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Communications

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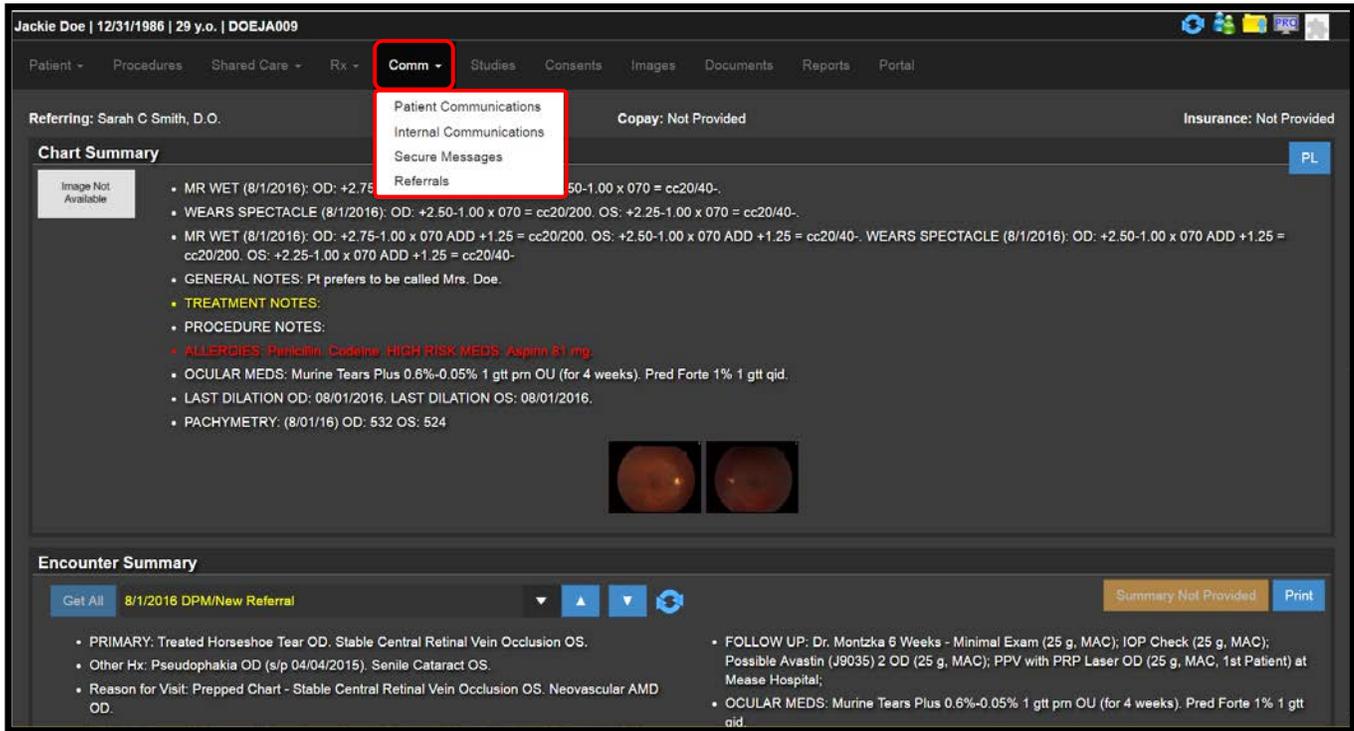
Communications

Objective

The purpose of this document is to demonstrate how to use the Communications tab in the Patient Detail to document messages and referrals regarding a particular patient.

Accessing Communications

From the Patient Summary screen, click on the Comm tab. A menu of 4 additional options will appear; Patient Communication, Internal Communication, Secure Messages, and Referrals.



Patient Communication

The top half of the Patient Communication, Internal Communication and Secure Messages pages are all the same.

Phone Numbers

The patient's contact phone numbers are listed at the very top. As well as, their preferred contact method. This information comes forward from the demographics page.

Encounter Summary

The contact phone numbers are followed by a section that allows you to review the patient encounter summary information. It is the same information that comes from the Patient Summary page and works the same way. You can click on the dropdown arrow and select a specific encounter or use the blue up and down arrows to scroll through each encounter.

Communications

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009

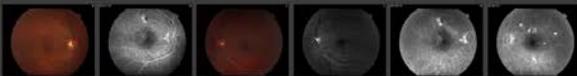
Patient - Procedures Shared Care - Rx - Comm - Studies Consents Images Documents Reports Portal

Patient Communications Save

Home Phone:(727)271-7894 Cell Phone: Work Phone: Other Phone: Preference:Home Phone

Get All 8/1/2016 DPM/New Referral

- PRIMARY: Treated Horseshoe Tear OD. Stable Central Retinal Vein Occlusion OS.
- Other Hx: Pseudophakia OD (s/p 04/04/2015). Senile Cataract OS.
- Reason for Visit: Prepped Chart - Stable Central Retinal Vein Occlusion OS. Neovascular AMD OD.
- HPI: CC: Blurred Vision OD. Severity: moderate. Onset: sudden. Duration of Problem: 1-2 days. Location: central vision.
- VA OD: Dcc20/200 PHNI NccUnable
- VA OS: Dcc20/40-1 PHNI NccJ2
- IOP: TP: OD:14 OS:15 Time:14:00 App: OD:13 OS:14 Time:14:05
- FOLLOW UP: Dr. Montzka 6 Weeks - Minimal Exam (25 g, MAC); IOP Check (25 g, MAC); Possible Avastin (J9035) 2 OD (25 g, MAC); PPV with PRP Laser OD (25 g, MAC, 1st Patient) at Mease Hospital;
- OCULAR MEDS: Murine Tears Plus 0.6%-0.05% 1 gtt pm OU (for 4 weeks). Pred Forte 1% 1 gtt qid.
- PROCEDURES: Avastin (J9035) #1 OS. Laser for Retinal Tear OD.
- OCULAR PROBLEM LIST:
 - Treated Horseshoe Tear OD.
 - Stable Central Retinal Vein Occlusion OS.
 - Neovascular AMD OD. Advised regular use of Amsler grid. Advised to call immediately if eye pain or loss of vision. Intravitreal anti-VEGF therapy was recommended. Discussed AREDS supplements, BP Control, and dark leafy green vegetables.
 - Dermatochalasis RUL.
 - Pseudophakia OD (s/p 04/04/2015).
 - Senile Cataract OS.



Patient Communications / Chart Notes Add Print

Chart Notes/Phone Calls

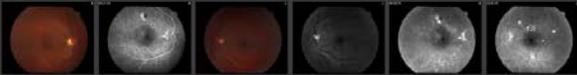
The bottom half of this page is labeled Patient Communication/Chart Notes. This area allows you to document information that will save in the Encounter Summary portion of the Patient Detail page as well as the top portion of the Communications page. Click the Add button to start a new Communication.

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009

Patient - Procedures Shared Care - Rx - Comm - Studies Consents Images Documents Reports Portal

IOP: TP: OD:14 OS:15 Time:14:00 App: OD:13 OS:14 Time:14:05

- 3. Neovascular AMD OD. Advised regular use of Amsler grid. Advised to call immediately if eye pain or loss of vision. Intravitreal anti-VEGF therapy was recommended. Discussed AREDS supplements, BP Control, and dark leafy green vegetables.
- 4. Dermatochalasis RUL.
- 5. Pseudophakia OD (s/p 04/04/2015).
- 6. Senile Cataract OS.



Patient Communications / Chart Notes Add Print

Date/Time	Initials	Type	Message
(1/0)			

View: 5 Save

Communications

In the first dropdown box, select the Initials of the person sending the message, usually your own initials. The Date/Time box will auto-populate.

In the next box, select the Type of call or note from the dropdown menu.

