

GET YOUR
“NEXTPERTISE™”

ON

QSiDental | UGM

Presenter(s):

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Topic

Effective Dental Clinic Management for NextGen®

EDR

Level

Tuesday, November 13 – 1:45PM to 3:00PM

Things our lawyers make us say...

Neither QSiDental 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

Effective Dental Clinic Management

- **NextGen PM Scheduling**
 - Templates and Status Colorization
 - Appointment Search Ahead
 - Wait List
 - Recall Plans
- **NextGen PM Worklog Manager and Tasking**
- **NextGen EDR Features**
 - Service Restrictions
 - Incomplete Treatment Report
 - Diagnosis Codes / Local Codes
 - NextGen PM Appointment Status Viewable from Patient List Screen in EDR
 - Date of Last Dental Visit Viewable from Patient List Screen in EDR
 - User and Patient Access Reports

Schedule Templates / Colors

10:00 A	Smith, James - DR
10:15 A	
10:30 A	Thomas, Sandra - DR - Kept - Chkd-Out
10:45 A	
11:00 A	Douglas, Robert - DR
11:15 A	
11:30 A	Thompson, Ellen - DR - Kept
11:45 A	
12:00 P	
12:15 P	
12:30 P	
12:45 P	Doe, Jane - DEN - Kept
1:00 P	
1:15 P	Davis, John - DEN
1:30 P	
1:45 P	Davis, Diana - DEN
2:00 P	
2:15 P	Smith, Jan - DEN
2:30 P	
2:45 P	Jones, Anita - DEN

- Event Template Setup / Defaults
- Workflow Status Colors
 - Easy to use – right click to change status
 - Wide range of colors and options
 - Updates PM and AEHR at the Same Time
 - Kept & Checked Out Update Automatically

Appointments Preferences

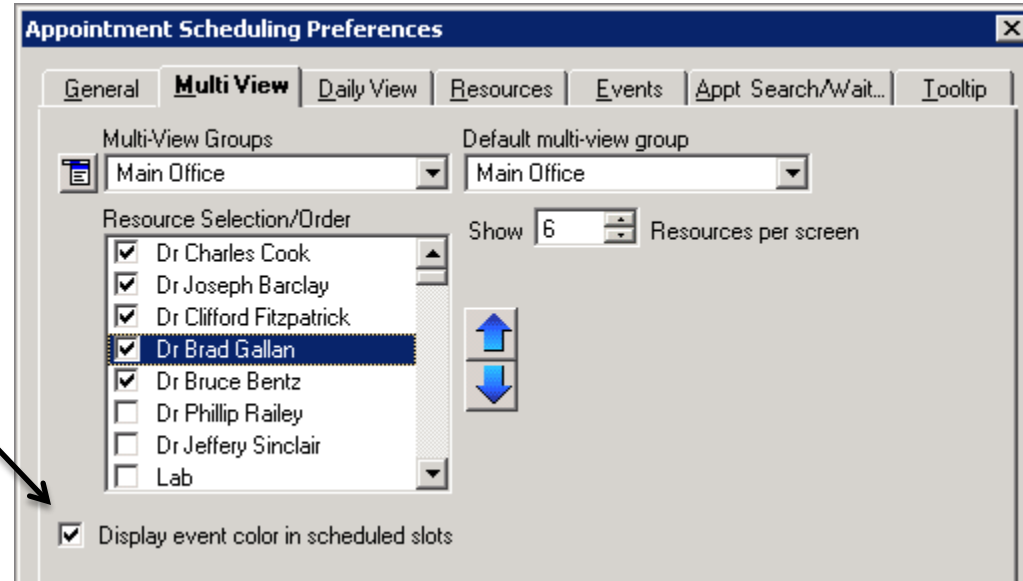
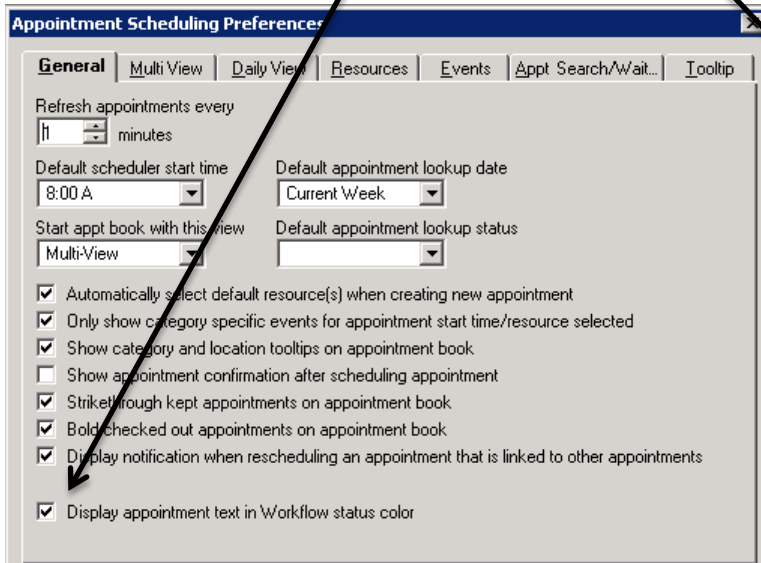
Appointment Status	Text Color
Ready for Nurse	Blue
Kept	Purple
With Nurse	Blue
Complete	Grey
Ready for Dr	Green
Pre-Op Tests	Purple
In Chair	Teal
Pt to ASC	Blue
Ready for Clinician	Red
Code Submitted	

