Patient Generated Data and Online Forms

Presented By: Shannon Pultro and Brian Kelly

USER GROUP MEETING

UGM 2016 NOV 6-9
MANDALAY BAY, LAS VEGAS
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Clinical  Financial  Value Based Care Success  Patient Engagement  Technical

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6. Remember to hit “**Submit**” once you have answered the questions
Session Guidelines

• Silence all cell phones 📞

• Hold questions until end of the presentation if possible 🙋

• Refrain from personal discussion 🗣️
Agenda

- Life Cycle of Online Forms (Templates)
- Online Forms
  - KBM Patient Portal Templates (Online forms)
  - Custom Created Templates (Online Forms)
  - Publishing Form Sets
- Supported Functionality
- Interactive Medical History (IMH)
  - IMH - Discrete
Life Cycle of Online Forms (Templates)
Life Cycle of an Online form

- The template is assigned to the patient.
  - Enrollment
  - Manual Assignment
  - Attachments to communications
Life Cycle of an Online form

- Preprocessing Event
  - Demographic information is extracted and prepopulated
  - Copy Forward Data is prepopulated
  - The NextGen Communication Services fires the special “Prepopulate” triggers
  - Snap shots of picklists are taken
Life Cycle of an Online form

- **Delivery**
  - Template is posted to the website
  - Patient Receives the email notification
Life Cycle of an Online form

- **Completion**
  - Patient completes the template online
  - Template is delivered to the practice for importation
Life Cycle of an Online form

- Importation
  - Staff Member Imports the template
  - Template tables are populated
  - Post Data Import Triggers are fired.
Online Forms (Templates)
KBM Patient Portal Templates
Overview

• With NextGen KBM 8.0+ installed, you can create customizable templates for Past Medical History, Family History, Medications, and Allergies.

  • Utilize the “out-of-the-box” templates provided with KBM

• You can package these templates as form sets and send them to a patient’s NextGen Patient Portal account to complete prior to their (initial) visit.
Existing Online Forms (Templates) Available

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Display As Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>nxmd_demographics</td>
<td>Patient Portal Demographics</td>
</tr>
<tr>
<td>nxmd_FamilyHealthHX</td>
<td>Patient Portal – Family Health History</td>
</tr>
<tr>
<td>nxmd_PastMedHX</td>
<td>Patient Portal – Past Medical History</td>
</tr>
<tr>
<td>nxmd_PastSurgHX</td>
<td>Patient Portal – Past Surgical History</td>
</tr>
<tr>
<td>Nxmd_spec_type</td>
<td>Patient Portal – Spec Template</td>
</tr>
<tr>
<td>Nxmd_config</td>
<td>Ngkbm Nxmd Template Config</td>
</tr>
</tbody>
</table>
### Existing Online Forms (Templates) Available

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Display As Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>nxmd_social_hx</td>
<td>Patient Portal – Social History</td>
</tr>
<tr>
<td>nxmd_ob_SHX</td>
<td>Patient Portal – OB Social Hx</td>
</tr>
<tr>
<td>nxmd_peds_sochx1</td>
<td>Patient Portal – Peds Social HX 1</td>
</tr>
<tr>
<td>nxmd_peds_sochx2</td>
<td>Patient Portal – Peds Social HX 2</td>
</tr>
<tr>
<td>nxmd_peds_sochx3</td>
<td>Patient Portal – Peds Social HX 3</td>
</tr>
<tr>
<td>nxmd_meds_allerg</td>
<td>Patient Portal – Medications and Allergies</td>
</tr>
</tbody>
</table>
NGKBM Nxmd Template Config
### NGKBM Nxmd Template Config

#### Custom Patient Portal Templates:

<table>
<thead>
<tr>
<th>Display</th>
<th>Template Name</th>
<th>0.2 MICRON FILTER</th>
<th>0.3% SODIUM CHLORIDE</th>
<th>0.9% SODIUM CHLORIDE</th>
<th>1,2-HEXANEDIOL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Template Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Custom Client Information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past Medical History</td>
<td>Past Medical</td>
</tr>
<tr>
<td>Family History</td>
<td>Family History</td>
</tr>
<tr>
<td>Aneurysm</td>
<td>Abdominal aortic aneurysm</td>
</tr>
<tr>
<td>Appendicitis</td>
<td>Abdominal</td>
</tr>
<tr>
<td>Acute appendicitis</td>
<td>appendicitis</td>
</tr>
<tr>
<td>Hypertension</td>
<td>with appendix</td>
</tr>
<tr>
<td>Diabetes</td>
<td>appendix</td>
</tr>
<tr>
<td>Cancer</td>
<td>Cancer</td>
</tr>
<tr>
<td>Depression</td>
<td>Cancer</td>
</tr>
<tr>
<td>Congenital muscular hypertrophy-cerebral syndromes</td>
<td>Cancer</td>
</tr>
<tr>
<td>Angina, grandparent</td>
<td>Cancer</td>
</tr>
</tbody>
</table>

