor trauma
 - HIV+
 - New medications
 - Nocturnal
 - Recent antibiotics
 - Recent travel outside the US
 - S/P cholecystectomy
 - Upon awakening

- Frequency:
- Constant
 - Cyclic
 - Daily
 - Monthly
 - Random
 - Transient
 - Weekly

- Aggravated By:
- Nothing
 - Alcohol
 - Brassica vegetables
 - Caffeine
 - Exercise
 - Fasting
 - Heavy meals
 - Milk/dairy products
 - NSAIDS
 - Spicy foods
 - Stress

- Relieved By:
- Nothing
 - Analgesics
 - Antacids
 - Bowel movement
 - Change in position
 - Fasting
 - Flatus
 - Over the counter meds
 - Rest

Other: []

Other: []

Other: []

Other: []

Associated Symptoms/Pertinent Negatives:

- | | | |
|--|--|---|
| <input type="checkbox"/> No associated symptoms | <input type="checkbox"/> No pertinent negatives | <input type="checkbox"/> All others negative |
| No Yes | No Yes | No Yes |
| <input type="radio"/> <input type="radio"/> Abdominal pain | <input type="radio"/> <input checked="" type="radio"/> Cramping, abdominal | <input type="radio"/> <input checked="" type="radio"/> Flatulence |
| <input type="radio"/> <input type="radio"/> Anorexia | <input type="radio"/> <input type="radio"/> Decreased urine output | <input type="radio"/> <input type="radio"/> Vomiting |
| <input type="radio"/> <input type="radio"/> Bloating | <input type="radio"/> <input type="radio"/> Distention, abdominal | <input type="radio"/> <input type="radio"/> Weight loss |

Other associated symptoms: []

In this example, we'll open the **Diarrhea-HPI** popup & make several selections that we'll use as our standard diarrhea HPI starting point. Next, click the **Save** icon.

Save & Close Cancel

Save Template Defaults

Default Set Category:

HPI

Specialties Access:

All Specialties

Templates to Save:

Save All Templates

Save Current Only:

Select Templates to Save:

(Saves Templates you have gone to in this Visit, that are Defaults Ready)

HPI_Diarrhea

Clear

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

DiarrheaHPI-RLD

Add

HPI Quick Saves

| Number of Templates | Title |
|---------------------|-------|
| | |

Leave the other selections as they are. Click **Add**, then **Save & Close**.

Update

Remove

Save & Close

Cancel

Type a name for your preset. If it is specific to age or gender, include that in the name. You may also want to include your initials.

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern:

Status:



When you wish to recall this preset in the future, click the **Open** icon, & select your preset.

Severity: Improved Worse
Stool frequency: Constant Cyclic Daily Monthly Random Transient Weekly

- Foul odor
- Loose
- Mucus present
- Oily
- Watery
- Brown Clay colored
- Green Yellow

- Family member with diarrhea
- HX of pelvic floor trauma
- HIV+
- New medications
- Nocturnal
- Recent antibiotics
- Recent travel outside the US
- S/P cholecystectomy
- Upon awakening

- Daily
- Monthly
- Random
- Transient
- Weekly

Aggravated By:

- Nothing
- Alcohol
- Brassica vegetables

Relieved By:

- Nothing
- Analgesics
- Antacids

Other:

Other:

Associated Symptoms/Pertinent Negatives:

- | | | |
|---|--|---|
| <input type="checkbox"/> No associated symptoms | <input type="checkbox"/> No pertinent negatives | <input type="checkbox"/> All others |
| No Yes | No Yes | No Yes |
| <input type="radio"/> Abdominal pain | <input checked="" type="radio"/> Cramping, abdominal | <input checked="" type="radio"/> Flatulence |
| <input type="radio"/> Anorexia | <input type="radio"/> Decreased urine output | <input type="radio"/> Joint |
| <input type="radio"/> Bloating | <input type="radio"/> Distention, abdominal | <input checked="" type="radio"/> Nausea |
| <input type="radio"/> Blood in stool | <input type="radio"/> Fecal incontinence | <input type="radio"/> Rash |
| <input type="radio"/> Change in appetite | <input type="radio"/> Fever | <input type="radio"/> Tenderness |

Comments:

- | | | | |
|---|---|--|---------------------------------------|
| No Yes | <input type="checkbox"/> Family history of colon cancer | <input type="checkbox"/> Attends daycare | <input type="checkbox"/> Reptile pets |
| <input type="checkbox"/> Family history of Crohns/colitis | <input type="checkbox"/> Chronic gum chewing | <input type="checkbox"/> Well water | |

Ngkbn Td Dbp Filter

Set Name
DiarrheaHPI-RLD

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: diarrhea

Onset: []

Severity: moderate

- Status:
- Resolved
 - Improved
 - No change
 - Worse
 - New onset



Stool frequency: intermittently

- Quality:
- Black/tarry
 - Bloody
 - Foul odor
 - Loose
 - Mucus present
 - Oily
 - Watery
 - Brown Clay colored
 - Green Yellow

- Context:
- AM predominance
 - Antacid use
 - Family member with diarrhea
 - HX of pelvic floor trauma
 - HIV+
 - New medications
 - Nocturnal
 - Recent antibiotics
 - Recent travel outside the US
 - S/P cholecystectomy
 - Upon awakening

- Frequency:
- Constant
 - Cyclic
 - Daily
 - Monthly
 - Random
 - Transient
 - Weekly

- Aggravated By:
- Nothing
 - Alcohol
 - Brassica vegetables
 - Caffeine
 - Exercise
 - Fasting
 - Heavy meals
 - Milk/dairy products
 - NSAIDS
 - Spicy foods
 - Stress

- Relieved By:
- Nothing
 - Analgesics
 - Antacids
 - Bowel movement
 - Change in position
 - Fasting
 - Flatus
 - Over the counter meds
 - Rest

Other: []

Other: []

Other: []

Other: []

Associated Symptoms/Pertinent Negatives:

No associated symptoms

No pertinent negatives

All others negative

- No Yes
- Abdominal pain
 - Anorexia
 - Bloating
 - Blood in stool

- No Yes
- Cramping, abdominal
 - Decreased urine output
 - Distention, abdominal
 - Fecal incontinence

- No Yes
- Flatulence
 - Joint pain
 - Nausea
 - Rash

- No Yes
- Vomiting
 - Weight loss

Other associated symptoms: []

Other pertinent negatives: []

Suppose you later decide you'd like to make some changes to this HPI & re-save it. Make the changes you want, then click the **Save** icon.

Save & Close Cancel

Save Template Defaults

Default Set Category:

HPI

Specialties Access:

All Specialties

Current Specialty Only: FP

Templates to Save:

Save All Templates

(Saves Templates you have selected in the Specialty Access section)

Save Current Only:

HPI_Diarrhea

Select Templates to Save:

[Empty list box for selecting templates to save]

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

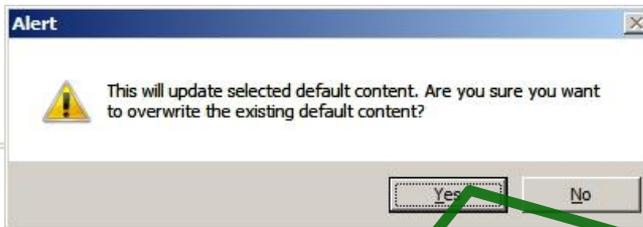
DiarrheaHPI-RLD

Clear

Add

HPI Quick Saves

| Number of Templates | Title |
|---------------------|-----------------|
| Single | DiarrheaHPI-RLD |



Update

Remove

Save & Close

Cancel

Select the preset you wish to change, then click **Update**.

Click **Yes** to confirm, then **Save & Close**.

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: diarrhea

Onset: []

Severity: []

- Status:
- Resolved
 - Improved
 - No change
 - Worse
 - New onset

Stool frequency: []

- Quality:
- Black/tarry
 - Bloody
 - Foul odor
 - Loose
 - Mucus present
 - Oily
 - Watery
 - Brown Clay colored
 - Green Yellow

Save
Close

Clear

Default
Show Field Names

Clear Picklists
Panel Defaults
Reload Macro Functions & System Variables

Full Screen

- frequency:
- Constant
 - Cyclic
 - Daily
 - Monthly
 - Random
 - Transient
 - Weekly

- Aggravated By:
- Nothing
 - Alcohol
 - Brassica vegetables
 - Caffeine
 - Exercise
 - Fasting
 - Heavy meals
 - Milk/dairy products
 - NSAIDS
 - Spicy foods
 - Stress

- Relieved By:
- Nothing
 - Analgesics
 - Antacids
 - Bowel movement
 - Change in position
 - Fasting
 - Flatus
 - Over the counter meds
 - Rest

Other: []

Other: []

Other: []

Other: []

Associated Symptoms/Pertinent Negatives:

- No associated symptoms
- No pertinent negatives
- All others positive

Here's another handy thing to note about HPI popups (as well as ROS & PE popups, which we'll discuss below). Say you've got dozens of bullets & boxes checked, & you'd just like to remove all of these checks & start over with a clean slate. Rather than unchecking everything one at a time, just right-click anywhere on the popup & choose **Clear**. All entries will be removed, & you can start over.

Some tips on HPI presets

- Obviously, there are a lot of chief complaints, & it could take some time to develop your ideal starting point for all of them. And no matter how common the problem, patients often present with a unique combination of complaints, which reduces the usefulness of having HPI presets. Consequently, it is probably best to forgo defining a lot of HPI presets at first. As you use the program, you may discover a handful of situations where you document the same thing over & over. Those are good candidates for you to develop a standard HPI you wish to save.
- Some info on HPI popups is shared with the ROS. So if you use both HPI popups & ROS popups, be careful that these don't lead to conflicting documentation.
- And there is another more robust way to save reusable phrases—My Phrases—that we'll discuss later. You may wish to use that rather than fretting too much over HPI presets.

Review of Systems

You can define one or more Review of Systems presets to use as your standard starting points in various clinical situations.

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

ROS Defaults:

Constitutional All neg
 Neg Pos
 Chills
 Fatigue
 Fever
 Malaise
 Night sweats
 Weight gain
 Weight loss
 Other:

Cardiovascular All neg
 Neg Pos
 Chest pain
 Claudication
 Edema
 Palpitations
 Other:

Reproductive All neg
 Neg Pos
 Abnormal Pap
 Dysmenorrhea
 Dyspareunia
 Hot flashes
 Irregular menses
 Vaginal discharge
 Other:

Neurological All neg
 Neg Pos
 Dizziness
 Extremity numbness
 Extremity weakness
 Gait disturbance
 Headache
 Memory loss
 Seizures
 Tremors
 Other:

Musculoskeletal All neg
 Neg Pos
 Back pain
 Joint pain
 Joint swelling
 Muscle weakness
 Neck pain
 Other:

Gastrointestinal All neg
 Neg Pos
 Abdominal pain
 Blood in stools
 Change in stools
 Constipation
 Diarrhea
 Heartburn
 Loss of appetite
 Nausea
 Vomiting
 Other:

Integumentary All neg
 Neg Pos
 Breast discharge
 Breast lump
 Brittle hair
 Brittle nails
 Hair loss
 Hirsutism
 Hives
 Pruritis
 Mole changes
 Rash
 Skin lesion
 Other:

Psychiatric All neg
 Neg Pos
 Anxiety
 Depression
 Insomnia
 Other:

Hematologic / Lymphatic All neg
 Neg Pos
 Easy bleeding
 Easy bruising
 Lymphadenopathy
 Other:

Immunologic All neg
 Neg Pos
 Contact allergy
 Environmental allergies
 Food allergies
 Seasonal allergies
 Other:

HEENT All neg
 Neg Pos
 Ear drainage
 Ear pain
 Eye discharge
 Eye pain
 Hearing loss
 Nasal drainage
 Sinus pressure
 Sore throat
 Visual changes
 Other:

Respiratory All neg
 Neg Pos
 Chronic cough
 Cough
 Known TB exposure
 Shortness of breath
 Wheezing
 Other:

Genitourinary All neg
 Neg Pos
 Dysuria
 Hematuria
 Polyuria
 Urinary frequency
 Urinary incontinence
 Urinary retention
 Other:

Metabolic / Endocrine All neg
 Neg Pos
 Cold intolerance
 Heat intolerance
 Polydipsia
 Polyphagia
 Other:

All others negative

Save Preset Cancel

As illustrated for the HPI above, you can save Review of Systems presets. Here we've opened the one-screen ROS-Female popup & made some entries. The **save** process is the same as above.