Refresh Appointments every minute(s)

OK Cancel

Set Color Options

EPM Setup Changes



Appointment Search Ahead

Appointment Search Ahead

Search Criteria

Event
 Dental Restorative-Major (Duration: 60)

Service Location
 Main Office

Resources/Classes

- Dr Joseph Barclay
- Dr Charles Cook
- Dr Bruce Benz
- Dr Clifford Fitzpatrick
- Dr Debra Morrison
- Dr Howard Tanner
- Dr Jeffrey Sinclair
- Dr Nancy Guimere

Date/Time Range
 Start Date: 09/02/2011
 End Date: / /
 Find next: 5 Appts

Start Time: 9:15 A
End Time: 1:30 P

Day of Week
 Sun Mon Tue Wed Thu Fri Sat No Preference

Patient
 Search Nearest Location
 Search within 1 miles of zip
 Use employer zip code

Zip Code: _____

Clear Find Wait List Close

Appointment Search Ahead

Search Criteria

Event
 Dental Evaluation (Duration: 30)

Service Location
 Main Office

Resources/Classes

- Dr Joseph Barclay
- Dr Charles Cook
- Dr Bruce Benz
- Dr Clifford Fitzpatrick
- Dr Debra Morrison
- Dr Howard Tanner
- Dr Jeffrey Sinclair
- Dr Nancy Guimere

Date/Time Range
 Start Date: 09/02/2011
 End Date: / /
 Find next: 5 Appts

Start Time: 8:00 A
End Time: 5:30 P

Day of Week
 Sun Mon Tue Wed Thu Fri Sat No Preference

Patient
 Search Nearest Location
 Search within 1 miles of zip
 Use employer zip code

Zip Code: _____

Available Timeslots

Date/Time	Resource(s)	Location(s)	Distance	Location Address
Saturday, September 03, 2011 at 12:45 PM	Dr Charles Cook	Main Office		719 Horsham Rd Horsham,
Saturday, September 03, 2011 at 01:00 PM	Dr Charles Cook	Main Office		719 Horsham Rd Horsham,
Saturday, September 03, 2011 at 01:15 PM	Dr Charles Cook	Main Office		719 Horsham Rd Horsham,
Saturday, September 03, 2011 at 01:30 PM	Dr Charles Cook	Main Office		719 Horsham Rd Horsham,
Saturday, September 03, 2011 at 01:45 PM	Dr Charles Cook	Main Office		719 Horsham Rd Horsham,

Clear Find Wait List Close

Wait List

Patient Wait List Item - Thomas, Sandra

Wait List Criteria

Event [Dropdown] **Duration** 15 **Start Date** 09/02/2011 **End Date** 09/09/2011

Service Location [Dropdown] High Priority **Start Time** 8:00 A **End Time** 5:30 P

Resources/Classes

- Dr Charles Cook
- Dr Bruce Bentz
- Dr Clifford Fitzpatrick
- Dr Debra Morrison
- Dr Howard Tanner
- Dr Jeffery Sinclair
- Dr Nancy Grimmer
- Dr Phillip Railey
- Bump List

Day of Week

Mon Tue Wed Thu Fri
 Sat Sun No Preference

Search Nearest Location

Zip Code: 30135

Search within 1 miles of pat zip code
 Use employer zip code

OK Cancel

Recall Plans

Recall Plan Maintenance

Available **Return Date**

Event

Resource

Location

Note

OK Cancel

This screenshot shows the 'Recall Plan Maintenance' dialog box with the 'Available' field empty and the 'Return Date' field showing a date picker. The 'Event' dropdown is set to 'Dental-3 Month Recall', 'Resource' is empty, and 'Location' is empty. The 'Note' field is also empty.