#### Alergics:

<table>
<thead>
<tr>
<th>Display</th>
<th>Template Name</th>
<th>0.2 MICRON FILTER</th>
<th>0.3% SODIUM CHLORIDE</th>
<th>0.9% SODIUM CHLORIDE</th>
<th>1,2-HEXANEDIOL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Template Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### How to customize Patient Portal templates:

1. Double-click a row to add or edit items in that row.
2. Customize the template according to your specific needs.
NGKBM Nxmd Template Config

Patient Portal Template Customization

The following is used to configure the Patient Portal templates copied from nxmd_spec_type template.

Custom Patient Portal templates (Double-click a row to add or edit items in that row.)

<table>
<thead>
<tr>
<th>Template Type</th>
<th>Template Name</th>
<th>Display 1</th>
<th>Display 2</th>
<th>Display 3</th>
<th>Display 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allergies</td>
<td>nxmd_spec_type_RD_All</td>
<td>(D)-L-MONONITRATE FLAVOR</td>
<td>0.3 % SODIUM CHLORIDE</td>
<td>0.9 % SODIUM CHLORIDE</td>
<td></td>
</tr>
<tr>
<td>Family History</td>
<td>nxmd_spec_type_RD_FH</td>
<td>Abdominal aortic aneurysm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family History</td>
<td>nxmd_FamilyHealthX</td>
<td>Hypertension</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Past Medical</td>
<td>nxmd_PastMedHX</td>
<td>Acute appendicitis with appendiceal abscess</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>nxmd_PastSurgHX</td>
<td>Abdominal aortic aneurysm</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional options:
- Open
- Delete
- Add New
- Sort Special
- Cancel
- Default Sort
NGKBM Nxmd Template Config

### Patient Portal template customization

<table>
<thead>
<tr>
<th>Disease</th>
<th>SNOMED code</th>
<th>Field label</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Acute appendicitis with appendix abscess</td>
<td>266439004</td>
<td>Acute appendicitis with appendix abscess</td>
</tr>
<tr>
<td>2. Malignant neoplastic disease</td>
<td>363346000</td>
<td>Cancer</td>
</tr>
<tr>
<td>3. Congenital muscular hypertrophy-cerebral syr</td>
<td>55016009</td>
<td>Congenital muscular hypertrophy-cerebral syr</td>
</tr>
</tbody>
</table>

**How to customize**

1. In template editor, type of template would be named `nxml.Patient.HX`.  
2. Launch the configuration.
Past Surgical History

Please select any of the surgeries or procedures you have ever had.

- Abdominal aortic aneurysm
- Appendicitis of a pelvic appendix
- Cancer

Comments:
How to Use the “Spec Type Template”

• Make a copy of the template in template editor
  • Know which category content you plan to configure this copied template for and possibly name it accordingly.

• Set up the template in System/Practice template NGKBM NXMD Template Config

• Publish template via a form set
**“Spec Type” template**

![Image showing a table with columns for Name, Type, Modified by, and Modify-Time, with specific entries highlighted.](image_url)
“Spec Type” template - copy

Once you copy this template, you don’t need to modify anything, just name the template accordingly. Your copied template should look just like this one.
“Spec Type” template - configure

These checkboxes are what you will define by the NGKBMT_Nxmd_Template_Config workflow.
Copied “Spec Type” template - configured

<table>
<thead>
<tr>
<th>Template Type</th>
<th>Template Name</th>
<th>Display 1</th>
<th>Display 2</th>
<th>Display 3</th>
<th>Display 4</th>
<th>Display 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family History</td>
<td>nxmd_FamilyHealthHX</td>
<td>Hypertension</td>
<td>Diabetes</td>
<td>Depression</td>
<td>Cancer</td>
<td></td>
</tr>
<tr>
<td>Past Medical History</td>
<td>nxmd_PastMedHX</td>
<td>Acute appendicitis</td>
<td>Cancer</td>
<td>Congenital muscular</td>
<td>Hypertrophy-cerebral syndrome</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>with appendix</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>abscess</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Past Surgical History</td>
<td>nxmd_PastSurgHX</td>
<td>Abdominal aortic</td>
<td>Appendicitis</td>
<td></td>
<td>Cancer</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>aneurysm</td>
<td>of a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>pelvic appendix</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family History</td>
<td>nxmd_spec_type_RD_FH</td>
<td>Abdominal aortic</td>
<td>ADD/ADHD</td>
<td>Alzheimer's disease</td>
<td>Anxiety</td>
<td>Angina, grandparent</td>
</tr>
<tr>
<td></td>
<td></td>
<td>aneurysm</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allergies</td>
<td>nxmd_spec_type_RD_All</td>
<td>(D)-LIMONENE</td>
<td>0.2 MICRON</td>
<td>0.3 % SODIUM</td>
<td>0.9 % SODIUM</td>
<td>1,2-HEXANEDIOL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FLAVOR</td>
<td>ATTACHMENT</td>
<td>CHLORIDE</td>
<td>CHLORIDE</td>
<td></td>
</tr>
</tbody>
</table>

