Milford Regional Physician Group
The Benchmark for Quality Care

Workflow for:

☒ Internal Medicine ☒ Pediatrics ☒ Family Medicine ☒ Specialty

☒ Clerical ☒ Clinical ☐ Provider

Date Initiated: 2/14/13 **Pages: 6**

NextGen: Alerts; General Info/Creating and Re-Activating

General Information

♦A **Chart Alert** can be manually created, from a patient chart in NextGen, to inform users of key information when the patient chart, an encounter or the patient account is accessed.

♦The information contained in the Chart Alert **may require action** or **may be purely informational** in nature.

♦**Alerts that are no longer relevant should be hidden** so that they no longer display.

♦An **expiration date can be entered on an alert** so that it will no longer display after the chosen date and would not need to be hidden.

♦**Chart alerts that have been hidden or expired can be re-activated**.

♦**Account Alerts were used in the past**, similar to a Chart Alert but created from the patient account.

♦To simplify the process for adding and maintaining alerts in NextGen **we will no longer use Account Alerts**, but will continue to utilize the Chart Alert feature.

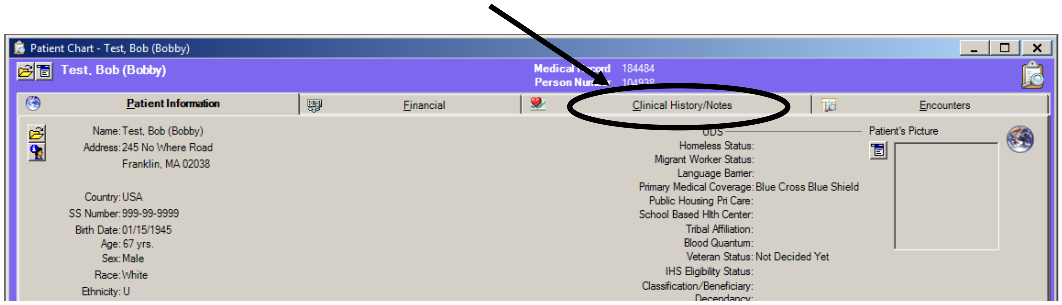
♦A standardized process will now be followed to ensure Chart Alerts are meaningful and to support this valuable tool.

♦To effectively institute this enterprise wide Alert initiative, **all Chart and Account Alerts created prior to 1/1/12 will be hidden on 3/1/13.** A report of the Alerts created 1/1/10-12/31/11 will be provided for each site so that Alerts still applicable to patients can be re-activated. (Alerts are identified and grouped by site based on the user that created the alert.)

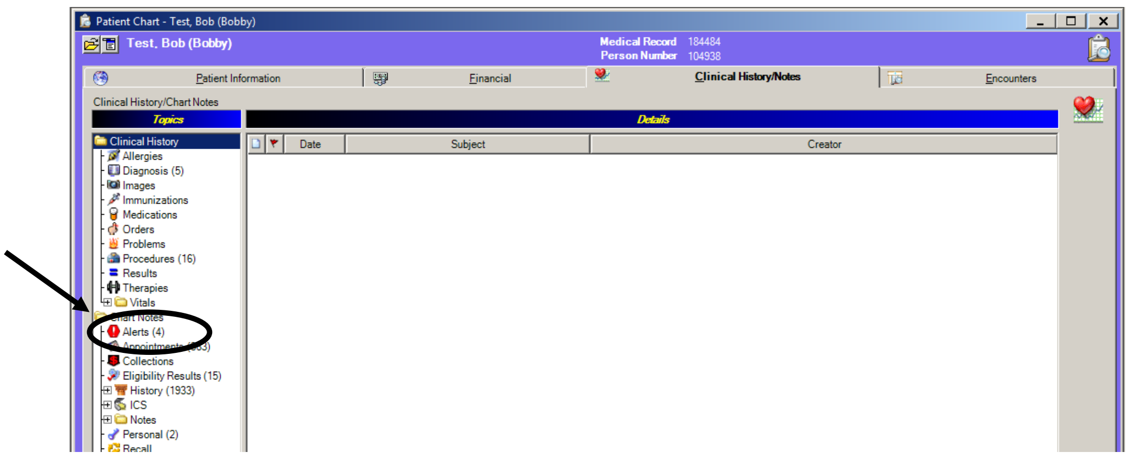
♦**On an annual basis, all Alerts created up until January of the preceding year will be hidden**. A report of the Alerts created for the preceding year will be provided for each site so that Alerts still applicable to patients can be re-activated. (Alerts are identified and grouped by site based on the user that created the alert.)

