

## Appendix B: 1 – NextGen Screenshots

### Colonoscopy Protocol Report Build Tool

1. NextGen EHR > File > Reports > Generate Report > by Practice
2. Select “Templates” in Settings List
3. Select “Order”
4. Select *Latest Value By* – “Encounter Date”
5. Select listed fields to pull for the report

NextGen Report Filter: Patient X

Settings List

- Allergy
- Columns
- Diagnosis
- Filter
- Logical Group
- Medication
- Orders
- Patient
- Patient Chart
- Problems
- Procedure
- Provider
- Sorting
- Templates**
- Totals

Templates

Search Template Name

Select Template

Template Name
<input checked="" type="checkbox"/> ORDER
<input type="checkbox"/> ORDER_ADMINISTR...
<input type="checkbox"/> ORDER_COMMENTS
<input type="checkbox"/> ORDER_DUPLICATIO...
<input type="checkbox"/> ORDER_EDITING
<input type="checkbox"/> ORDER_HOLD_TEMP
<input type="checkbox"/> ORDER_INSTRUCTIO...
<input type="checkbox"/> ORDER_MANAGEME...
<input type="checkbox"/> ORDER_MANAGEME...
<input type="checkbox"/> ORDER_MANAGEME...
<input type="checkbox"/> ORDER_MODULE_P...
<input type="checkbox"/> ORDER_MULTIPLE_D...

Convert to Numeric

All Selected Tables must have a record.

Fields

Select Field

<input checked="" type="checkbox"/>	ORDER__ACTREASONCODE
<input checked="" type="checkbox"/>	ORDER__ACTTEXTDISPDOC
<input checked="" type="checkbox"/>	ORDER__ACTTEXTDISPLAY
<input checked="" type="checkbox"/>	ORDER__APPTDATE
<input checked="" type="checkbox"/>	ORDER__CANCELLEDDATE
<input checked="" type="checkbox"/>	ORDER__COMPLETEDDATE
<input checked="" type="checkbox"/>	ORDER__ORDEREDBY
<input checked="" type="checkbox"/>	ORDER__ORDEREDDATE
<input type="checkbox"/>	ORDER__CDS_MODIFIER
<input type="checkbox"/>	ORDER__CDS_REF_NUM
<input type="checkbox"/>	ORDER__CDS_SCORE
<input type="checkbox"/>	ORDER__CHK_ADMIN1_SUBMITTED
<input type="checkbox"/>	ORDER__CHK_ADMIN2_SUBMITTED
<input type="checkbox"/>	ORDER__CHK_ADMIN3_SUBMITTED
<input type="checkbox"/>	ORDER__CHK_AUTH_OBTAINED
<input type="checkbox"/>	ORDER__CHK_ASSIGNED

Latest Value By:

Encounter Date

Clear Templates

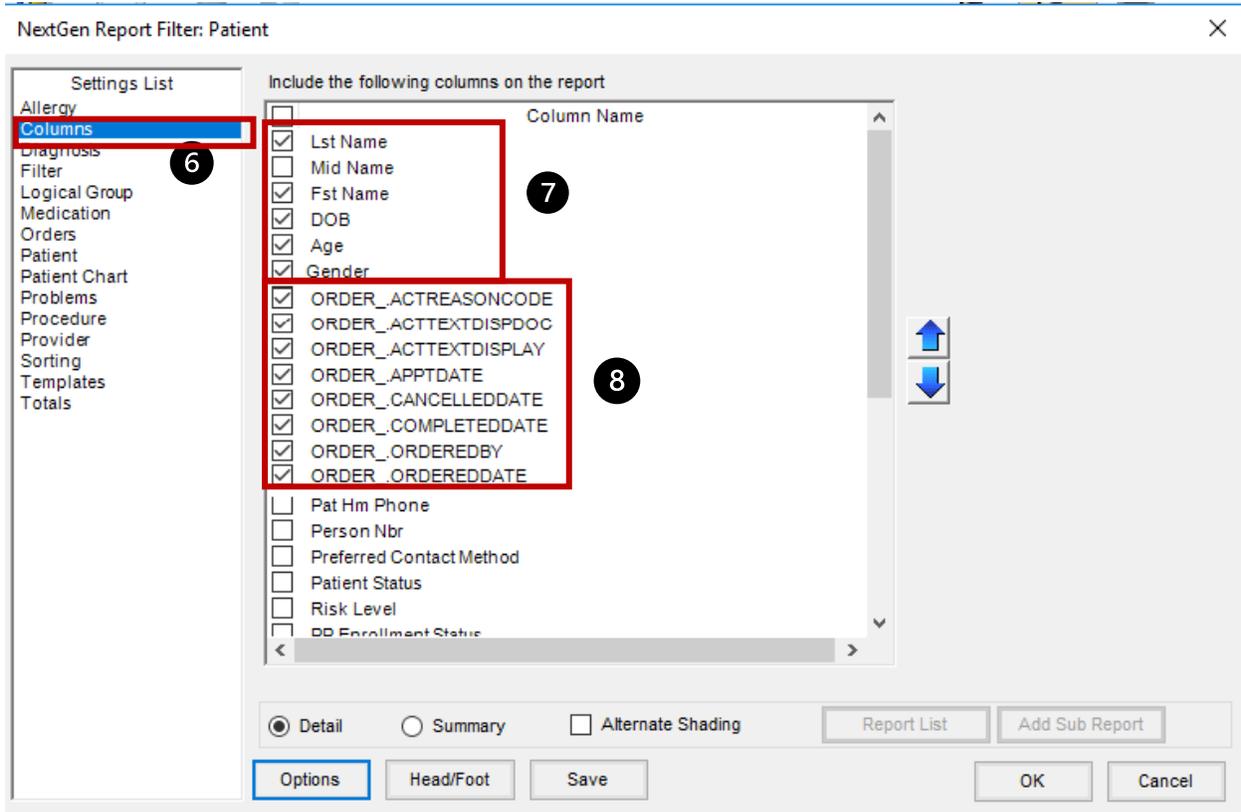
Detail    Summary    Alternate Shading

Report List   Add Sub Report

Options   Head/Foot   Save   OK   Cancel

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6. Select “Columns” in Settings List
7. Select desired column names for report
8. Select field order for the report



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9. Select Filter from Settings List
10. Select “Like” for order\_.actReasonCode
11. Enter “Health Maintenance” in description box
12. Select “Like for order\_.actTextDisplay
13. Enter “Colonoscopy” in description Box
14. Change all other filters to OR

NextGen Report Filter: Patient

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Field	Operator	Value	Action
ORDER_ACTREASONCODE	Like	Health Maintenance	Add Item
ORDER_ACTTEXTDISPLAY	AND Like	Colonoscopy	Add Item
ORDER_APPTDATE	OR <none>	___/___/___	
ORDER_CANCELLEDDATE	OR <none>	___/___/___	
ORDER_COMPLETEDDATE	OR <none>	___/___/___	
ORDER_ORDEREDBY	OR <none>		Add Item
ORDER_ORDEREDDATE	OR <none>	___/___/___	
ORDER_RECOMMENDEDDATE	OR <none>	___/___/___	

Entries

Select Field: [ ] Entries: [ ] [ ] [ ]

From: [ ] To: [ ] Time Between Entries: [ ]

No Field Value Time Period

Time Period: [ ] From: [ ] To: [ ]

Detail  Summary  Alternate Shading

Report List Add Sub Report

Options Head/Foot Save OK Cancel

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15. Select "Patient" in Settings List
16. Add any filters desired from available listing.
17. Add any additional Settings List filter to apply to report as desired
18. Select "OK" to generate report on screen

NextGen Report Filter: Patient ✕

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Filter		
Last Name	<none> ▾	<input type="text"/>
Mid Name	<none> ▾	<input type="text"/>
First Name	<none> ▾	<input type="text"/>
DOB	<none> ▾	<input type="text"/> <input type="text"/> <input type="text"/>
Age	Greater Equ ▾	<input type="text"/>
Gender	<none> ▾	<input type="text"/> ... Clear
Address1	Not Equal	<input type="text"/>
City	Greater	<input type="text"/>
State	Greater Equal	<input type="text"/>
Zip	Less Equal	<input type="text"/> ... Clear
Home Phone	Between	<input type="text"/> ... Clear
Deceased	<none> ▾	<input type="text"/>
Race	<input type="text"/> ▾	... Clear
Ethnicity	<input type="text"/> ▾	... Clear
Risk Level	<input type="text"/> ▾	... Clear

Person Nbr

Person Nbr <none> ▾

Patient Status  ▾ ...

