Valley-Wide Health Systems, Inc.

NextGen® EPM
Quick Reference
# Table of Contents

New Patient Check-in—Adding Demographic Information from PIF ..... 3  
New Patient Check-in—Adding UDS Information from PIF ............... 4  
New Patient Check-in—Chart Details ........................................ 5  
Check-in—Create Encounter .................................................. 6  
Check-in AutoFlow—Verifying Demographic Information ............... 7  
Check-in AutoFlow—Privacy Notice Information ........................... 8  
Check-in AutoFlow—Client Defined Information ........................... 9  
Check-in AutoFlow—UDS Information...................................... 10  
Check-in AutoFlow—Add Insurance when Patient Is Subscriber ...... 11  
Check-in AutoFlow—Add Insurance - Other Person is Subscriber ...... 13  
Check-in AutoFlow—Add Insurance - Multiple Insurance ............. 15  
Check-in AutoFlow—Attach Insurance Not in System................. 17  
Check-in AutoFlow—Adolescent Health—Guarantor & Insurance ...... 19  
Check-in AutoFlow—Insurance Card Scanning ............................ 21  
Check-in AutoFlow—Patient with No Insurance .......................... 23  
Check-in AutoFlow—Chart Details & Printing Labels .................... 24  
Look Up Patient’s Appointments ......................................... 25  
Generate List of Tomorrow’s Appointments for Confirmations ........ 25  
Adding Blood Draw Ordered During Provider Visit ..................... 26  
Scheduling—New Patient Appointment .................................. 27  
Scheduling—Established Patient Appointment ........................... 29  
Creating an Encounter for Patient without Appointment .......... 31  
View Patient’s Chart .......................................................... 32
**New Patient Check-in—Adding Demographic Information from PIF**

- **Names and addresses:** DO NOT USE SYMBOLS or PUNCTUATION (except period) in address. Use a space instead.

- **Mailing Address = Billing Address** if different than Physical Address; then physical address would be Secondary Address. If only one address listed, put that as Billing Address.

- **If a patient does not have or does not disclose their SSN, use all 9s:** 999-999-9999

- **After typing Street, press TAB key twice and type ZIP code to auto-fill the City, State, and County.**

- **Use Alternate Phone for Emergency Contact information. Put Contact name and relation in Comment.**

- **Click Chart button to create a chart for the new patient after all required information is filled in from PIF. Don’t forget UDS page!**

- **Only enter data into boxes indicated above—do not add data where NOT specified.**
New Patient Check-in—Adding UDS Information from PIF

The UDS page records data we report to the Federal Government for funding. **Primary Medical Coverage** is for reporting and **DOES NOT** attach insurance for the current Encounter. (Select **NONE** from list if patient is Self Pay). **DO NOT** CLICK **Self Pay** box.

Click **Chart** button to create a chart for the new patient after all required information is filled in from PIF.

Only enter data into boxes indicated above—do not add data where NOT specified.

Basic Patient Information at the top of the page remains for Demographics, UDS, Client Defined and Privacy pages.
New Patient Check-in—Chart Details

Only boxes to update are PIF Updated and Patient Handbook. Type in the current date using full date format: MM/DD/YYYY. Please use slashes.

Click OK to continue checking patient in, to create Encounter.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in—Create Encounter

Guarantor = adult who will be responsible for paying for charges for THIS encounter (in case insurance does not pay). All Minors* must have an adult (Person) as Guarantor

If Rendering provider is a mid-level, choose their Supervisor from the list.

For Nurse Visits and Dental Hygienists, choose Rendering and put clinic nurse or hygienist in First Consulting box (i.e. CCFMC Nurse) - type first few letters of clinic nurse/hygienist name to locate in list. If Resident, they are First Consulting and hygienist is Second Consulting.

*the only exception is for an Adolescent Care visit—minor will be Guarantor in that case ONLY

Only enter data into boxes indicated above—do not add data where NOT specified
Verify Demographic information with patient or if entered for new patient, verify that information was entered correctly from PIF.

Click AutoFlow button after verifying Demographic information, to go to next page: Privacy Notice.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Privacy Notice Information

If patient has signed Privacy Notice in chart, type dates from form and choose Signed in Privacy Notice Reason list. Put in today’s date and Privacy Notice Reason if new patient.