Creating a Chart Alert

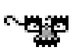
Access the patient chart.
Click the tab to view the Clinical History/Notes section of the chart.



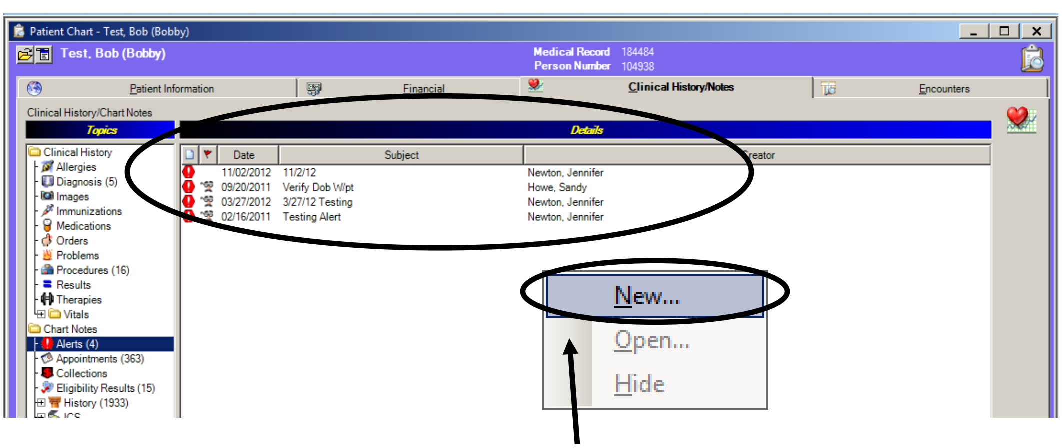
From the list of topics on the left, click Alerts.



Details of Chart Alerts created for this patient will display including; the date the alert was created, the subject line entered on the alert and the name of the user that created the alert.

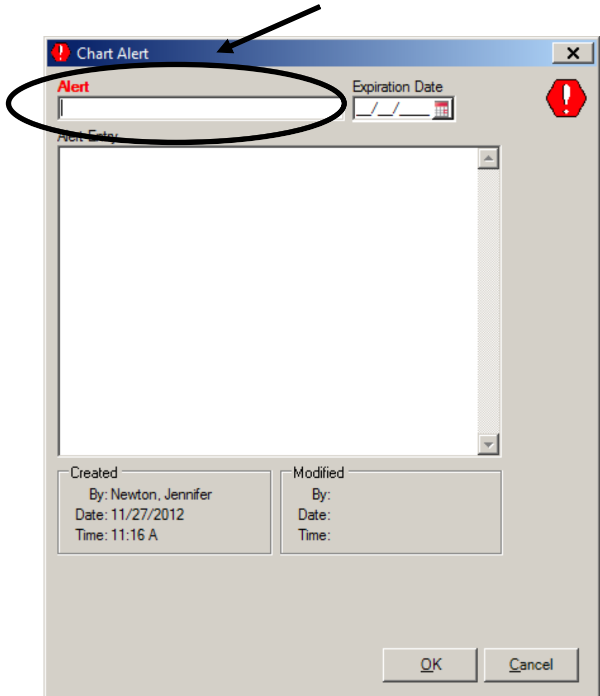
The hide icon  next to the date indicates the alert has been hidden and will no longer display in a pop-up message.

♦You can make an alert active again by unhiding it and/or removing the expiration date (if one was entered). See pages 5-6 for instructions.



Right click anywhere in the white details section, select New.

The **subject line** of the Chart Alert should include **today's date and one of the following 5 categories**:



1. **Pt Info**

(Patient Information)

For communications involving any field on the Patient Information Screen

For example;

- Dr Dahl listed as PCP w/BCBS, please clarify and update in NG or have Pt call Ins to correct.
- Name changed in NG to match BCBS records please inform pt and have them call insurance if change is necessary.
- Bad Address, statements returned undeliverable, please update with next patient contact.

2. **Insurance**

For key information relating to the patient's insurance plan, not already displayed on the Ins Maintenance screen

For example;

- Newborn not added to BCBS
- Medicare Primary/HP secondary – do not collect co-pay.
- Referrals Required
- PA Required for MRI

***Alerts entered regarding termed insurance or requests to scan insurance cards should include an expiration date 1 week from the date of the patient's appointment.**

3. **Appts**

(Appointments)

For communications involving patient appointments

For example;

- 30 min required w/Dr Prosnitz
- CPE scheduled 2/1/13 (an expiration date of 2/1/13 should be added so that this alert does not display after the patient appointment.

