GET YOUR “NEXTPERTISE™” ON
Presenter(s):

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Topic

NextGen® EDR Updates & Roundtable

Level

Monday, November 12 – 10:30AM to 11:45AM
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
Software Requirements

• EPM version
  – 5.6 and above
  – EDR will work with version 5.5 of EPM, but with limited integration functionality.

• Workstations (require 1 of the following Microsoft operating system):
  – Windows XP Professional (SP2 or newer) (Not Home version)
  – Windows Vista Business or Ultimate (Not recommended) (Not Home version)
  – .NET Framework 3.5 or above

• Server:
  – Microsoft Windows Server 2003 or above
  – .NET Framework 3.5 or above
  – Web service 1.1 or above (Not applicable for EPM clients)
  – Sybase SQL Anywhere Studio version 8 or above (9 or above recommended) or
  – Microsoft SQL Server 2005 or above
Hardware Requirements

• Workstations:
  – Minimum of 1GB memory for XP. (Recommended 2 or 3 GB)
  – A minimum of 2GB memory for Windows Vista/Windows 7. (Recommended 3 or 4 GB)
Release Notes

• Help Menu
  – View and Print in PDF format of the upcoming features.
Clock/ Stop Watch/ Timer/Alarm

Manage and track the timing of activities around the practice, giving you a better sense of and control over the flow. In addition to a traditional clock you can:

- Use the timer feature to manage timing of procedures or activities such as anesthesia or fluoride treatments
- Use the stopwatch feature to track procedures or activities such as wait time or intake time
- Use the Alarm to remind you of a training class or meeting
## Appointment Status

View the patient’s appointment status and type directly from the Patient List screen in the Status and Event columns.

- Patients that are checked in will show the Kept status.
- NextGen EDR supports the event types created in NextGen EPM, including, Dental (DEN) and Hygiene (HYG)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Birth Date</th>
<th>Person #</th>
<th>Home Phone</th>
<th>Time</th>
<th>Status</th>
<th>Event</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dobbs</td>
<td>Ann</td>
<td>05/01/1940</td>
<td>25</td>
<td>(215) 555-1212</td>
<td>8:30</td>
<td>Kept</td>
<td>DEN</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>SANCHEZ</td>
<td>MARIA</td>
<td>01/28/1980</td>
<td>280</td>
<td>(404) 339-8293</td>
<td>9:00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hart</td>
<td>Robert</td>
<td>01/06/1943</td>
<td>62</td>
<td>(404) 247-7442</td>
<td>9:45</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barker</td>
<td>Ben</td>
<td>09/01/1956</td>
<td>48</td>
<td>(404) 849-9918</td>
<td>10:30</td>
<td></td>
<td>DEN</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>Barker</td>
<td>Ben</td>
<td>09/01/1956</td>
<td>48</td>
<td>(404) 849-9918</td>
<td>11:00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smith</td>
<td>Kathy</td>
<td>02/18/1985</td>
<td>3</td>
<td>(312) 234-2342</td>
<td>11:45</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GRANTHAM</td>
<td>JENNIFER</td>
<td>10/19/1965</td>
<td>100</td>
<td>(770) 887-7754</td>
<td>12:30</td>
<td></td>
<td>PRO</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>Brown</td>
<td>John</td>
<td>09/22/1973</td>
<td>124</td>
<td>(404) 999-8888</td>
<td>1:45</td>
<td></td>
<td>DEN</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>JOHNSON</td>
<td>ALLEN</td>
<td>01/16/1917</td>
<td>34</td>
<td>(415) 555-1212</td>
<td>2:15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welch</td>
<td>Elizabeth</td>
<td>06/11/1939</td>
<td>278</td>
<td>(215) 321-4243</td>
<td>3:00</td>
<td></td>
<td>PRO</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>Gasper</td>
<td>Godfrey</td>
<td>02/16/1977</td>
<td>241</td>
<td>(302) 111-1111</td>
<td>4:00</td>
<td></td>
<td>DEN</td>
<td>Barclay (30)</td>
</tr>
<tr>
<td>Gasper</td>
<td>Godfrey</td>
<td>02/16/1977</td>
<td>241</td>
<td>(302) 111-1111</td>
<td>4:30</td>
<td></td>
<td>HYG</td>
<td>Barclay (30)</td>
</tr>
</tbody>
</table>
EPM Appointment Book

To provide the ability to entered in Details in the NextGen EPM Appointment Book directly from a treatment plan in the patient chart using the right-click menu. The treatment plan items can be pasted directly into the notes section of the appointment.
Create the appointment in the NextGen EPM scheduler. Paste the treatments into the Details field as the appointment is created.

Upon clicking the OK button, the details will be copied and NextGen EPM will open automatically.
Pre-Authorization Claims

Electronically transmit and submit your pre-authorization claim requests during treatment planning. Additionally, you can view the status of the request in the chart and to filter for those that are pending or submitted.

Request a Pre-authorization claim
Transmit Pre-authorization Claim

Status
- Pending
- Submitted
- Error

Preauthorization 11 for Sandra Abbott has the following errors:
Coverage data is missing.
Provider date is missing.
Provider Taxonomy Code is missing.
Billing entity information does not exist.

Preauthorization 13 for Sandra Abbott has the following errors:
Coverage data is missing.
Provider date is missing.
Review/Close Pre-authorization Claim

From the Patient Chart
Approval Process

- The approval options section within the Advanced Search Options will be disabled (greyed out) when the practice preferences option for approvals is turned off.

