

# ONLINE

USER GROUP MEETING

Mandalay Bay, Las Vegas | November 1-4, 2015

NEXTGEN<sup>®</sup>  
HEALTHCARE

Presenter(s):

Chris Lutz and Srinivas MA

Topic

Technical Review Patient Portal - Advanced

Level

300

# Meet our Panelists



**Christopher Lutz**  
*Senior Design  
Engineer*



**Srinivas MA**  
*Manager Software  
Development*

# Safe Harbor Provisions/Legal Disclaimer

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# Agenda

- *In this session, we'll review the SQL table schema, how to generate meaningful reports from NextGen Patient Portal, and other useful SQL scripts.*
- *Goal will be to provide the audience with a deeper understanding of the portal infrastructure and managing the state of your portal implementation.*

# Agenda

## Presentation/Discussion ( 60 minutes)

- Christopher Lutz
- Srinivas MA

## Question and answers (15 minutes)

*This presentation is targeted to system administrator or developer level attendees who have TSQL knowledge and currently have the NextGen Patient Portal up and running*

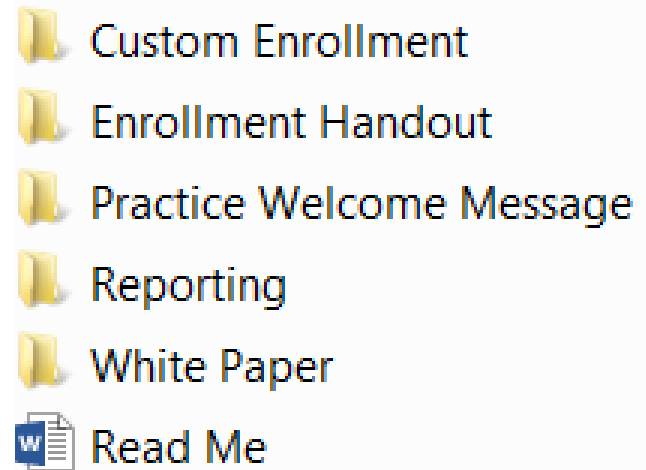
# Topics we will cover

- Architecture/Topology
- Patient Message Flow
- Table Schema
- Archiving Data
- Copying Prod over test
- Merging/Splitting Practices

# Attendee Materials

- All scripts and templates discussed in this presentation are included in the downloadable attendee materials

*Caution: Do not insert, update or modify the schemas or attempt to “back end” data.*





But First...

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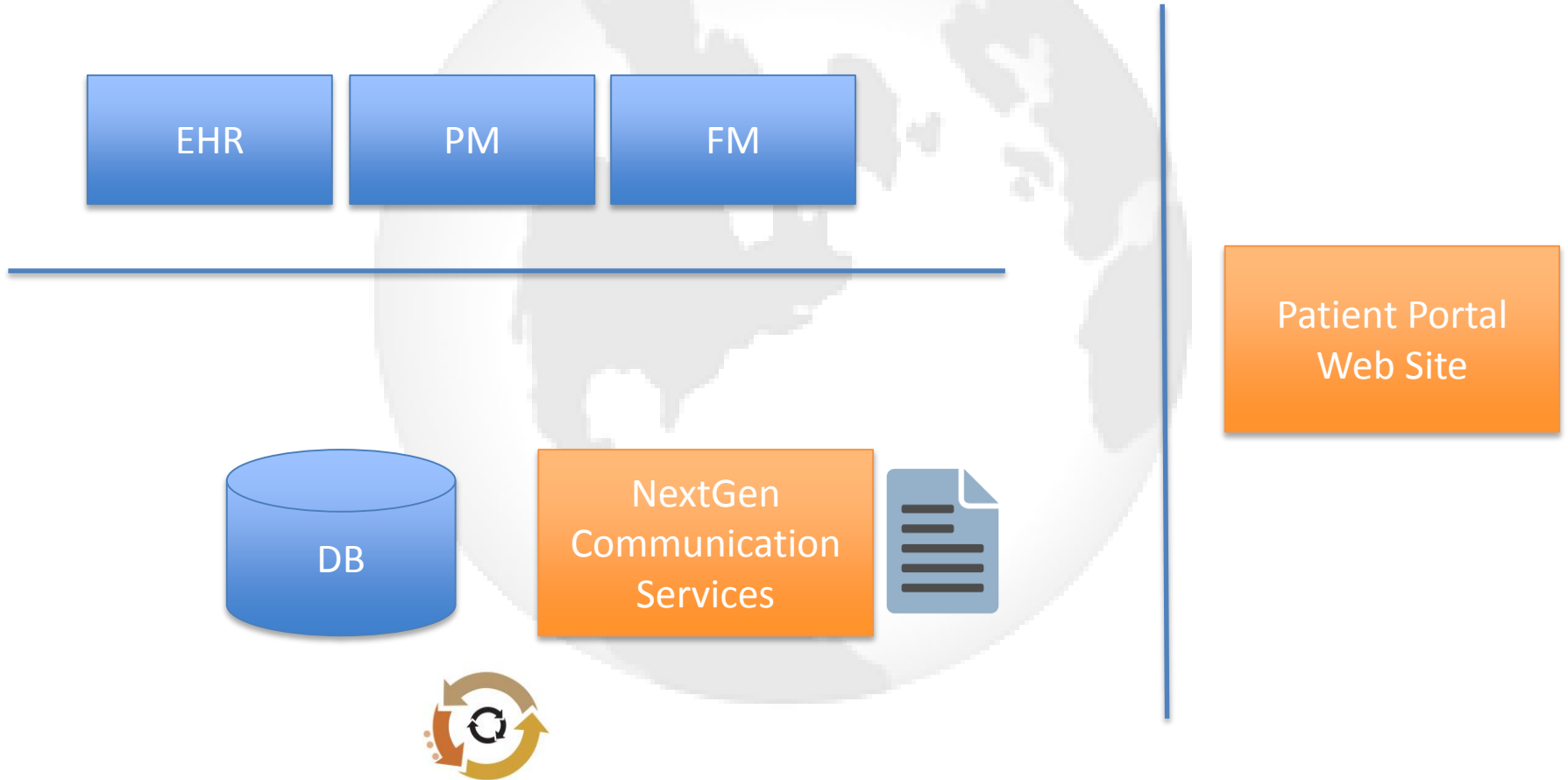
Thank  
You

A Quick Overview of the moving parts...

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# Topology Review



# NCS Service Functions

- Synchronization of appointments, medications, recall plans and other clinical data.
- Generating Patient Health Records
- Sending and receiving any patient communication messages
- Sending appointment reminders

# NCS is composed of two services

NextGen Message Relay Service

NextGen Queue Processor Service

Import

Export

Reminders

PHR

...

N

# Security on the NCS

- All traffic is encrypted at 2048 bit strength or higher
- Outbound HTTPS 433 and 11001
  - No inbound ports
- Certificate Authentication
- Firewall Rules

# Keeping an eye on the message queue

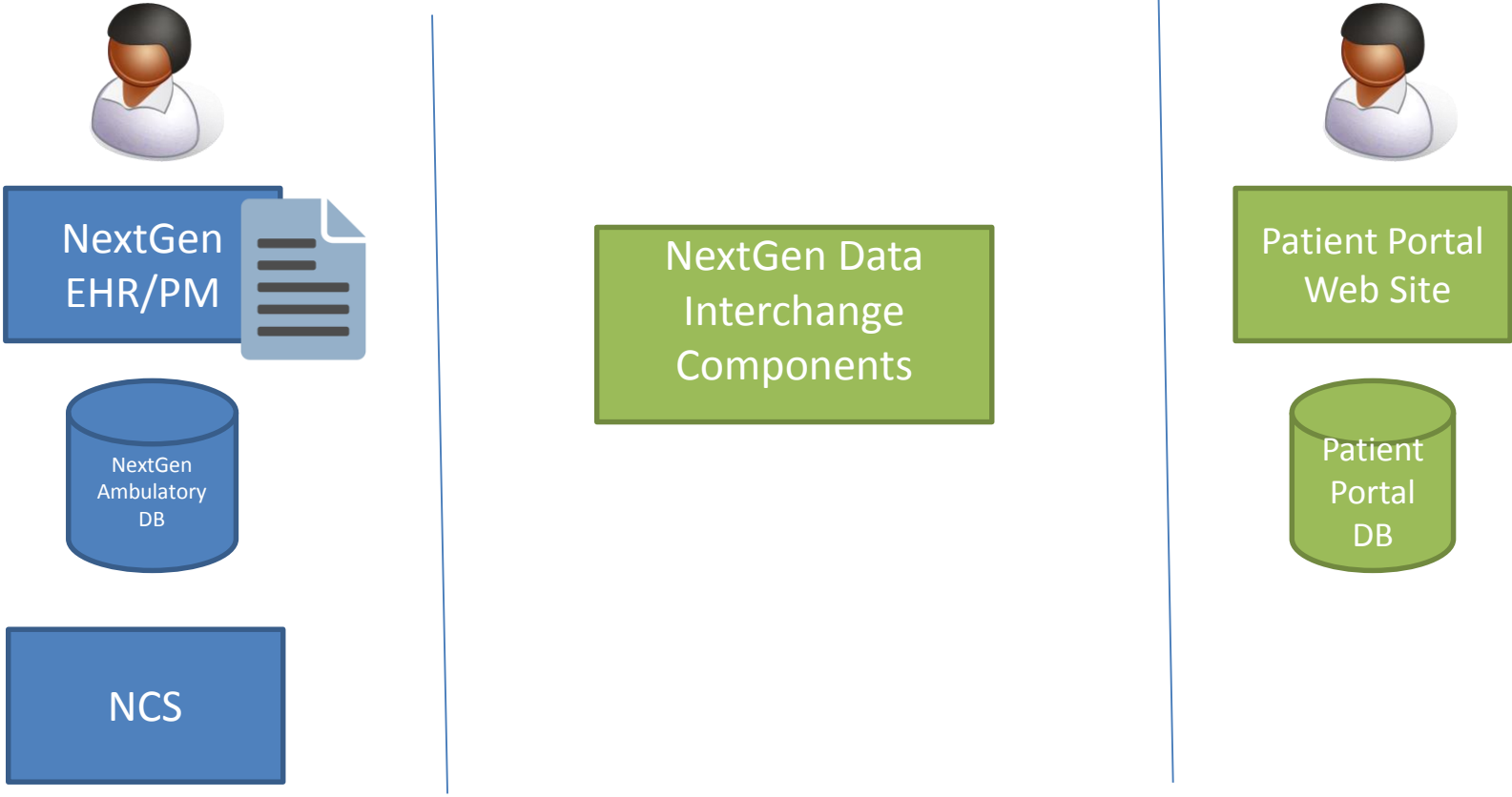


# Life Cycle of a Message

There are two message queues, Import and Export

- The Import queue refers to messages coming from the Patient Portal Server
- The Export queue refers to messages outbound from your site to the portal server.