4. Billing

For communications involving billing issues
For example;

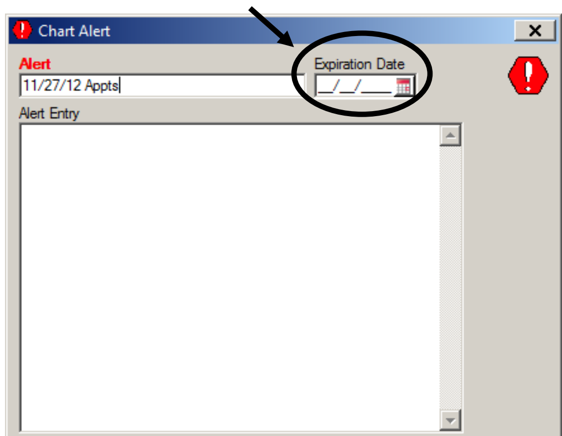
- Hx uncollectables, copayment should be collected and pt contact billing following next visit

5. Misc

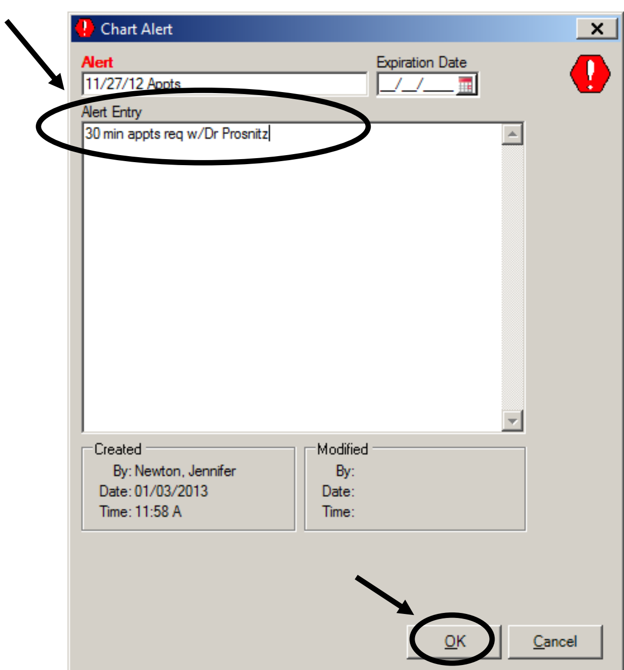
(Miscellaneous)
For other communications/requests not covered by the above categories
For example;

- Pt Permission form on file
- Interpreter Required

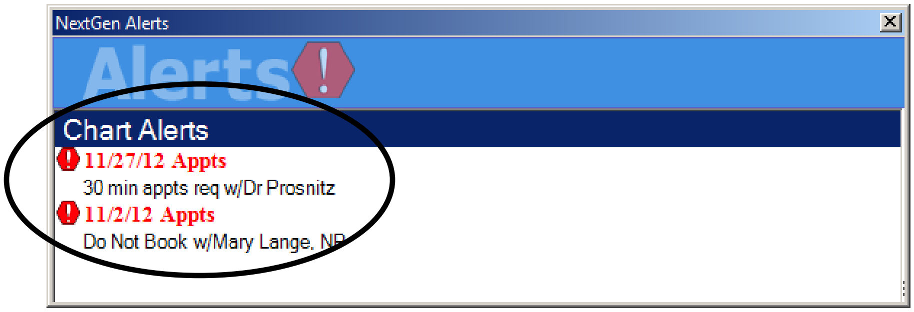
If applicable, enter an Expiration Date.
♦If entered, the alert will no longer display after this date and will not need to be hidden.



Enter details for the Chart Alert in the Alert Entry field and then click OK to save.

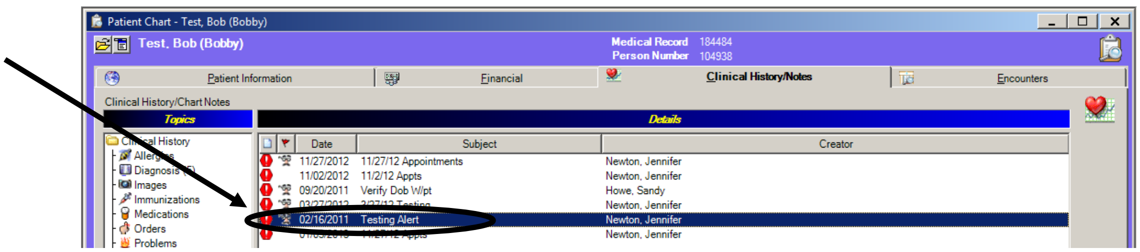


The next time this patient's chart, an encounter or the patient account is accessed the Chart Alert will display, in addition to any other active Chart Alerts.

