

GET YOUR
“NEXTPERTISE™”

ON

QSiDental | UGM

Presenter(s):

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Topic

QSiDental CPS Best Practices

Level

Tuesday, November 13 – 9:15AM to 10:30AM

Things our lawyers make us say...

Neither NextGen Healthcare nor any presenter at the Users Group Meeting is engaged in rendering legal or other professional advice and this presentation is not a substitute for the advice of your attorney, accountant and/or other professional advisor.

Session Guidelines

- Turn off all cell phones & pagers
- Questions will be addressed at the end of the presentation
- Refrain from personal discussion

QSiDental CPS Best Practices

A best practice is defined as a technique or methodology that, through experience and research, has proven to reliably lead to a desired result.

- User Setup
- Document categories
- Filters
- Treatment Plan Groups
- Provider Daily Summary
- Patient Summary Report
- Provider Approvals
- Documents and Forms
- User Access Report
- Close Patients Chart at End of Visit

User Setup

- Each user should have a private password
- Mnemonics can now be up to six characters
- Only Clinically Authorized users can edit other users notes

The 'Edit User' window, General tab, displays the following fields and options:

- Id:** 50
- Other Id:** 0
- Login Name:** Ethridge, Karen
- Mnemonic:** KETHR| (Coded name or abbreviation)
- PMS Account Id:** 0-156
- PMS Employee #:** 32
- Logon Provider:** [Dropdown]
- Hygienist:** [Dropdown]
- Practice:** QSI IPS Dev Pub System
- Default Filter:** [Dropdown]
- Use default provider's filter
- Default Toolbar:** Cindy's toolbar
- Use default provider's toolbar
- Approval authorized
- Chart items entered by this user require approval
- Clinical User

The 'Edit User' window, Security tab, displays the following fields and options:

- Old Password:** [Text Field]
- New Password:** [Text Field]
- Confirm New Password:** [Text Field]
- Last Login:** 11/03/2012
- Password Last Modified:** 11/03/2012
- Logging Level:** 15
- Status:** Active
- Authorized Administrator
- Access Options:**

	View	Add	Edit	Delete
Chart Items:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Perio Charts/Screenings:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Video Images:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Setup:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Info:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chart Fees:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Authorization:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Document Categories

- Easy setup
- Find document categories faster
- Supports multiple key words
- Key word(s) do not need to be part of description
- Case matters – make sure key words are typed in the same

Edit Document Category

Category Description:

Category Filter Keywords:

Edit Document Category

Category Description:

Category Filter Keywords:

Add a Document to the Chart

1. Select Document Category :

Filters	Categories
<input type="text" value="Admin"/>	<input type="text" value="Drivers License"/>
<input type="text" value="Consent"/>	<input type="text" value="Insurance Card"/>
<input type="text" value="Ortho"/>	<input type="text" value="Insurance EOB"/>
	<input type="text" value="Insurance Sheet"/>
	<input type="text" value="Pre Auths"/>

Filters

- More efficient way to find chart items
- Sift by dates
- Can use and, or and not in Descriptions Containing box

Edit Filter

Description: All Providers

Period: All Dates Start Date: / / End Date: 11/04/2012

Provider: (All Providers)

User: (All Users)

Display on Tooth Chart

Services: Existing, Completed, Conditions

Treatment Plans: Planned, Pending, Accepted, Rejected

Sort By:

Date, Provider, Tooth, Time entered

Date, Time entered

Date, Tooth, Time entered

Display in History Detail

Services: Existing, Completed, Conditions, Fees

Treatment Plans: Planned, Pending, Accepted, Rejected, Include n/a (no longer applicable) items

Screenings/Exams: Perio Chartings, Perio Screenings, Video/Images, Include deleted (strickethrough) items

Notes: Description, Text, Documents

Description column width: Tooth Chart, Treatment Plan (Small, Medium, Wide)

Set to Standard Clear All Descriptions containing: |

OK Cancel

Treatment Plans

Treatment Plan Form

- Permanent Record of what was presented at any given time
- Total by procedure group and grand total
 - Groups can be set to be included or not included in totals
- Location Address drop down allows selection
- Alternative Treatment Options
- Warnings/Risks explanation and Comments
- Signed by Patient