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

ROS Defaults:



Constitutional All neg Cardiovascular All neg Reproductive All neg **Neurological** All neg Musculoskeletal All neg

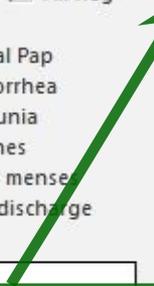
- Neg Pos**
- Chills
 - Fatigue
 - Fever
 - Malaise
 - Night sweats
 - Weight gain
 - Weight loss
 - Other:

- Neg Pos**
- Chest pain
 - Claudication
 - Edema
 - Palpitations
 - Other:

- Neg Pos**
- Abnormal Pap
 - Dysmenorrhea
 - Dyspareunia
 - Hot flashes
 - Irregular menses
 - Vaginal discharge
 - Other:

- Neg Pos**
- Dizziness
 - Extremity numbness
 - Extremity weakness
 - Gait disturbance
 - Headache
 - Memory loss
 - Seizures
 - Tremors
 - Other:

- Neg Pos**
- Back pain
 - Joint pain
 - Joint swelling
 - Muscle weakness
 - Neck pain
 - Other:



Remember that each heading will take you to a more detailed ROS for that system. Here we'll click on **Neurological**.

- Neg Pos**
- Ear drainage
 - Eye pain
 - Hearing loss
 - Nasal drainage
 - Sinus pressure
 - Sore throat
 - Visual changes
 - Other:

- Neg Pos**
- Nausea
 - Vomiting
 - Other:

- Neg Pos**
- Hirsutism
 - Hives
 - Pruritis
 - Mole changes
 - Rash
 - Skin lesion
 - Other:

- Neg Pos**
- Other:
- Metabolic / Endocrine** All neg
- Neg Pos**
- Cold intolerance
 - Heat intolerance
 - Polydipsia
 - Polyphagia
 - Other:

- Neg Pos**
- Easy bleeding
 - Easy bruising
 - Lymphadenopathy
 - Other:
- Immunologic** All neg
- Neg Pos**
- Contact allergy
 - Environmental allergies
 - Food allergies
 - Seasonal allergies
 - Other:

- Respiratory** All neg
- Neg Pos**
- Chronic cough
 - Cough
 - Known TB exposure
 - Shortness of breath
 - Wheezing
 - Other:

- Genitourinary** All neg
- Neg Pos**
- Dysuria
 - Hematuria
 - Polyuria
 - Urinary frequency
 - Urinary incontinence
 - Urinary retention
 - Other:

All others negative

Save & Close Cancel

- ❖ Constitutional
- ❖ HEENT
- ❖ Respiratory
- ❖ Cardiovascular
- ❖ Vascular
- ❖ Gastrointestinal
- ❖ Genitourinary
- ❖ Reproductive
- ❖ Metabolic/Endocrine
- ❖ **Neuro/Psychiatric**
- ❖ PHQ
- ❖ Dermatologic
- ❖ Musculoskeletal
- ❖ Hematologic
- ❖ Immunological

Information on this ROS that has been pre-populated from a HPI must be changed on the HPI to prevent conflicting documentation.

Select all negative

Neurological:

Neg Pos

- Aphasia
- Dizziness
- Dysarthria
- Focal weakness
- Gait disturbance
- Headache
- Incontinence
- Incoordination
- Light-headedness

Neg Pos

- Loss of consciousness
- Memory impairment
- Near syncope
- Paresthesias
- Seizures

Other associated symptoms:

Other pertinent negatives:



You can also save preset versions of the system-specific ROS as well.

Comments:

- See chief complaint See chronic conditions See HPI See past medical history

And you can move to any other system you wish to document through the left-side navigation.

Neg Pos

- Incontinence
- Difficulty concentrating
- Psychiatric/emotional

Other associated symptoms:

Other pertinent negatives:

Comments:

- See chief complaint See chronic conditions See HPI See past medical history

And here's an even neater trick. Say you've entered your personalized negative ROS, using a combination of the one-page ROS & several system's ROS popups.

On the SOAP tab, click the **Save** icon you see under the **Review of Systems** section:

The screenshot shows a medical software interface with the following elements:

- Navigation Bar:** Intake, Histories, SOAP (selected), Finalize, Checkout.
- Sub-navigation:** Standing Orders, Adult Immunizations, Peds Immunizations, My Plan, Procedures, Order Management.
- Panel Control:** Toggle, Cycle, and other icons.
- Reason for Visit:** (Empty field)
- Review of Systems:** (Section header)
- Review of Systems Table:**

| System | Neg/Pos | Findings |
|-----------------|----------|---|
| Constitutional | Negative | Fever. |
| ENMT | Negative | Nasal drainage, otalgia, sinus pressure and sore throat. |
| Respiratory | Negative | Cough and dyspnea. |
| Cardio | Negative | Chest pain and edema. |
| GI | Positive | Abdominal cramping, Flatulence. |
| GI | Negative | Diarrhea, heartburn, nausea and vomiting. |
| GU | Negative | Dysuria. |
| Neuro | Negative | Dizziness, gait disturbance, headache, incontinence and near syncope. |
| Integumentary | Negative | Nail changes, pruritus, rash and skin lesion. |
| MS | Negative | Joint pain. |
| Allergic/Immunc | Negative | Contact allergy. |

On the left side of the table, there is a list of system categories: Constitutional, HEENT, Respiratory, Cardiovascular, Vascular, Gastrointestinal, Genitourinary, Reproductive, Metabolic | Endocrine, Neuro | Psychiatric, Dermatologic, Musculoskeletal, Hematologic, Immunologic.

At the bottom left, it says "One Page ROS - Female". At the bottom right, there is a "PHQ" button.

Save Template Defaults

Default Set Category:

ROS Full Exam

Specialties Access:

All Specialties Current Specialty Only: FP

Templates to Save:

Save All Templates (Saves Templates you have gone to in this Visit, that are Defaults Ready)

Save Current Only: USA_fts_soap83

Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

ROSFullNegFemale-RLD

Clear

Add

ROS Full Exam Quick Saves

| Number of Templates | Title |
|---------------------|-------|
| | |

Update

Remove

Save & Close

Cancel

These are the "Full" ROS presets. Note that **Save All Templates** is selected. Give it a name, click **Add**, then **Save & Close**.

Now you can recall this full ROS preset directly from the **SOAP** tab; you can view all your documentation here, too, allowing you to directly change any 1-2 items you need to.

This is a really powerful tool that can significantly speed up your workflow.

Care Guidelines | Global Days | Panel Control: Toggle Cycle

Reason for Visit

Review of Systems

| System | Neg/Pos | Findings |
|-----------------|----------|-----------|
| Constitutional | Negative | Fever. |
| ENMT | Negative | Nasal dra |
| Respiratory | Negative | Cough a |
| Cardio | Negative | Chest pa |
| GI | Positive | Abdomir |
| GI | Negative | Diarrhea, |
| GU | Negative | Dysuria. |
| Neuro | Negative | Dizziness |
| Integumentary | Negative | Nail char |
| MS | Negative | Joint pai |
| Allergic/Immunc | Negative | Contact. |

Constitutional
HEENT
Respiratory
Cardiovascular
Vascular
Gastrointestinal
Genitourinary
Reproductive
Metabolic | Endocrine
Neuro | Psychiatric
Dermatologic
Musculoskeletal
Hematologic
Immunologic

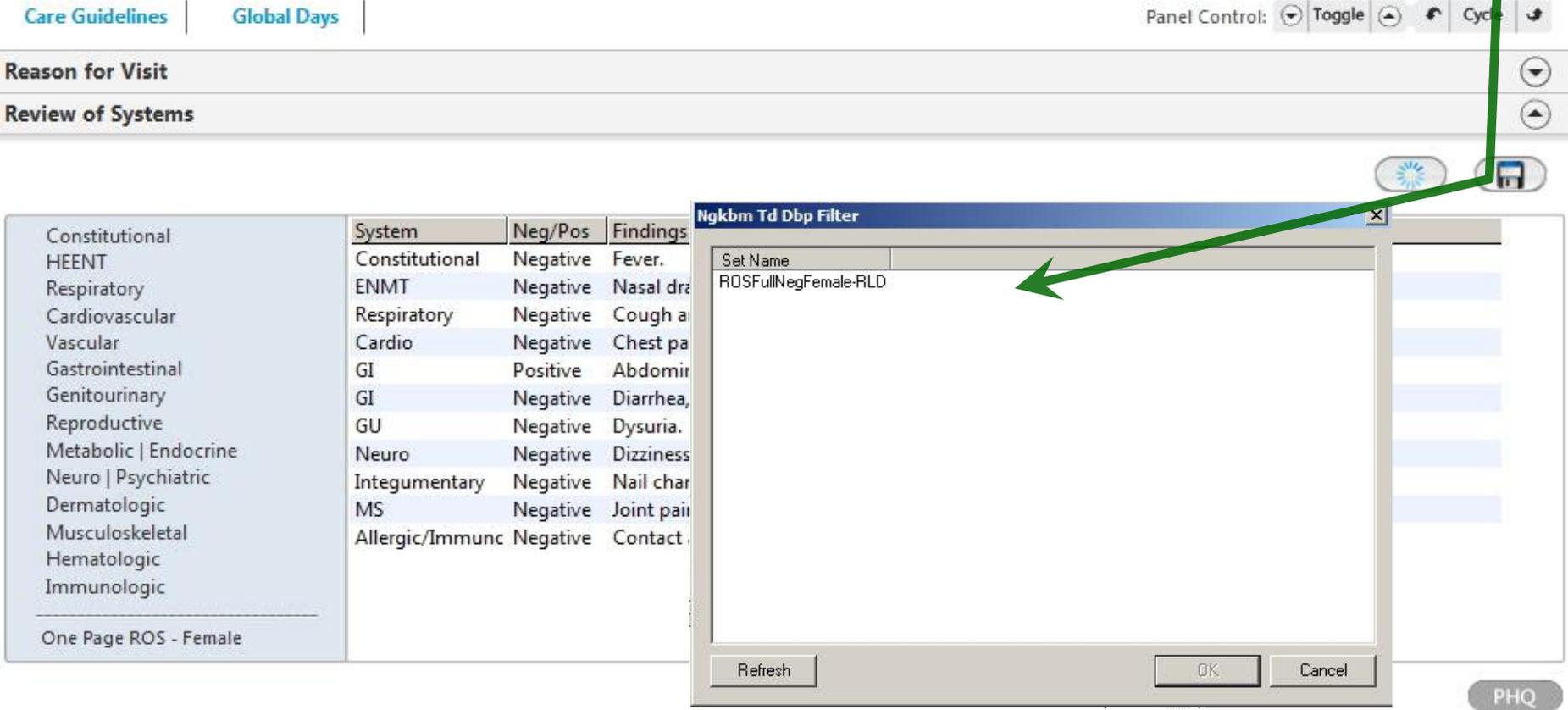
One Page ROS - Female

Ngkbn Td Dbp Filter

Set Name
ROSFullNegFemale-RLD

Refresh OK Cancel

PHQ



Specialty ▾ Family Practice

Visit Type ▾ Office Visit



Intake

Histories

SOAP

Finalize

Checkout

Standing Orders

Adult Immunizations

Peds Immunizations

My Plan

Procedures

Order Management

Care Guidelines

Global Days

Panel Control: Toggle Cycle

Reason for Visit

Review of Systems

Some tips on ROS presets

- Note the difference between having your own default normal ROS compared to just choosing "All negative," "All others negative," "Globally normal," etc: you only include items you normally mention, rather than a "scorched earth" laundry list of items that may not be pertinent to the visit or patient type.

- Some info on HPI popups is shared with the ROS. So if you use both HPI popups & ROS popups, be careful that these don't lead to conflicting documentation.