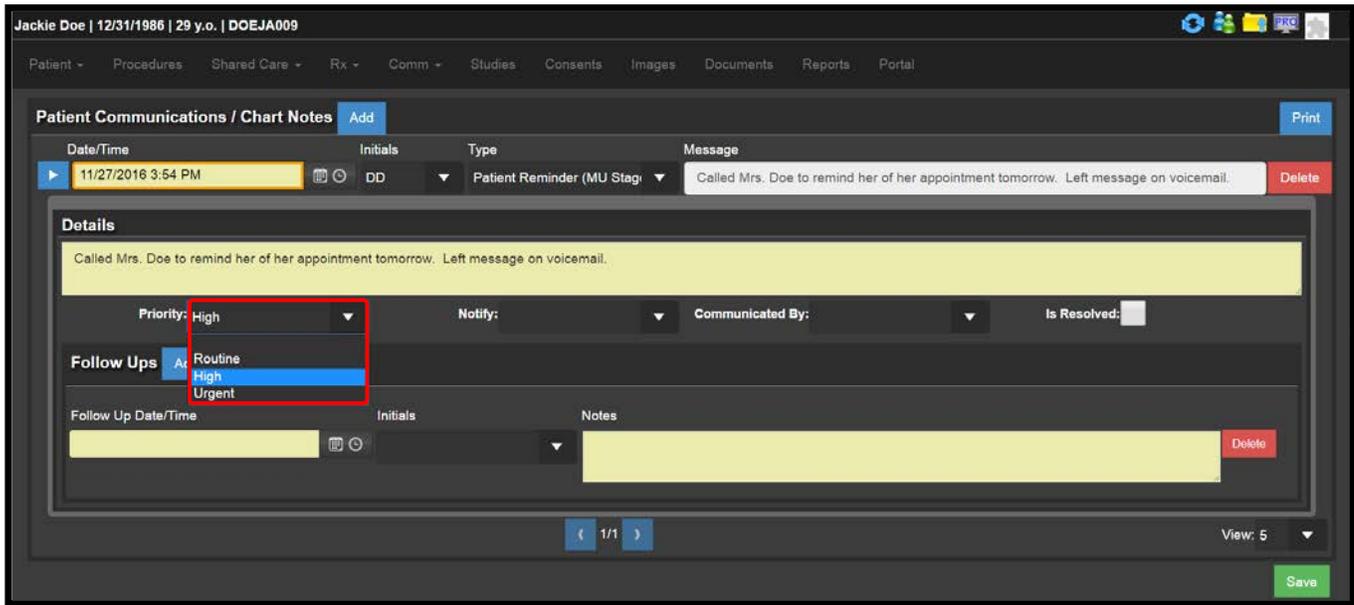
The screenshot shows the 'Patient Communications / Chart Notes' form for Jackie Doe. The 'Date/Time' field is set to 11/27/2016 3:54 PM. The 'Initials' dropdown is set to 'DD'. The 'Type' dropdown is open, showing a list of options: Cancel/Reschedule Appointment, Eye Pain/Vision Loss - Not Post-Op/Injection, Referring/PCP/Other Doctor, Other, Prescription Refill, Billing/Authorization, Eye Pain/Vision Loss - Post-Op/Injection, Preventive Care (MU Stage 2), Connect On Call, Continuing Care (drops, etc.), Patient Reminder (MU Stage 1), and Record Request. The 'Patient Reminder (MU Stage 1)' option is highlighted in blue. The 'Message' field is empty. The 'Details' section has a large yellow text field for notes. The 'Follow Ups' section has a table with columns for Date/Time, Initials, and Notes.

Type your Notes in the yellow text field.

The screenshot shows the same form as above, but with the 'Message' field containing the text: 'Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.' The 'Details' section's yellow text field now contains the text: 'Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.' The 'Follow Ups' section is empty.

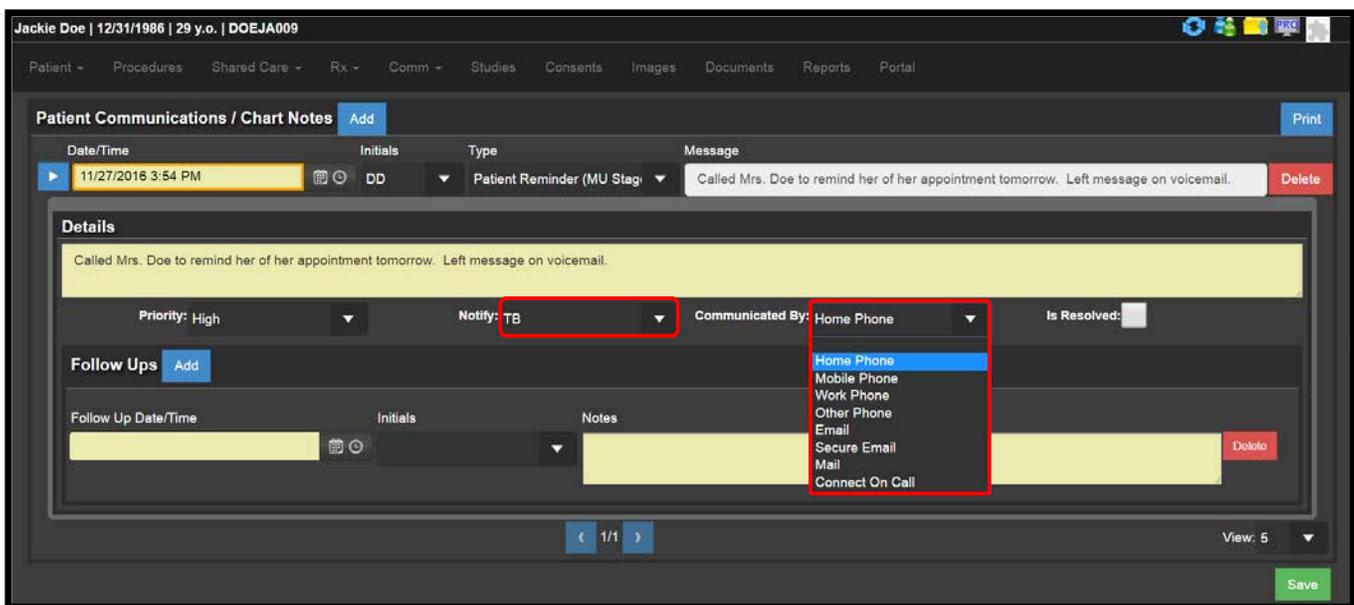
Communications

Select the Follow Up Priority. The highlight around the Date/Time field will change color based on the priority selected. Routine=Yellow. High=Orange. Urgent=Red.



Select the initials of the person you would like to Notify to follow up with the patient.

The Communicated By box can be used to indicate how you communicated with the patient. For meaningful use, when the "Patient Reminder" communication type is selected, the Communicated By field must reflect the patient's preferred method of communication as indicated on the Demographics page. Click the Save icon to secure your message.



Communications

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009

Summary
Demographics
 Insurance & Auth
 Demographics

Copyay: Not Provided Insurance: Not Provided Save

Primary Information
 Last Name: Doe
 First Name: Jackie MI:
 Title:
 Occupation: Retired
 Familiar:
 SSN: xxx-xx-8056 View Edit
 Chart Number: DOEJA009
 Opt Out: Iris Registry x Vestrum x

Identifying Information
 Gender: Male Female
 Language: Arabic
 Races:
 Ethnicity: Hispanic Origin

Birth Information
 DOB: 12/31/1986
 Age: 29 y.o. Minor:

Contact Information
 Home Phone: (727)271-7894
 Mobile Phone:
 Work Phone:
 Other Phone:
 Email:
 Secure Email:
 Preference: Home Phone

Notifications (Pt Comm)

The Chart Notes/Patient Communication messages will appear in the notification window as Pt Comm. The color of the link will match the color of the highest priority level in the Patient Communication sections. Click on the link to view the messages you have received.

gCRC - Clearwater - Retina - tbiondo Refresh 11/27/2016 Admin Logout

Notifications
 Incomplete Charts (655)
 Billing (67/324)
 Pending Studies (180)
 Study Review (1)
 Int Comm (3/0)
Pt Comm (11)
 Pending Letters (30)
 Document Review (478)
 eRx Notification (21)
 Unmatched Patients (8)

AM PM (0) Patient Processing (0) Tech1 Waiting 2 (0) Exam1/Laser Checkout Exit (0)

The circle on the left side matches the color determined by the priority level. This helps you to prioritize your messages. Click on the Patient Name to access the Patient Communications Tab.