Preferred Contact Method  ▾ ...

Patient coverage  ▾ ...

Enable Patient Portal Status Filter

Non Patient Portal Patients

Patient Portal Patients

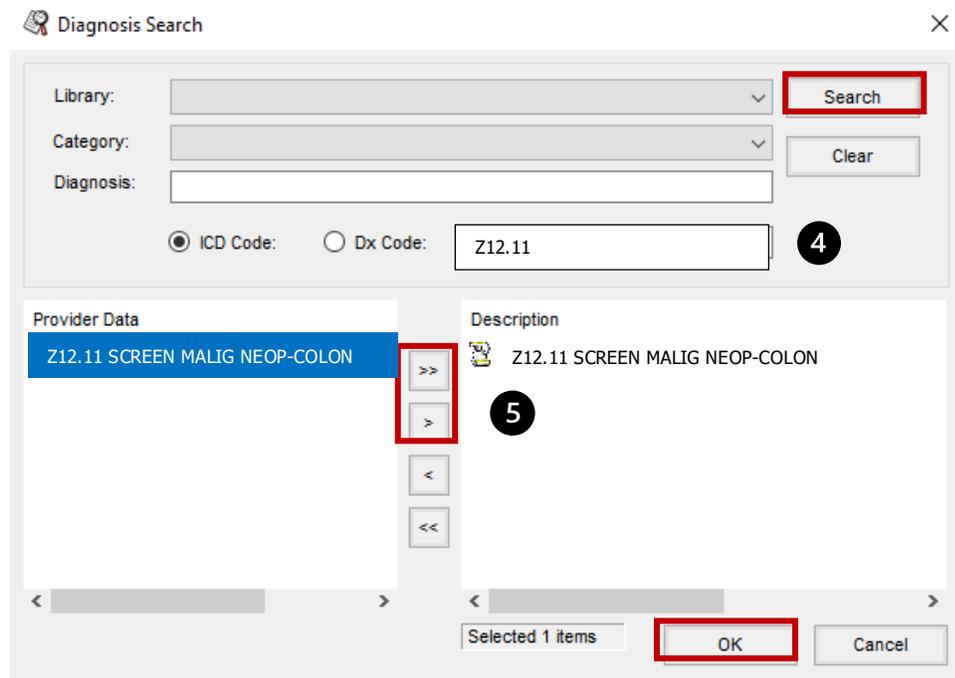
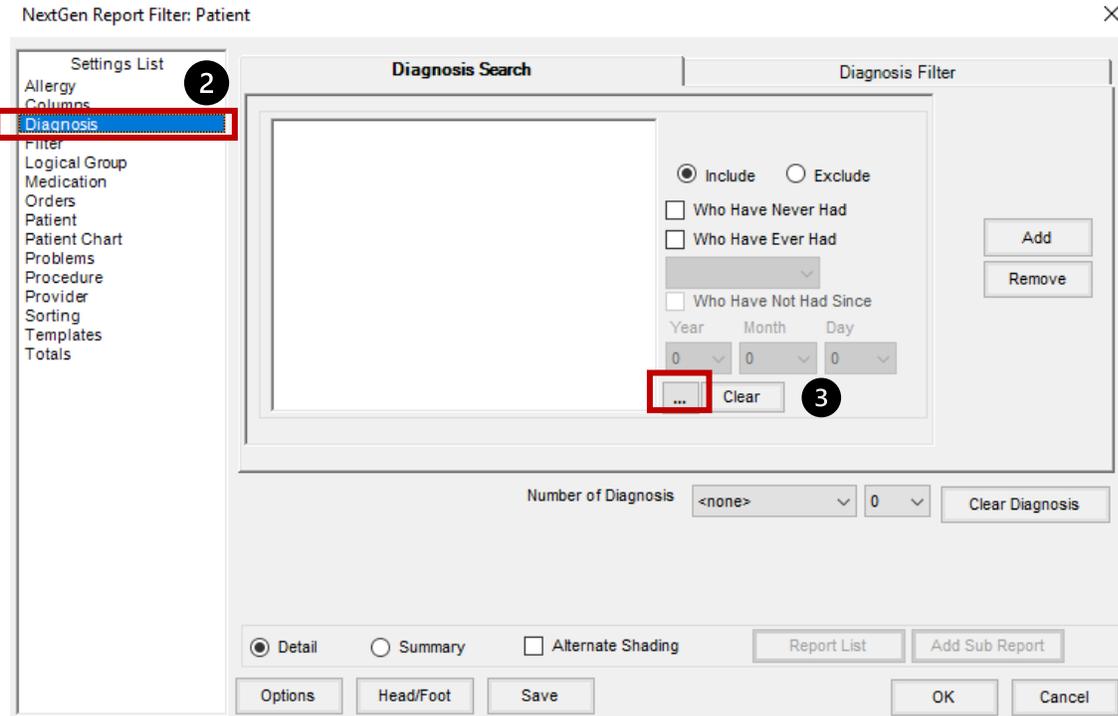
Patient Portal Patient Status  ▾