Physical Exam

You can define several Physical Exam presets to use as your standard starting points in various clinical situations.

Physical Exam



- One Page Exam
- Constitutional
- Diabetic Foot Exam
- Ears
- Nose | Mouth | Throat
- Neck | Thyroid
- Breast
- Respiratory
- Cardiovascular
- Abdomen
- Genitourinary
- Skin | Hair
- Musculoskeletal
- Psychiatric

Additional

Exam Findings Details

Image Office Diagnostics

Analogous to the ROS demonstration above, you can save Physical Exam presets. You would often start with the **One Page Exam**.

Pe General Exam

Default: []

❖ Constitutional: Overall appearance: Normal [No acute distress] []

❖ Eyes: ❖ Vision Screening:

Conjunctiva: R Normal [] []
 L Normal [] []

Pupil: R Normal [] []
 L Normal [] []

Fundus: R Normal [] []
 L Normal [] []

❖ Ears: ❖ Nose/Mouth:

External ear: R [] []
 L [] []

Canal: R [] []
 L [] []

TM: R [] []
 L [] []

Hearing: R [] []
 L [] []

External nose: [] []

Lips/teeth/gums: [] []

Oropharynx: [] []

Tonsils: [] []

❖ Neck/Thyroid: ❖ Lymphatic:

Neck inspection: [] []

Neck palpation: [] []

❖ Breast: Breast exam deferred

Breast inspection: Normal Breast palpation: Normal

❖ Respiratory:

Effort: Normal [] []

Inspection: Normal [] [] []

Auscultation: Normal [] [] []

❖ Cardiovascular: Auscultation: Normal ◆ EKG

❖ Vascular: ❖ Extremity:

Pedal pulses: Normal Capillary refill: Less than 2 seconds
 Greater than 2 seconds

Edema: No Yes

❖ Abdomen:

Inspection: Normal [No masses] []

Auscultation: Normal [] []

Neg Pos

Abdominal tenderness: [] []

Hepatic enlargement: [] cm below margin Crosses midline

Spleen enlargement: [] cm below margin Crosses midline

External genitalia: Normal [] []

Uterus: Normal [] []

Adnexa: Normal [] []

Sphincter tone: Normal [] []

Fecal occult blood test: Negative Positive Not indicated

Submit to Superbill

❖ Psych:

Sensory: Normal [Motor/sensory grossly nl] []

No Yes

Oriented to person, place, time, situation Poor judgement

Appropriate mood and affect Poor insight

Comments: Carry forward comments

Save & Close Cancel

You can document a general exam on one screen, & save that as a preset just like we did for the ROS above.

And also like above, you can click on any heading to open a more detailed exam for each system, & save presets for those.

Pe General Exam

Default: []

❖ Constitutional: Overall appearance: Normal [No acute distress] []

❖ Eyes: ❖ Vision Screening: Conjunctiva: R Normal [] []

Pupil: [] []

Fundus: [] []

❖ Ears: External: [] []

Canal: [] []

TM: [] []

Hearing: R Normal [] []

L Normal [] []

External nose: Normal [Nares clear] []

Lips/teeth/gums: Normal [] []

Oropharynx: Normal [Clear] []

Tonsils: Normal [] []

❖ Neck/Thyroid: ❖ Lymphatic: [] []

❖ Vascular: ❖ Extremity: Pedal pulses: Normal Capillary refill: Less than 2 seconds

Edema: No Yes Greater than 2 seconds

❖ Abdomen: Inspection: Normal [] []

Adnexa: Normal [] []

Sphincter tone: Normal [] []

Fecal occult blood test: Negative Positive Not indicated [Submit to Superbill]

❖ Musculoskeletal: Overview: Normal

❖ Skin: Inspection: Normal

❖ Neurological: Memory: Normal [] []

Cranial nerves: II - XII grossly intact I is grossly intact [Details]

DTRs: Normal [] []

Sensory: Normal [Motor/sensory grossly nl] []

❖ Psych: No Yes No Yes

Oriented to person, place, time, situation Poor judgement

Appropriate mood and affect Poor insight

Carry forward comments

Comments: []

[Save & Close] [Cancel]

But given the convenience of the **One Page Exam**, there is a great temptation to do everything here, even if you're hammering a square peg into a round hole, as you can see I did here by squeezing both motor & sensory items under a box labeled "Sensory."

The **One Page Exam** always seems to be missing a spot for 1-2 items you want to document, or limits the space you have available.

This is where the "Full" preset save option really shines. Document however you deem fit on the **One Page Exam** & any addition system-specific exams as you like, then on the **SOAP** tab use the **Save** icon you see under the **Physical Exam** section to save all those entries as one preset.

03/05/2014 01:06 PM : "**USA SOAP" x

Physical Exam

| Exam | Fi |
|-----------------------|----|
| One Page Exam | |
| Constitutional | N |
| Diabetic Foot Exam | |
| Ears | * |
| Ears | N |
| Nose Mouth Throat | |
| Neck Thyroid | |
| Breast | |
| Respiratory | |
| Cardiovascular | N |
| Abdomen | N |
| Extremity | N |
| Neurological | * |

Save Template Defaults

Default Set Category:
PE Full Exam

Specialties Access:
 All Specialties Current Specialty Only: FP

Templates to Save:
 Save All Templates (Saves Templates you have gone to in this Visit, that are Defaults Ready)
 Save Current Only: USA_fts_soap83
 Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):
PEFullINIAdult-RLD

PE Full Exam Quick Saves

| Number of Templates | Title |
|---------------------|-------|
|---------------------|-------|

Update Remove

Save & Close Cancel

ed otherwise below.

Office Diagnostics

Now you're not limited to the boxes on the **One Page Exam** popup, & you can see your exam directly on the **SOAP** tab. Click on any specific item to change 1-2 findings.

You might want to save several normal exams, divided by age or gender, or whether they are brief or complete. You might save a different normal exam for diabetics that includes a monofilament exam, which you probably wouldn't mention for most non-diabetics. You might even save some abnormal exams as a starting point for common conditions.

This is a very valuable workflow enhancement.

The screenshot displays a medical software interface. On the left, a sidebar lists various exam categories: One Page Exam, Constitutional, Eyes, Ears, Nose | Mouth | Throat, Neck | Thyroid, Breast, Respiratory, Cardiovascular, Abdomen, Genitourinary, Skin | Hair, and Musculoskeletal. The main area features a table with three columns: Exam, Findings, and Details. A green arrow points from the text above to a 'Set Name' dialog box that is open over the table. The dialog box contains the text 'PEFullINFemale:RLD'. The table data is as follows:

| Exam | Findings | Details |
|-----------------|----------|--|
| Constitutional | * | Overall appearance - No acute distress. |
| Ears | * | Canal - Right: w/o excessive wax or inflam, Left: w/o excessive wax or inflam. TM - Right: Uninflamed, Left: Uninflamed. |
| Nose/Mouth/Thro | * | Nares - Right: Clear, Left: Clear. Oropharynx - Clear. |
| Nasopharynx | * | Oropharynx - Clear. |
| Neck Exam | Normal | Inspection - Normal. Palpation - Normal. Cervical lymph nodes - Normal. |
| Lymph Detail | Normal | No cervical or supraclavicular adenopathy. |
| Respiratory | Normal | Auscultation - Normal. |
| Cardiovascular | Normal | Regular rate and rhythm. No murmurs, gallops. |
| Abdomen | * | Inspection - No masses. |
| Abdomen | Normal | No abdominal tenderness. |
| Extremity | Normal | No edema. |
| Neurological | * | Sensory - Grossly nl. Motor - Grossly nl. |

Procedures

You can define several Procedure presets to use as your standard starting points in various clinical situations.

We'll open the **Joint aspiration/injection** popup from the **Procedures** button at the bottom of the **SOAP Tab**. (You could also open the full Procedure Template from the **Navigation Bar**.)

- Office Procedures
- Review/Co-sign Orders
- View Immunizations
- Office Diagnostics
- Physical Therapy Orders
- Health Promotion Plan

| | |
|---------------|---|
| Plan Orders | Further diagnostic evaluations ordered today include MRIs of brain, stem, w/o foll by w/ contrast 1 Week to be performed. |
| 4. Assessment | Lung mass (786.6). |
| Plan Orders | Further diagnostic evaluations ordered today include X-ray, chest, two views, frontal/lateral to be performed. |

Ngkbn Udp Procedure Picklist

| Procedure Name |
|----------------------------|
| Debridement/burn |
| EKG |
| Foreign body |
| Fracture/Cast/Strapping |
| Generic |
| Incision & Drainage |
| IUD |
| Joint aspiration/injection |
| Laceration |
| Lesion/shaving |
| Lesion/wart |
| Lumbar puncture |
| Nail avulsion |
| Suture removal |

Refresh OK Cancel

Resident-Attending discussion took place Attending saw patient

Provider Comm. Meds **Procedures** Patient Plan Visit Document Document Library EM Coding Dictation



Consent

- Consent was obtained
- Procedure/risks were explained
- Questions were answered

Defaults: Right Left



Today's Assessments: (Select an assessment and check the desired labs below.) [Add Common Assessment](#)

Injection History:

How to use this template:

| # | Diagnosis Description | Code | Status |
|---|-------------------------------|--------|--------|
| 1 | Shoulder impingement syndrome | 726.2 | |
| 2 | Mixed hyperlipidemia | 272.2 | |
| 3 | Migraine Unsp | 346.90 | |
| 4 | Lung mass | 786.6 | |

| Encounter Date:Time | Description | Proc Code | Units |
|---------------------|----------------------------------|-----------|-------|
| 03/04/2014 01:45 PM | Arthrocentesis major joint/bursa | 20610 | 1.00 |

[Add](#) [Edit](#) [Sort](#) [Remove](#)

Injection detail:

| Code: | Procedure: | Location: | Method: |
|---------|----------------------------|------------------------------|-----------|
| 726.2 | arthrocentesis major joint | right shoulder subacromial s | injection |
| Site 2: | | | |
| Site 3: | | | |
| Site 4: | | | |

| Site prepped: | Technique: | Anesthetic: | mL | Needle gauge: |
|---|---------------|-------------|----|---------------|
| <input checked="" type="checkbox"/> Yes | Chlorhexidine | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |

| Placement confirmed by: | Fluid: | (mL) Fluid withdrawn: | Medication: | mg | mL | Seq | No charge medication | Sterile dressing: | Pressure | Adhesive |
|--------------------------|--------|-----------------------|---------------|----|----|-----|--------------------------|--------------------------|--------------------------|--------------------------|
| Site 1: manual palpation | | | Betamethasone | 4 | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Site 2: | | | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Site 3: | | | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Most procedure templates also allow the saving of presets. In this example, we've opened a **Joint Injection/Aspiration** template & made several selections that we'll use as a standard shoulder injection. Next, click the **Save** icon.

Comments [Manage My Phrases](#) [My Phrases](#)

1 ml lidocaine combined w/ 4 mg betamethasone injected into subacromial space w/o difficulty.

Plan: My Plan
 Lab Orders: Schedule follow-up visit
 Timeframe: Appropriate post injection instructions given
 Reason(s) for next visit:
 For injection/aspiration
 Other:

[Place Order](#) [Submit to Superbill](#) [Save & Close](#) [Cancel](#)

Default Set Category:



Proc

Specialties Access:

 All Specialties Current Specialty Only: FP

Templates to Save:

 Save All Templates

(Saves Templates you have gone to in this Visit, that are Defaults Ready)

 Save Current Only:

proc_joint_injections

 Select Templates to Save:

Clear

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):

Shoulder dexamethasone-RLD

Add

Proc Quick Saves

| Number of Templates | Title |
|---------------------|------------------------|
| Single | NexplanonInsertion-RLD |
| Single | ForeskinRetraction-RLD |
| Single | I&DSimple-RLD |

Type a name, click **Add**,
then **Save & Close**.

Update

Remove

Save & Close

Cancel

Procedure presets can be particularly handy when a specific procedure template isn't available in NextGen. For example, here I've used the **Generic Procedure** template to create a preset for Nexplanon insertion. You need to know what the appropriate diagnosis & procedure codes are, but after you save this once, you never have to know them again.