PRACTICE NAME OR LOGO

Patient Name: **BRIAN ABBOTT** Id: **23** DOB: **07/15/1958** Sex: **M**

Phase	Status	Service	Description	Tooth	Surface	UCF	Amount	Prim	Sec	Pat
1		<i>Next visit (4 Units) Entered:10/28/12</i>								
	Planned	D0120	Periodic Oral Evaluation			0.00	0.00	0.00	0.00	0.00
	Planned	D0274	Bitewings - Four Films			0.00	0.00	0.00	0.00	0.00
	Planned	D1119	Prophylaxis Adult			0.00	0.00	0.00	0.00	0.00

Group Total:						0.00	0.00	0.00	0.00	0.00
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Phase	Status	Service	Description	Tooth	Surface	UCF	Amount	Prim	Sec	Pat
2		<i>2nd visit (6 Units) Entered:10/28/12</i>								
	Planned	D2752	Crown - Porcelain Fused To Noble Metal	22		969.00	969.00	0.00	0.00	969.00
	Planned	D1351	Sealant - Per Tooth	10		45.00	45.00	0.00	0.00	45.00

Group Total:						1014.00	1014.00	0.00	0.00	1014.00
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GRAND TOTAL:						1014.00	1014.00	0.00	0.00	1014.00
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Alternative Explained:

Warnings/Risk Advised:

The Treatment Plan recorded above and alternatives have been described to me. I fully understand the rights, benefits and alternatives of the recommended treatment presented. By signing below I acknowledge that I understand the information presented and I have had all my questions answered satisfactorily.

Comments:

Patient/Guardian Signature:

Date: **10/28/2012**

Electronic Treatment Plan Form



Treatment Plan Grouping

- Grouping plans makes it clear to everyone what's planned for the patient
- Creating preset groups makes grouping more efficient
- Easy way to communicate scheduling needs to administrative personnel

11/04/12	KETHRZ 1	030		1st Visit (4 Units)			1st Visit	0.00
11/04/12	KETHRZ	030	0714	SURG RMV-ERUPTED TTH	1		1st Visit	0.00
11/04/12	KETHRZ	030	0714	SURG RMV-ERUPTED TTH	16		1st Visit	0.00
11/04/12	KETHRZ	030	0714	SURG RMV-ERUPTED TTH	17		1st Visit	0.00
11/04/12	KETHRZ	030	0714	SURG RMV-ERUPTED TTH	32		1st Visit	0.00
11/04/12	KETHRZ 2	030		2nd visit (3 Units)			2nd visit	0.00
11/04/12	KETHRZ	030	0216	AMALGAM 3 SURF-PERM	3	MOD	2nd visit	0.00
11/04/12	KETHRZ	030	0230	RESIN-1 SRF-ANTERIOR	6	F	2nd visit	0.00
11/04/12	KETHRZ 19	030		Pre-auth sent			Pre-auth sent	700.00
11/04/12	KETHRZ	030	0275	CROWN-PORC TO GOLD	15		Pre-auth sent	700.00

Provider Daily Summary

- Found under the Reports menu
- Used to ensure correct entry of patient services
- Providers can easily view the report at the most convenient time

The screenshot shows a software window titled "Daily Summary Report". At the top, there are two date input fields, both containing "11/04/2012", with the word "to" between them. To the right of the second date field is a checkbox labeled "All Providers" which is currently unchecked. Below this is a section titled "What to Print" containing a grid of checkboxes for various report categories: Demographics, Video Exams, Planned Services, Perio Chartings, Notes (checked), Completed Services (checked), Perio Screenings, Documents, Existing Services, and Conditions. At the bottom left of the "What to Print" section are two buttons: "Clear All" and "Set All". At the bottom right of the window is a checkbox labeled "Show Fees" which is checked.