Recall Plan Maintenance

Available **Return Date**

Dental-6 Month Recall 03/05/2012

Event

Dental-3 Month Recall

Dental-6 Month Recall

Eye Recheck (2 Weeks)

General Recall 90 Days

Glaucoma Check

Hearing Test

Mammography Recall

Resource

Location

Note

OK Cancel

This screenshot shows the 'Recall Plan Maintenance' dialog box with 'Dental-6 Month Recall' selected in the 'Available' field and '03/05/2012' in the 'Return Date' field. The 'Event' dropdown is set to 'Dental-6 Month Recall', 'Resource' is empty, and 'Location' is empty. The 'Note' field is also empty.

WorkLog Manager & Tasking

The screenshot shows the 'Worklog Manager' application window. It features a 'Search Criteria' section with tabs for 'General' and 'Advanced'. The 'General' tab is active, showing various search filters: Task Type, Subject, Status (set to 'Not Started'), Priority, Assigned To (set to 'User, Alle A'), Source Type, Employer/Last Name, First Name, Location, Financial Class, Rendering Physician, and Primary Payer. Below the search criteria is a 'Task List' table with columns for Source Nbr, Create Date, Priority, Status, Task Type, Source Type, Source Name, Due Date, Start Date, and Exp. The table contains several rows of task data, with the first row highlighted. At the bottom of the window, there are buttons for 'Clear', 'Find', 'My Tasks', and 'Close', along with a checkbox for 'Do not refresh Worklog after updating tasks' and a 'Records Found: 51' indicator.

Source Nbr	Create Date	Priority	Status	Task Type	Source Type	Source Name	Due Date	Start Date	Exp
16	02/17/2005		In Progress	Account Follow...	Account	Bago, Lum			
152	11/21/2008	Normal	Not Started	Aged Delinque...	Account	Abbott, Sandra			
129	01/09/2008		Not Started	Appointment D...	Chart	Cardman, Tilla...			
288	12/30/2008		Not Started	Appointment D...	Chart	Roberts, Aaron			
11	07/30/2008		Not Started	Appointment D...	Chart	Paterson, Stella			
110	01/09/2009		Not Started	Appointment D...	Chart	Tessman, Char...			
293	01/08/2008		Not Started	Appointment D...	Chart	Sikler, Nelia			

WorkLog Manager & Tasking

The screenshot displays the NextGen Health Clinic software interface. The main window is titled "Scheduler Book: Monday, October 03, 2011" and shows a grid of time slots (6:00 A to 6:15 P) for different dental chairs (Dental Chair 1 and Dental Chair 2). The grid is populated with names of staff members and their roles, such as "Smith, John - DRM", "Jones, Beth - DRM", "Thomas, Sally - DRM", "Smith, James - DR", "Thomas, Sandra - DR - Keep", "Douglas, Robert - DR", "Thompson, Ellen - DR", "Doe, Jane - DEN", "Davis, John - DEN", "Davis, Diana - DEN", "Smith, Jan - DEN", "Jones, Anita - DEN", and "Brown, Mary - DRM".

An "Add Task - Thomas, Sandra" dialog box is open in the foreground. It contains the following information:

- Source Name: Thomas, Sandra
- Source Number: 14
- Source Type: Chart
- Task Type: [Dropdown]
- Status: Not Started
- Priority: [Dropdown]
- Subject: Assigned To
- Details: [Text area]
- Start Date, Follow Up Dt, Due Date, Expiration Dt, Completion Dt, Completion Reason, Completed By: [Date and dropdown fields]
- Options: Discontinue future auto creation of this task type, Indefinitely, Until [Date]
- Buttons: OK, Cancel

The dialog box also features an "Open Tasks Filter" section with a dropdown set to "All" and a list of "Open Tasks related to this Source" with checkboxes and columns for Source Type, Source Nbr, and Task 1. Below this is a "Task Detail history for related Open Tasks" section with a scrollable list.