# Practice To Patient Message Flow



# Queue Tables

Table Name	Description
Nxmd_import	Incoming message queue
Nxmd_export	Outgoing message queue
Nxmd_fileattachments	Large document payloads

*Ideally all of these tables should close to zero records*

# Message Queue Management

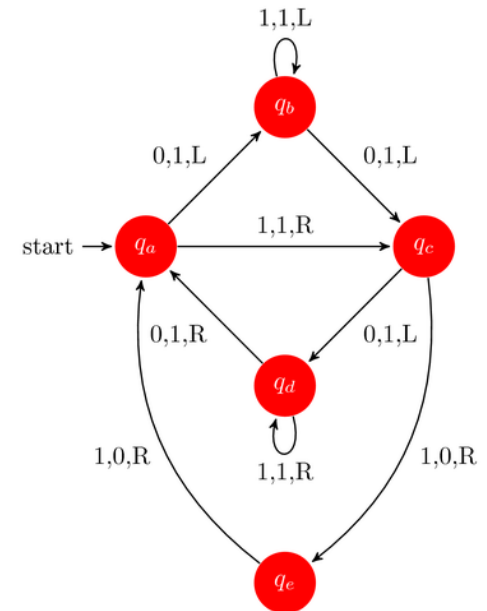
- Messages in the queue are ephemeral
- They are handled first come first served
- They may be gone before a support representative arrive to triage

# Reporting on the Queue

One technique is to take snap shots of the queue on fixed interfaces to capture state information

Over time the “snap shots” can be pulled Together to build trend data on traffic patterns

High backlogs indicate that adjustments in the NCS settings may be warranted



# Case Study

- nwgeb\_generate\_export\_audit\_log\_entry
- Can be set up to inserts a periodic snap shot record into two audit tables
  - NXMD\_QUEUE\_AUDIT\_LOG
  - NXMD\_QUEUE\_AUDIT\_LOG\_TOTALS
- Import queue records are identified with an 'I'
- Export queue records are identified with an 'E'

Select a page

- General
- Steps
- Schedules
- Alerts
- Notifications
- Targets

Script Help

Name: NCS Queue Size Audit

Owner: ppsa

Category: NextGen

Description: This job will periodically audit the queue tables and collect metric information and the size of the queue

Connection

Server: STL2NGSPSQL20

Connection: ppsa

[View connection properties](#)

Enabled

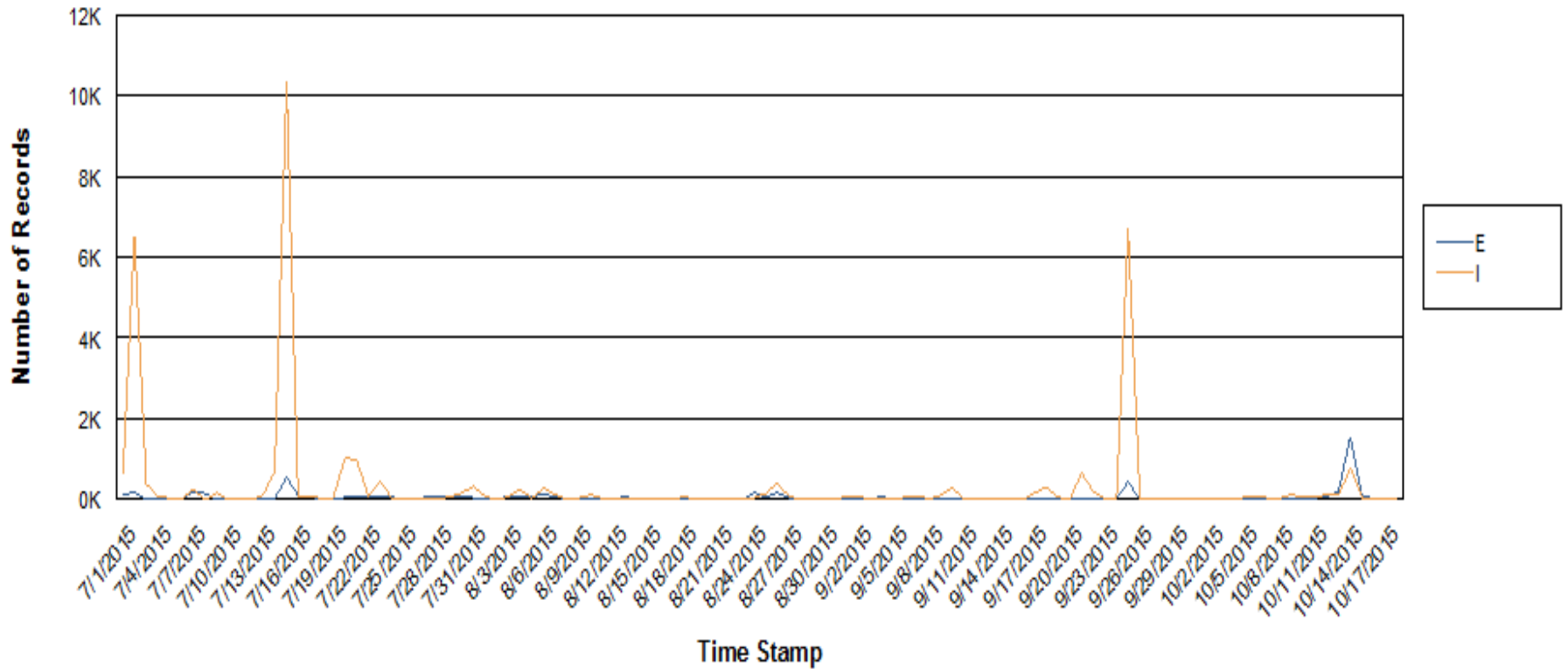
Source:

Created: 10/5/2015 1:48:03 PM

Last modified: 10/5/2015 1:48:04 PM

Progress

### Import/Export Queue Depth



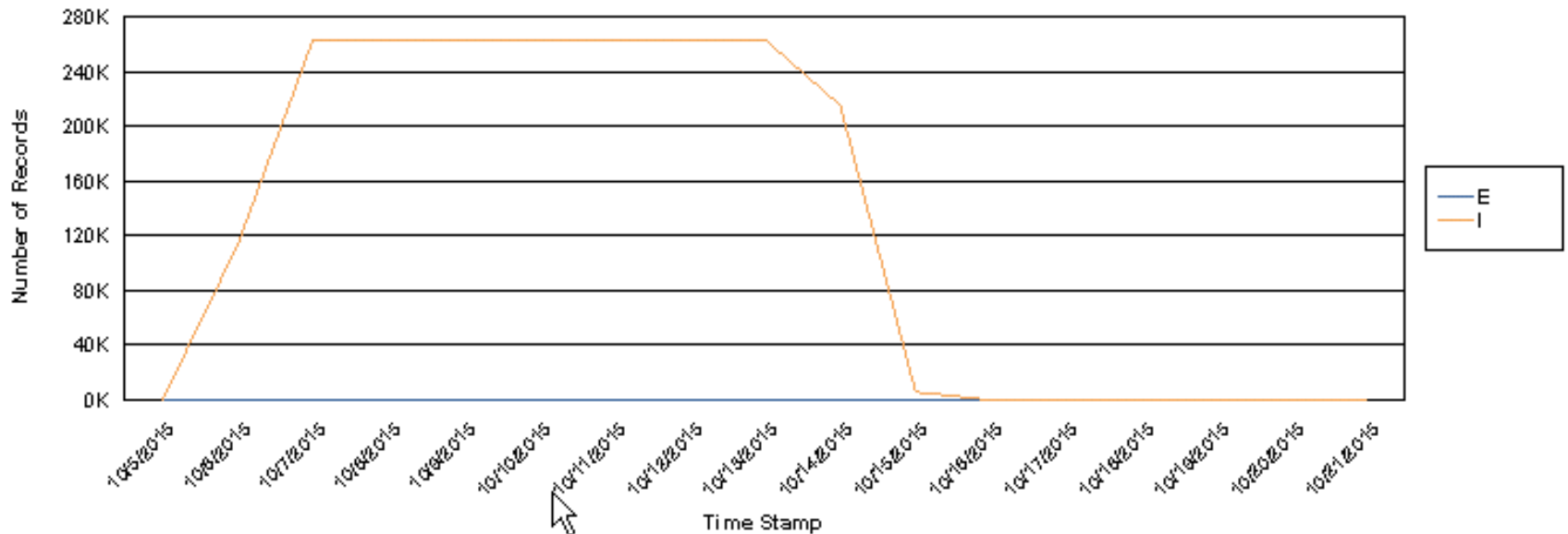


# Unhealthy Queue Example

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### Import/Export Queue Depth



# Meta Data Information and General Conventions

# General Table Conventions

- All patient portal tables are named with a prefix of nxmd\_ or ngweb\_
- All time stamps on any of these tables is in GMT/UTC
- Records are “soft” deleted. The delete\_ind field will be set to ‘Y’
- Person\_id vs Proxy\_id