Provider Daily Summary Report

Printed by User Id: 50

QSI IPS
 16701 NE 80th Street
 Redmond, WA 98052
 (425)857-3443

11/04/2012 08:12 pm Page 1 of 2

DAILY SUMMARY REPORT FOR PROVIDER 030 (11/04/2012 - 11/04/2012)

<u>Patient</u>	<u>Date</u>	<u>Code</u>	<u>Type</u>	<u>Description</u>	<u>Tooth</u>	<u>Surface</u>	<u>Fee</u>	<u>Prov</u>
0002240 SMITH MARY	11/04/12	02140	Completed	AMAL 1 surface	22	F	65.00	030
Next Appointment: None							Subtotal:	65.00
1000331 MOEDER BILL	11/04/12		Completed	PRIMARY DEDUCTIBLE			0.00	030
1000331 MOEDER BILL	11/04/12	02160	Completed	AMALGAM 3 SURF-PERM	13	MOD	150.00	030
1000331 MOEDER BILL	11/04/12		Text Note	Amalgam Topical Used Dyclone. Anesthetic used: Xylocaine 2% w/epinephrine. Carpules Used: 1. Base Used: None. Desensitizer: None. Bonding Agent: None. KCP Not Used. Rubber Dam Not Used. Patient Behavior - Patient was cooperative. Checked occlusion. Advised patient that tooth may be sensitive to hot and cold for a while and to avoid eating hard foods for 24 hours.	13		0.00	030
Next Appointment: None							Subtotal:	150.00

Patient Summary Report

- Found under Reports menu
- Can now include Stick Notes and Alerts
- Option to include fees or not

The screenshot shows a software window titled "Patient Summary Report". At the top, it has a "Range of Dates" field with "11/05/2012" entered in two boxes, followed by a "to" label and another "11/05/2012" box. To the right is a checkbox labeled "Limit planned services to within the date range". Below this is a section titled "What to Print" containing a grid of checkboxes: "Demographics", "Video Exams", "Planned Services", "Sticky Notes", "Perio Chartings", "Notes", "Completed Services", "Alerts", "Perio Screenings", "Documents", "Existing Services", and "Conditions". There are also "Clear All" and "Set All" buttons. A "Show Fees" checkbox is located at the bottom right of this section. Below the "What to Print" section is a "Sort by:" section with three radio buttons: "Patient #", "Patient Name", and "Appointment time". At the bottom of the window is an "Additional Notes:" label above a large empty text area. At the very bottom are "Print" and "Close" buttons.

Patient Summary Report

Printed by User Id: 234

CPS QA TEST CLINIC New

11/05/2012 04:42 pm Page 1 of 1

Street Address
City, St 12345
(714)731-7171

SUMMARY REPORT FOR MARTHA SAMUALS

Patient # 0000610

Chart #:

Patient: MARTHA SAMUALS

DOB: 07/22/1944

Last Visit: 11/05/2012

Next Appointment: None

Sticky Notes:

taking coumidin

Alerts:

.Blood thinners

<u>Date</u>	<u>Provider</u>	<u>Service Code</u>	<u>Type</u>	<u>Description</u>	<u>Tooth</u>	<u>Surface</u>
11/05/12	anjuri Srinivas	02750	Completed	CROWN-PORC TO GOLD	29	
11/05/12	anjuri Srinivas	02140	Completed	AMAL 1 surface	30	O
11/05/12	anjuri Srinivas	02160	Completed	AMALGAM 3 SURF-PERM	31	MOD

-END-

Approvals

Approval Authorization Required

User:

Password:

Chart Note

Description:

Note Date: Entered:

Provider:

Tooth #s:

Chart Note

Description:

Note Date: Entered:

Provider:

Tooth #s:

Patient List

Name (first and/or last) Birthdate Person # Chart # Home Phone #

Display patients with appointments
Appointment date: Provider:

Advanced Search Options

Display patients with charts needing approval

Chart items entered by:

Chart items entered on my behalf.

Chart items entered on behalf of anyone.