Generic - Procedure

Indication:
Description: Insertion of implantable subdermal contraceptive Code: V25.5 Status:

Procedure:
Description: Insert non-biodegradable drug del implant Code: 11981

Skin of L upper arm inspected, cleaned w/ Hibiclens, & anesthetized. Nexplanon placed SQ w/ introducer w/o difficulty.

Anesthesia: None Dose %: Units:
lidocaine with epinephrine mg 2% 3ml Digital Local Nerve IV
 mg Digital Local Nerve IV

Findings:

Complications:
None

Post procedure:
Instructions:
Leave butterfly bandage in place till it falls off, usually 1-3 days. Tylenol or ibuprofen for pain.

Dressing/wound care:

Pre-procedure care:
 Consent was obtained
 Procedure/risks were explained
 Questions were answered
 Prepped and draped

Follow up:
Return for follow up:
 Sooner if symptoms per
 PRN

Save Template Defaults

Default Set Category: Proc

Specialties Access:
 All Specialties Current Specialty Only: FP

Templates to Save:
 Save All Templates (Saves Templates you have gone to in this Visit, that are Defaults Ready)
 Save Current Only: proc_generic
 Select Templates to Save:

Default Set Name (For Exam gender specific defaults, use 'male' or 'female' in the default set name and for full exam include Specialty in the default set name.):
NexplanonInsertion-RLD

Proc Quick Saves

| Number of Templates | Title |
|---------------------|----------------------------|
| Single | ForeskinRetraction-RLD |
| Single | NexplanonInsertion-RLD |
| Single | Shoulder dexamethasone-RLD |
| Single | I&DSimple-RLD |

Update Remove
Save & Close Cancel

Some tips on Procedure presets

- Given that some of the procedure templates are a bit tedious to work with, carefully setting up your most commonly used procedure presets can save you some time & frustration.
- In the past, text in the **Comments** box was not consistently preserved as part of the preset. It appears this problem has been largely remedied, but you may want to keep an eye on this to make sure comments appear as desired.

Tolerated procedure well: No Yes

Improvement by site: 1 2 3 4 % Improvement:

Comments

1 ml lidocaine combined w/ 4 mg betathasone injected into subacromial space w/o difficulty.

Manage My Phrases My Phrases

Lab Orders:

Schedule follow-up visit

Timeframe:

Follow-up with:

Custom Plan

Appropriate post injection instructions given

Reason(s) for next visit:

For injection/aspiration

Other:

Submit to Superbill

Save & Close

Cancel

My Plan

You can define several Plan presets to use as your standard starting points in various clinical situations.

Please Note:

A number of design issues & technical problems have prevented us from emphasizing this template in the past. We are currently evaluating its potential in this iteration of NextGen, & we'll get back to you when we know more. In the meantime, here are a few notes on anticipated usage.

My Plan

Assessments **My Plan** A/P Details Lab

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Add Edit Remove

Selected Dx: Migraine Unsp

On the Assessment-Plan Suite, after you've made your assessments, you can move to the next tab to the right, **My Plan**.

Perform: -today

Lab orders

- Sed rate
- C-Reactive Protein
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Diagnostics

MRI/MRA Information

- Brain (including Brainstem) MRI WITH Contrast click arrow to choose
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- click arrow to choose

Office medications

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Office procedures

- HYDRATION IV INFUSION, INIT
- HYDRATE IV INFUSION, ADD-ON
- click arrow to choose

Display office supplies DME

Office labs

- click arrow to choose

For this example, we'll click on the **Migraine Unsp** diagnosis; an **Order set** of potential orders appears on the template. And each user can customize these as desired.

Pregnant:

No Yes Possible Not pertinent

Record Request

Counseling Details

Add Del

She is to schedule a follow-up visit

She will be referred to

Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Reference System: custom_impression_pl

Diagnosis Group: Headache

Use order set from: My saved Others saved -select a set to use

Display: Order sets Protocols

Protocols due in:

Pregnant: No Yes Possible Not pertinent

Save Order Set

Procedure/Test Instructions

- Record Request
- Counseling Details

Selected Dx: Migraine Unsp

Perform: Lab orders

1 Sedation
2 C-Reactive Protein
3 BMP
4 CMP
5 CBC
6 click arrow to choose

Diagnostics

1 Brain MRI WITH Contrast
2 Brain (including Brainstem) MRI WITHOUT Contrast
3 Brain/Head CT WITH Contrast
4 Brain/Head CT WITHOUT Contrast
5 click arrow to choose

Office medications

1 SUMATRIPTAN SUCCINATE / 6 MG
2 KETOROLAC TROMETHAMINE INJ
3 METOCLOPRAMIDE HCL INJECTION
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose

Office labs

1 click arrow to choose

Follow-up visit/referral

- She is to schedule a follow-up visit
- She will be referred to
- Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)
◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

Notice that you're actually working on an Order set for a Diagnosis Group, & not just one specific diagnosis. This means you can use the order set for all of the various headache diagnoses, instead of having to recreate it for every individual diagnosis code.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

Use order set from: My saved Others saved -select a set to use

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | |
| 5 | Benign essential hypertension | |

Reference System: custom_impression_pl

Display: Order sets Protocols

Protocols due in:

Save Order Set

Diagnosis Group:

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1 Sed rate
- 2 C-Reactive Protein
- 3 BMP
- 4 CMP
- 5 CBC w/diff
- 6 click arrow to choose

Diagnostics

- 1 Brain (includi
- 2 Brain (includi
- 3 Brain/Head C
- 4 Brain/Head C
- 5 click arrow to

Office medications

- 1 SUMATRIPTAN
- 2 KETOROLAC T
- 3 METOCLOPRA
- 4 PROCHLORPE
- 5 NORMAL SALINE SOLUTION INFUS
- 6 click arrow to choose

Follow-up visit/referral

- She is to schedule a follow-up visit
- She will be referred to
- Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)
◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

We'll modify this order set. Under Lab Orders, let's say I don't really want C-Reactive Protein.

Click **Cl** (for Clear), & in the ensuing popup select item #2.

Clear which item?

- 1
- 2
- 3
- 4
- 5
- 6
- all

Close

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | |
| 5 | Benign essential hypertension | |

Reference System: custom_impression_pl
Diagnosis Group:
Display: Order sets Protocols due in:
Save Order Set

C-Reactive Protein drops off the list.

Selected Dx: Migraine Unsp
Add Edit Remove

Perform: -today
Lab orders
1 Sed rate
2 click arrow to choose
3 BMP
4 CMP
5 CBC w/diff
6 click arrow to choose

Office procedures
1 HYDRATION IV INFUSION, INIT
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose

Instructions
 My Instructions Add Del

Additional orders
Select type (Required)
1 click arrow to choose

Diagnostics
1 Brain (including Brainstem)
2 Brain (including Brainstem)
3 Brain/Head CT WITH Contrast
4 Brain/Head CT WITHOUT Contrast
5 click arrow to choose

For demonstration purposes, let's add a TSH. Click the 1st unused dropdown arrow.

Office labs
1 click arrow to choose

Office medications
1 SUMATRIPTAN SUCCINATE / 6 MG
2 KETOROLAC TROMETHAMINE INJ
3 METOCLOPRAMIDE HCL INJECTION
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose

She is to schedule a follow-up visit
 She will be referred to
 Disposition:
 Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)
Lab/Diagnostics/Radiology Order Module Processing

You'll see a short list of orders, but it doesn't include TSH. So double-click *****See All***** to get a full list of tests.

Today's Assessments:
(Select a diagnosis to associate with the orders below)

| # | Description |
|---|-------------------------------|
| 1 | Shoulder impingement syndrome |
| 2 | Mixed hyperlipidemia |
| 3 | Migraine Unsp |
| 4 | Lung mass |
| 5 | Benign essential hypertension |

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

| Instruction | Code |
|------------------------------|----------|
| *** See All *** | |
| Amylase | NG001396 |
| BMP | NG322758 |
| CBC w/diff | NG005009 |
| CMP | NG322000 |
| Hepatic Function Panel | NG322755 |
| Lipase | NG001404 |
| Stool Culture | NG008144 |
| Urinalysis | NG003038 |
| Urine Culture, Comprehensive | NG008086 |

| Select Order | Column2 |
|----------------------------------|----------|
| 12+Oxycodone+Crit-Unbund | NG763824 |
| 13+Oxycodone+Crit-Scr | NG733726 |
| 9+Oxycodone+Crit-Scr | NG733692 |
| 9+Oxycodone+Crit-Unbund | NG737588 |
| 1-Methyl-histidine | NG911172 |
| 1-Methyl-histidine, 24hr Urine | NG911925 |
| 1-Methyl-histidine, CSF | NG910752 |
| 1-Methyl-histidine, Urine | NG911917 |
| 10+Oxycodone+Crit-Scr | NG733727 |
| 11-Dehydro Thromboxane B2/Crt. | NG500319 |
| 11-dehydro TXB2/Creat Ratio | NG501620 |
| 11-Desoxycortisol | NG500550 |
| 12+Oxycodone+Crit-Scr | NG733690 |
| 17-alpha-Hydroxyprogesterone | NG004713 |
| 17-Hydroxycort, 24H+Creat.Ratio | NG120998 |
| 17-Hydroxycorticosteroids, Urine | NG004242 |
| 17-Hydroxypregnenolone | NG140715 |
| 17-Hydroxyprogesterone 3 Spec | NG47522 |
| 17-Hydroxyprogesterone 4 Spec | NG49742 |

Click anywhere in the list & type **TSH**.

Today's Assessments:
(Select a diagnosis to associate with the

| # | Description | |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

The list scrolls down to TSH; double-click on it.

Diagnosis Group:
Headache

Protocols:

Pregnant:
 No Yes Possible Not pertinent

Procedure/Test Instructions
Record Request
Counseling Details

Add Edit Remove

Selected Dx: Migraine Unsp

Perform: -today
Lab orders

- 1 Sed rate
- 2 click arrow to choose
- 3 BMP
- 4 CMP
- 5 CBC w/diff
- 6 click arrow to choose

- Diagnostics
- 1 Brain (including Brainstem) MRI WITH Cor
 - 2 Brain (including Brainstem) MRI WITHOUT
 - 3 Brain/Head CT WITH Contrast
 - 4 Brain/Head CT WITHOUT Contrast
 - 5 click arrow to choose

- Office medications
- 1 SUMATRIPTAN SUCCINATE / 6 MG
 - 2 KETOROLAC TROMETHAMINE INJ
 - 3 METOCLOPRAMIDE HCL INJECTION
 - 4 PROCHLORPERAZINE INJECTION
 - 5 NORMAL SALINE SOLUTION INFUS
 - 6 click arrow to choose

Ngkbn Dbp Labs Radiology

| Select Order | Column2 |
|-------------------------------|-----------------|
| Trichloroacetic Acid, Urine | NG723254 |
| Trichloroethane Exposure Prof | NG723262 |
| Trichloroethane Metabolite,U | NG723247 |
| Trichloroethane, Blood | NG723189 |
| Trichloroethanol, Blood | NG723197 |
| Trichloroethylene Exposure | NG723015 |
| Trichloroethylene, Blood | NG723122 |
| Tricyclic Antidepressants | NG007690 |
| Triglycerides | NG001172 |
| Triiodothyronine,Free,Serum | NG010389 |
| Troponin I | NG120832 |
| Trypsin | NG010355 |
| Tryptophan,Qn,24hr,Ur | NG911826 |
| Tryptophan,Qn,CSF | NG910703 |
| Tryptophan,Qn,Pl | NG911123 |
| Tryptophan,Qn,U | NG911818 |
| TSH | NG004259 |
| TSH+Free T4 | NG224576 |
| Tumor Necrosis Factor-Alpha | NG140673 |