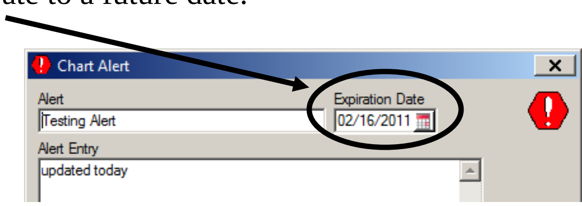


Re-Activating a Chart Alert

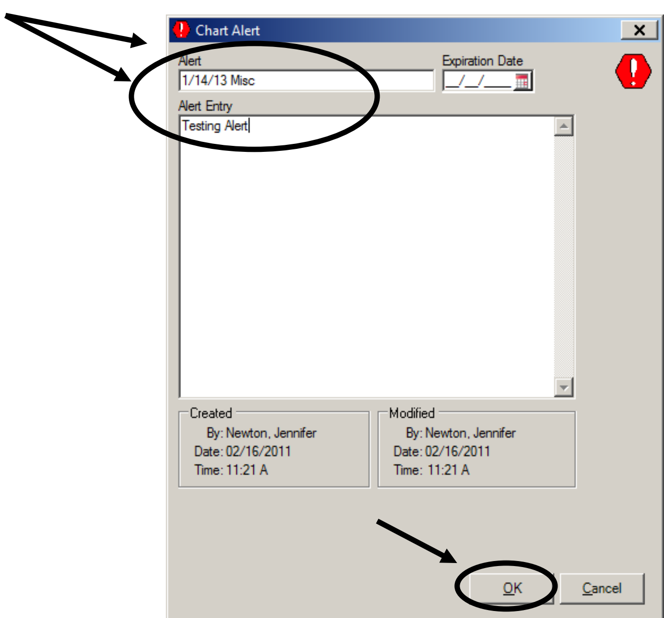
Double click to open the alert you wish to re-activate.



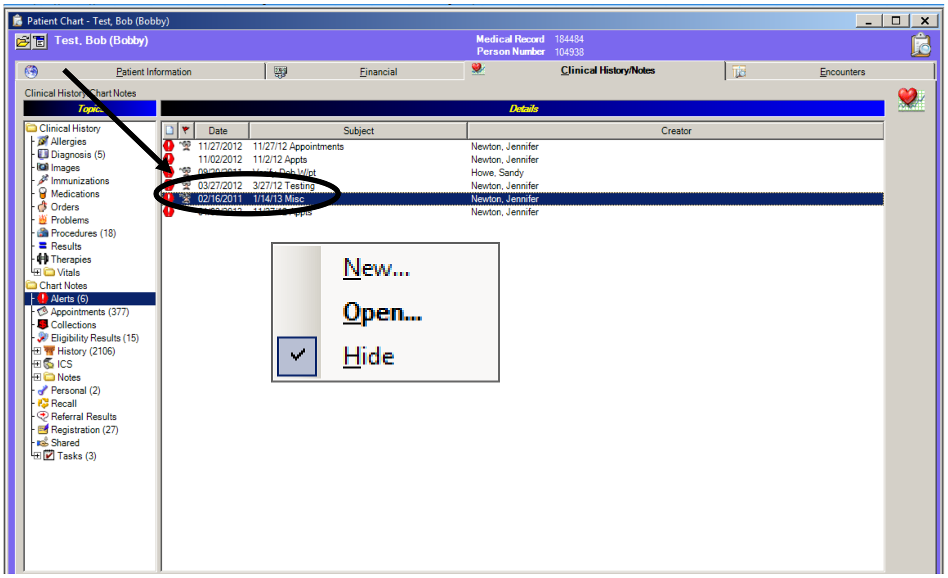
Remove or edit the Expiration Date to a future date.



Enter today's date and the appropriate category on the subject line.
If necessary, edit the details for the chart alert in the alert entry field and then click OK to save.



If the alert is hidden , right click on it; click on the √ to remove it from Hide.



Hide icon has been removed, alert will now display when the chart, an encounter or patient account is accessed.