Click AutoFlow button after verifying Privacy Notice information, to go to next page: Client-Defined.

Only enter data into boxes indicated above—do not add data where NOT specified.
Only enter data into boxes indicated above—do not add data where NOT specified.

**Check-in AutoFlow—Client Defined Information**

- **Check-in AutoFlow**—Client Defined Information
  - **Update Patient Information**
    - **Last**: Roosevelt
    - **First**: Franklin
    - **Middle**: D
    - **Previous Last**: 
    - **Nickname**: 
    - **Social Security**: 999-99-9999
    - **Birth Date**: 07/04/1981
    - **Age**: 96 yrs.
    - **Sex**: Male
    - **Demographics**
      - **Family Size/Income Disclosure**
        - **Information Disclosed On PIF**
      - **Voter Registration**
        - **Registered Voter**
    - **Client Defined**
      - **CICP Location**
    - **Medical Home**
      - **SBMC Beck, Sisneros, Daboll**
  - **Choose Declined Disclosure** if patient checked box to decline to disclose Family Size and Income on PIF.
  - **Choose Voter Registration** status.
  - **Choose Medical Home** (Medical Provider group).

- **Click AutoFlow button after verifying Client Defined information, to go to next page: UDS.**
UDS page records data we report to the Federal Government for funding. **Primary Medical Coverage** is for reporting and **DOES NOT** attach insurance for the current Encounter. (Select NONE from list if patient is Self Pay). DO NOT CLICK Self Pay box.

**Check-in AutoFlow—UDS Information**

Click **AutoFlow** button after verifying **UDS** information, to go to next page: **Insurance Selection**.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Add Insurance when Patient is Subscriber (pg 1 of 2)

Click **Patient** in list; then right-click and select **New Insurance**.

Type a few letters of the Insurance name in **Payer Name** box and click **Find** to lookup insurance in NextGen. Then double-click insurance in list.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Add Insurance when Patient Is Subscriber

Click **Ins Cards** tab to scan the insurance card for the insurance. See **Insurance Card Scanning** on page 21 & 22.

Type information from Insurance card into fields on **Detail** page—**HIC/Policy Nbr** is typically the Subscriber Number or ID.

Click **OK** button when insurance information has been added and insurance card has been scanned.

Insurance has been added and is applied for this encounter by selecting it on left and clicking right arrow to add to right side of screen.

Click **AutoFlow** button to continue.
Check-in AutoFlow—Add Insurance - Other Person is Subscriber (pg 1 of 2)

Click card-holder’s name in list; then right-click and select **New Insurance**. If card-holder is not in list, right-click and add **New Relation**, then add New Insurance for card-holder.

Type a few letters of the Insurance name in **Payer Name** box and click **Find** to lookup insurance in NextGen. Then double-click Insurance in list.

Only enter data into boxes indicated above—do not add data where NOT specified
Check-in AutoFlow—Add Insurance - Other Person is Subscriber (pg 2 of 2)

- Type information from Insurance card into fields on Detail page—HIC/Policy Nbr is typically the Subscriber Number or ID.
- Click OK button when insurance information has been added and insurance card has been scanned.
- Click Ins Cards tab to scan the insurance card for the insurance. See Insurance Card Scanning on page 21 & 22.
- Insurance has been added and is applied for this encounter by selecting it on left and clicking right arrow to add to right side of screen.
- Click AutoFlow button to continue.

Only enter data into boxes indicated above—do not add data where NOT specified
Check-in AutoFlow—Add Insurance - Multiple Insurance (pg 1 of 2)

Click **Patient** in list; then right-click and select **New Insurance**.

Type a few letters of the Insurance name in **Payer Name** box and click **Find** to lookup insurance in NextGen. Then double-click insurance in list.
Check-in AutoFlow—Add Insurance - Multiple Insurance (pg 2 of 2)

Type information from Insurance card into fields on Detail page—HIC/Policy Nbr is typically the Subscriber Number or ID.

Click Ins Cards tab to scan the insurance card for the insurance. See Insurance Card Scanning on page 21 & 22.

Click OK button when insurance information has been added and insurance card has been scanned.

Repeat the steps above to add insurance to the patient for the second insurance held by the patient. If additional insurance is held by a relation, follow the instructions for Adding Insurance—Other Person is Subscriber on page 13 and 14.