How to customize Patient Portal templates:

1. In template editor, copy the template nxmd_spec_type. It is recommended to name the template according to the specialty and type of template. You must choose “Create New” as the Template Fields option. For example a Pediatric medication template would be named nxmd_peds_meds.

2. Launch the configuration popup from the Custom Patient Portal templates grid. Right-click and select add new.
Custom Online Form (template)
Create Your Own Forms

• May develop your own forms (templates).

• Understand supported functionality within Portal as you develop.
Create Template – Sample

Patient Survey

5 - Excellent, 4 - Very Good, 3 - Good, 2 - Fair, 1 - Poor

1) LENGTH OF TIME YOU WAITED TO BE SEEN FOR YOUR APPOINTMENT?

2) OVERALL, HOW WOULD YOU RATE YOUR EXPERIENCE TODAY?

3) LENGTH OF TIME SPENT WITH THE PERSON YOU SAW TODAY?

4) GETTING THE HELP THAT YOU NEEDED TODAY?

5) THE PERSONAL MANNER OF THE PERSON YOU SAW TODAY?

6) THE COURTESY OF OUR STAFF?

7) CLEANLINESS OF OUR OFFICE?

8) OVERALL IMPRESSION OF PRACTICE RESPONSE TIME FOR MESSAGES, APPOINTMENT REQUESTS AND PRESCRIPTION RENEWAL REQUESTS SENT THROUGH PATIENT PORTAL?
Custom Online Form - Sample

Patient Survey

1) LENGTH OF TIME YOU WAITED TO BE SEEN FOR YOUR APPOINTMENT?
2) OVERALL, HOW WOULD YOU RATE YOUR EXPERIENCE TODAY?
3) LENGTH OF TIME SPENT WITH THE PERSON YOU SAW TODAY?
4) GETTING THE HELP THAT YOU NEEDED TODAY?
5) THE PERSONAL MANNER OF THE PERSON YOU SAW TODAY?
6) THE COURTESY OF OUR STAFF?
7) CLEANLINESS OF OUR OFFICE?
8) OVERALL IMPRESSION OF PRACTICE RESPONSE TIME FOR MESSAGES, APPOINTMENT REQUESTS AND PRESCRIPTION RENEWAL REQUESTS SENT THROUGH PATIENT PORTAL?

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Custom Online Form - Sample

Patient Survey

1) LENGTH OF TIME YOU WAITED TO BE SEEN FOR YOUR APPOINTMENT?
2) OVERALL, HOW WOULD YOU RATE YOUR EXPERIENCE TODAY?
3) LENGTH OF TIME SPENT WITH THE PERSON YOU SAW TODAY?
4) GETTING THE HELP THAT YOU NEEDED TODAY?
5) THE PERSONAL MANNER OF THE PERSON YOU SAW TODAY?
6) THE COURTESY OF OUR STAFF?
7) CLEANLINESS OF OUR OFFICE?
8) OVERALL IMPRESSION OF PRACTICE RESPONSE TIME FOR MESSAGES, APPOINTMENT REQUESTS AND PRESCRIPTION RENEWAL REQUESTS SENT THROUGH PATIENT PORTAL?
Custom Online Form - Sample

Patient History

Patient Survey Sample

10/14/2016 04:12 PM EDT
10/13/2016 11:17 AM EDT
10/10/2016 09:14 AM EDT
10/03/2016 03:03 PM EDT

Patient Survey

5 - Excellent, 4 - Very Good, 3 - Good, 2 - Fair, 1 - Poor

1) LENGTH OF TIME YOU WAITED TO BE SEEN FOR YOUR APPOINTMENT?

2) OVERALL, HOW WOULD YOU RATE YOUR EXPERIENCE TODAY?

3) LENGTH OF TIME SPENT WITH THE PERSON YOU SAW TODAY?

4) GETTING THE HELP THAT YOU NEEDED TODAY?

5) THE PERSONAL MANNER OF THE PERSON YOU SAW TODAY?

6) THE COURTESY OF OUR STAFF?

7) CLEANLINESS OF OUR OFFICE?