Refresh OK Cancel

Add Del

Auto Tasking On
do not upload to modules.)
Order Module Processing

task Place Order Save & Close Cancel

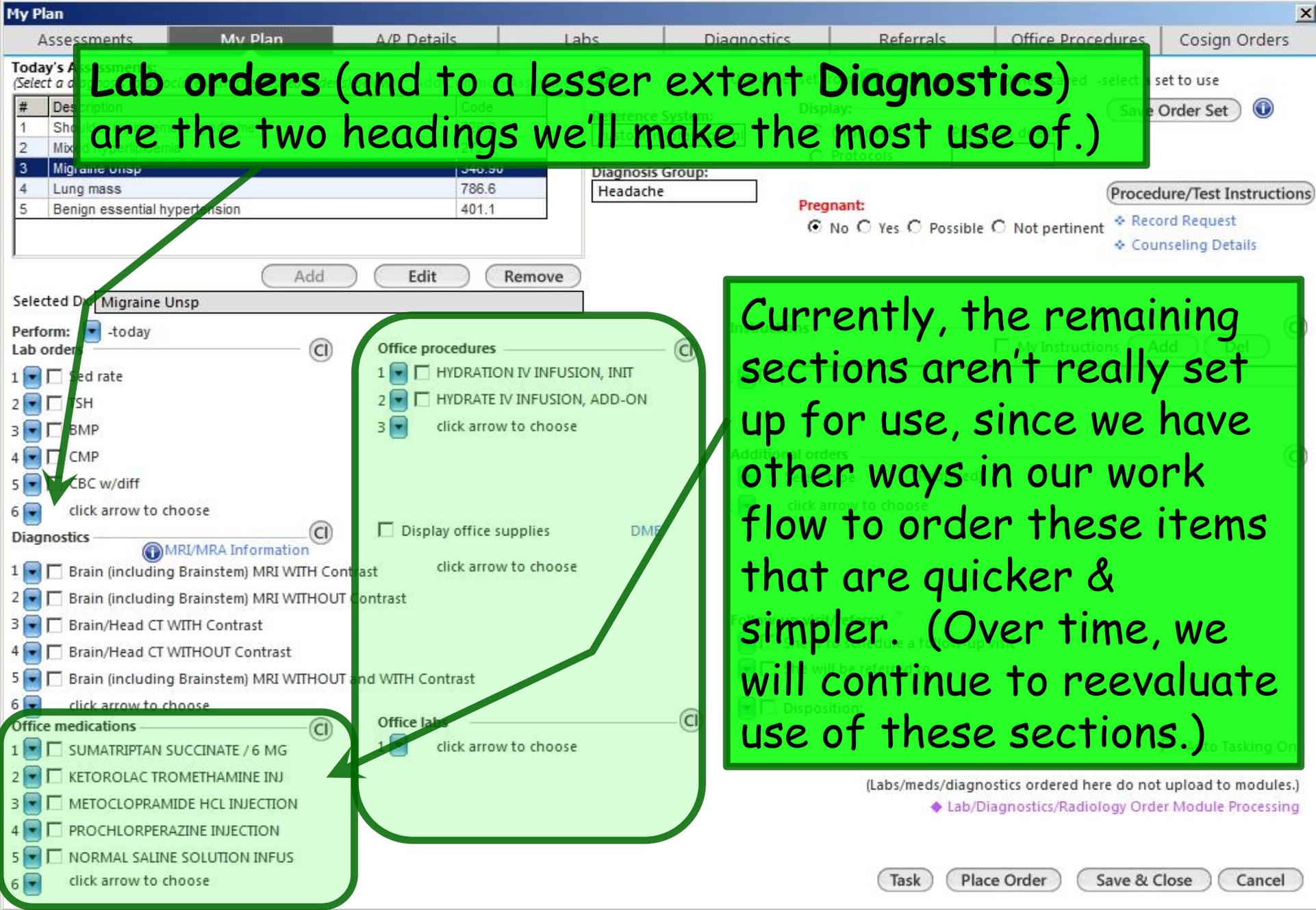
TSH is added to the list. Follow the same process to delete, add, or rearrange orders as desired.

You can do the same for radiographic studies.

The screenshot displays a medical software interface with several sections:

- My Plan**: A table of assessments with columns for #, Description, and Code. The table contains:

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |
- Selected Dx:** Migraine Unsp
- Perform:** -today
- Lab orders:** A list of lab tests with checkboxes and dropdown menus:
 - 1 Med rate
 - 2 TSH
 - 3 BMP
 - 4 CMP
 - 5 CBC w/diff
 - 6 click arrow to choose
- Diagnostics:** A list of diagnostic tests with checkboxes and dropdown menus:
 - 1 Brain (including Brainstem) MRI WITH Contrast
 - 2 Brain (including Brainstem) MRI WITHOUT Contrast
 - 3 Brain/Head CT WITH Contrast
 - 4 Brain/Head CT WITHOUT Contrast
 - 5 click arrow to choose
- Office medications:** A list of medications with checkboxes and dropdown menus:
 - 1 SUMATRIPTAN SUCCINATE / 6 MG
 - 2 KETOROLAC TROMETHAMINE INJ
 - 3 METOCLOPRAMIDE HCL INJECTION
 - 4 PROCHLORPERAZINE INJECTION
 - 5 NORMAL SALINE SOLUTION INFUS
 - 6 click arrow to choose
- Office labs:** A list of lab tests with checkboxes and dropdown menus:
 - 1 click
- Ngkbn Dbp Labs Radiology**: A dialog box titled "Select Order" with a list of radiology studies:
 - Bone survey X-ray; Complete (e.g., axial and appendicular)
 - Bone survey X-ray; Limited (e.g., for metastases)
 - Bone X-ray (Bone Age Studies)
 - Bone X-ray (Bone Length Studies)
 - Brachial Artery Angiogram (Retrograde)
 - Brain (including Brainstem) MRI WITH Contrast
 - Brain (including Brainstem) MRI WITHOUT and WITH Contrast
 - Brain (including Brainstem) MRI WITHOUT Contrast
 - Brain (Posterior Fossa) Myelogram
 - Brain CT Angiogram
 - Brain MR Angiogram WITH Contrast
 - Brain MR Angiogram WITHOUT and WITH Contrast
 - Brain MR Angiogram WITHOUT Contrast
 - Brain scan; Complete (minimum of 4 views); static
 - Brain scan; Complete (minimum of 4 views); with vascular flow
 - Brain scan; Complete; tomographic (SPECT)
 - Brain scan; Limited (less than 4 views)
 - Brain scan; Limited (less than 4 views); with vascular flow



Lab orders (and to a lesser extent Diagnostics) are the two headings we'll make the most use of.)

Currently, the remaining sections aren't really set up for use, since we have other ways in our work flow to order these items that are quicker & simpler. (Over time, we will continue to reevaluate use of these sections.)

Office procedures
1 HYDRATION IV INFUSION, INIT
2 HYDRATE IV INFUSION, ADD-ON
3 click arrow to choose

 Display office supplies

Office labs
1 click arrow to choose

Office medications
1 SUMATRIPTAN SUCCINATE / 6 MG
2 KETOROLAC TROMETHAMINE INJ
3 METOCLOPRAMIDE HCL INJECTION
4 PROCHLORPERAZINE INJECTION
5 NORMAL SALINE SOLUTION INFUS
6 click arrow to choose

My Plan

Assessments My Plan A/P Details Labs Diagnostics Referrals Office Procedures Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Reference System: custom_impression_pl

Diagnosis Group: Headache

Use order set from: My saved Others saved -select a set to use

Display: Order sets Protocols

Protocols due in:

Save Order Set

Pregnant: No Yes Possible Not pertinent

Procedure/Test Instructions

- Record Request
- Counseling Details

Selected Dx: Migraine Unsp

Perform: -today

Lab orders Office procedures

1 Sed rate

2 TSH

3 BMP

1 HYDRATION IV INFUSION, INIT

2 HYDRATE IV INFUSION, ADD-ON

3 click arrow to choose

Instructions My Instructions Add Del

1

Additional orders

1 click arrow to choose

2 click arrow to choose

3 click arrow to choose

4 click arrow to choose

5 click arrow to choose

6 click arrow to choose

Office labs

1 click arrow to choose

2 click arrow to choose

3 click arrow to choose

4 click arrow to choose

5 click arrow to choose

6 click arrow to choose

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

You can also add a few brief Instructions to your order set. In general, Plan Details, with the ability to save My Phrases, provides better functionality, & this is what we recommend. In addition, the setup of instructions here can be a bit confusing.

However, for those users who wish to use this feature, a brief explanation follows.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|-------|
| 1 | Shoulder impingement syndrome | 726.2 |

Reference System: custom_impression_pl

Use order set from: My saved Others saved -select a set to use

Display: Order sets Protocols

Protocols due in:

Save Order Set

Pregnant: No Yes Possible Not pertinent

Procedure/Test Instructions

- Record Request
- Counseling Details

Instructions

My Instructions

1 Keep headache diary

2 click arrow to

Additional orders

Select type (Required)

1 click arrow to choose

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)

◆ Lab/Diagnostics/Radiology Order Module Processing

We want to start by populating "My Instructions," a list of instructions you frequently use. In the first Instructions line, type **Keep headache diary**.

Click **Add** & select **1** in the ensuing popup. Note that, while this is not made particularly clear, you are actually adding this to your list of "My Instructions."

Add which instruction?

1

2

3

Close

My Plan

Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

Use order set from: My saved Others saved -select a set to use

Display: Order sets Protocols

Protocols due in:

Save Order Set

Reference System: custom_impression_pl

Diagnosis Group: Headache

Pregnant: No Yes Possible Not pertinent

Procedure/Test Instructions
 Record Request
 Counseling Details

| # | Description | Code |
|---|-------------------------------|-------|
| 1 | Shoulder impingement syndrome | 7202 |
| 2 | Lung mass | 788.8 |
| 3 | Migraine, Uncomplicated | E85 |

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff

Office procedures

- HYDRATION IV INFUSION, INIT
- HYDRATE IV INFUSION, ADD-ON
- click arrow to choose

Instructions

My Instructions

- Take abortive med & lie down in dark, quiet room
- click arrow to

Additional orders

Select type (Required)

click arrow to choose

Follow-up visit/referral

He is to schedule a follow-up visit

He will be referred to

Disposition:

Auto Tasking On

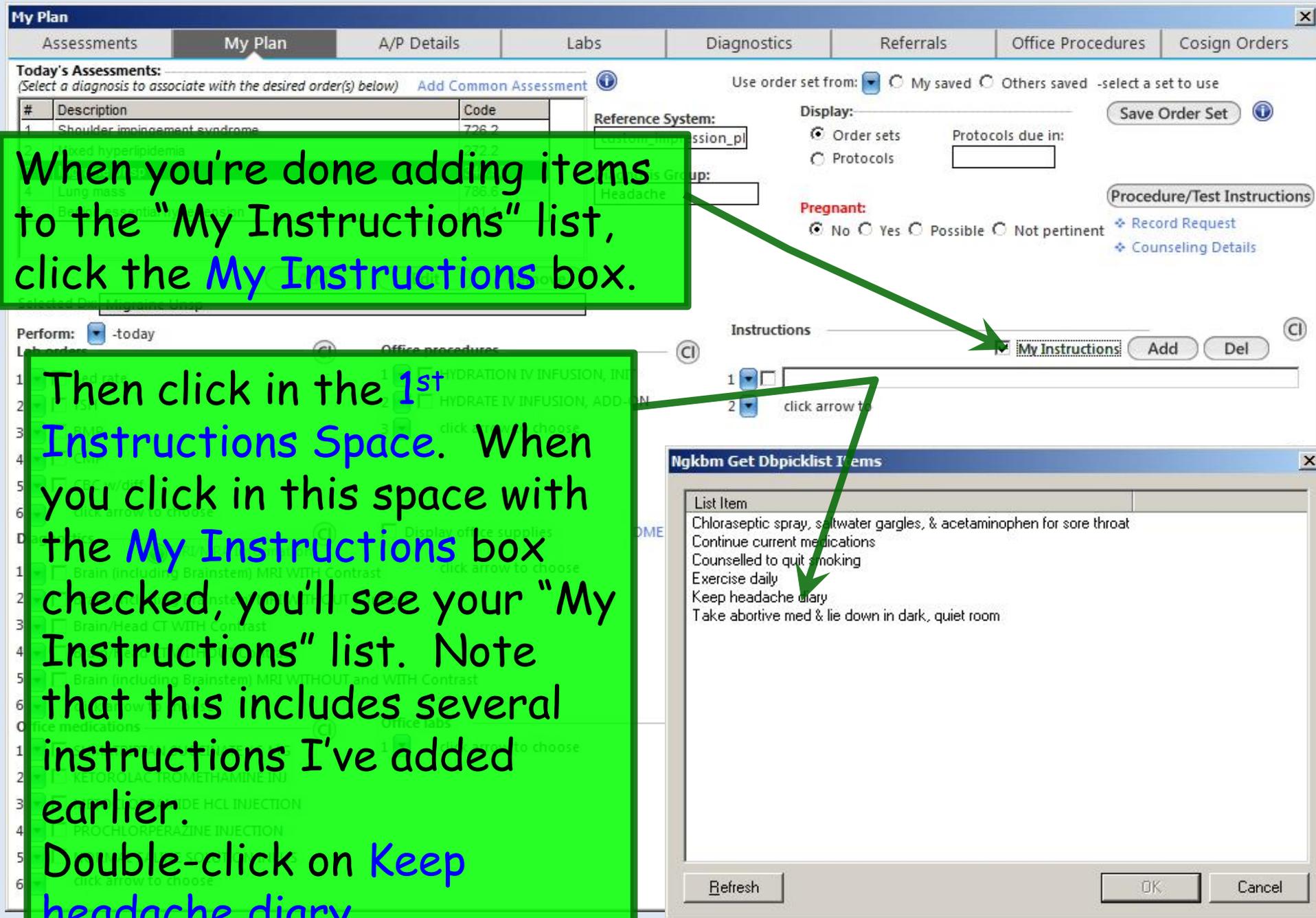
(Labs/meds/diagnostics ordered here do not upload to modules.)
◆ Lab/Diagnostics/Radiology Order Module Processing