Selected Insurance for the Encounter should be added in the order of billing: Primary in the list first, followed by Secondary and Tertiary. Select the insurance name in the list on the left and click the right arrow to add it for the encounter, on the right.

Click AutoFlow button to continue.

Only enter data into boxes indicated above—do not add data where NOT specified.
Use the following method to add insurance for an encounter/patient ONLY if the insurance is NOT in our list of Insurance Payers.

Click Patient/Relation in list; then right-click and select New Insurance.

Type a few letters of the Insurance name in Payer Name box and click Find to lookup insurance in NextGen. If Insurance NOT FOUND Continue below.

Type scan in Payer Name box and click Find to lookup “Scanned Card” insurance in NextGen. Then double-click Scanned Card in list.

Only enter data into boxes indicated above—do not add data where NOT specified
Check-in AutoFlow—Attach Insurance Not in System (pg 2 of 2)

Click Ins Cards tab to scan the insurance card for the insurance. See Insurance Card Scanning on page 21 & 22. Be sure scanned card is clear!

Type information from Insurance card into fields on Detail page—HIC/Policy Nbr is typically the Subscriber Number or ID.

Click OK button when insurance information has been added and insurance card has been scanned.

Scanned Card Insurance has been added and is applied for this encounter by selecting it on left and clicking right arrow to add to right side of screen. Billing Department will review insurance card information.

Click AutoFlow button to continue.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Adolescent Health—Guarantor & Insurance (pg 1 of 2)

If an adolescent comes in and does not wish parents to be billed or know about an appointment, we set them as Guarantor for the encounter and set the Insurance selection so that their parents or insurance are not billed.

Choose **Self as Guarantor** on Create Encounter screen. Then click **Yes** to confirm setting Guarantor as minor.

On the UDS page, indicate the patient’s Primary Medical Coverage as Adolescent Health Confidential.

Click **Patient** in list, then right-click and select **New Insurance**.

Type a few letters of **Adolescent Health** in **Payer Name** box and click **Find** to look up in NextGen. Then double-click Adolescent Health in list.

**Only enter data into boxes indicated above—do not add data where NOT specified.**
Check-in AutoFlow—Adolescent Health—Guarantor & Insurance (pg 2 of 2)

Click OK button without entering any data on Insurance Maintenance or Ins Cards page.

Remove parent’s insurance: Select parent’s insurance on RIGHT side and click LEFT arrow to remove insurance for this encounter.

Add Adolescent Health as “insurance” for this encounter by selecting it on left and clicking right arrow to add to right side of screen.

Click AutoFlow button to continue.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Insurance Card Scanning

Be sure Visioneer RoadWarrior and Show Camera/Scanner Interface options are checked. Then click Acquire.

Only enter data into boxes indicated above—do not add data where NOT specified.
Grayscale and AutoCrop to Original must be chosen for best image scanning. Insert card and click Scan.

Don’t forget to scan the Back of the card!

Click OK button when insurance card has been scanned. And click OK out of Insurance window.

Be sure scanned card is clear! If you can’t read it, likely no one else can either. Rescan distorted or unclear images of cards.

Only enter data into boxes indicated above—do not add data where NOT specified.
Check-in AutoFlow—Patient with No Insurance (Self Pay)

On the UDS page, indicate the patient’s Primary Medical Coverage as NONE. DO NOT CLICK SELF PAY box.

On the Encounter Insurance Selection page, DO NOT ADD Insurance to the Patient and do not select Insurance for the Encounter. There should be no Insurance on the right in Selected Insurance.

Click AutoFlow button to continue.

Only enter data into boxes indicated above—do not add data where NOT specified.
### Check-in AutoFlow—Chart Details

Verify that patient has updated PIF within the last year and also that they have been issued a patient handbook. If updated during this visit, type in today’s date (use mm/dd/yyyy format).

### Check-in AutoFlow—Printing Labels

Choose Encounter Label from Template list and click Print 3 copies.

Then choose Patient ID Label and Print 5 copies.

Click AutoFlow button to finish the Check-in.
Look Up Patient’s Appointments

Click Appt List icon in toolbar.

Then type in Date of Birth for patient and choose Expected from the Status list, then click Find button to view all the patient’s future Expected appointments. Add first few letters of Last name to limit search more. Leave Status blank (none) to view all appointments for patient.