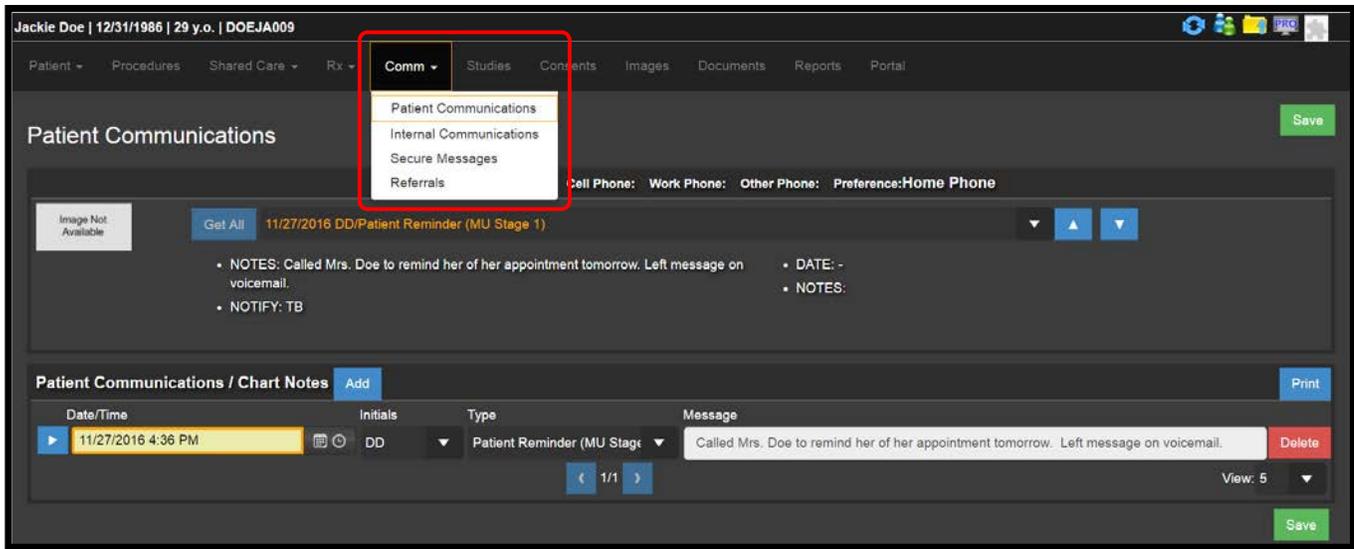
Patient Name	Call Date	Notify	Issue	Message
Doe, Jackie	11/27/2016	TB	Patient Reminder (MU Stage 1)	Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.
Doe, Pauline	9/23/2016			Beta test.
Doe, Heather	9/20/2016	TB	Cancel/Reschedule Appointment	Message.
Phillips, Robert	7/24/2015	TB		Tia- for DOS J3490- they are denying the authorization saying it is not valid. Please ask Lee why the authorization is not going through. Thanks! :)
Wood, James	7/24/2015	TB		Tia- This Patients insurance is stating that the gave auth for 67042 and 67113- we billed a 67108 so they are denying. Let me know what's going on with these sx pts. if we need to change and bill the other code. Please get back with me ASAP as we are hitting timely filing. Thank you :)
SMITH, FRANCIS M	4/7/2015	TB	Other	ERROR DELETING
BETANCOURT, ANDRES	3/31/2015	TB		ERROR DELETING
Hudson Jr., Michael	3/19/2015		Other	vdASFvADVD
Hudson Jr., Michael	3/10/2015	co	Other	Test Message
Hudson Jr., Michael	10/21/2014	TB	Other	This is a sample note.
Doe1, John	4/10/2013	TB	Eye Pain/Vision Loss - Post-Op/Injection	c/o eye pain and floaters-started 2 days following injection

11 records Refresh Workflow

20 items per page 1 - 11 of 11 items

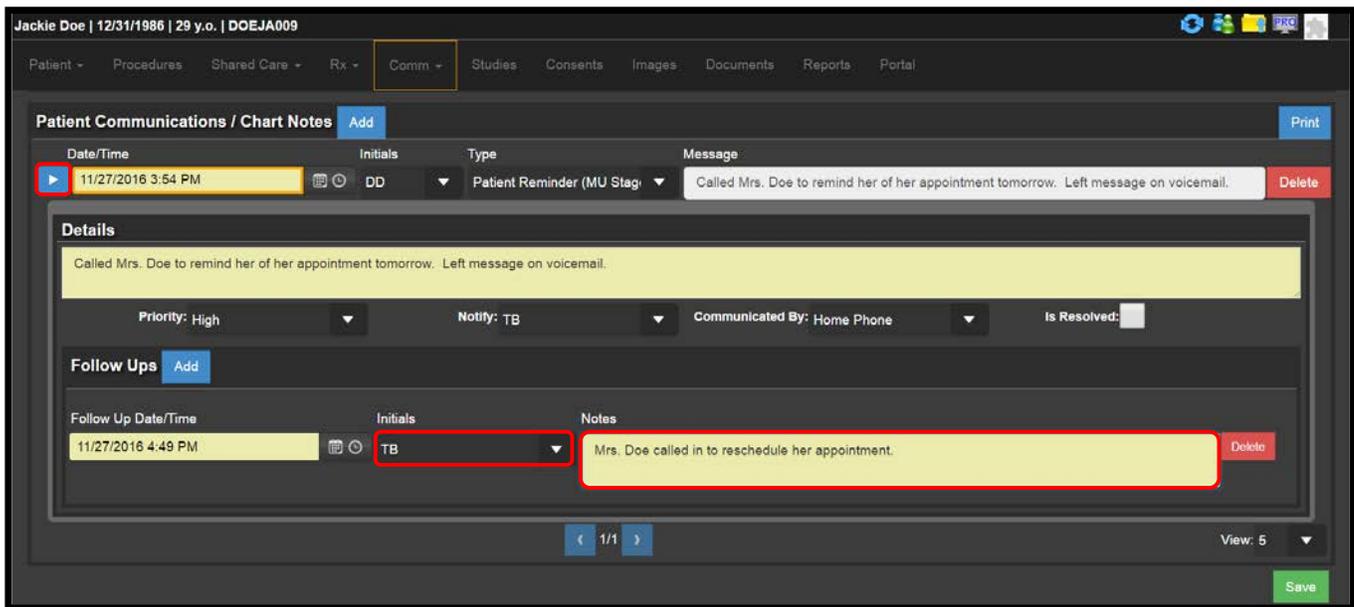
Communications

Anytime there is an active message in any section of the communications tab, the tab itself will have a highlighted box around it. The box will match the color of the highest priority level selected in the communications section. The dropdown menu will also display the highlight to indicate which Communication needs to be addressed.