# Site and Practice Identifiers

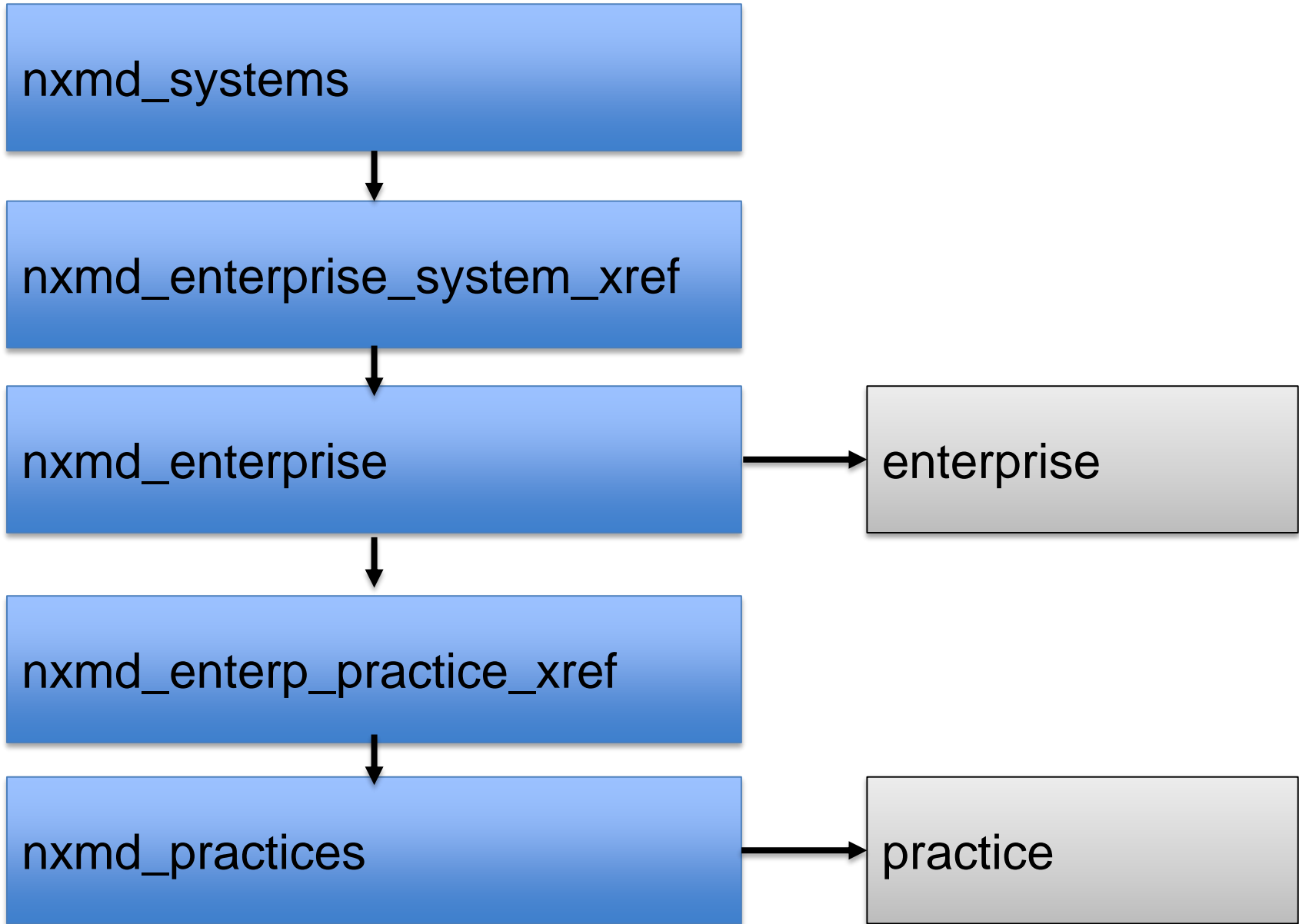
- EHR and EPM use Integer identifiers for practices and enterprises
- In a global topology, there will be collisions with integer identifiers
- In portal, each business unit is assigned a GUID identifier to uniquely identify that entity in the world



# Meta Data Tables

## Enterprise/Practice Identifiers

nxmd\_systems  
nxmd\_practices  
nxmd\_enterp\_practice\_xref  
nxmd\_enterprise  
nxmd\_enterprise\_system\_xref



What are my patients doing?

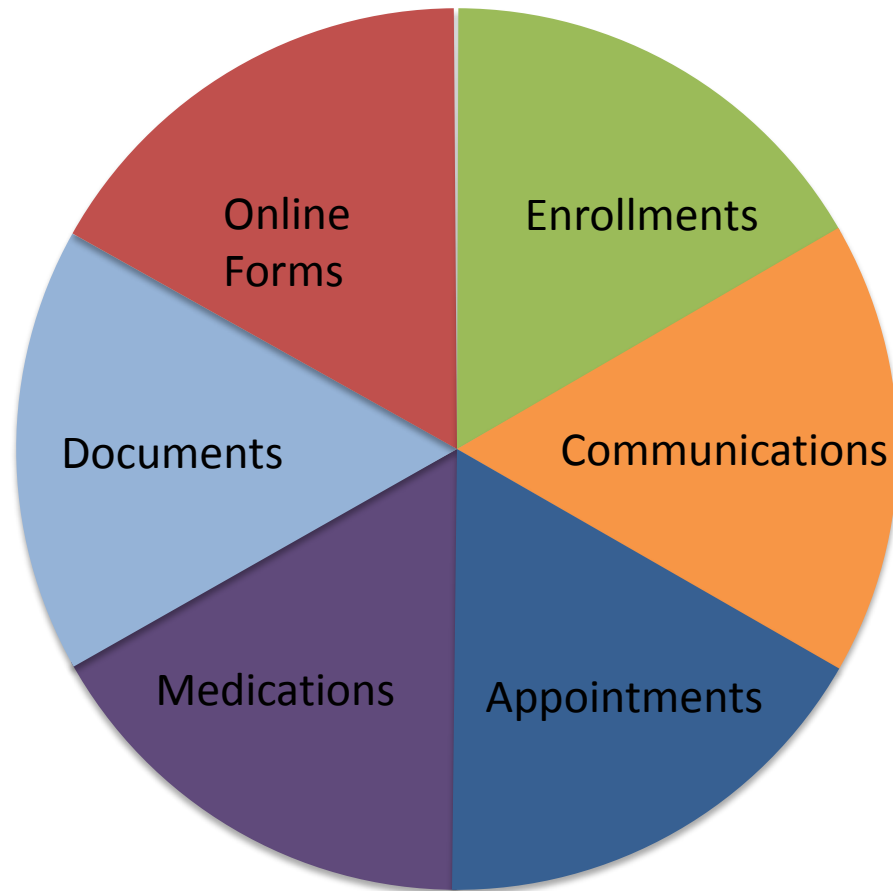
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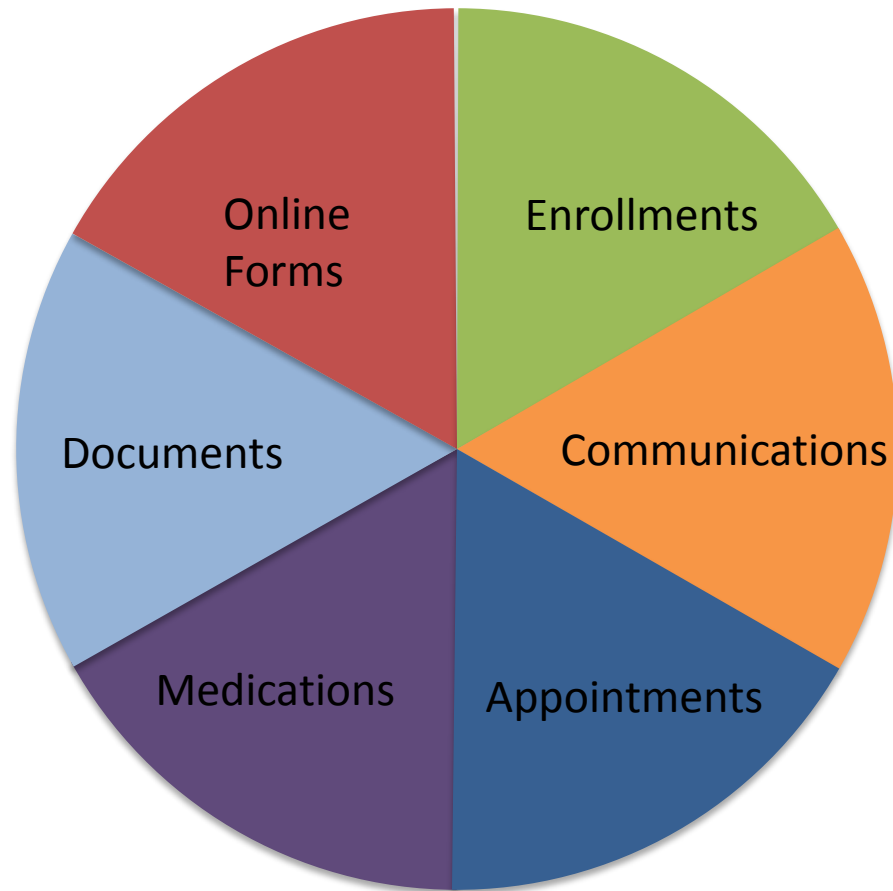
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# Building a narrative around your patients population

- Who is enrolled?
- Who did not enroll in a timely fashion?
- Who has not logged in within a time period?
- Who has sent a communication message?
- Are my staff responding in a timely fashion?