Delete or type over "Keep headache diary," typing instead "Take abortive med & lie down in dark, quiet room."

Again click Add & select 1 in the ensuing popup. In a similar fashion, add other lines as desired.

Add which instruction?

- 1
- 2
- 3



When you're done adding items to the "My Instructions" list, click the **My Instructions** box.

Then click in the **1st Instructions Space**. When you click in this space with the **My Instructions** box checked, you'll see your "My Instructions" list. Note that this includes several instructions I've added earlier. Double-click on **Keep headache diary**.

Now note the **Additional Orders** section. You can add more orders even if you run out of space in one of the sections. Under **Additional Orders**, click the **Select type** dropdown arrow & choose the instruction type. You can then add specific orders as demonstrated above.

My Plan

Assessments | **My Plan**

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below)

| # | Description |
|---|-------------------------------|
| 1 | Shoulder impingement syndrome |
| 2 | Mixed hyperlipidemia |
| 3 | Migraine Unsp |
| 4 | Lung mass |
| 5 | Benign essential hypertension |

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Diagnostics

MRI/MRA Information

- Brain (including Brainstem) MRI WITH Contrast
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

Office medications

- SUMATRIPTAN SUCCINATE / 6 MG
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL INJECTION
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Office labs

- click arrow to choose

Additional Orders

- keep near the diary
- Take abortive med & lie down in dark, quiet room
- click arrow to

Additional orders (Required)

- Select type
- click arrow to choose

Wgkbn Dbp ActClasses

| Act Descript |
|--------------------|
| Lab Orders |
| Diagnostics |
| Office Medications |
| Office Procedures |
| Office Supplies |
| Office Labs |
| Instructions |

Refresh | OK | Cancel

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Use order set from: My saved Others saved -select a set to use

Reference System:

Diagnosis Group:

Display: Order sets Protocols

Protocols due in:

Save Order Set

Pregnant: No Yes Possible Not pertinent

Procedure/Test Instructions
 Record Request
 Counseling Details

Let's say our order set is complete.
To save it, click **Save Order Set**.
(You won't be prompted for a name or any further information.)

Selected Dx:

Perform:

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Diagnostics

Display office supplies

MRI/MRA Information

- Brain (including Brainstem) MRI WITH Contrast
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

Office labs

- click arrow to choose

Follow-up visit/referral

She is to schedule a follow-up visit

She will be referred to

Disposition:

Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.)
◆ Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

Today's Assessments: (Select a diagnosis to associate with the desired order(s) below) Add Common Assessment Use order set from: My saved Others saved -select a set to use

| # | Description |
|---|-------------------------------|
| 1 | Shoulder impingement syndrome |
| 2 | Mixed hyperlipidemia |
| 3 | Migraine Unsp |
| 4 | Lung mass |
| 5 | Benign essential hypertension |

In the future, on any patient for whom you select a headache diagnosis, your order set will appear automatically.

Selected Dx: Migraine Unsp Add Edit Remove

Perform: -today Lab orders Office procedures Instructions My Instructions Add Del

- 1 Sed rate
- 2 TSH
- 3 BMP
- 4 CMP
- 5 CBC w/diff
- 6 click arrow to choose

- 1 HYDRATION IV INFUSION, INIT
- 2 HYDRATE IV INFUSION, ADD-ON
- 3 click arrow to choose

- 1 Keep headache diary
- 2 Take abortive med & lie down in dark, quiet room
- 3 click arrow to

- 1 Brain (including Brainstem) MRI WITH Contrast
- 2 Brain (including Brainstem) MRI WITHOUT Contrast
- 3 Brain/Head CT WITH Contrast
- 4 Brain/Head CT WITHOUT Contrast
- 5 Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- 6 click arrow to choose

Display office supplies DME

Additional orders Select type (Required) click arrow to choose

- 1 SUMATRIPTAN SUCCINATE / 6 MG
- 2 KETOROLAC TROMETHAMINE INJ
- 3 METOCLOPRAMIDE HCL INJECTION
- 4 PROCHLORPERAZINE INJECTION
- 5 NORMAL SALINE SOLUTION INFUS
- 6 click arrow to choose

- 1 click arrow to choose

- Follow-up visit/referral She is to schedule a follow-up visit She will be referred to Disposition: Auto Tasking On

(Labs/meds/diagnostics ordered here do not upload to modules.) Lab/Diagnostics/Radiology Order Module Processing

Task Place Order Save & Close Cancel

To use your order set, click the checkboxes for the desired orders for that patient & then click **Place Order**.

There are some other steps that go into actually processing the order—and that is one of the main reasons we're not wholeheartedly endorsing this workflow yet. But this gives you the idea on how to create order sets.

The screenshot shows a medical software interface with a 'My Plan' tab. At the top, there are tabs for 'Assessments' and 'My Plan'. Below this, a section titled 'Today's Assessments:' contains a table with the following data:

| # | Description |
|---|-------------------------------|
| 1 | Shoulder impingement syndrome |
| 2 | Mixed hyperlipidemia |
| 3 | Migraine Unsp |
| 4 | Lung mass |
| 5 | Benign essential hypertension |

Below the table, there are sections for 'Selected Dx:' (Migraine Unsp), 'Perform:' (-today), 'Lab orders', 'Diagnostics', and 'Office medications'. Each section contains a list of items with checkboxes and dropdown menus. At the bottom right, there are buttons for 'Task', 'Place Order', 'Save & Close', and 'Cancel'. A green arrow points from the 'Place Order' button back to the 'Migraine Unsp' assessment in the table.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
(Select a diagnosis to associate with the desired order(s) below) Add Common Assessment

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Use order set from: My saved Others saved -select a set to use

Reference System: custom_impression_pl

Diagnosis Group: Headache

Display: Order sets Protocols

Pregnant: No Yes Possible Not pertinent

Save Order Set

Procedure/Test Instructions

- Record Request
- Counseling Details

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- 1 Sed rate
- 2 TSH
- 3 BMP
- 4 CMP
- 5 CBC w/diff

Office procedures

- 1 HYDRATION IV INFUSION, INIT
- 2 HYDRATE IV INFUSION, ADD-ON
- 3 click arrow to choose

Task | Place Order | Save & Close | Cancel

You can also click the **Use order set from dropdown arrow** to select from order sets for other diagnoses. For example, you could use this **Headache** order set as the starting point for a new order set for **Fatigue**.

By default you're using order sets you've saved before (or are already pre-populated in the system). But you can also click **Others saved** to see a list of other providers in your practice who have saved order sets. You can then pick from their order sets instead.

My Plan

Assessments | **My Plan** | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Assessments:
 (Select a diagnosis to associate with the desired order(s) below) [Add Common Assessment](#)

| # | Description | Code |
|---|-------------------------------|--------|
| 1 | Shoulder impingement syndrome | 726.2 |
| 2 | Mixed hyperlipidemia | 272.2 |
| 3 | Migraine Unsp | 346.90 |
| 4 | Lung mass | 786.6 |
| 5 | Benign essential hypertension | 401.1 |

Reference System: custom_impression_pl

Diagnosis Group: Headache

Use order set from: My saved Others saved -select a set to use

Display: Order sets Protocols

Protocols due in:

Save Order Set

Pregnant: No Yes Possible Not pertinent

Procedure/Test Instructions
 Record Request
 Counseling Details

Selected Dx: Migraine Unsp

Perform: -today

Lab orders

- Sed rate
- TSH
- BMP
- CMP
- CBC w/diff
- click arrow to choose

Office procedures

- HYDRATION IV INFUSION, INIT
- HYDRATE IV INFUSION, ADD-ON
- click arrow to choose

Display office supplies DME

Diagnostics

[MRI/MRA Information](#)

- Brain (including Brainstem) MRI WITH Contrast click arrow to choose
- Brain (including Brainstem) MRI WITHOUT Contrast
- Brain/Head CT WITH Contrast
- Brain/Head CT WITHOUT Contrast
- Brain (including Brainstem) MRI WITHOUT and WITH Contrast
- click arrow to choose

Office medications

- SUMATRIPTAN SUCCINATE
- KETOROLAC TROMETHAMINE INJ
- METOCLOPRAMIDE HCL
- PROCHLORPERAZINE INJECTION
- NORMAL SALINE SOLUTION INFUS
- click arrow to choose

Instructions

My Instructions **Add** **Del**

- Keep headache diary
- Take abortive med & lie down in dark, quiet room
- click arrow to

Additional orders

Select type (Required)

- click arrow to choose

Follow-up visit/referral

She is to schedule a follow-up visit

Auto Tasking On
 (Labs/meds/diagnostics ordered here do not upload to modules.)
 Lab/Diagnostics/Radiology Order Module Processing

Task **Place Order** **Save & Close** **Cancel**

You can make changes to your order sets on the fly. Add or remove orders, & just click **Save Order Set** again.

My Phrases

You have the ability to establish & modify text, in your own words, that you can then use at multiple locations within NextGen.

Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

| # | Description | Code | Status |
|---|-------------------------------|--------|--------|
| | Shoulder impingement syndrome | 726.2 | |
| | Migraine Unsp | 548.50 | |
| | Upper mass | 786 | |
| | ... | 40 | |

Links to My Phrases appear at several spots within the program, but one of the most useful places is A/P Details, where you see several opportunities to use them.

Selected Assessment: Migraine Unsp

Add Edit Sort DX Remove

Impression/Comments:

My Phrases

Differential Diagnosis:

My Phrases

Text area for Impression/Comments with a scroll bar and a 'My Phrases' button.

Text area for Differential Diagnosis with a scroll bar and a 'My Phrases' button.

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Previous Patient Details | Previous Provider Details | Health Promotion Plan

Patient Details:

My Phrases Common Phrases

Provider Details:

My Phrases Common Phrases

Text area for Patient Details with a scroll bar and 'My Phrases' and 'Common Phrases' buttons.

Text area for Provider Details with a scroll bar and 'My Phrases' and 'Common Phrases' buttons.

(Provider details will not print on the patient plan.)

Today's Orders:

Further diagnostic evaluations ordered today include MRIs of brain, stem, w/o foll by w/ contrast 1 Week to be performed.

Manage My Phrases

Follow Up

Counseling Details

Save & Close

Cancel

Today's Assessments: (Select an assessment and enter the details below.)