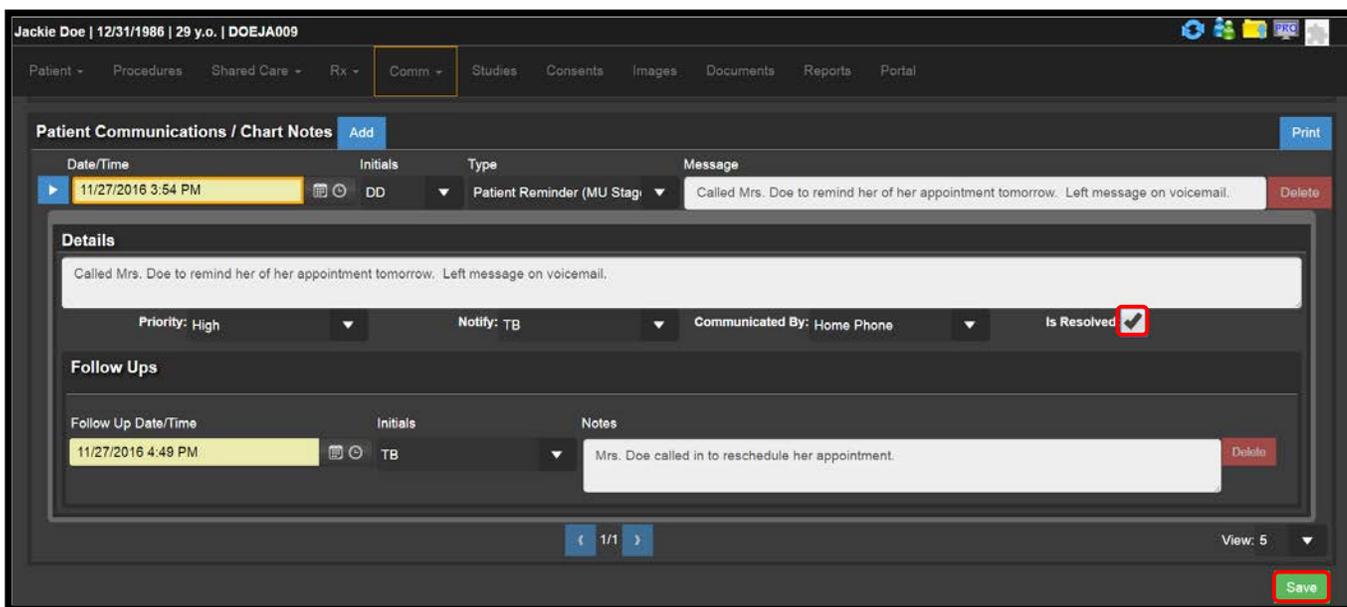
Issue Resolved

To document that you have followed up on the call, click the blue arrow to open the current Patient Communication. Select your Initials from the dropdown list and enter your Note in the yellow text field.

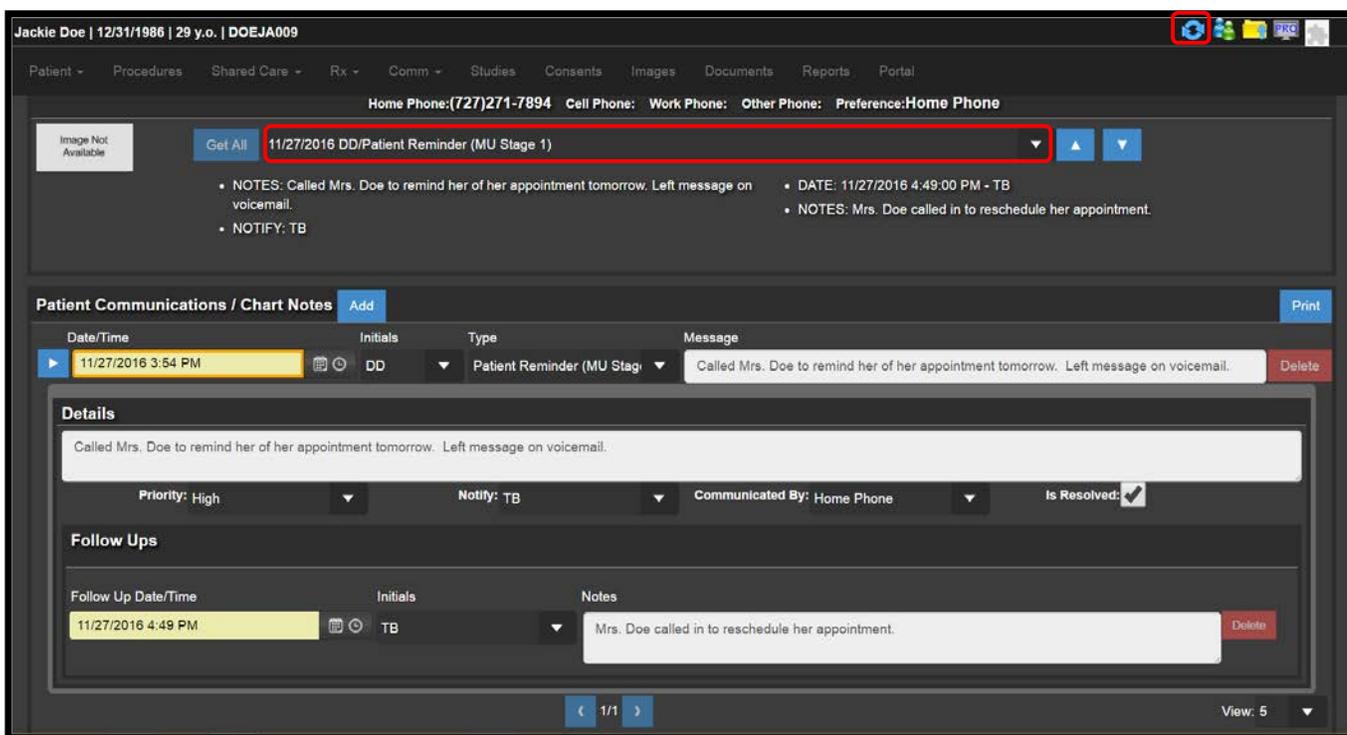


Communications

Once completed, place a check mark in the box next to Issue Resolved. This will lock the notes. Click Save.



Click the refresh icon in the top right corner to display the patient communication/chart note in the Encounter Summary.

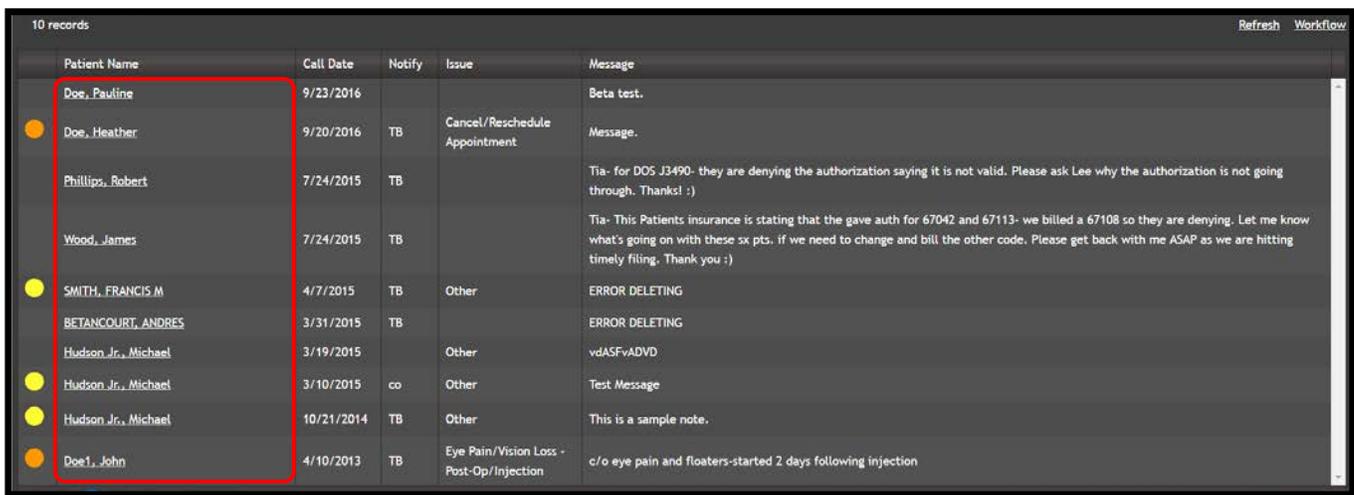


Communications

Also, once resolved, the Pt Comm section in Notifications will update to reflect that there is no longer a pending issue. There are now only 10 items in Pt Comm instead of 11.