Generate List of Tomorrow’s Appointments for Confirmations

Click Appt List icon in toolbar.

Choose:
- Expected in Status
- Tomorrow in Appt Date
- (optional) Provider name in Resource

then click Find button to view appointments for tomorrow.

Double-click appointment in list to view patient phone number. Call, type results of call in Confirmation Results box and click Confirmed box if patient is confirmed coming.

Only enter data into boxes indicated above—do not add data where NOT specified.
Adding Blood Draw Ordered During Provider Visit

**Scheduler Book:**

- Right-click Appointment in Scheduler Book and select **Open** from menu.

**Add Appointment:**

- Scroll the **Resources** list and click to put the green check-mark beside the **Nurse** for your clinic. **Both** the Nurse and the Provider should be checked. Then click **OK**. You may need an Override if the Nurse schedule is full.

Patient’s appointment now displays in both the Provider and the Nurse column and only one Encounter is in NextGen.

**Only enter data into boxes indicated above—do not add data where NOT specified**
Scheduling—New Patient Appointment (pg 1 of 2)

Locate appointment slot on schedule, right-click timeslot in Scheduler Book and select NEW (for new appointment) from menu.

Click Menu button and click Lookup to find person in NextGen. For a new person, be diligent to ensure person is not already in NextGen.

Find person by Birth Date first. If not found, delete Birth Date and use ONLY the first three or four letters of Last and First name.

BE SURE THE PERSON is NOT already in NextGen! Click the New button to add a new person to the system for an appointment.

BE SURE THE PERSON is NOT already in NextGen! Fill in the basic Pt Info for Appointment:
- Last Name
- First Name
- MI
- DOB
- Home Phone
And click OK.

Only enter data into boxes indicated above—do not add data where NOT specified.
Scheduling—New Patient Appointment (pg 2 of 2)

Select the Event for which the patient is being seen from the list. The Duration is set according to the Event chosen, but can be adjusted in increments of 15 minutes.

The Date, Time, Provider/Resource, and Service Location should be set according to the timeslot and column you selected in the Schedule Book.

The person’s name displays in the Description box automatically after adding the person. Click after their name in the box and type the specific complaint for which they are being seen. Add the same complaint to the Details box.

Click OK when the Appointment information has all been entered.

The Appointment Confirmation window displays a summary of the scheduled appointment. You can print an Appointment Reminder Label if needed. Then Close the Print Labels and Appointment Confirmation screen.

Only enter data into boxes indicated above—do not add data where NOT specified.
Scheduling—Established Patient Appointment (pg 1 of 2)

- Locate appointment slot on schedule, right-click timeslot in Scheduler Book and select NEW (for new appointment) from menu.

- Schedule Book Buttons:
  - Change Date
  - Go To Today
  - Previous Date
  - Next Date
  - Appointment Search Ahead
  - Refresh Schedule
  - Hide Patient Names

- Click Menu button and click Lookup to find person in NextGen.

- Use Birth Date to find patient first. If not found, delete Birth Date and use ONLY the first three or four letters of Last and First name.

- Double-click the patient’s name in the list, confirm the patient’s Demographic information and click OK to return to the Add Appointment box.

Only enter data into boxes indicated above—do not add data where NOT specified.
Only enter data into boxes indicated above—do not add data where NOT specified.
Creating an Encounter for Patient without Appointment

Click the Tasks menu and select Create Encounter.

Look up patient by Birth Date (you can add first few letters of Last name to narrow search). Then click Find and double-click patient’s name in list.

Select the Rendering provider (and Supervisor for mid-level Rendering provider) and the Service Location and click OK.

Then click Yes to add insurance if encounter charges will be billed to insurance (see pp. 11-22). If no insurance or will not be billed to insurance, click No. Encounter Displays in patient’s chart on left.

Note: Creating an encounter for a patient with an appointment on the same day checks in the patient’s appointment if not already checked in.

Only enter data into boxes indicated above—do not add data where NOT specified.
**View Patient’s Chart**

Click the Chart button on the toolbar and Find the patient using their Birth Date (you can add first few letters of Last name to narrow search). Then click Find.

Then double-click patient’s name in list to view their chart. If patient icon is a Globe, the Person information page (demographics, etc.) displays.

Only enter data into boxes indicated above—do not add data where NOT specified.