NextGen EDR Features

- Service Restrictions
- Diagnosis Codes
- Incomplete Treatment Report
- Local Codes
- NextGen PM Appointment Status Viewable from Patient List Screen in EDR
- Date of Last Dental Visit Viewable from the Patient List Screen in EDR
- User and Patient Access Reports

Service Restrictions

Service Restrictions Shared ✕

Payer: **Delta Dental** Filter:

Code	Description	Rule	Age Range	Restriction
D0120	Periodic Oral Evaluation	Time interval	all ages	once every 6 months
D0145	Oral Evaluation under 3 yrs	Time interval Not allowed	2 and younger 3 and older	once every 6 months
D0210	Intraoral - Comp Series (Incl Bitewings)	Time interval	all ages	or
D0270	Bitewing - Single Film	Time interval	all ages	or
D0272	Bitewings - Two Films	Time interval	all ages	or
D0273	Bitewing- three film	Time interval	all ages	or
D0274	Bitewings - Four Films	Time interval	all ages	or
D0330	Panoramic Film	Time interval	all ages	or
D1110	Prophylaxis Adult	Time interval	all ages	or
D1120	Prophylaxis Child	Frequency	20 and younger	2
D1203	Top Appl Of Fluor(Prophy Not Incl)-Ch	Time interval Not allowed	20 and younger 21 and older	once every 6 months
D1204	Top Appl Of Fluor(Prophy Not Incl)-Ad	Time interval Not allowed	21 and older 20 and younger	once every 6 months
D1206	Fuoride Varnish Application	Time interval	all ages	once every 6 months
D1351	Sealant - Per Tooth	Teeth Not allowed	20 and younger 21 and older	2-5,12-15,18-21,28-31
D7140	Extraction, Erupted Tooth Or Exposed Roo	Consent Required	all ages	

Show only services with restrictions. Select

Service Restriction Alert ✕

Code: D0330 **Tooth:** N/A **Surface:** N/A **Description:** Panoramic Film
1: This service is allowed once every 3 years. Next available date: 09/02/2014

OK

Restriction Rule Setup Shared ✕

Rule name:

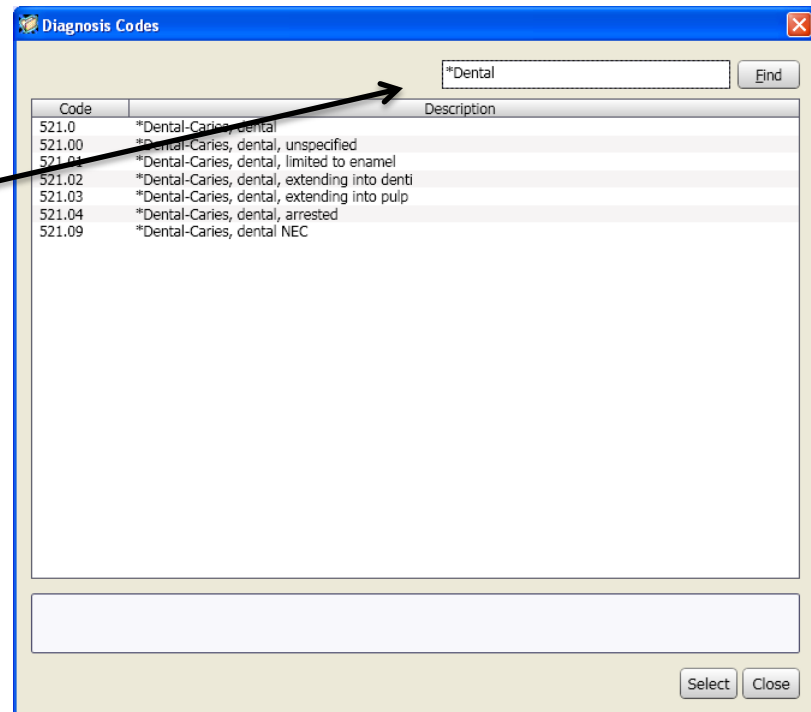
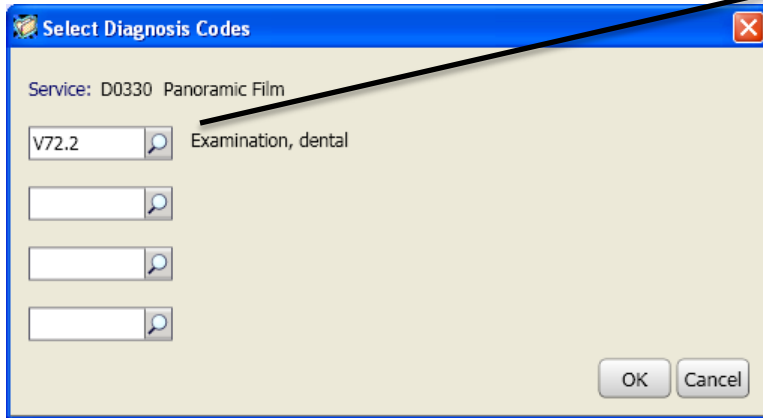
Message:

Show service restrictions using this rule

Save Cancel

Diagnosis Codes

- Create a logical description and only list the ones you want to use (Dental – or *Dental)
- Use if there is a compliance requirement or business reason.



Incomplete Treatment Report

Summary Report: Incompleted Treatment Plans

From: To: All Providers

Sort by:

Patient Id Patient Name Provider Id

Additional Notes:

Printed by User ID: 2 QSI 09/02/2011 04:37 pm Page 1 of 1

INCOMPLETE TREATMENT PLANS FOR ALL PROVIDERS

Patient	Date	Code	Type	Description	Teeth Surface	Fee	Prov
112 Thomas Sandra	09/02/11	D2393	Planned	Res-Based Comp - Three Surfs, Posterior	14 MOD	62.50	038
112 Thomas Sandra	09/02/11	D2150	Planned	Amal - Two Surfs, Prim Or Perm	20 DO	25.00	038
112 Thomas Sandra	09/02/11	D3310	Planned	Anterior (Excluding Final Restoration)	7	175.00	038
112 Thomas Sandra	09/02/11	D2750	Planned	Crown-Perc Fused To High Noble Metal	27	375.00	038
Next Appointment: None					Subtotal:	637.50	
267 Thompson Ellen	09/02/11	D2393	Planned	Res-Based Comp - Three Surfs, Posterior	4 MOD	250.00	038
267 Thompson Ellen	09/02/11	D7250	Planned	Surg Remov Of Residual Tooth Roots (Cutt	18	95.00	038
267 Thompson Ellen	09/02/11	D2160	Planned	Amal - Three Surfs, Prim Or Perm	14 MOD	200.00	038
267 Thompson Ellen	09/02/11	D5214	Planned	Mand Part Dent-Cast Met Framework With R	28-30	2000.00	038
Next Appointment: None					Subtotal:	2345.00	
Total Fee:						3182.50	

Local Codes

- Posting local codes from notes can generate service items that will transfer to NextGen PM that can be reported on for tracking purposes.

Date	User	Prov	Code	Description	Type
08/31/11	Allie	030	D1320	Tob Couns Control And Prev Of Oral Dis	Completed
08/31/11	Allie	030	D1310	Nutrit Couns For Control Of Dent Dis	Completed
08/31/11	Allie	030	8000	Referral to Specialist	Completed
08/31/11	Allie	030		Check Out	Note
Check out - Provided OHI /Tobacco Counseling / Nutrition Counseling / Patient education provided. Referrals - Periodontist;. Tx plan - completed.					

Examples include:

- Interim Steps for Multi-Appointment Procedures
- Patient Education Provided
- Treatment Plan Status
- Referrals

NextGen PM Appointment Status Viewable from Patient List Screen in EDR

Patient List


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

Display patients with appointments
 Appointment date: 9/27/2012 Provider: Cook, DMD, Charles (1038)