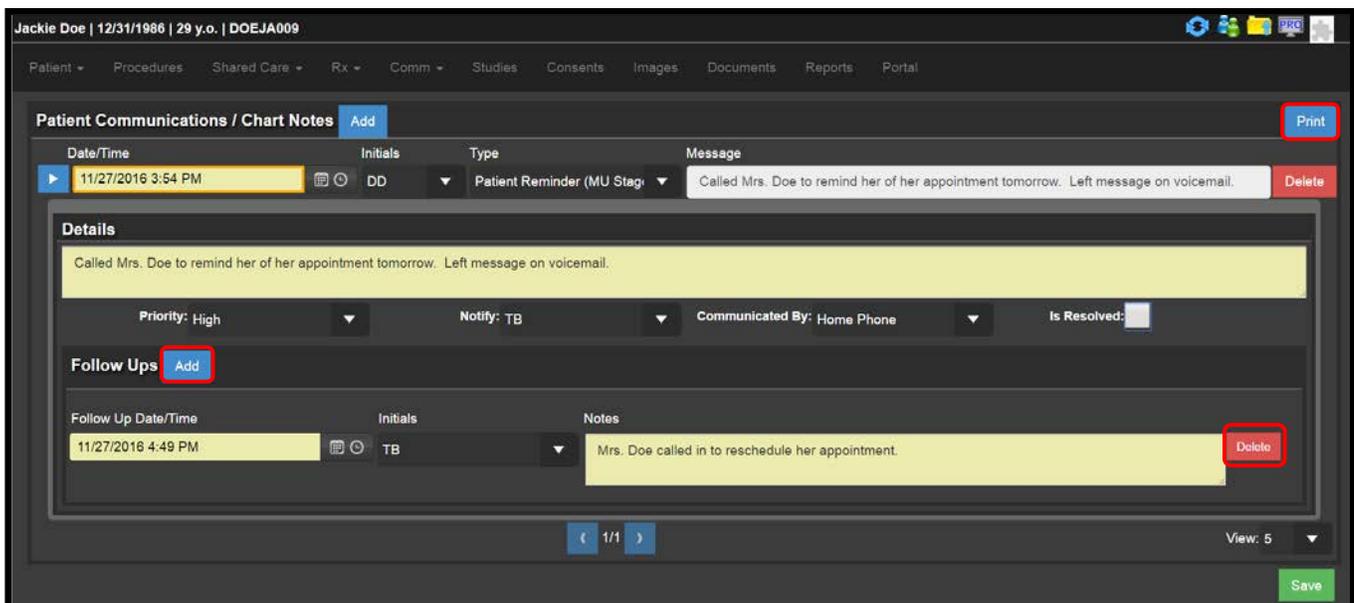


Click on the link to display the names. That patient is no longer in the list.



Adding/Deleting Messages

Multiple notes or messages can be added by using the Add button. Likewise, if available, notes can be deleted by using the Delete button.



Communications

Print

Lastly, there is an option available to print the items from the Patient Communication/Chart Note section. Click on the Print button on the top right corner of that section. A PDF document will display with each Patient Communication/Chart Note on a separate page. Right click on the document and select print. At this point you have the option to print all pages or select the page or pages you would like to print.

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 CLEARWATER, FL 33761

Name
Jackie Doe

Chart#
DOEJA009

DOB
12/31/1986 (29 y.o.)

Date	Type	Priority	Initial	Message
11/27/2016 3:54:00PM	Patient Reminder (MU Stage 1)	High	DD	Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.
11/27/2016 4:49:00PM			TB	Mrs. Doe called in to reschedule her appointment.

Internal Communication

Internal Communications are temporary messages that are entered to remind office staff of something that needs to be done for the patient.

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009


Patient - Procedures Shared Care - Rx - **Comm -** Studies Consents Images Documents Reports Portal

Referring: Sarah C Smith, D.O.

Chart Summary

Image Not Available

- MR WET (8/1/2016): OD: +2.75-1.00 x 070 = cc20/40-.
- WEARS SPECTACLE (8/1/2016): OD: +2.50-1.00 x 070 = cc20/200. OS: +2.25-1.00 x 070 = cc20/40-.
- MR WET (8/1/2016): OD: +2.75-1.00 x 070 ADD +1.25 = cc20/200. OS: +2.50-1.00 x 070 ADD +1.25 = cc20/40-. WEARS SPECTACLE (8/1/2016): OD: +2.50-1.00 x 070 ADD +1.25 = cc20/200. OS: +2.25-1.00 x 070 ADD +1.25 = cc20/40-
- GENERAL NOTES: Pt prefers to be called Mrs. Doe.
- **TREATMENT NOTES:**
- PROCEDURE NOTES:
- ALLERGIES: Penicillin, Codeine. **HIGH RISK MEDS: Aspirin 81 mg.**
- OCULAR MEDS: Murine Tears Plus 0.6%-0.05% 1 gtt prn OU (for 4 weeks). Pred Forte 1% 1 gtt qid.
- LAST DILATION OD: 08/01/2016, LAST DILATION OS: 08/01/2016.
- PACHYMETRY: (8/01/16) OD: 532 OS: 524



Copy: Not Provided

Insurance: Not Provided

PL

Internal Communications

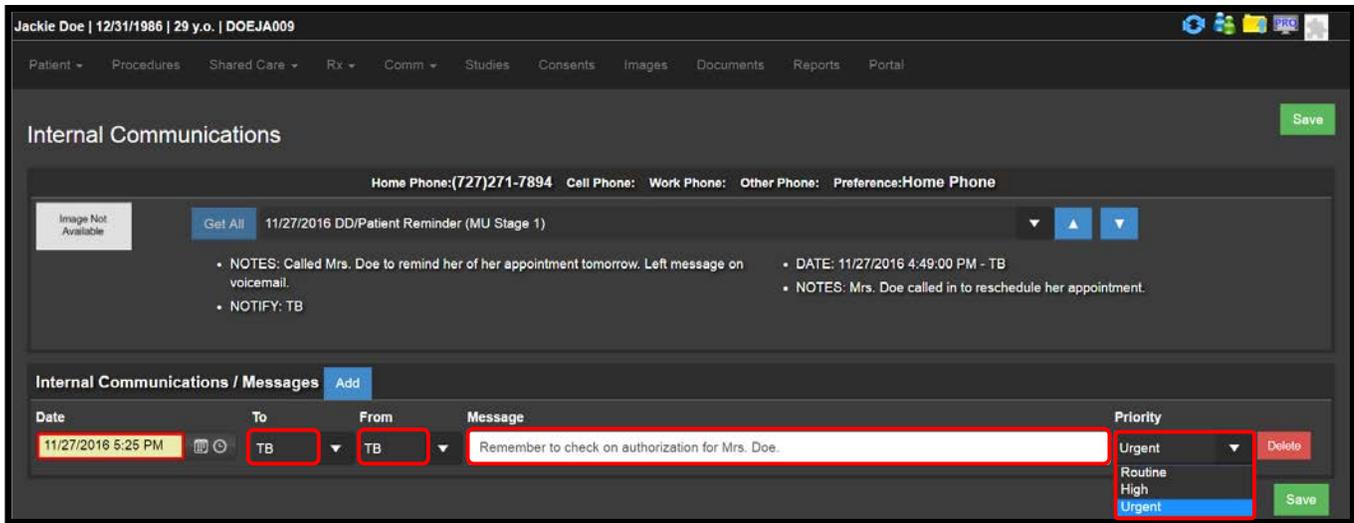
Secure Messages

Referrals

Internal Communications

Communications

Select the initials of the person receiving the message and the initials of the person creating the message. This can be used as a reminder to yourself by placing your initials in both the To and From fields. Enter the message in the text box. Select the message priority and the date field on the left will change color based on the priority selected.