Detail  Summary  Alternate Shading

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### EHR Diagnosis Report Screening for Colon Malignancy (ICD 9 V76.51, ICD10 Z12.11)

1. NextGen EHR > File > Reports > Generate Report > By Practice
2. Select “Diagnosis” in Settings List
3. Select ellipsis to open diagnosis search box
4. Enter appropriate diagnosis in open box and select “Search”
5. Use arrows in center to move desired data to description box
6. Select “OK”



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7. Check box to include patients “Who Have Never Had”. Other options are available depending upon desired report.

NextGen Report Filter: Patient X

Diagnosis SearchDiagnosis Filter

Special screening for malignant neoplasms, colon

Include  Exclude  
 Who Have Never Had  
 Who Have Ever Had

Who Have Not Had Since  
Year:  Month:  Day:

Number of Diagnosis:

Detail  Summary  Alternate Shading

8. Select “Patient” in Settings List
9. Select any desired Patient filters for report generation

NextGen Report Filter: Patient X

Settings List

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Filter

Last Name	<none>	<input type="text"/>	Person Nbr	<none>	<input type="text"/>
Mid Name	<none>	<input type="text"/>	Patient Status	<input type="text"/>	<input type="button" value="..."/>
First Name	<none>	<input type="text"/>	Preferred Contact Method	<input type="text"/>	<input type="button" value="Clear"/>
DOB	<none>	<input type="text"/>	Patient coverage	<input type="checkbox"/>	<input type="button" value="Clear"/>
Age	Greater Eq	<input type="text"/>	Enable Patient Portal Status Filter	<input type="checkbox"/>	<input type="button" value="Clear"/>
Gender	<none>	<input type="text"/>	<input type="radio"/> Non Patient Portal Patients		
Address1	Equal	<input type="text"/>	<input type="radio"/> Patient Portal Patients		
City	Not Equal	<input type="text"/>	Patient Portal Patient Status	<input type="text"/>	<input type="button" value="..."/>
State	Greater	<input type="text"/>			
Zip	Less	<input type="text"/>			
Home Phone	Greater Equal	<input type="text"/>			
Deceased	Less Equal	<input type="text"/>			
Race	Between	<input type="text"/>			
Ethnicity	<none>	<input type="text"/>			
Risk Level	<none>	<input type="text"/>			

Detail  Summary  Alternate Shading

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10. Select “Sorting” in Settings List
11. Indicate desired sort for the report generation
12. Add any additional filters from Settings list as desired
13. Select “OK” to generate report on screen

