

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

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.

☒ Detail ☐ Summary ☐ Alternate Shading

Options Head/Foot Save

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

Report List Add Sub Report

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

NextGen Report Filter: Patient

Settings List

- Allergy
- Columns** (6)
- Diagnosis
- Filter
- Logical Group
- Medication
- Orders
- Patient
- Patient Chart
- Problems
- Procedure
- Provider
- Sorting
- Templates
- Totals

Include the following columns on the report

| <input type="checkbox"/> | Column Name |
|-------------------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Lst Name |
| <input type="checkbox"/> | Mid Name |
| <input checked="" type="checkbox"/> | Fst Name |
| <input checked="" type="checkbox"/> | DOB |
| <input checked="" type="checkbox"/> | Age |
| <input checked="" type="checkbox"/> | Gender |
| <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"/> | Pat Hm Phone |
| <input type="checkbox"/> | Person Nbr |
| <input type="checkbox"/> | Preferred Contact Method |
| <input type="checkbox"/> | Patient Status |
| <input type="checkbox"/> | Risk Level |
| <input type="checkbox"/> | DD Enrollment Status |

8

Detail Summary Alternate Shading

Report List Add Sub Report

Options Head/Foot Save

OK Cancel

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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

Settings List

- Allergy
- Columns
- Diagnosis
- Filter**
- Logical Group
- Medication
- Orders
- Patient
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| | | | | |
|-----------------------|-----|--------|--------------------|----------|
| 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: Time Between Entries

To:

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 ✕

| Settings List | Filter | Value | Person Nbr | Patient Status | Preferred Contact Method | Patient coverage | Enable Patient Portal Status Filter | Patient Portal Patient Status |
|----------------|------------|---------------|------------|----------------|--------------------------|--------------------------|---|-------------------------------|
| Allergy | Last Name | <none> | <none> | | | <input type="checkbox"/> | <input type="radio"/> Non Patient Portal Patients | |
| Columns | Mid Name | <none> | | | | | <input type="radio"/> Patient Portal Patients | |
| Diagnosis | First Name | <none> | | | | | | |
| Filter | DOB | <none> | | | | | | |
| Logical Group | Age | Greater Equ | | | | | | |
| Medication | Gender | <none> | | | | | | |
| Orders | Address1 | Equal | | | | | | |
| Patient | City | Not Equal | | | | | | |
| Patient Chart | State | Greater | | | | | | |
| Problems | Zip | Less | | | | | | |
| Procedure | Home Phone | Greater Equal | | | | | | |
| Provider | Deceased | Less Equal | | | | | | |
| Sorting | Race | Between | | | | | | |
| Templates | Ethnicity | | | | | | | |
| Totals | Risk Level | | | | | | | |

☐ Detail ☐ Summary ☐ Alternate Shading Report List Add Sub Report

Options Head/Foot Save OK Cancel

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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”

NextGen Report Filter: Patient

Settings List

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

Diagnosis Search

Diagnosis Filter

Include ☒ Exclude ☐

☐ Who Have Never Had

☐ Who Have Ever Had

☐ Who Have Not Had Since

Year: 0 Month: 0 Day: 0

... Clear

Number of Diagnosis: <none> 0 Clear Diagnosis

☒ Detail ☐ Summary ☐ Alternate Shading

Report List Add Sub Report

Options Head/Footer Save OK Cancel

Diagnosis Search

Library: Search

Category: Clear

Diagnosis:

☒ ICD Code: ☐ Dx Code: Z12.11

Provider Data

Z12.11 SCREEN MALIG NEOP-COLON

Description

Z12.11 SCREEN MALIG NEOP-COLON

>> > < <<

Selected 1 items OK Cancel

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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

Settings List

Allergy

Columns

Diagnosis

Filter

Logical Group

Medication

Orders

Patient

Patient Chart

Problems

Procedure

Provider

Sorting

Templates

Totals

Diagnosis Search

Diagnosis 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

0 0 0

...

Clear

Add

Remove

Number of Diagnosis <none> 0 Clear Diagnosis

☒ Detail

☐ Summary

☐ Alternate Shading

Report List

Add Sub Report

Options

Head/Foot

Save

OK

Cancel

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

NextGen Report Filter: Patient

Settings List

Allergy

Columns

Diagnosis

Filter

Logical Group

Medication

Patient

Patient Chart

Problems

Procedure

Provider

Sorting

Templates

Totals

Filter

Last Name

<none>

Mid Name

<none>

First Name

<none>

DOB

<none>

Age

Greater Equal

Gender

<none>

Address1

<none>

City

<none>

State

Greater Equal

Zip

<none>

Home Phone

<none>

Deceased

<none>

Race

<none>

Ethnicity

<none>

Risk Level

<none>

Person Nbr

<none>

Patient Status

<none>

Preferred Contact Method

<none>

Patient coverage

<none>

Enable Patient Portal Status Filter

☐ Non Patient Portal Patients

☐ Patient Portal Patients

Patient Portal Patient Status

<none>

Clear Patient

☒ Detail

☐ Summary

☐ Alternate Shading

Report List

Add Sub Report

Options

Head/Foot

Save

OK

Cancel

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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

NextGen Report Filter: Patient ×

Settings List

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

Include the following sorting options in the report

| Column | Ascending | Descending | Group By | Page Bre |
|----------------------|-----------|------------|----------|----------|
| Lst Name | ✓ | | | |
| Mid Name | | | | |
| Fst Name | | | | |
| DOB | | | | |
| Age | | | | |
| Gender | | | | |
| Race | | | | |
| Ethnicity | | | | |
| Deceased | | | | |
| Addr 1 | | | | |
| Addr 2 | | | | |
| Pat City | | | | |
| Pat State | | | | |
| Pat Zip | | | | |
| Pat Hm Phone | | | | |
| Person Nbr | | | | |
| Preferred Contact... | | | | |
| Patient Status | | | | |
| Risk Level | | | | |
| PP Enrollment Status | | | | |
| Practice Name | | | | |

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☒ Detail ☐ Summary ☐ Alternate Shading

Report List Add Sub Report

Options Head/Foot Save **OK** Cancel