Include inactive patients

Hide personal information

Last Name	First Name	Birth Date	Person #	Home Phone	Entry Date	User
Knealy	Ralph		91		6/23/2011	Bentz, Bruce
Brown	Dennis		122		4/13/2012	Bentz, Bruce
Wilson	Debbie		8		4/26/2012	Bentz, Bruce
Dobbs	Ann		25		5/8/2012	Bentz, Bruce
Bennett	Christine		225		5/23/2012	Bentz, Bruce
Russell	Karen		10		7/26/2012	Bentz, Bruce
Brady	Marsha		70		8/7/2012	Bentz, Bruce
Brown	John		124		8/11/2012	Bentz, Bruce
Connery	Sean		256		8/20/2012	Bentz, Bruce
Stearns	John		337		8/25/2012	Bentz, Bruce

- Approvals can be over the shoulder or from the Patient List Advanced Search Options lookup.
- User approval for Residents or new staff or “on behalf of” approvals can be used.
 - “On behalf of approvals” now only apply to completed items and notes and they lock once the approval is posted.
- Only the provider who approved the item can edit it after approval.



Approval Management

Office Managers can now review charts that have items that have not been approved. They can easily determine if a provider is not completing the required chart approvals.

Advanced Search Options

Display patients with charts needing approval

Chart items entered by:

Chart items entered on my behalf.

Chart items entered on behalf of anyone.

Include inactive patients

Hide personal information

Last Name	First Name	Birth Date	Person #	Home Phone	Entry Date	User
Dacaney	Gerald	11/04/1940	193	(404) 999-9999	6/7/2011	Charles Cook
Dacaney	Gerald	11/04/1940	193	(404) 999-9999	6/7/2011	Joseph Barclay
Hathaway	John	10/03/1967	220	(715) 847-8837	6/9/2011	Joseph Barclay
Anton	Mary	10/19/1959	93	(404) 298-3479	6/8/2011	Maureen Brown
Knealy	Ralph	11/13/1987	91	(214) 854-7574	6/23/2011	Bentz, Bruce
PACE	SUSAN	04/01/1942	12	(215) 467-9937	7/6/2011	Joseph Barclay
PACE	SUSAN	04/01/1942	12	(215) 467-9937	7/6/2011	Charles Cook

Documents and Forms

Scan vs Fill in (HTML)

- Reporting capabilities
- Copy forward
- Mandatory fields
- Improved document importing options
- What data can be captured?
 - Past vs Present
- Newest features
 - Form responses can post codes or conditions

User Access Report

User Activity Report [X]

From: To:

User(s): All Users

Notes:

NextGen EDR

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USER SUMMARY REPORT FOR USER JAMES LASAPONARA (2)

Date	Patient	Area	Comment
09/04/2012 12:59:11		Logon	Logon
09/04/2012 12:59:14	Brown, Mary (331)	Patient Access	Accessed
09/04/2012 12:59:56	Doe, Jane (130)	Patient Access	Accessed
James Lasaponara (2) 09/04/2012 13:00:06	Doe, Jane (130)	Patient Access	Accessed
James Lasaponara (2) 09/04/2012 13:00:14	Doe, Jane (130)	Tooth Chart	New item added
James Lasaponara (2) 09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	Item modified
James Lasaponara (2) 09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	New item added
James Lasaponara (2) 09/04/2012 13:00:22	Doe, Jane (130)	Tooth Chart	Operatory note
James Lasaponara (2) 09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
James Lasaponara (2) 09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
James Lasaponara (2) 09/05/2012 06:50:00		Logon	Logon
James Lasaponara (2) 09/05/2012 06:50:00	Doe, Jane (130)	Patient Access	Accessed
James Lasaponara (2) 09/05/2012 16:15:18		Logon	Logon
James Lasaponara (2) 09/05/2012 16:24:04	Thomas, Sandra (112)	Patient Access	Accessed
James Lasaponara (2) 09/05/2012 16:25:58	Thomas, Sandra (112)	Patient Access	Accessed
James Lasaponara (2) 09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
James Lasaponara (2) 09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added

Patient Access Report

Patient Activity Report ✖

From: To:

Patient:

Notes:

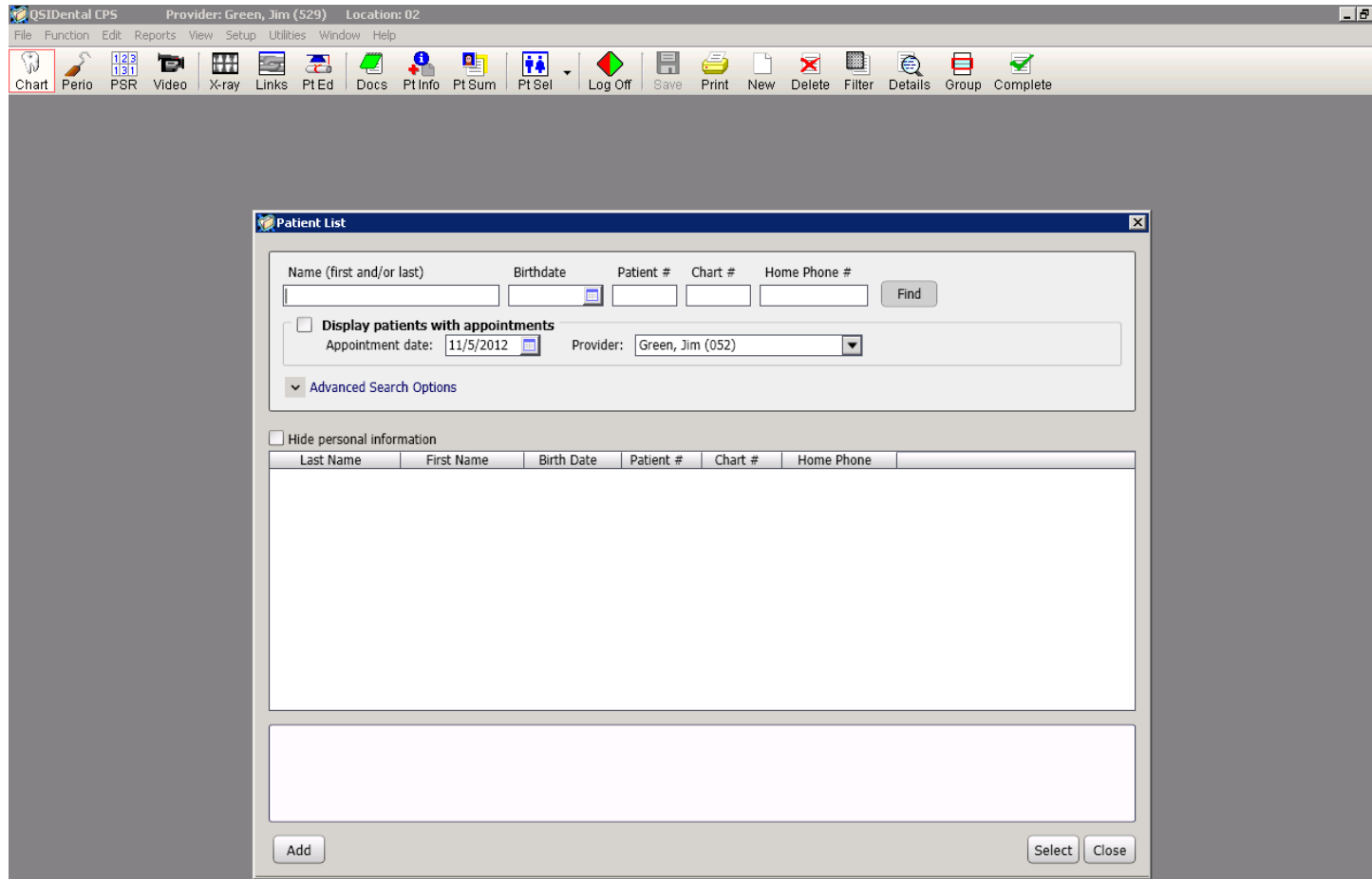
NextGen EDR 09/28/2012 02:31 pm Page 1 of 4

() -

USER SUMMARY REPORT FOR SANDRA THOMAS (112)

<u>Date</u>	<u>Patient</u>	<u>Area</u>	<u>Comment</u>
09/05/2012 16:24:04	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:25:58	Thomas, Sandra (112)	Patient Access	Accessed
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 16:50:00	Thomas, Sandra (112)	Tooth Chart	Operatory note
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:32	Thomas, Sandra (112)	Tooth Chart	New item added
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted
09/05/2012 17:20:39	Thomas, Sandra (112)	Tooth Chart	Item deleted

Closed Patient Chart



Any Questions?