Assessment/Plan Expanded View

| # | Description | Code | Status |
|---|-------------------------------|--------|--------|
| | Shoulder impingement syndrome | 726.2 | |
| | Migraine Unsp | 548.90 | |
| | Lump mass | 786.6 | |

Take note of the 4 fields where My Phrases can be used, especially Patient Details vs Provider Details, since you'll need to know what type of phrase you'll be adding.

Selected Assessment: Migraine Unsp

Add Edit Sort DX Remove

Impression/Comments:

My Phrases

Differential Diagnosis:

My Phrases

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Previous Patient Details | Previous Provider Details | Health Promotion Plan

Patient Details:

My Phrases

Common Phrases

Provider Details:

My Phrases

Common Phrases

Today's Orders:

Further diagnostic evaluations ordered today include

Manage My Phrases

Follow Up

Counseling Details

Save & Close

Cancel

To begin setup of My Phrases, click **Manage My Phrases**.

Let's add a phrase for the Patient Details field, for instructions we commonly give allergic rhinitis patients. Click in the **My Phrase type** box. In the ensuing popup, select **Plan-Patient**.

Manage My Phrases

My phrase type: List

My phrase:

Characters left: 1000

My phrase summary: Copy phrase

Manage which phrase type?

- Advice
- ASC Anesthesia Comments
- ASC Nursing Comments
- ASC Pathology Collection
- ASC PostOp Nursing Comments
- ASC PostOp Orders Comments
- ASC PreOp Nursing Comments
- Derm Instruct
- Derm Mohs
- Derm Plan
- Derm Repair
- Diagnostics History
- Differential Diagnosis
- Event Log
- Family History
- HPI
- Impression
- OB Education
- OB Postpartum
- OB Prenatal Progress Note
- ONC Cancer Dx Narrative
- ONC Progress Note
- ONC Radiation Narrative
- ONC Social Hx
- Pathology Results
- Physician Note
- Plan - Patient
- Plan - Provider
- proc description
- proc instructions
- Procedure Documentation
- procedure supplies
- Provider Test Action
- Review
- RHE INF Nurse Note
- RHE INF Prov Note

| My Phrase Type | My Phrase Summary |
|-----------------|------------------------|
| Plan - Patient | ADD Start |
| Plan - Patient | Balance-multifactorial |
| Plan - Patient | Advance As Tolerated |
| Plan - Patient | Abd pain, nonspecific |
| Plan - Patient | AK-Cryo |
| Plan - Patient | Asthma |
| Plan - Patient | Ankle Sprain |
| Plan - Patient | Aphthous Sore |
| Plan - Provider | Muskrat Attack |

child has attention deficit disorder. We often see some pretty good improvement w/ medication: reasons to have balance troubles, including arthritis, diabetes, & hypertension; sometimes medication activities as tolerated.

have a little belly pain for a lot of different reasons that aren't very serious: a minor viral infection w/ liquid nitrogen. These may blister over the coming days; if so, just let the blister heal in its own opportunity. Ice for swelling 15 min at a time every 3-4 hrs for next couple days, or until swelling or "aphthous sore." They hurt a lot, but go away on their own within about a wk. Some people Provider Plan in the event a patient is attacked by a muskrat, or is exposed to the song "Muskrat Love"

Add Update

Save & Close Remove

Close

Manage My Phrases

My phrase type:

Plan - Patient

List only these phrase types

My phrase summary:

Allergic rhinitis-Patient

Copy phrase

My phrase:

Avoid smoke and other identified allergens/irritants. Fluticasone 1 spray each nostril daily, using 2 sprays each nostril daily during first week of use. USE EVERY DAY; it doesn't help much if you just use it "as needed." If doing well in 2-3 months, you may try leaving it off, but resume it if your symptoms return. You may use it intermittently throughout the year like this. Loratadine or cetirizine (available over the counter) as needed for runny nose, itchy/watery eyes. Recheck if symptoms are not satisfactorily managed over the next 4 wks or so.

Characters left: 439

Add

Update

| My Phrase Type | My Phrase Summary | My Phrase |
|----------------|---------------------------------|---|
| Plan - Patient | Allergic rhinitis-Patient | Avoid smoke and other identified allergens/irritants. Fluticasone 1 spray each nostril daily, using 2 sprays each nostril daily during first week of use. USE EVERY DAY; it doesn't help much if you just use it "as needed." If doing well in 2-3 months, you may try leaving it off, but resume it if your symptoms return. You may use it intermittently throughout the year like this. Loratadine or cetirizine (available over the counter) as needed for runny nose, itchy/watery eyes. Recheck if symptoms are not satisfactorily managed over the next 4 wks or so. |
| Plan - Patient | AK-Cryo | Lesions frozen twice w/ liquid nitrogen. These may blister over the coming days; if so, just let the blister heal in its own time. |
| Plan - Patient | Ankle Sprain | Elevate ankle at every opportunity. Ice for swelling 15 min at a time every 3-4 hrs for next couple days, or until swelling subsides. |
| Plan - Patient | Aphthous Sore | This is a mouth ulcer or "aphthous sore." They hurt a lot, but go away on their own within about a wk. Some people have them frequently. |
| Plan - Patient | Asthma | Avoid smoke and other identified allergens/irritants. Continue Advair 250/50 1 puff twice daily. Albuterol as needed. |
| Plan - Patient | Balance-multifactorial | You've got multiple reasons to have balance troubles, including arthritis, diabetes, & hypertension; sometimes medication. |
| Plan - Patient | Abd pain, nonspecific, children | Sometimes you can have a little belly pain for a lot of different reasons that aren't very serious: a minor viral infection, constipation, or indigestion. |
| Plan - Patient | ADD Start | It does appear your child has attention deficit disorder. We often see some pretty good improvement w/ medication. |
| Plan - Patient | Advance As Tolerated | Relative rest, advancing activities as tolerated. |

Save & Close

Remove

You can update your phrase, or you can delete it. You can also copy an existing phrase, modify it, & save it with a new name or different My Phrase Type.

Since you have these editing options, you can begin creating & modifying My Phrases immediately, without worrying about getting them perfect on the first try.

This is important to note!

If you keep telling yourself you'll find some time to sit down & create your perfect list of My Phrases, you'll never do it, & you'll never cover everything you'll need them for.

Instead, the 1st time you realize you're typing several lines of instructions about a problem there is any chance you'll see again, *save it as a My Phrase*, no matter how good or bad you think it is. The next time you see a patient with that problem, modify/improve the phrase as appropriate for the next patient, & save those changes. By the time you buff it 2-3 times, you'll have something pretty useful.

Assessment Plan Details

Assessments

My Plan

A/P Details

Labs

Today's Assessments: (Select an assessment and enter the details below.)

| # | Description |
|---|-------------------------------|
| 1 | Shoulder impingement syndrome |
| 2 | Mixed hyperlipidemia |
| 3 | Migraine Unsp |
| 4 | Lung mass |
| 5 | Benign essential hypertension |

Selected Assessment: Migraine Unsp

Impression/Comments:

My Phrases

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Plan Details

Patient Details:

My Phrases

Common Phrases

Provider Details:

My Phrases

Common Phrases

Ngkbnm Udp Dbpicklist Items

| Qualifier 2 | List Item |
|---------------------------------|---|
| Abd pain, nonspecific, children | Sometimes you can have a little belly pain for a lot of different rea |
| ADD Start | It does appear your child has attention deficit disorder. We often |
| Advance As Tolerated | Relative rest, advancing activities as tolerated. |
| AK-Cryo | Lesions frozen twice w/ liquid nitrogen. These may blister over th |
| Allergic rhinitis-Patient | Avoid smoke and other identified allergens/irritants. Fluticasone |
| Ankle Sprain | Elevate ankle at every opportunity. Ice for swelling 15 min at a ti |
| Aphthous Sore | This is a mouth ulcer or "aphthous sore." They hurt a lot, but go |
| Asthma | Avoid smoke and other identified allergens/irritants. Continue Ad |
| Balance-multifactorial | You've got multiple reasons to have balance troubles, including e |
| Migraine Initial-Patient | Imitrex 100 mg immediately at onset of bad headache; may repea |
| URI-PtPlan Sample | Sample MyPhrase for Pt Plan section. |
| URI-PtPlan-Sample | Sample Patient Plan for URI. |

Refresh OK Cancel

Back in Plan Details, to use your phrase, select the diagnosis & click the **My Phrases** button for the appropriate section, then double-click the **Allergic rhinitis** phrase.

Plan Details is the place where My Phrases are of the greatest use, but there are other locations where they're available, with further expansion anticipated over time.

Generic Free Form3 - HPI

Information on this HPI that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: Severity: Mild Moderate Severe Incapacitating Other: Frequency: Constantly Daily Weekly Randomly Other: E & M coding information: ⓘ

Onset: ⓘ

Duration: ⓘ Location:

Aggravated by: Relieved by:

Acute Chronic

Review of Test(s)

HPI: Filter: Summary Phrase

This field is limited to 9000 characters.

One useful place you'll find them is on the Generic Free Form HPI popup.

Specialty Family Practice Visit Type Office Visit

HPI Notes

Chief complaint/reason for visit: Manage My Phrases

Diarrhea My Phrases

1.

Shoulder pain My Phrases

2.

Squirrels follow me My Phrases

3.

4.

5.

6.

Save & Close Cancel

Intake

Standing Orders

Care Guidelines

Reason for Visit

Introduction:

This 57 year old female

Do not launch HPI

- asthma
- chest pain
- depression
- diabetes
- fatigue
- GERD
- headache
- hyperlipidemia
- hypertension
- back pain
- chronic condition:

Order Management

Panel Control: Toggle ↶ ↷ Cycle ↻

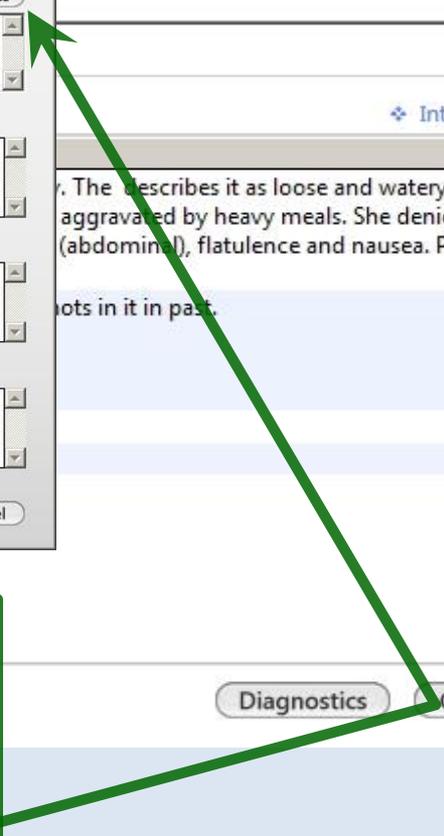
[Intake Comments](#)

The describes it as loose and watery. It aggravated by heavy meals. She denies (abdominal), flatulence and nausea. Pertinent

shots in it in past.

Diagnostics Comments

An even more handy place My Phrases appear is in the **Reasons for Visit/HPI** section of the **SOAP** tab, when you click the **Comments** button.





Consent

- Consent was obtained
- Procedure/risks were explained
- Questions were answered

Defaults: Right Left



Today's Assessments: (Select an assessment and check the desired labs below.) [Add Common Assessment](#)

Injection History: [How to use this template:](#)

| # | Diagnosis Description | Code | Status |
|---|---|--------|--------|
| 1 | Acute bronchitis | 466.0 | |
| 2 | Neoplasm of uncertain behavior of skin | 238.2 | |
| 3 | Disorders of bursae and tendons in shoulder region, unspecified | 726.10 | |

| Encounter Date:Time | Description | Proc Code | Units |
|---------------------|-------------|-----------|-------|
| | | | |

[Add](#) [Edit](#) [Sort](#) [Remove](#)

Injection detail:

| | Code: | Procedure: | Location: | Method: |
|---------|-------|------------|-----------|---------|
| Site 1: | | | | |
| Site 2: | | | | |
| Site 3: | | | | |
| Site 4: | | | | |

| Site prepped: | | Needle gauge: | |
|--------------------------|------------|---------------|----|
| Yes | Technique: | Anesthetic: | mL |
| <input type="checkbox"/> | | | |

| Placement confirmed by: | Fluid: | (mL) Fluid withdrawn: | Medication: | mg | | | mL | | | Seq | | | No charge medication | | Sterile dressing: | | Pressure | Adhesive | Clear |
|-------------------------|--------|-----------------------|------------------------|----|--|--|----|--|--|-----|--|--------------------------|----------------------|--------------------------|-------------------|--------------------------|----------|--------------------------|-----------------------|
| | | | | | | | | | | | | | | | | | | | |
| Site 1: | | | Detail | | | | | | | | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | Clear |
| Site 2: | | | | | | | | | | | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | Clear |
| Site 3: | | | | | | | | | | | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | Clear |
| Site 4: | | | | | | | | | | | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | Clear |

Procedure bill [Verify Charges](#) (To submit charges, you must click on the "Submit to Superbill" button prior to clicking Verify Charges)

Some procedure templates also include My Phrases.