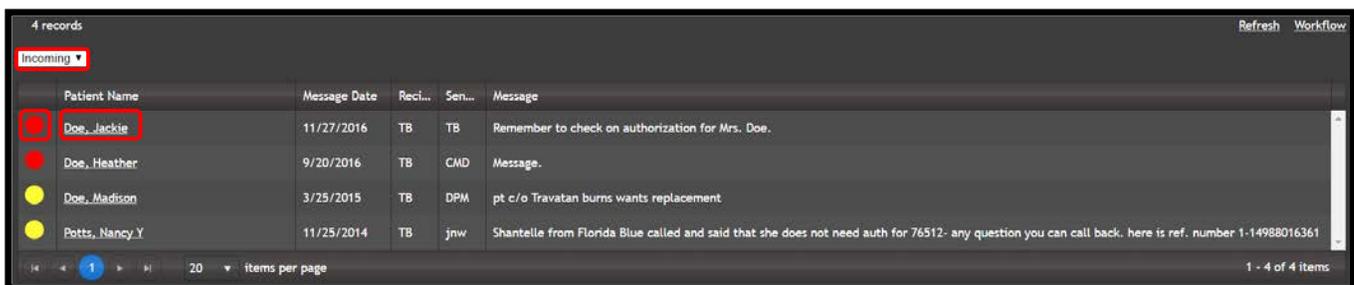


Notifications (Int Comm)

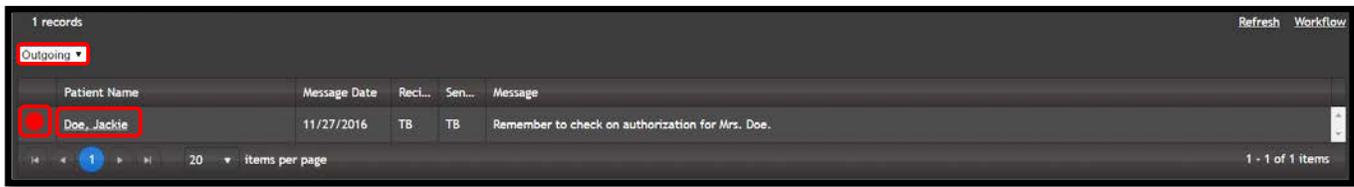
The Int Comm link in the notification window is where the internal messages will populate. The first number will be messages sent to you or your Incoming Messages. The second number will be messages you have sent to others or your Outgoing Messages. Click on the link to view the messages.



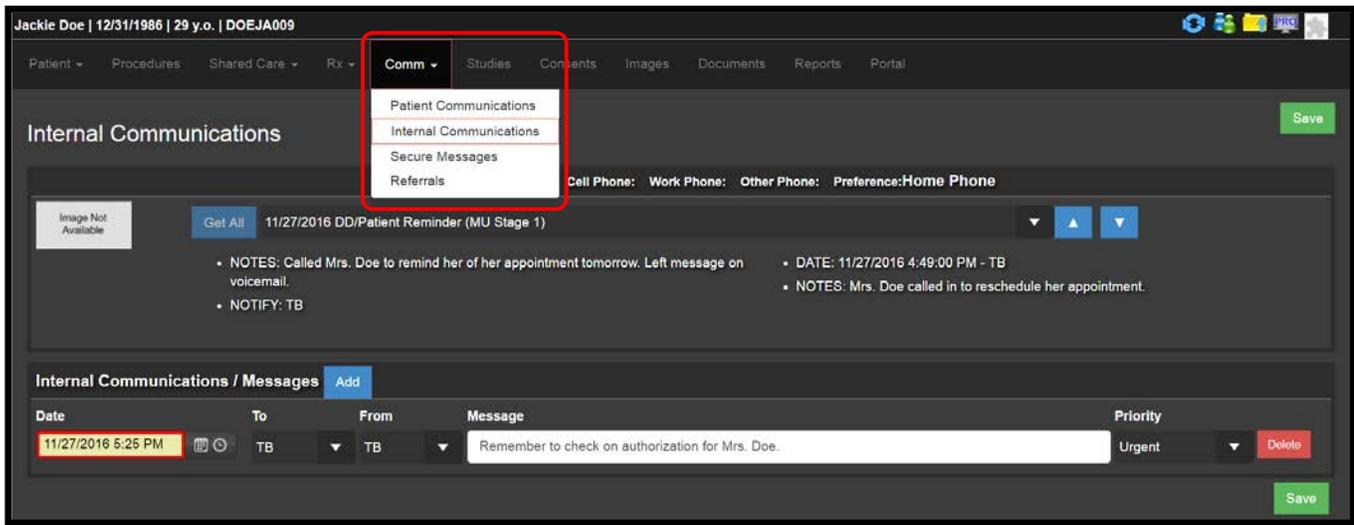
There is a dropdown at the top indicating your Incoming or Outgoing messages. It will automatically default to show your incoming messages first. The circle on the left side matches the color determined by the priority level. This helps you to prioritize your messages. Click on the patient's name to access the Internal Communications Tab.



Communications

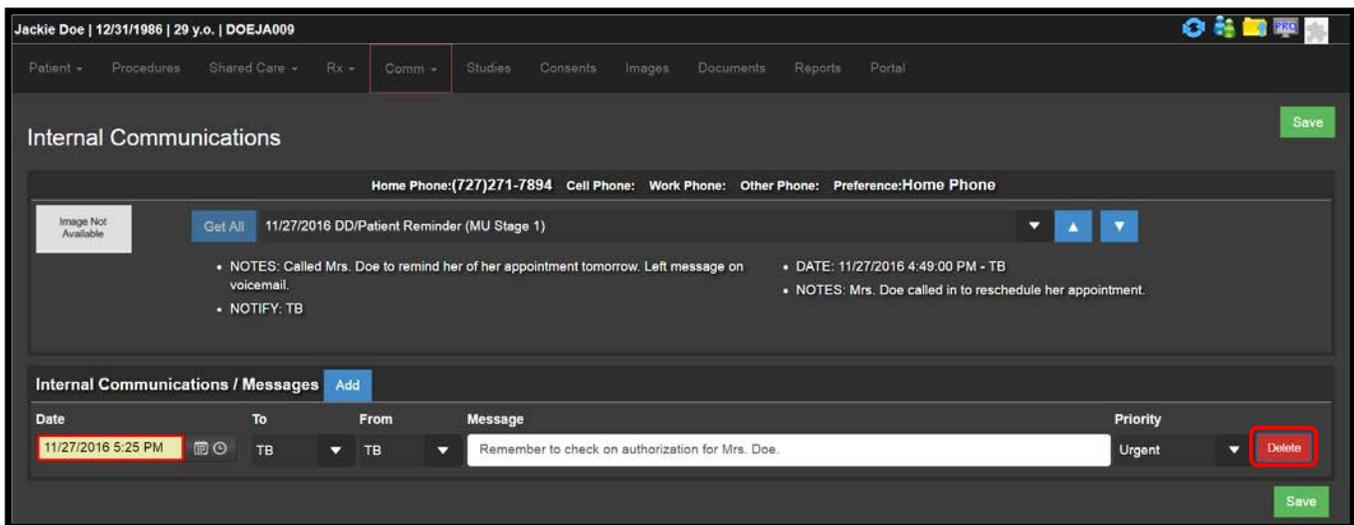


Remember, anytime there is an active message in any section of the communications tab, the tab itself will have a highlighted box around it. The box will match the color of the highest priority level selected in communications section.



Deleting Messages

To get a message to clear from your Notifications, you must delete it from the Internal Communications tab. Remember, the Messages section is only for temporary notes. Click the Delete button and the message will be removed from the Communications tab. Again, remember to click Save anytime you make changes to the page.



Communications

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009

Internal Communications

Home Phone:(727)271-7894 Cell Phone: Work Phone: Other Phone: Preference:Home Phone

Get All 11/27/2016 DD/Patient Reminder (MU Stage 1)

- NOTES: Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.
- NOTIFY: TB
- DATE: 11/27/2016 4:49:00 PM - TB
- NOTES: Mrs. Doe called in to reschedule her appointment.

Internal Communications / Messages Add

Date	To	From	Message	Priority	Delete
11/27/2016 5:33 PM		TB			

Save

It will be removed from the Messages link in as well.

gcrs - Clearwater - Retina - tbiondo

Refresh 11/27/2016 Admin Logout

Time	Name	Reason For Visit	Area	Task	Doc	Wait

Notifications

- Incomplete Charts (655)
- Billing (67/324)
- Pending Studies (180)
- Study Review (1)
- Int Comm (3/0)
- Pt Comm (10)
- Pending Letters (30)
- Document Review (478)
- eRx Notification (21)
- Unmatched Patients (8)

AM PM (0) Patient Processing (0) Tech1 Waiting 2 (0) Exam1/Laser Checkout Exit (0)

Secure Messages

Secure Messages are available for practices attesting for Meaningful Use Stage 2. Please contact Support for additional information.