Hide personal information

Last Name	First Name	Birth Date	Person #	Home Phone	Time	Status	Event	Provider
Smith	John	09/20/1978	328	(509) 667-3333	8:00		DR	Cook, DMD (1038)
Jones	Beth	05/10/1967	63	(903) 480-4093	8:30		DRM	Cook, DMD (1038)
Martin	Jerry	09/21/1988	303	(404) 923-8279	9:00		DRM	Cook, DMD (1038)
Thomas	Sally	10/19/1978	104	(404) 342-3432	9:30		DRM	Cook, DMD (1038)
Smith	James	12/31/1965	316	(802) 864-1234	10:00		DR	Cook, DMD (1038)
Thomas	Sandra	10/18/1978	112	(404) 998-2828	10:30	Kept	DR	Cook, DMD (1038)
Douglas	Robert	01/01/1999	318	(802) 864-4321	11:00		DR	Cook, DMD (1038)
Thompson	Ellen	05/10/1967	267	(708) 575-8476	11:30		DR	Cook, DMD (1038)
Doe	Jane	12/01/1978	130	(404) 777-0000	12:45		DEN	Cook, DMD (1038)
Davis	John	09/18/1978	131	(802) 247-7439	1:15		DEN	Cook, DMD (1038)
Smith	Jim	03/12/1992	300	(404) 370-9821	1:30		DR	Cook, DMD (1038)
Davis	Diana	09/18/1968	82	(802) 247-7439	1:45		DEN	Cook, DMD (1038)
Smith	Jan	10/19/1978	128	(770) 994-9494	2:15		DEN	Cook, DMD (1038)
Jones	Anita	01/31/2002	330	(509) 331-7790	2:45		DEN	Cook, DMD (1038)

Sandra Thomas

 Birthdate: 10/18/1978 Address: 9381 Harrison Rd Person #: 112
 Age: 33 Atlanta, GA, 30135 Chart #:
 Gender: Female Phone: (404) 998-2828 Last Visit: 09/27/2012

Select Close

Date of Last Dental Visit Viewable from Patient List Screen in EDR

Patient List

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

Display patients with appointments
Appointment date: 9/27/2012 Provider: Cook, DMD, Charles (1038)

Advanced Search Options

Hide personal information

Last Name	First Name	Birth Date	Person #	Home Phone	Time	Status	Event	Provider
Smith	John	09/20/1978	328	(509) 667-3333	8:00		DR	Cook, DMD (1038)
Jones	Beth	05/10/1967	63	(903) 480-4093	8:30		DRM	Cook, DMD (1038)
Martin	Jerry	09/21/1988	303	(404) 923-8279	9:00		DRM	Cook, DMD (1038)
Thomas	Sally	10/19/1978	104	(404) 342-3432	9:30		DRM	Cook, DMD (1038)
Smith	James	12/31/1965	316	(802) 864-1234	10:00		DR	Cook, DMD (1038)
Thomas	Sandra	10/18/1978	112	(404) 998-2828	10:30	Kept	DR	Cook, DMD (1038)
Douglas	Robert	01/01/1999	318	(802) 864-4321	11:00		DR	Cook, DMD (1038)
Thompson	Ellen	05/10/1967	267	(708) 575-8476	11:30		DR	Cook, DMD (1038)
Doe	Jane	12/01/1978	130	(404) 777-0000	12:45		DEN	Cook, DMD (1038)
Davis	John	09/18/1978	131	(802) 247-7439	1:15		DEN	Cook, DMD (1038)
Smith	Jim	03/12/1992	300	(404) 370-9821	1:30		DR	Cook, DMD (1038)
Davis	Diana	09/18/1968	82	(802) 247-7439	1:45		DEN	Cook, DMD (1038)
Smith	Jan	10/19/1978	128	(770) 994-9494	2:15		DEN	Cook, DMD (1038)
Jones	Anita	01/31/2002	330	(509) 331-7790	2:45		DEN	Cook, DMD (1038)

Sandra Thomas

Birthdate: 10/18/1978 Address: 9381 Harrison Rd Person #: 112
Age: 33 Atlanta, GA, 30135
Gender: Female Phone: (404) 998-2828 **Last Visit: 09/27/2012**

Select Close

User Access Report in EDR

User Activity Report

From: To:

User(s): All Users

Notes:

NextGen EDR

09/28/2012 02:33 pm Page 1 of 9

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
09/04/2012 13:00:06	Doe, Jane (130)	Patient Access	Accessed
09/04/2012 13:00:14	Doe, Jane (130)	Tooth Chart	New item added
09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	Item modified
09/04/2012 13:00:21	Doe, Jane (130)	Tooth Chart	New item added
09/04/2012 13:00:22	Doe, Jane (130)	Tooth Chart	Operatory note
09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
09/04/2012 13:00:58	Doe, Jane (130)	Tooth Chart	Item deleted
09/05/2012 06:50:00		Logon	Logon
09/05/2012 06:50:00	Doe, Jane (130)	Patient Access	Accessed
09/05/2012 16:15:18		Logon	Logon
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

James Lasaponara (2)
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Patient Access Report in EDR

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

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Any Questions?