# Enrollment Tables

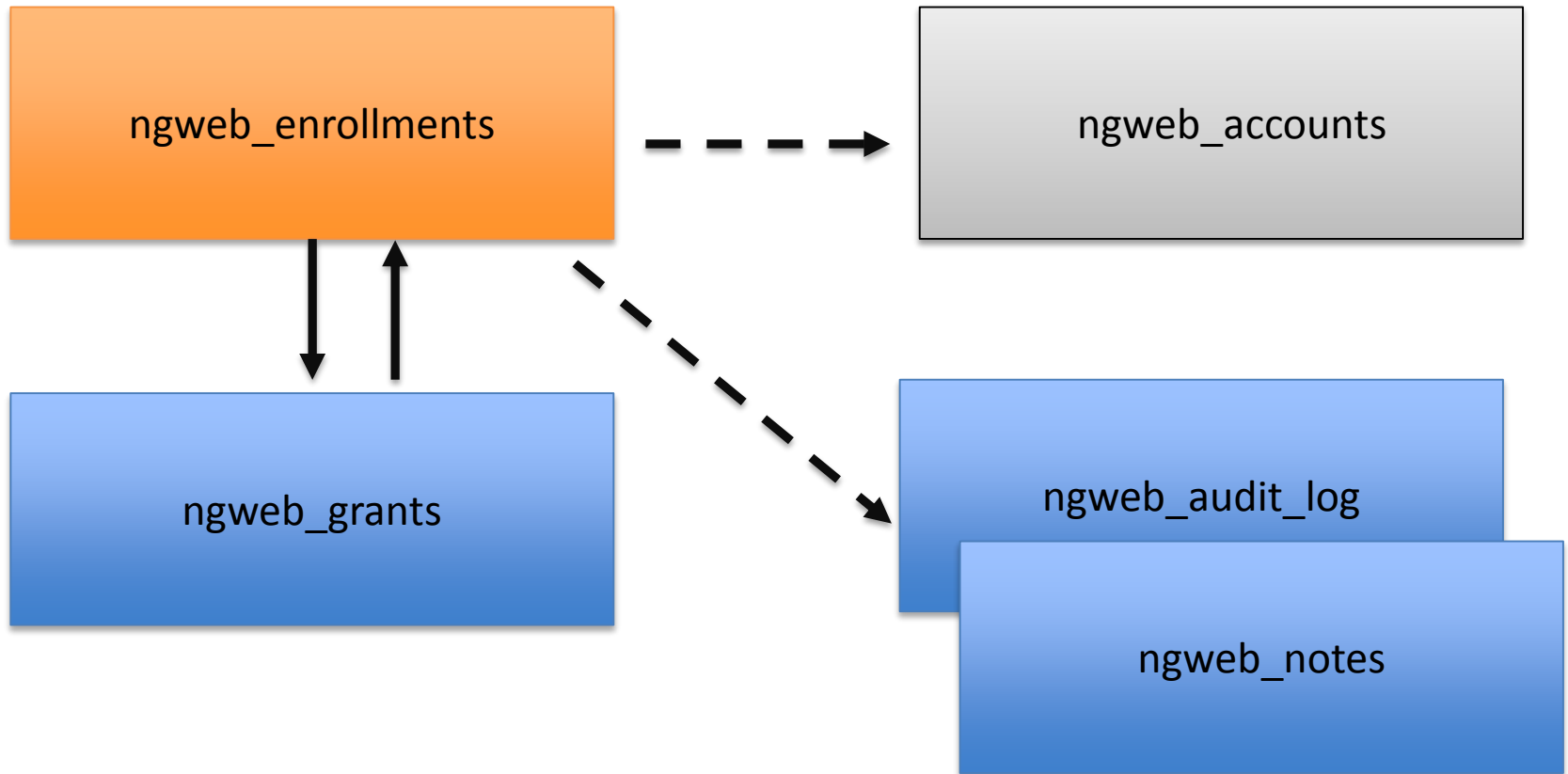


Table	Description
ngweb_enrollments	Current Enrollment Status and audit information
ngweb_grant	Who has access between which accounts?
ngweb_account	Deprecated table, do not use
ngweb_audit_log ngweb_notes	Audit events and notes
Ngweb_securables	User Rights Definitions

Table	Important Fields
ngweb_enrollments	person_id, Nx_practice_id Enrollment_status
ngweb_grant	person_id, entity_id, entity_type, securable_id expiration_date
ngweb_account	Deprecated table, do not use
ngweb_audit_log	person_id, log_type_id
ngweb_notes	object_id,

*Note: The nxmd\_enroll flag in the patient table is deprecated.*

```

(
select
p.practice_id, p.practice_name, e.person_id, e.enrollment_status,
e.enrolled_when, e.account_locked, 'Completed' as 'final_status'
from
nxmd_practices np with (nolock),
practice p with (nolock),
ngweb_enrollments e with (nolock)--Primary patient
where
np.practice_id = p.practice_id AND e.nx_practice_id = np.nx_practice_id
and np.delete_ind = 'N' and e.delete_ind = 'N'
and e.enrollment_status in (3) --pending or completed, we do not care about any of the other enrollment statuses.
)
UNION
(
select
p.practice_id, p.practice_name, e.person_id, e.enrollment_status,
e.enrolled_when, e.account_locked,
CASE ISNULL( MAX(guardian.enrollment_status), 0)
WHEN 3 THEN 'Guardian Enrolled'
ELSE 'Pending'
END as 'final_status'

from
nxmd_practices np with (nolock),
practice p with (nolock),
ngweb_enrollments e with (nolock)--Primary patient
LEFT JOIN ngweb_grant g with (nolock)
ON e.person_id = g.person_id AND e.nx_practice_id= g.nx_practice_id and g.delete_ind = 'N'
and g.entity_type = 0 and g.person_id <> g.entity_id and (g.expiration_date < getutcdate() OR g.expiration_date is null)
LEFT JOIN ngweb_enrollments guardian with (nolock) ON guardian.person_id = g.entity_id

where
np.practice_id = p.practice_id AND e.nx_practice_id = np.nx_practice_id
and np.delete_ind = 'N' and e.delete_ind = 'N'
and e.enrollment_status in (1) --pending or completed, we do not care about any of the other enrollment statuses.
GROUP by p.practice_id, p.practice_name, e.person_id, e.enrollment_status,
e.enrolled_when, e.account_locked
)

```

# Simplifying Enrollments

```
select * from ngweb_vw_ugm_enrollment_status
```

# Examples

View/Stored Procedure	Description
ngweb_vw_ugm_enrollment_status ngweb_vw_ugm_enrollment_status_last_login	Enrollment Status View
sp_UGMPortal_EnrollmentsAll	Enrollment Status for all patients for all enterprises
sp_UGMPortal_EnrollmentsPract	Enrollment Status for all patients for a given practice
sp_UGMPortal_EnrollmentsPractAggr	Aggregate Enrollment Status Counts
sp_UGMPortal_EnrollmentsLastLogin	Enrollment and Last Login Information for patients in a practice
sp_UGMPortal_EnrollmentsNotes	Account History information for a given patient



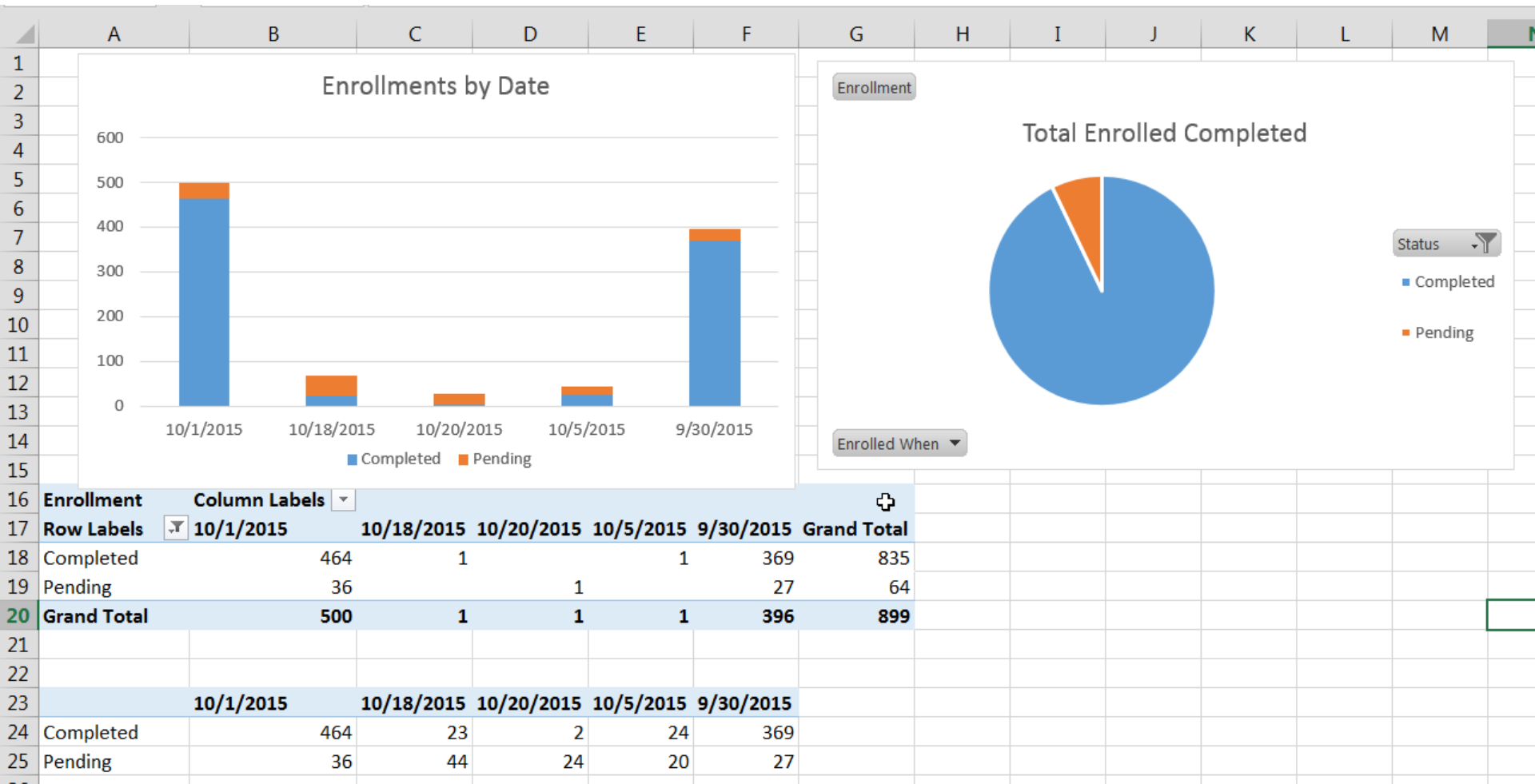
# Determining Patients who have not completed enrollment

*Stored procedure: sp\_UGMPortal\_EnrollmentsLastLogin*

first_name	last_name	final_stat...	enrolled_when	last_login
Anup	D	Completed	2014-09-22 03:01:28.163	2014-09-22 07:02:10.800
Care	Manager1	Completed	2014-10-30 01:19:57.103	2014-10-30 05:28:33.517
Child	Dependen1	Completed	2014-10-30 01:25:39.467	2014-10-30 05:25:49.780
Christopher	Lutz	Pending	NULL	2015-09-17 15:24:08.863
David	Burns	Completed	2015-01-08 12:25:40.837	2015-01-09 19:53:59.977
Kevin	Burns	Completed	2015-01-09 14:44:17.010	2015-01-09 19:44:53.383
Kumar	S	Completed	2014-09-22 06:16:52.263	2014-09-22 06:46:58.890
Liz	Burns	Completed	2014-11-17 15:40:13.417	2014-11-18 19:41:26.963
Michelle	Pollard	Completed	2015-01-09 14:42:41.773	2015-01-09 20:03:07.167
Moin	Pasha	Completed	2014-09-05 02:58:23.923	2015-02-24 08:21:36.537
Moin	Pasha1	Completed	2014-08-27 09:38:36.210	2015-02-24 08:11:30.390
Moin	Pasha2	Completed	2014-09-05 02:59:50.913	2015-01-23 05:50:03.080
Moin	Pasha3	Completed	2014-10-10 12:39:41.950	2014-10-16 12:21:20.963