Jackie Doe | 12/31/1986 | 29 y.o. | DOEJA009

Secure Messages

Comm - Patient Communications Internal Communications Secure Messages Referrals

Get All 11/27/2016 DD/Patient Reminder (MU Stage 1)

- NOTES: Called Mrs. Doe to remind her of her appointment tomorrow. Left message on voicemail.
- NOTIFY: TB
- DATE: 11/27/2016 4:49:00 PM - TB
- NOTES: Mrs. Doe called in to reschedule her appointment.

Secure Messages

Recipient	Subject	Status	Created
Subject:			
Body:			

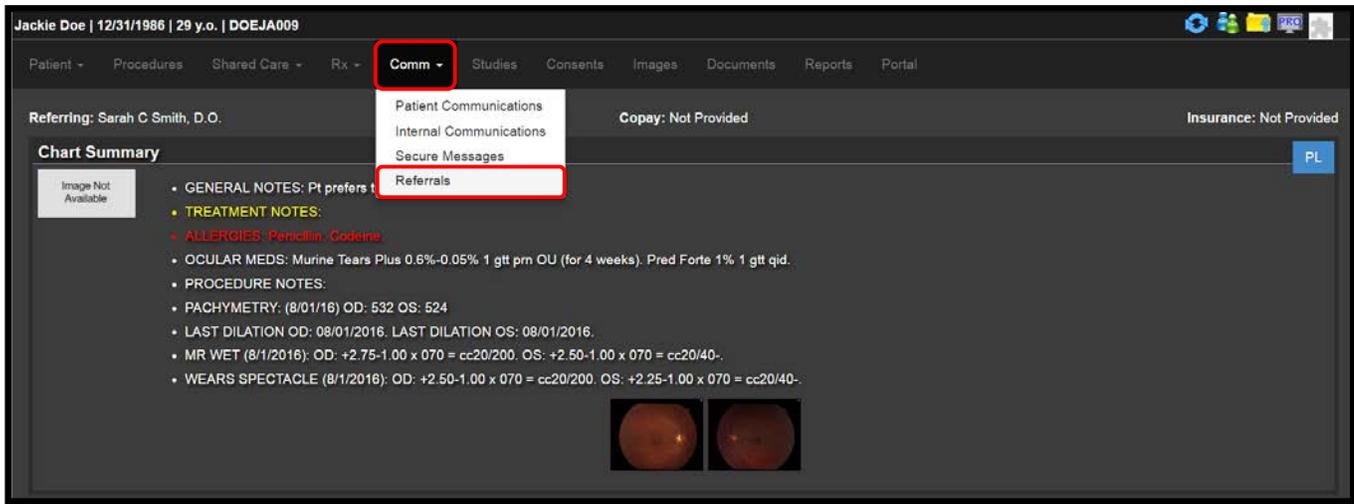
Status: Read Unread Resolved

New Send

Communications

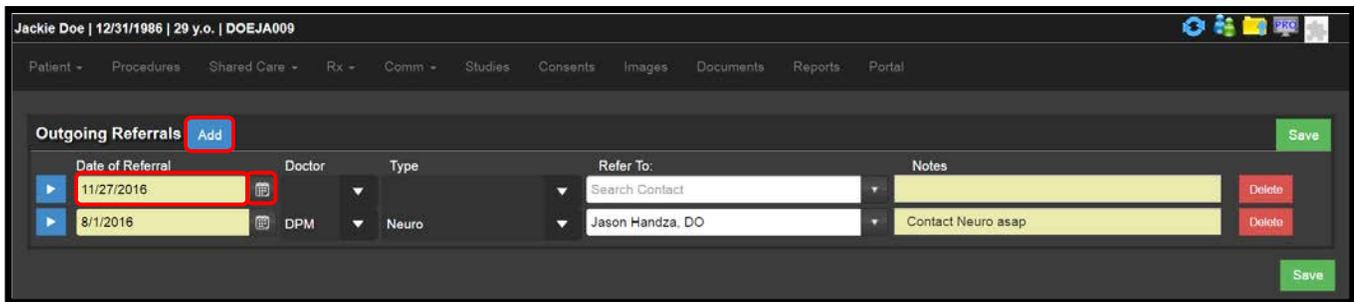
Referrals

The Referrals that are created inside the chart on the Imp/Plan tab will also display in the Communications Tab under Referrals.



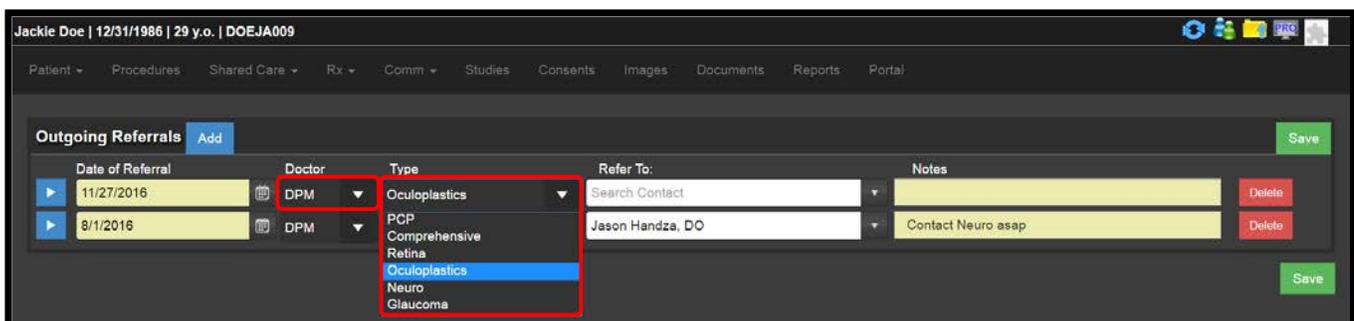
Creating Referrals from Communications

Click the Add button to create a new referral from the Communications page. The current date will automatically populate in the Date of Referral field. Click on the calendar icon to change the date.



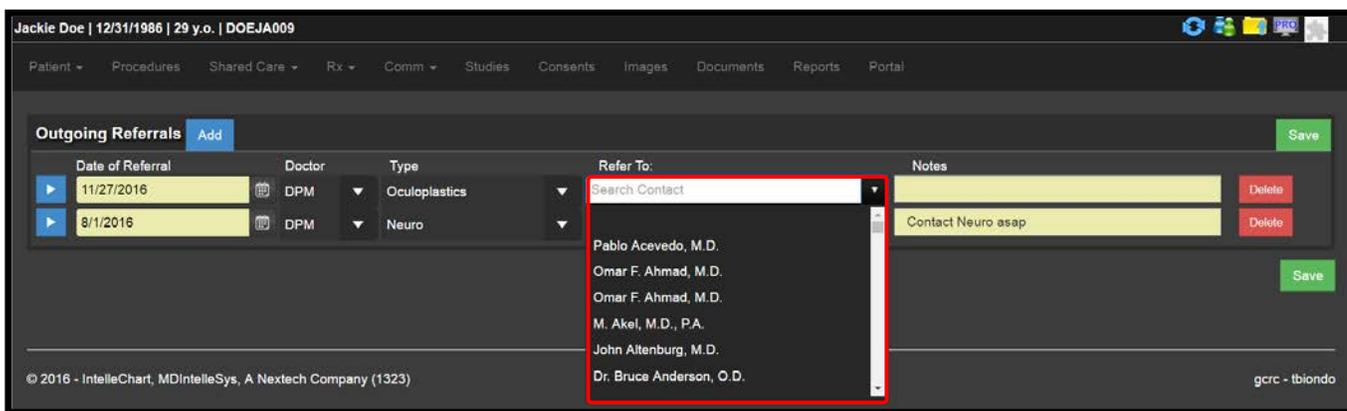
Click the dropdown next to Doctor to indicate the doctor that is sending the referral.