- Chart approval is only required for Completed Item and Notes; changes to planned services will no longer require approval for “on behalf of”
Approval Process

- The chart will be locked from editing once the “on behalf of” approval note is added:
  - This only applies to the chart items that are added with the “on behalf of” approval note.
  - The “on behalf of” provider that is on the chart is the only provider allowed to make changes to the locked chart items.

- Logged-in user with approval authorization will now be able to view chart items entered “on behalf of” or “all” but they cannot pick another provider.
User Activity Report

Quickly review users’ activities in Nextgen EDR such as accessing charts, adding services and modifying details in an easy to read.

![User Activity Report](image)

![User Activity Report](image)

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![User Activity Report](image)

![User Activity Report](image)

![User Activity Report](image)
Diagnosis Entry

Quickly enter or select a diagnosis code in the redesigned selection screen.

- Type the diagnosis code directly – the description will automatically populate the description if it is an exact match.
- Lookup by code or descriptions using the enhanced tool.
Validation of Information

• Patient Title Bar
  – Quickly confirm the patient’s identity using the title bar which now displays the patient’s age and birthdate
  – Patient’s name, age and birthdate display on the title bar even when the Patient Information screen is open.

• Patient Name
  – Long patient names (more than 24 characters) will be imported without issue.
• Patient List
  – The “Last Visit Date” will display as expected in the Patient Information Summary of the Patient List screen.
**Encounter Details**

- Easily check the patient’s insurance details when selecting an encounter in the Encounters window.
- Additionally, selecting an encounter of a prior date will be transmitted to NextGen EPM with that charge date as being completed and show in EDR. This is not “backdating” charge feature but allows to select a prior encounter. This will assist when the service and posting are not completed on the same date.
• RX Status
  – Easily identify and distinguish active and inactive medications in the patient’s chart history. Each prescription will display as Rx-Inactive or Rx-Active.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>RX Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>000</td>
<td>Amoxil 500 mg Tab</td>
<td>Rx-Inactive</td>
</tr>
<tr>
<td>000</td>
<td>Mag-Al Plus 200 mg-200 mg-20 mg/5 mL Oral Susp</td>
<td>Rx-Active</td>
</tr>
<tr>
<td>000</td>
<td>Amoxil 500 mg Tab</td>
<td>Rx-Inactive</td>
</tr>
</tbody>
</table>

• Re-calculate fees
  – The ability to update the fee whenever insurance/sliding fee information is changed on a given planned item by using the right-click menu option on the planned item, “Re-calculate Fee”.

![Re-calculate fees menu](image)
• **Patient Summary Report**
  
  - Review more patient information in less time with the enhanced Patient Summary Report. New features include:
    
    o Demographics, including birthdate, print by default; checking the “Demographics” in the “What to Print” section is no longer required.
    
    o Option to include Sticky Notes, Alerts, Preauthorization Request and show fees.
• **User Setup**
  - In the Add/Edit User window, the second field has been renamed “EPM User Id” in place of “Other Id”. The field is now required for logging into the NextGen EDR system and a warning will display if the field is left blank.
Documents

• Increase the information contained within the electronic chart by importing PDF and multiple page TIFF files, for example, emailed files or insurance documents.
• Documents and images can be viewed for all patients, including merged or inactive patients, without an issue.
• A warning message displays when the system is unable to open or locate a document within the chart.

![Warning Message](image-url)
QSI Imaging (Apteryx) Synchronization

- Simplify access and increase accuracy as you work with QSI Imaging (Apteryx) X-ray systems in connection with NextGen EDR. QSI Imaging (Apteryx) will automatically close the patient chart when you close the patient’s chart in NextGen EDR.
Provider Information

• Inactive Provider
  – The name of the provider that planned a treatment will display even if the provider was later made inactive. It will be greyed out.

• Provider drop down boxes
  – Will show the provider name along with provider number enclosed in parentheses, e.g. John Alexander (23). In previous versions, a few setup screens, e.g. “Users setup” were only showing the provider name.
Feature Modifications

• Charting
  – Existing services with no date (00/00/00) will be visible in the chart history even when a custom filter is applied.

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Grp</th>
<th>P</th>
<th>Prov</th>
<th>Code</th>
<th>Description</th>
<th>Tooth</th>
<th>Surface</th>
<th>Type</th>
<th>Amount</th>
<th>n/a</th>
</tr>
</thead>
<tbody>
<tr>
<td>00/00/00</td>
<td>1</td>
<td>Other</td>
<td></td>
<td></td>
<td>D2750</td>
<td>Crown-Por Fused To High Noble Metal</td>
<td>32</td>
<td></td>
<td>Existing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/26/10</td>
<td>JBSH</td>
<td>Other</td>
<td></td>
<td></td>
<td>D3330</td>
<td>RCT Molar (Excluding Final Restoration)</td>
<td>18</td>
<td></td>
<td>Existing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/08/11</td>
<td>JBSH</td>
<td>030</td>
<td></td>
<td></td>
<td>030</td>
<td>Chipped Tooth</td>
<td>8</td>
<td>MI</td>
<td>Condition</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Notes
  – Any text added at the end of a SmartNote will be retained when the note was saved.
Feature Modifications

• Menu Option word change
  – The following function menu option has been renamed to be more meaningful in the context where it’s used.
    o “Change Logon options” now called “Set Active Location & Default provider”

• User Setup word change
  – “Dentist” now called “Logon Provider”

• Delete Custom Toolbar button when in use
  – User will no longer be able to delete a custom toolbar button. In the past, a missing toolbar button caused the application to close.

• Password Expiration Time
  – User will now be able to specify the password expiration time up to 120 days.
What’s next ...
Any Questions or Comments?