*Usage Example: sp\_UGMPortal\_EnrollmentsLastLogin 0,'0004'*

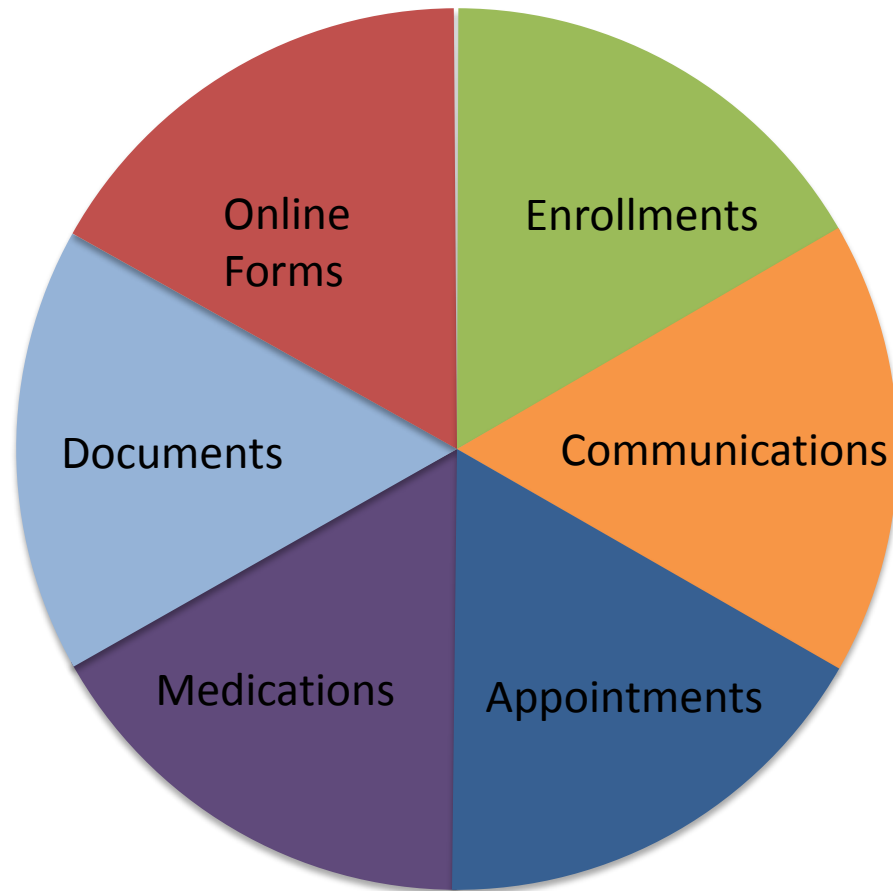
# Rendering in Excel



# Last Login Time

Select

```
    l.person_id, MAX(l.audit_event_timestamp)
from ngweb_audit_log l with (nolock)
where
    log_type_id = '3F7F9863-777A-4723-BBB6-5E428B5260DB'
group by l.person_id
```



# Communication Schema

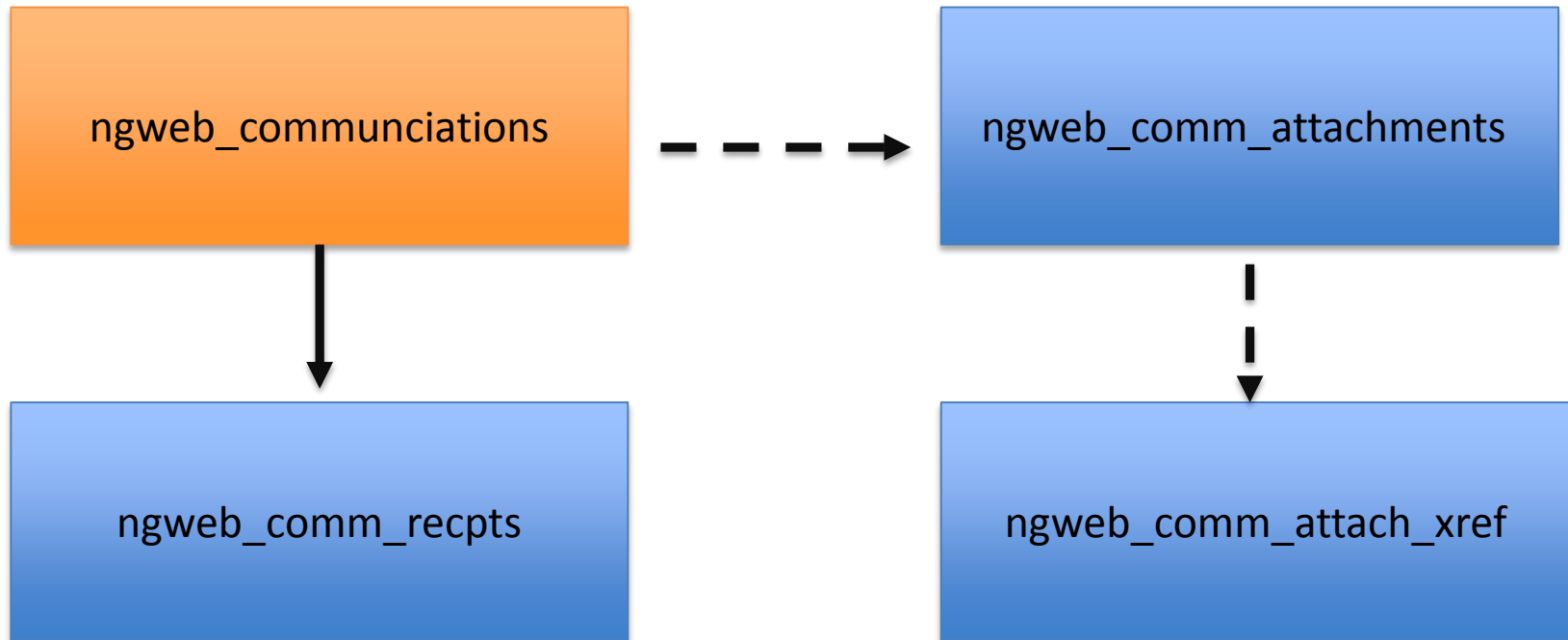


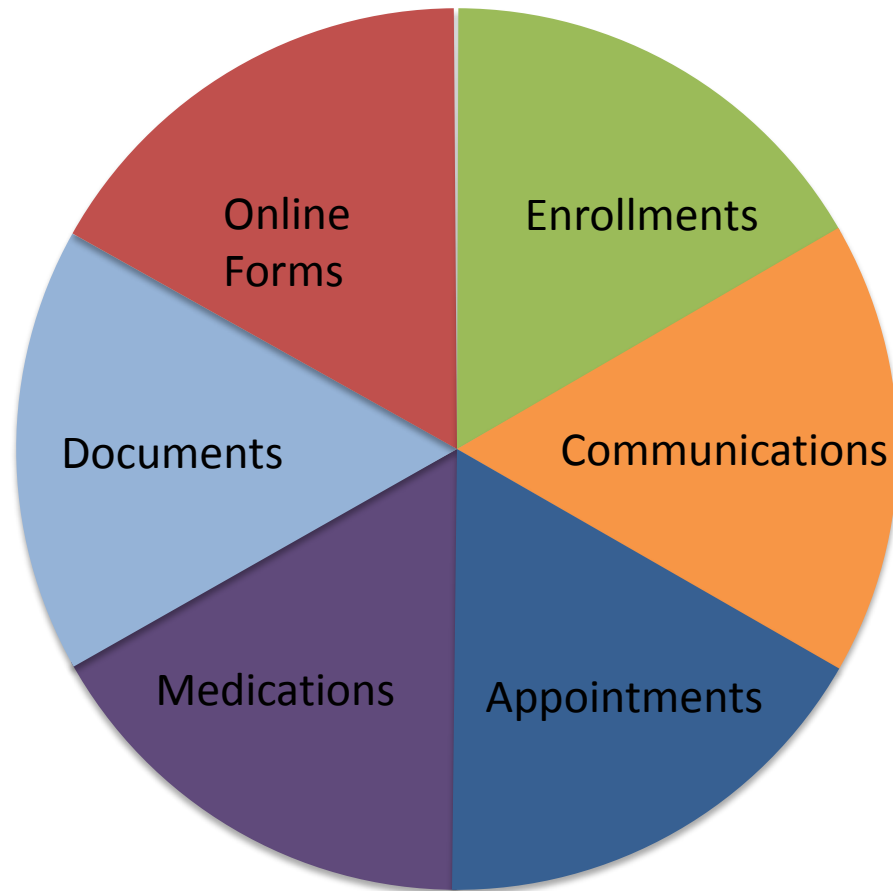
Table	Description
ngweb_communications	The actual communication message that was sent. The subject, the body, etc...
ngweb_comm_recpts	To whom the message was sent
ngweb_comm_attachments ngweb_comm_attach_xref	Attachment information that was sent with the message

Table	Key Columns
ngweb_communications	comm_id, parent_id sender_id, sender_type, sender_name, receive_when, replied_when, completed_status
ngweb_comm_recpts	comm_id Recipient_id, Recipient_Type ( 1=user, 2=patient, 5 = rule) Name
ngweb_comm_attachments	comm_id, attachment_type (0 = Online Forms, 1 IMH Form, 2-6= Document, Images) attachment_id , attachment_name
ngweb_comm_attach_xref	parent_id, attachment_id, nx_patient_id, assignment_id

# Examples

Stored Procedure Name	Description
ngweb_vw_ugm_communication_status	View to return all communications messages that originated from the patient portal
sp_UGMPortal_CommMsgsAll	All online appointments requested across enterprises
sp_UGMPortal_CommMsgsPract	All online appointments requested at the practice level
sp_UGMPortal_CommNotResponded	All communication message not responded to by a practice staff member
sp_UGMPortal_CommMsgsPerson	All online communication messages sent by a





