Customizing NextGen® Patient Portal KBM 8.0 Templates

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The following terms may be used interchangeably throughout this document:

- NextGen Ambulatory EHR and NextGen EHR
- NextGen Practice Management and NextGen EPM
- NextGen Optical Management and NextGen Optik
- NextGen Document Management and NextGen ICS
- NextGen Patient Portal and NextMD
- NextGen Remote Patient Chart Synchronization and NextGen PatientSync
- NextGen Real Time Services and NextGen Real-time Transaction Server
- NextGen CHS and NextGen HIE

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Overview

With NextGen KBM 8.0 installed, you can create customizable templates for Past Medical History, Family History, Chronic Illnesses, Medications, and Allergies. You can package these templates as formsets and send them to a patient’s NextGen Patient Portal account to complete prior to their initial visit.

On the NextGen Patient Portal Web site, the patient opens the form and selects all check boxes that apply to their conditions, medications, allergies and histories.

After the patient has submitted the forms, you can review and import the forms in NextGen EHR as an encounter.

Note: To better define products offered by NextGen Healthcare to our clients, NextMD has been rebranded as NextGen® Patient Portal. The rebranding process will span over a number of NextGen releases through a series of continued enhancements to this product. Some of the references and screen shots, both within the product and those depicted in this manual may refer to either NextMD or Patient Portal.

How to Customize the Templates

To customize you NextGen Patient Portal KBM 8.0 templates:

1. Access Template Editor.
2. From the File menu, select Open.
   - The Open dialog box displays.
3. Select nxmd_spec_type and click Open.
The `nxmd_spec_type` template displays.

4. From the **File** menu, select **Copy Template**.

The **Copy Template** dialog box opens.

5. Enter the new **Template Name** based on the template type (for example. `nxmd_meds_form`, `nxmd_allergy_form`, etc.).

6. In the **Template Fields** section, select **Create new**.

7. When prompted to update the template links, choose **No**.

8. Repeat the steps above for the following template types as needed: Medication, Allergy, Past Medical History, Past Surgical History, Chronic Illnesses, and Family History.
How to Use the Customized Forms in NextGen EHR

To use the customized forms in NextGen EHR:

1. Access NextGen EHR.
2. From the File menu, select System/Practice Template.
   The Select dialog box displays.
3. Click the Practice tab.
4. In the Show section, select All.
5. Select the ngkbm_nxmd_template_config and click OK.
   The Ngkbm Nxmd Template Config template displays.
6. Right click in the grid and select Add New.
The Patient Portal template customization (nxmd_config) form displays.

7 Double-click the Template name field. The Ngkbm Ddp Templates list displays.

8 Select one of the templates you copied as described previously.

9 Click OK to return to the Patient Portal Template Customization popup.

10 Click in the Template type field. The Nxmd Template Type list displays.
11 Choose a **Type** and click **Close**.  

The *Patient Portal Template Customization* popup displays the template title and instructions.

![Patient Portal template customization](image)

12 Click the **down arrows** next to fields 1-20 to select which fields display in NextGen Patient Portal.

![Patient Portal template customization](image)

13 If needed, edit the **Field** label.

14 After making your selection, click **Save** and then **Close**.

15 Repeat the steps above for the remaining NextGen Patient Portal customized templates you created.

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**Publishing the Templates**

To publish the templates to the NextGen Patient Portal website:

1. Log on to **File Maintenance**.
2. Under Master Files, click **NextMD**, and then select **Online Forms Publisher**.
The *Publish Online Formsets* dialog box displays.

![Publish Online Formsets dialog box](image)

**Note:** If you already saved a formset, the *Properties* tab displays instead.

3. From the *Templates* menu, select **Add New Online Template Set**.

   The *Properties* tabbed page displays.

![Properties tabbed page](image)

4. On the *Properties* page:
   - Enter the **Online Form Set Name** and any **Patient Instructions** in the fields provided.
   - Select the **Prepopulate Demographic Templates with data when sending to a patient** check box.

5. Click the **Online Forms** tab.

6. Click the **Template** button.
The Select which EHR Templates are to be part of this online forms dialog box displays.

7 Select the six templates you created in Template Editor.
8 Set up your Recurring Forms and Routing Rules as needed.
9 Click Save.
10 Click the Publish button to upload the forms to the NextGen Patient Portal Web site.

Reference: For more information on publishing templates, please refer to the NextGen Patient Portal Configuration Guide.

Processing Submitted Templates

When you receive completed forms submitted by a patient, you can review and import the results.

1 Log on to NextGen EHR.
2 Open the NextGen Patient Portal Communications window.
3 Double-click the submitted form in the Online Forms Inbox folder.
   The Import Online Form dialog box displays.
4 Select a form in the Completed Forms section to view it.
5 From the Encounter list, select Create a new encounter.
6 Click the Accept All button to approve all forms.
   The approved forms are added to the selected encounter.
Reference: For more information on processing submitted templates, please refer to the NextGen Patient Portal Provider Guide for NextGen EHR.

Verifying Submitted Data in an Encounter
1 Select a patient and select the encounter created in the previous section.
2 Confirm data was uploaded after import for each template type as follows:
   ▪ Medications: Nothing to confirm.
   ▪ Allergies: Open the Allergy module and confirm that the submitted allergies selected are present.
   ▪ Open the Histories – OV template.
   ▪ In the Past Medical/Surgical grid, confirm that all submitted illnesses (disease) and procedures (management) are present
   ▪ In the Family grid, confirm that all submitted illnesses (diagnosis) are present
   ▪ Open the Diagnosis module and confirm that all submitted chronic illnesses are present
      Note: Because the Diagnosis module uses ICD9 codes, the disease/diagnosis name may appear differently.
   ▪ Open the Intake-OV template and confirm that all submitted chronic illnesses (problem) are present on the Chronic Problems grid.