Patient response:

Tolerated procedure well: No Yes

Improvement by site: 1 2 3 4 % Improvement:

Plan: [My Plan](#)

Lab Orders:

Schedule follow-up visit

Timeframe:

Follow-up with:

Appropriate post injection instructions given

Reason(s) for next visit:

For injection/aspiration

Other:

Comments

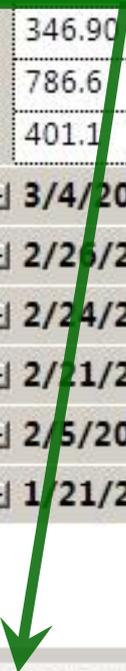
[Manage My Phrases](#) [My Phrases](#)

[Place Order](#) [Submit to Superbill](#) [Save & Close](#) [Cancel](#)

Diagnosis Favorites

You can save diagnoses you use frequently, making it easy to add them quickly to an encounter. While the diagnosis search tools are **MUCH** better now in NextGen, this still can come in handy.

You add Diagnosis Favorites through the diagnosis search tool, anywhere you can access it. From the Problems Module, click **Add ICD**.



Note that Diagnosis Favorites are ICD diagnoses—not the SNOMED codes used to populate the Problem List. This also means you're probably better off waiting to configure these until ICD-10 appears 10/1/14.

| ICD Code | Description | Chronic | Status | Severity | Date of Onset |
|----------|-------------------------------|--------------------------|--------|----------|---------------|
| 346.90 | Migraine Unsp | <input type="checkbox"/> | | | |
| 786.6 | Lung mass | <input type="checkbox"/> | | | |
| 401.1 | Benign essential hypertension | <input type="checkbox"/> | | | |

- + 3/4/2014 1:45:21 PM
- + 2/26/2014 10:59:18 AM
- + 2/24/2014 07:20:31 PM
- + 2/21/2014 11:43:11 AM
- + 2/5/2014 2:00:05 PM
- + 1/21/2014 1:45:47 PM

Notice I've already set up a few Favorites folders, to help me group my most commonly-used diagnoses.

The screenshot shows a software window with a search bar at the top. The search bar contains the text "Enter search term" and a "Search" button. Below the search bar is a list of diagnoses. The list is divided into sections: "All Diagnoses", "Patient's Diagnoses", "Patient's Chronic Diagnoses", "Favorites", and "Categories". The "Favorites" section is expanded, showing four folders: "Metabolic", "CV", "Pulmonary", and "Misc". A green box highlights the "Favorites" section, and a green arrow points from the text box above to the "Search" button. Another green box highlights the "Favorites" section, and a green arrow points from the text box below to the "Search" button.

Enter search term Search

All Diagnoses

- Patient's Diagnoses
- Patient's Chronic Diagnoses
- ▼ Favorites +
 - Metabolic
 - CV
 - Pulmonary
 - Misc
- ▼ Categories
 - Abnormal Tests/L
 - Accucheck
 - Acute Otitis
 - All FX
 - Arrhythmias
 - Arthritis
 - ASTHMA
 - Asymptomatic
 - Bleeding/Menstru
 - Blood and Blood-
 - Breast
 - Breast needle bio
 - Diagn. Arm

Clinical Description and ICD Code | Billing Description

Click in the search field. Type **hypothyroidism**, then click **Search**.

Select Cancel

I'll take the first finding, Hypothyroidism 244.9. Click on that, drag it to the Metabolic folder, then release.

Q hypothyroidism Search

| Clinical Description and ICD Code | Billing Description |
|---|--|
| Hypothyroidism 244.9 | Unspecified acquired hypothyroidism |
| Hypothyroidism after radioiodine therapy 244.1 | Other postablative hypothyroidism |
| Hypothyroidism after radio-iodine therapy 244.1 | Other postablative hypothyroidism |
| Hypothyroidism following radioiodine therapy 244.1 | Other postablative hypothyroidism |
| Hypothyroidism post ablative 244.1 | Other postablative hypothyroidism |
| Hypothyroidism S/P ablation 244.1 | Other postablative hypothyroidism |
| Hypothyroidism S/P radioiodine therapy 244.1 | Other postablative hypothyroidism |
| Hypothyroidism status post ablation 244.1 | Other postablative hypothyroidism |
| Hypothyroidism status post radioiodine therapy 244.1 | Other postablative hypothyroidism |
| Acquired hypothyroidism 244.9 | Unspecified acquired hypothyroidism |
| Congenital hypothyroidism 243 | Congenital hypothyroidism |
| Congenital iodine deficiency hypothyroidism 243 | Congenital hypothyroidism |
| Hypothyrotropic hypothyroidism 244.8 | Other specified acquired hypothyroidism |
| Iatrogenic hypothyroidism 244.3 | Other iatrogenic hypothyroidism |
| Infantile hypothyroidism 243 | Congenital hypothyroidism |
| Iodine hypothyroidism 244.2 | Iodine hypothyroidism |
| Nonpitting edema associated with hypothyroidism 244.9 | Unspecified acquired hypothyroidism |
| Other iatrogenic hypothyroidism 244.3 | Other iatrogenic hypothyroidism |
| Other postablative hypothyroidism 244.1 | Other postablative hypothyroidism |

78 rows returned Select Cancel

All Diagnoses

- Patient's Diagnoses
- Patient's Chronic Diagno
- ▼ Favorites
 - Metabolic
 - CV
 - Pulmonary
 - Misc
- ▼ Categories
 - Abnormal Tests/L
 - Accucheck
 - Acute Otitis
 - All FX
 - Arrhythmias
 - Arthritis
 - ASTHMA
 - Asymptomatic
 - Bleeding/Menstru
 - Blood and Blood-Breast
 - Breast needle bio
 - Diagn Arm

Now when you click on the **Metabolic folder**, you see the Hypothyroidism diagnosis.

The screenshot shows a search interface with a search bar containing 'hypothyroidism' and a 'Search' button. On the left, a sidebar lists various diagnostic categories. The 'Metabolic' folder is highlighted in blue, and a green arrow points from the text above to this folder. The main area displays a table with one row of results.

| Clinical Description and ICD Code | Billing Description |
|-----------------------------------|-------------------------------------|
| Hypothyroidism 244.9 | Unspecified acquired hypothyroidism |

At the bottom of the window, there is a status bar with a gear icon, the text '1 rows returned', and two buttons: 'Select' and 'Cancel'.

Note you can drag folders up & down; here I've arranged them in alphabetical order.

Q Migraine | Search

All Diagnoses

- Patient's Diagnoses
- Patient's Chronic Diagnoses
- ▼ Favorites
 - CV
 - Metabolic
 - Misc
 - Neuro
 - Pulmonary
- ▼ Categories
 - Abnormal Tests/L
 - Accucheck
 - Acute Otitis
 - All FX
 - Arrhythmias
 - Arthritis
 - ASTHMA
 - Asymptomatic
 - Bleeding/Menstru
 - Blood and Blood-
 - Breast
 - Breast needle biopsy

Clinical Description and ICD Code

| |
|--|
| Migraine 346.80 |
| Migraine attack 346.90 |
| Migraine headache variant 346.20 |
| Migraine w/ prolonged aura 346.00 |
| Migraine w/o aura 346.10 |
| Migraine with aura without HA 346.00 |
| Migraine without aura 346.10 |
| Migraine with aura, without mention of intractable migraine, without mention of status migrainosus 346.00 |
| Migraine attack with an aura (sensory warning sign such as a bright light or unpleasant smell) before the attack 346.0 |
| Migraine headache characterized by extreme pain, nausea, vomiting and sensitivity to light, not adequately controlled b |
| Migraine 346.92 |
| Migraine accompanied by transient neurological phenomena 346.02 |
| Migraine attack without an aura (sensory warning sign such as a bright light or unpleasant smell) before the attack that |
| Migraine with acute-onset aura w/ status migrainosus 346.02 |
| Migraine w/ aura 346.02 |
| Migraine w/ aura w/o headache w/ status migrainosus 346.02 |
| Migraine w/ aura without HA 346.02 |
| Migraine w/ status migrainosus 346.92 |

You can delete diagnoses, or entire folders. And the same diagnosis can be placed in more than one folder.

Results are limited to top 100. Consider refining search.

Select

Cancel

To select a diagnosis, click on the folder you put it in, then double-click on the diagnosis.

Enter search term Search

| Clinical Description and ICD Code | Billing Description |
|-----------------------------------|---|
| CVA 434.91 | Cerebral artery occlusion, unspecified with cerebral infarction |
| Migraine 346.80 | Other forms of migraine without mention of intractable migraine |
| Parkinson's disease 332.0 | Paralysis agitans |

All Diagnoses
Patient's Diagnoses
Patient's Chronic Diagnoses
Favorites
CV
Metabolic
Misc
Neuro
Pulmonary
Categories
Abnormal Tests/L
Accucheck
Acute Otitis
All FX
Arrhythmias
Arthritis
ASTHMA
Asymptomatic
Bleeding/Menstru
Blood and Blood-
Breast
Breast needle biopsy

Here's something that might initially confuse users: Make sure you have nothing in the search box when you select a folder. For example, if you had **diabetes** in the search box & clicked on the **Neuro** folder, the results would be blank.

Add or Update Assessment

Assessments

My Plan

A/P Details

Today's Concerns/Reason for Visit:

1. Diarrhea 2. Shoulder pain 3. Squirrels follow me

(Select a row from any grid to add to Today's Assessments) Add Assessments on 1-click

Diagnosis History Show Chronic only

| Diagnosis Description | Code |
|---|--------|
| Acute bronchitis | 466.0 |
| Acute laryngitis without mention of obstruction | 464.00 |
| Allergic Rhinitis | 477.9 |
| Asymptomatic postmenopausal status (age-related) (natural) | V49.81 |
| Benign essential hypertension | 401.1 |
| Cerumen Impaction | 380.4 |
| Chronic frontal sinusitis | 473.1 |
| Constipation, unspecified | 564.00 |
| COPD | 496 |
| Cough | 786.2 |
| Disorders of bursae and tendons in shoulder region, unspecified | 726.10 |
| Dysuria | 788.1 |

Show Chronic Show My Tracked problems No active problems

| Description | Onset Date |
|----------------------------------|------------|
| Allergic rhinitis | |
| Benign essential hypertension | |
| Chronic obstructive lung disease | 02/24/2014 |

My Favorites Favorites Category: All Filter:

| Description | Code |
|-------------------------------|--------|
| Benign essential hypertension | 401.1 |
| Coronary artery disease | 414.00 |
| Cough | 786.2 |
| CVA | 434.91 |

Notice that your favorites appear in the My Favorites section of the Add or Update Assessment popup.

Also observe that you can narrow it down to the folders you created by clicking the Favorites Category dropdown. This gives you a quick way to add diagnoses to today's encounter without having to perform a search.

Ngkbn Diagnosis Favorite Mst

| Diag Favorite Name |
|--------------------|
| All |
| CV |
| Metabolic |
| Misc |
| Neuro |
| Pulmonary |

Refresh OK Cancel

This concludes the NextGen User Personalization demonstration.

My mechanic told me he couldn't repair
my brakes, so he made my horn louder.