# Appointment Requests

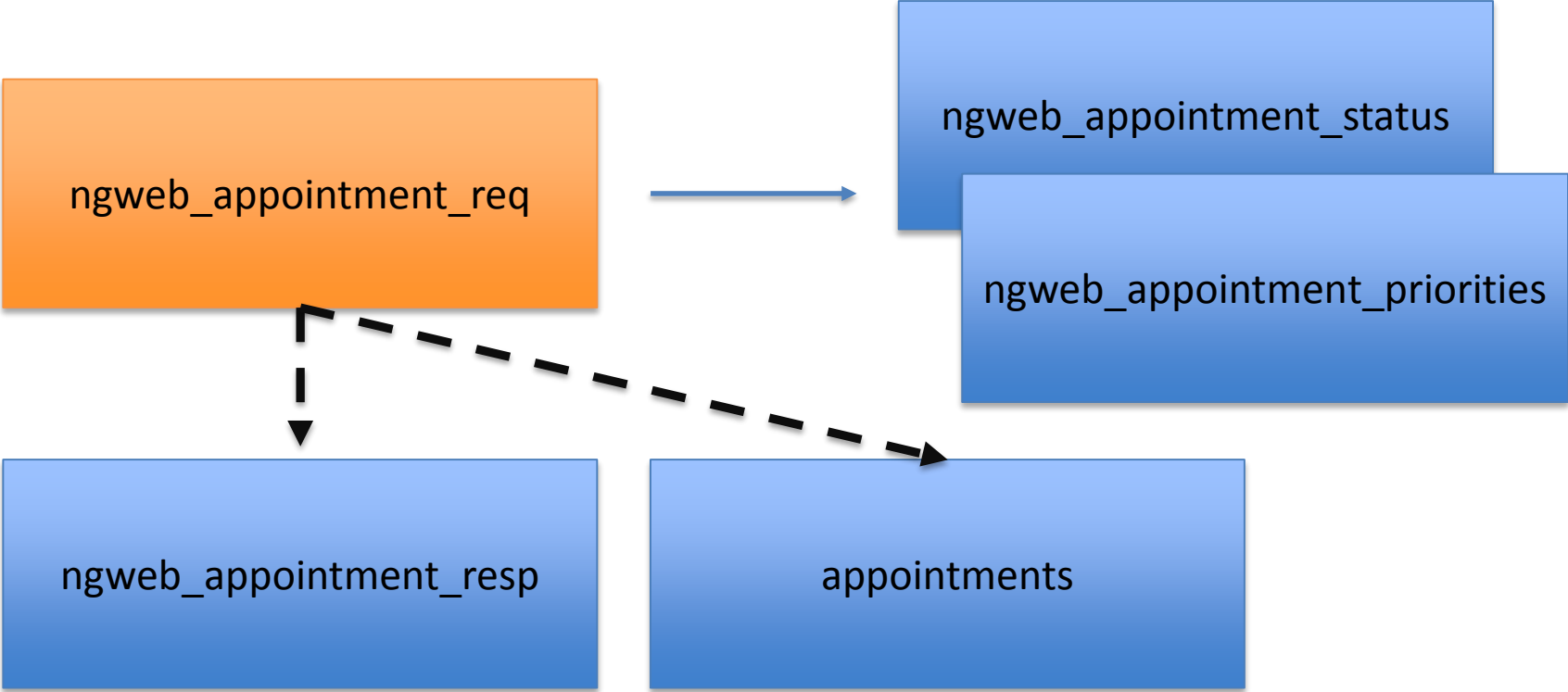


Table	Description
ngweb_appointment_req	Core appointment request table containing the appointment requests informationi
ngweb_appointment_resp	Core table containing practice responses to patient appointment requests.
ngweb_appointment_priorities	Cross reference table containing human readable descriptions of appointment priorities
ngweb_appointment_statuses	Cross reference table containing human readable descriptions of appointment status

Table	Key Columns
ngweb_appointment_req	appointment_id pin_id epm_appt_id requested_when
ngweb_appointment_resp	Appointment_id responded_when
ngweb_appointment_priorities	appointment_priority_id, description
ngweb_appointment_statuses	appointment_status_id, description

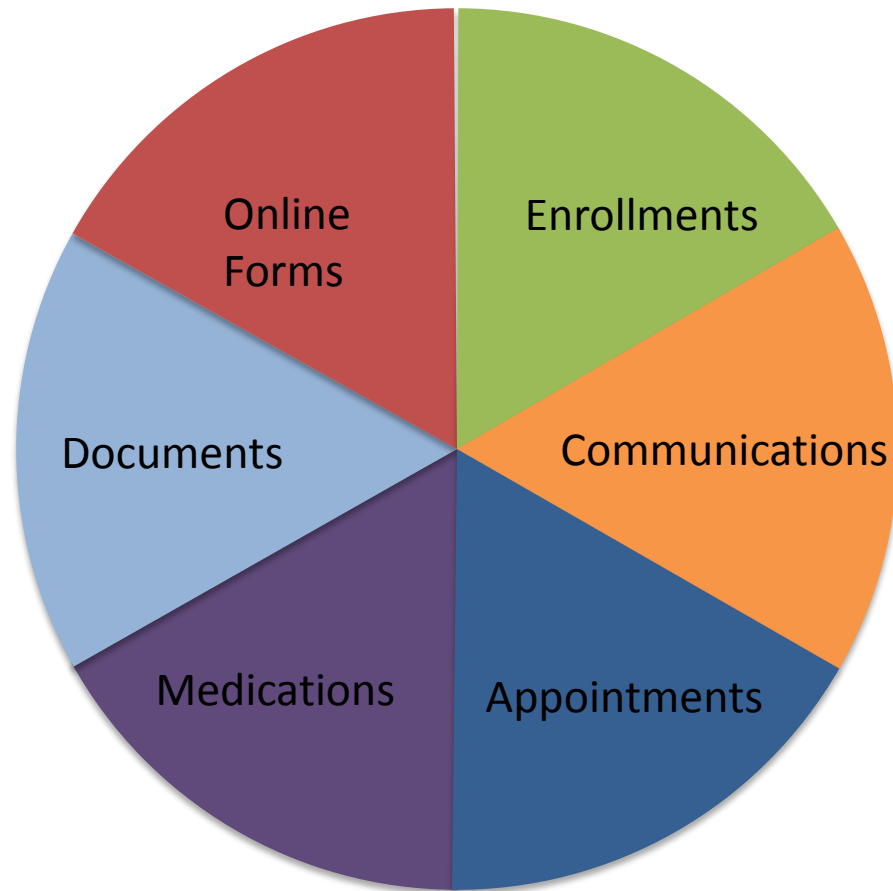
# Illustrative Example

```
select * from ngweb_vw_ugm_appointment_status
```

	practice_name	requested_when	priority	status	Provider Name	Appointment Categ...	location_na...	requested_rea...	Responded When
1	Viva Las Vegas Family Practice	2014-09-10 08:52:14.287	NORMAL	BOOKED	Blood Pressure Check	BP Check	Main Office	Test1	2014-09-10 08:53:54.710
2	Viva Las Vegas Family Practice	2014-09-10 08:53:07.920	NORMAL	BOOKED	Blood Pressure Check	BP Check	Main Office	Test2	2014-09-10 08:54:40.350
3	Viva Las Vegas Family Practice	2014-11-03 07:45:28.230	NORMAL	BOOKED	Blood Pressure Check	BP Check	Main Office	Test	2014-11-03 08:12:11.117
4	Viva Las Vegas Family Practice	2014-09-10 08:55:39.290	NORMAL	BOOKED	Blood Pressure Check	BP Check	Main Office	Test3	2014-09-10 08:57:02.087

# Examples

Stored Procedure Name	Description
ngweb_vw_ugm_appointment_status	View displaying information about appointment requests that originated from the patient portal.
sp_UGMPortal_AptReqsAll	All online appointments requested across enterprises
sp_UGMPortal_AllAptsReqByPractice	All online appointments requested at the practice level
sp_UGMPortal_AllAptsReqByPerson	All online appointments requested by a patient for a given practice