8) OVERALL IMPRESSION OF PRACTICE RESPONSE TIME FOR MESSAGES, APPOINTMENT REQUESTS AND PRESCRIPTION RENEWAL REQUESTS SENT THROUGH PATIENT PORTAL?
Custom Online Form - Reporting

- Once this custom Patient Survey template is submitted by the patient, the practice imports it into the patient’s chart.

- Practice can then create reports or queries to pull out the data and perform metrics to see how well they are doing overall in the office form their patient perspectives.
Publishing Form Sets
Publishing Templates

• Create Form Set for patients to fill out

• Configuration Options
  • Prepopulating with Data
  • Automatically sending forms as part of an enrollment
  • Assigning templates to the Form Set
  • Recurrence
  • Routing
Online Form Set - Data Pre-population
Online Form Set - Data Pre-population

- When the “Pre-populate flag is set” the following data is fetched
  - Data from demographic tables
  - Medical Record Template fields with the “Copy Forward” attribute
  - The “Pre-populate” special event will fire.
Online Form Set - With New Enrollment

Send this online form set automatically as part of a patient enrollment.

Prepopulate Demographic Templates with data when sending to a patient.
Online Form Set - With New Enrollment

• Regardless of which enrollment method is used, the new enrollment will execute the online form set to be sent to the patient as a new message.
Online Form Set - Assigning Templates
Online Form Set - Recurrence

Automatically send this template for the patient to fill out on a periodic basis

Repeat every [ ] Year(s)
up to [ ] times (enter 0 to repeat)
Online Form Set – Routing Rules

This template set is of the following type:

- Est Pt Packet

(These values are defined in the routing rules editor)

When a patient completes this form set, send a task list item to:

- Name
- Dr. Jones
- John Smith

(These values are defined in the routing rules editor)
Online Form Set – Advanced

This template set was uploaded on 6/6/2016 6:44:05 PM
Online Form Set – Actions

Publish  Publish All  Save  Close
Supported Functionality
Instant Medical History (IMH)
IMH – Current Solution
Interactive Medical History (IMH) Forms

• Base package of health questionnaires that may be sent to patients.
• Practice to determine which questionnaires they want staff to have available within system
• IMH Forms may be sent to patients from EHR only
Interactive Medical History (IMH) Forms

• No cost for this feature

• Requires a Symphonia license which can be applied via NG Support if it was not part of the installation
  • Reach NG Support prior to implementing this feature
File Maintenance – IMH Configuration
Sending IMH Form to Patient
IMH Form – Patient Workflow

Welcome Capri Testing (+1)! Last logged in: 9/20/2016, 4:34 PM

Please answer the following interactive questions

Back to Inbox | Save | Print |

Patient Portal Team Practice1
9/22/2016 Capri Testing’s Excuse for Work

Patient Portal Team Practice1
9/20/2016 Capri Testing’s Flu Shot

Patient Portal Team Practice1

Excuse for Work Questionnaire

Do you need an excuse from work or school for your visit today?

- Yes
- No
- Don’t know

« BACK NEXT » SKIP QUESTION
CHIEF COMPLAINT
Capri Testing is a 36 year old female. The "Excuse for Work" screening questionnaire was administered by the Instant Medical History Software. The following are her responses.

RISK FACTORS

PATIENT ISSUES
She reported: Needs excuse from school or work.
Instant Medical History – Discrete
NextGen EHR with Instant Medical History

#1 Physician Complaint - Too much time spent on documentation and using EHR

Enable patients to begin their own medical history from the waiting room or home.

- A hosted web service that allows patients to complete clinical interviews/questionnaires.
- Patient responses passed as discrete data to EHR/KBM.
- Summary document attached to patient’s encounter.
NextGen EHR with Instant Medical History

Key Benefits

- Reduce the office visit time by 3-4 minutes
- Reduces data entry time and EHR clicks
- Increase the number of patients seen each day
- Enhances patient communication and satisfaction
- Increases the documentation quality significantly
NextGen EHR with Instant Medical History

Matthew Ferrante, PhD
Chief Executive Officer
Supplemental Materials
Materials

This slide deck and any additional supplemental materials pertaining to this slide deck will be available on www.oneugm.com.

- As well as inside the UGM mobile app, these will be listed where the presentation is listed underneath this session.

Supplemental Materials:

- patient_survey_sample.TXML
- Clipboard3.jpeg
- Customizing NextGen Patient Portal KBM 8.pdf
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Please take a moment to complete a brief survey regarding this session.

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3. Select “Sessions”
4. Search for and select this session Patient Portal – Patient Generated Data and Online Forms
5. From the sessions details screen, select “Rate this Session”
6. Remember to hit “Submit” once you have answered the questions