The Type field indicates the type of provider to whom you are referring the patient.

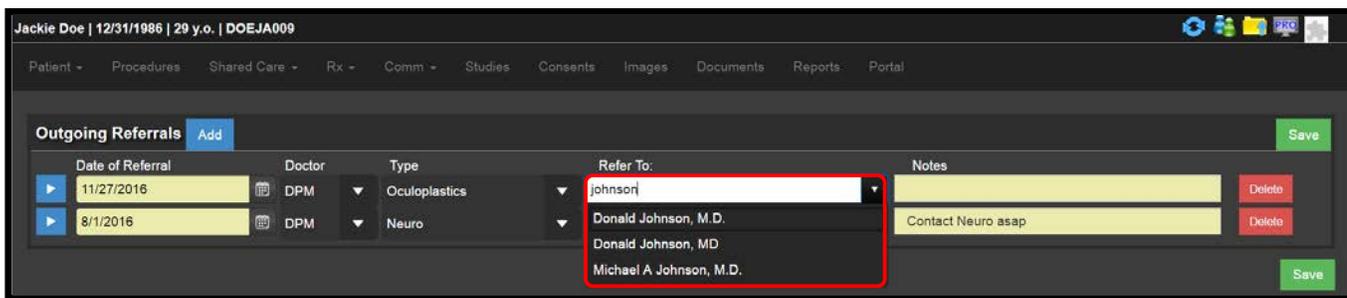


Communications

The Refer To field indicates the doctor to whom you are referring your patient.

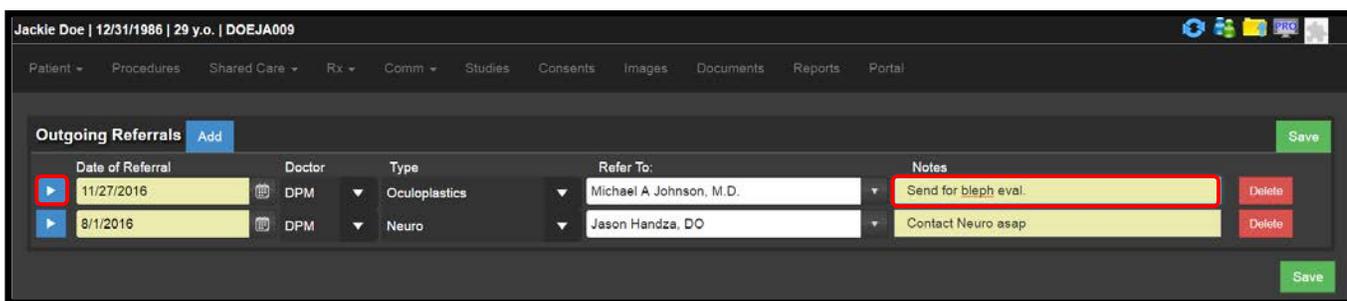


You can type in the field to search for the doctor. Keep in mind that they must be in your database in the Contacts section of the Practice Admin.



The Notes field provides a place to document pertinent information regarding this referral.

To Document the Outgoing or Incoming Communications, click on the blue arrow.

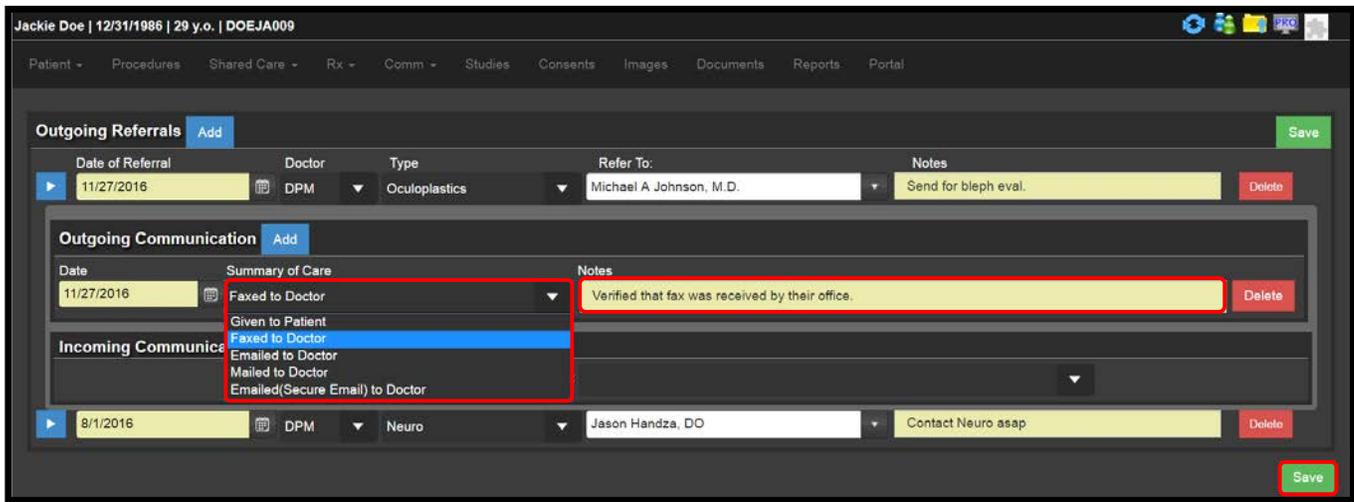


Communications

Outgoing Referral Communications

In the Summary of Care box, select the method that this information was communicated with the referring doctor. Enter a Note regarding any additional information you wish to document.

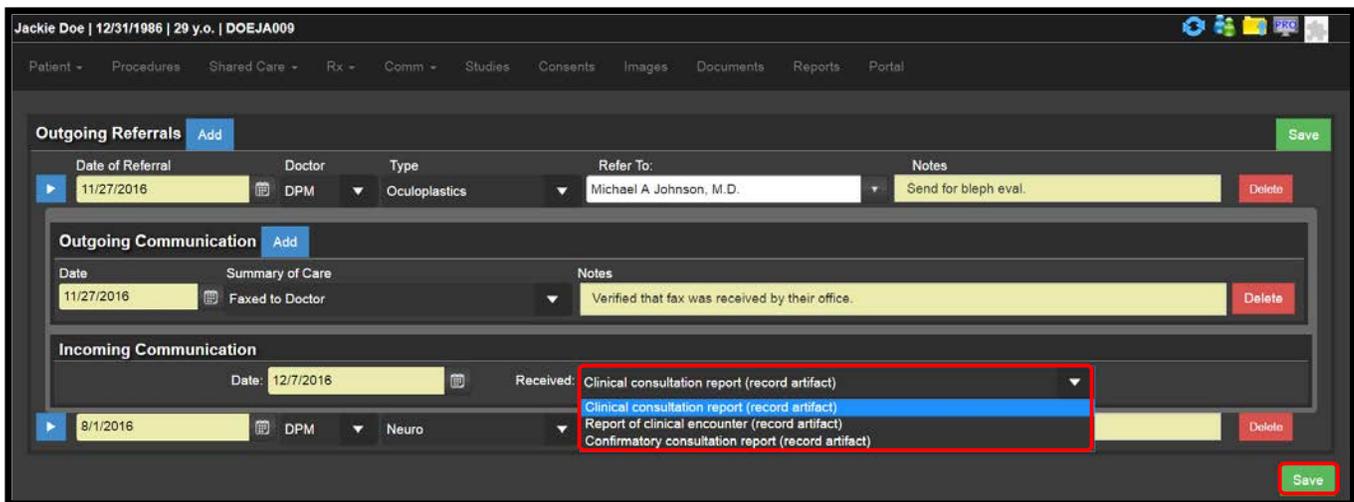
Remember to click Save.



Incoming Referral Communications

In the Received Box indicate the method used by the physician to communicate back to your office regarding the patient you referred to them. This allows for closed loop communication as required by certain stages of Meaningful Use.

As always, remember to click Save.



Thank You

Thank you for reviewing the lesson on the Communications Tab.

Intellicart Support

If you have any additional questions, please contact Support at 727-386-4167 x1 or support@mdintellect.com.