# Medication Renewals

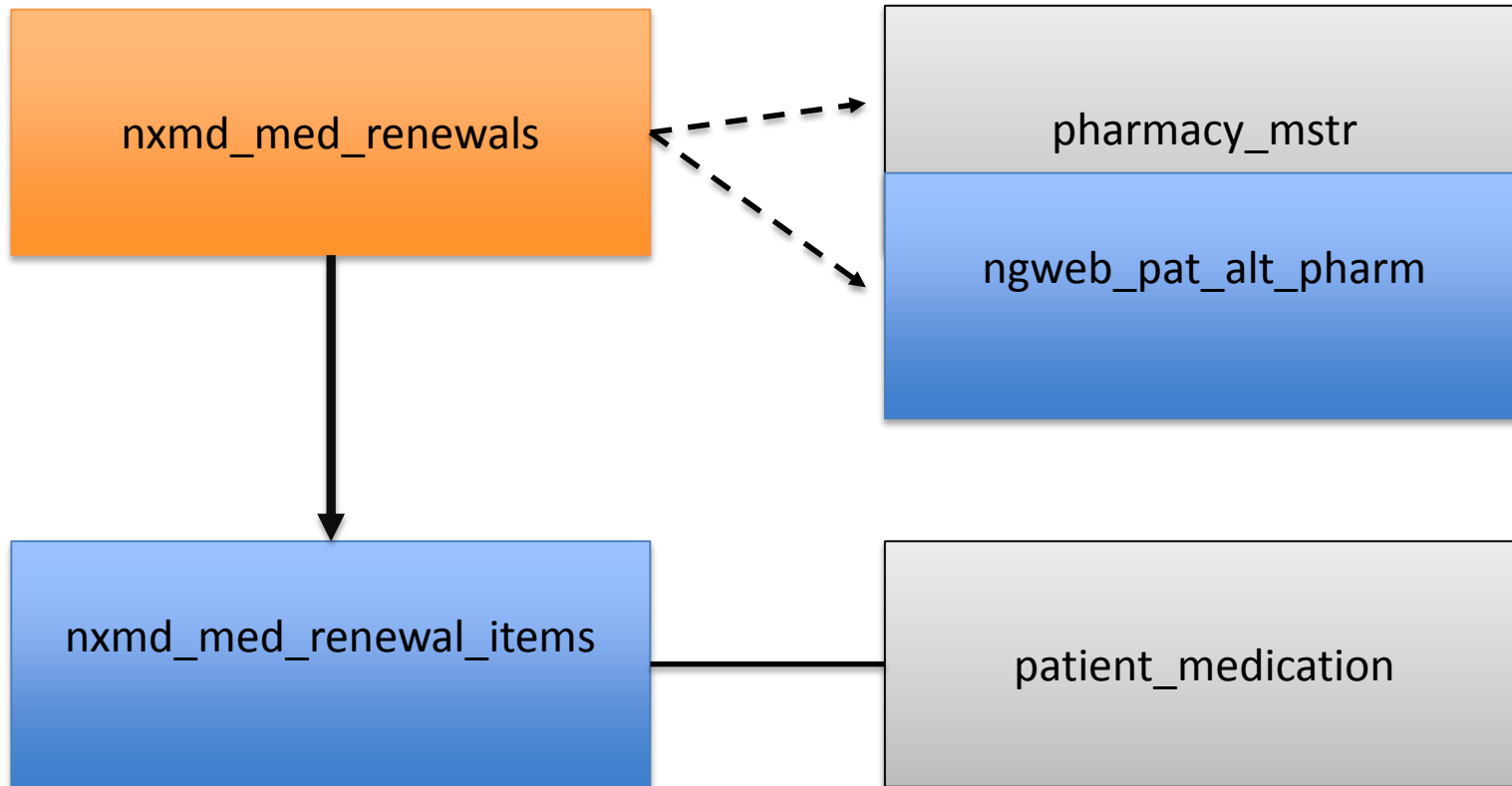




Table	Description
nxmd_med_renewals	Medication renewal transaction record.
nxmd_med_renewal_items	Individual medications that the patient requested to renewal. Has a many to one relationship with the <i>nxmd_med_renewals</i> table
ngweb_pat_alt_pharm	Patient entered pharmacy.

Table	Key Columns
nxmd_med_renewals	Medication renewal transaction record.
nxmd_med_renewal_items	Individual medications that the patient requested to renewal. Has a many to one relationship with the <i>nxmd_med_renewals</i> table
ngweb_pat_alt_pharm	Patient entered pharmacy.

# Medication Renewal Core Query

select

p.practice\_id, p.practice\_name, m.person\_id,  
cat.name, o.name, m.request\_date, m.response\_date

from

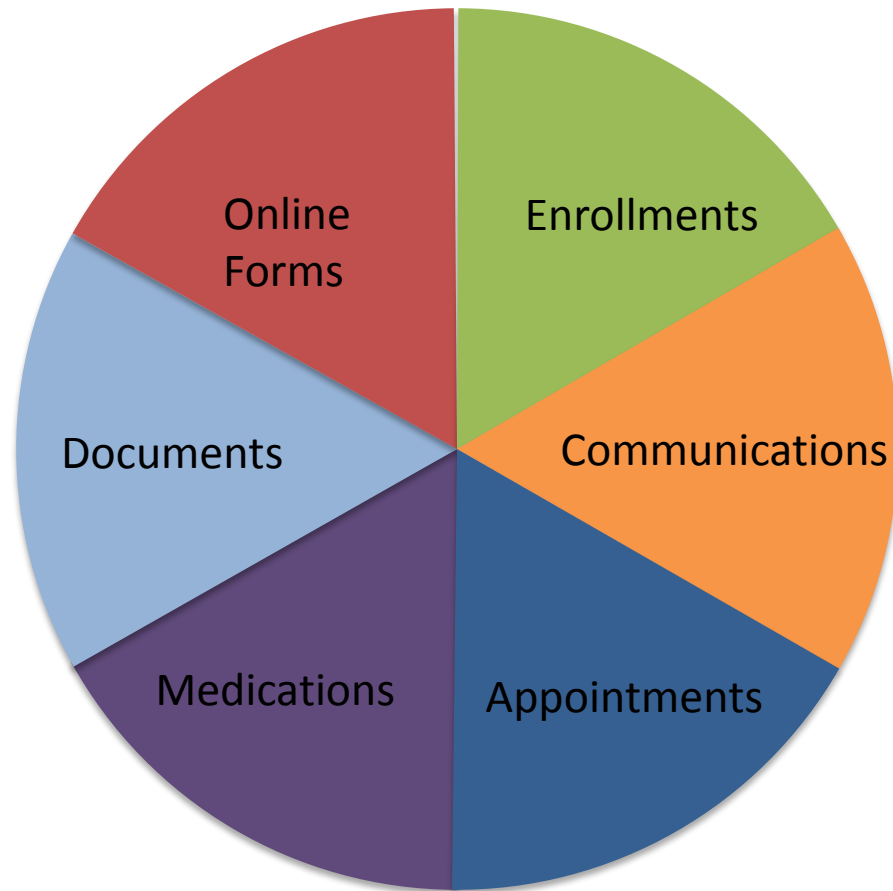
nxmd\_med\_renewals m with (nolock),  
nxmd\_practices np with (nolock),  
practice p with (nolock),  
ngweb\_online\_identities o with (nolock),  
ngweb\_msg\_sub\_categories cat with (nolock)

WHERE

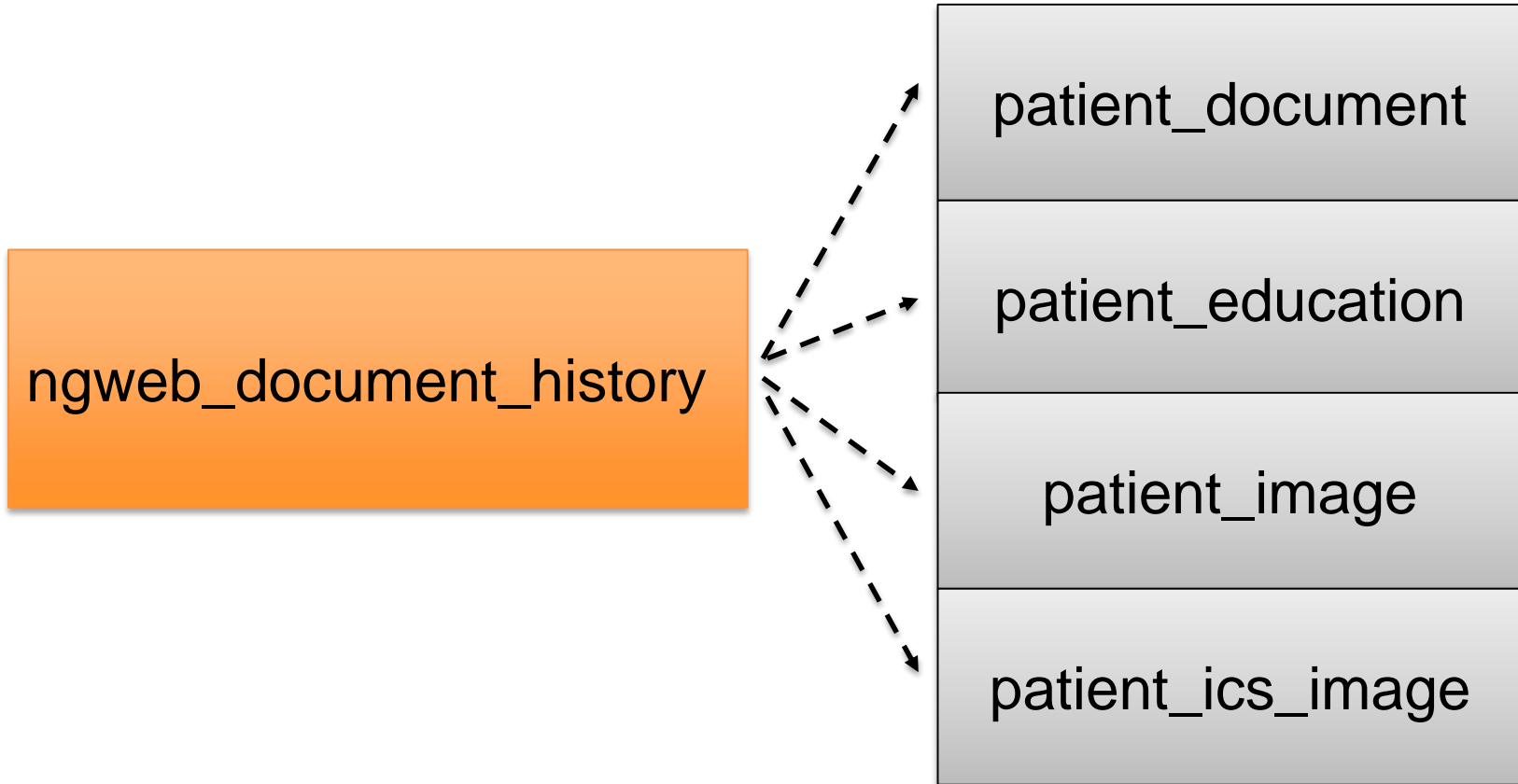
m.nx\_practice\_id = np.nx\_practice\_id and np.practice\_id = p.practice\_id  
and o.row\_id = m.msg\_rcpt\_id and cat.row\_id = m.msg\_sub\_cat\_id  
order by request\_date desc

# Examples

Procedure/View Name	Description
ngweb_vw_ugm_med_renewal_status	View that will return all medication renewal transactions that originated from the patient portal as well their current status.
sp_UGMPortal_MedRenwlsAll	All online medication renewal requests across enterprises
sp_UGMPortal_MedRenwlsPract	All online medications renewal requests at the practice level
sp_UGMPortal_MedRenwlsPerson	All online medication requested by a patient for a given practice



# Portal Documents



# Portal Documents

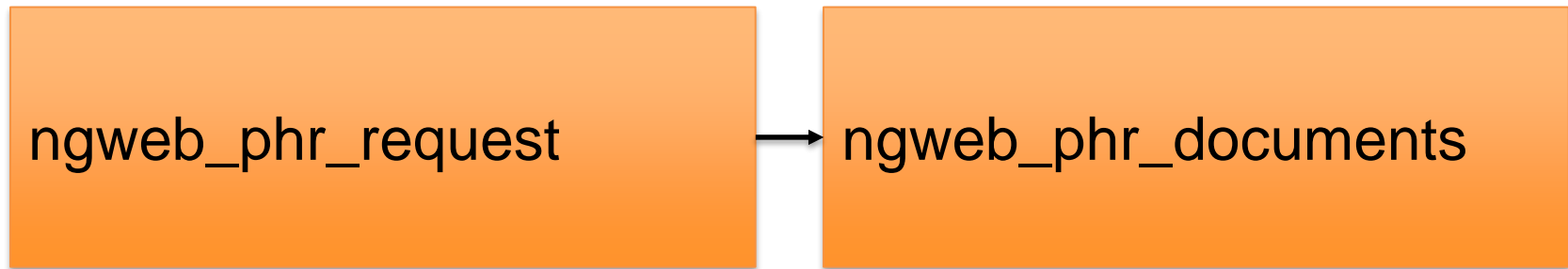


Table	Description
ngweb_document_history	<p>Patient Portal Document History record. When a document is sent to the patient and when they read the record.</p> <p>Links to the patient document, education and image tables</p> <p>Key Fields : emr_doc_id, person_id</p>
<p>Ngweb_phr_request Ngweb_phr_document</p>	<p>Contains information about PHR record documents that were requested or generated for a patient</p> <p>Key fields</p> <p>request_id, person_id, practice_id, create_timestamp</p>



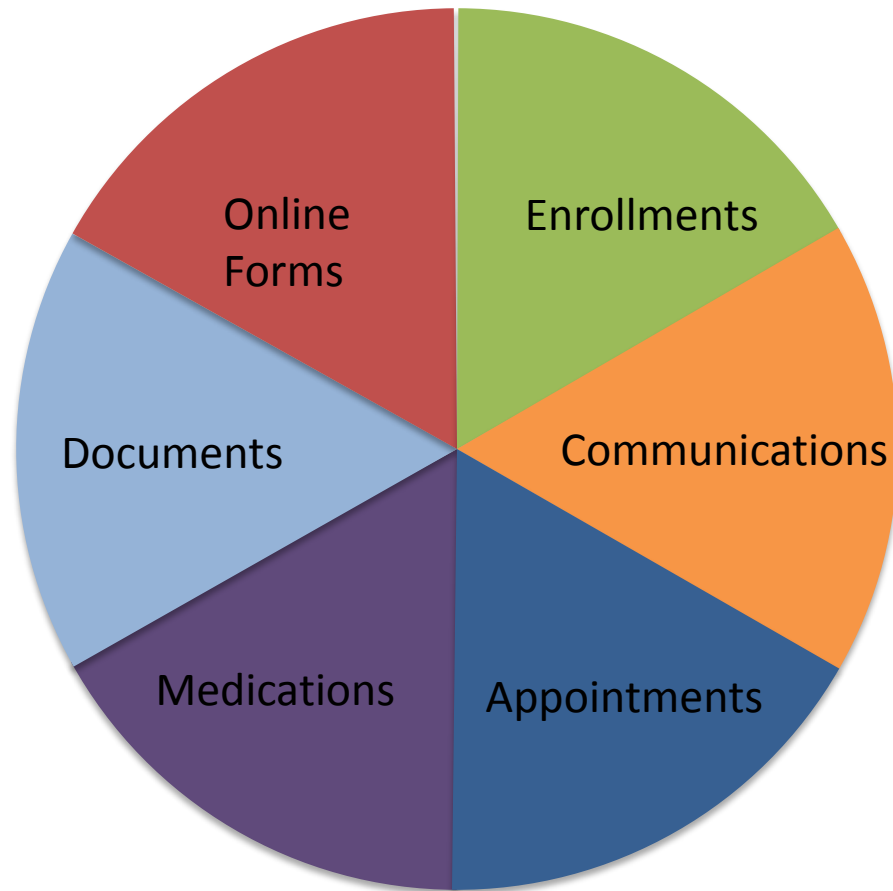
# Illustrative Examples

View/Procedure	Description
<b>ngweb_vw_ugm_document_status</b>	This view will return information about all of the documents, ics images, patient images, patient education that was sent to the patient portal and whether the documents were read.
<b>sp_UGMPortal_DocPatHist</b>	This stored procedure will return information about all of the documents, ics images, patient images, patient education that was sent to a specific patient, and whether the patient read the document

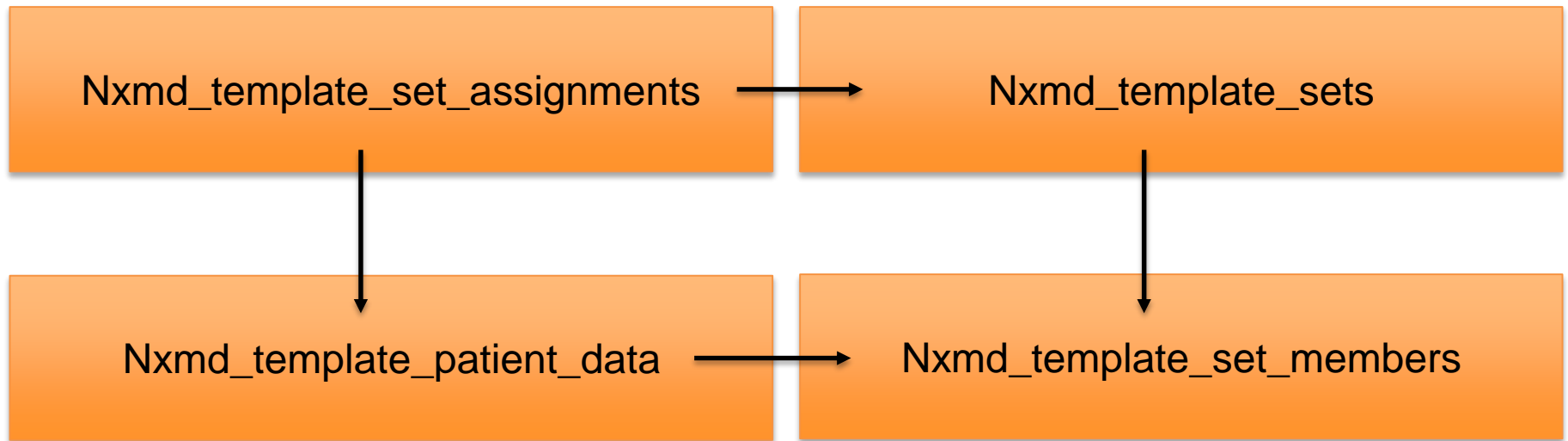
# Illustrative Sample

Stored Procedure: sp\_UGMPortal\_DocPatHist

	Document Name	Sent When	Read When
1	VIS Influenza	Oct 23 2015 12:00PM	Oct 23 2015 11:57AM
2	Chest Xray	Oct 20 2015 7:12PM	NULL
3	VIS Influenza	Oct 20 2015 7:10PM	NULL
4	Patient Plan	Oct 20 2015 6:58PM	NULL
5	Bone Marrow Transplant: What to Expect	Oct 20 2015 5:50PM	NULL



# Online Forms



# Key Tables

Table	Description
Nxmd_template_set_assignments	Defines which online forms have been sent to which patients
Nxmd_template_sets	The “Grouping” record that combines online forms together for assignment to the patient.
Nxmd_template_set_members	The “compiled” definition an online form. One or more of the records belong to an nxmd_template_set
Nxmd_template_patient_data	The actual data entered by the patient is stored in this table

# Key Fields

Table	Key Fields
Nxmd_template_set_assignments	id, template_set_id, person_id, current_state (0 = pending, 1 = Patient Completed, 2 = Imported), assigned_timestamp, completed_timestamp
Nxmd_template_sets	id, name, practice_id
Nxmd_template_set_members	id, template_set_id, emr_template_id
Nxmd_template_patient_data	template_member_set_id, template_assignment_id, current_state, field_data

# Illustrative Example

## View/Stored Procedure

## Description

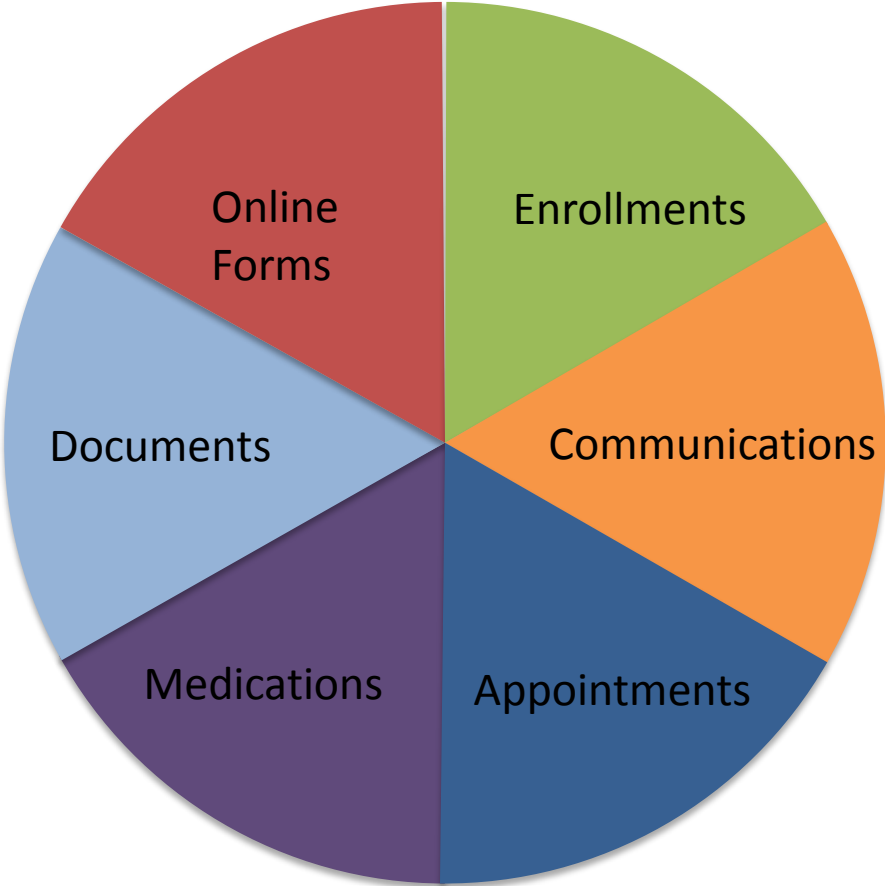
**ngweb\_vw\_ugm\_online\_form\_status**

This view will return information about all of the documents, ics images, patient images, patient education that was sent to the patient portal and whether the patient read the document

**sp\_UGMPortal\_OnlineForms**

This stored procedure will return information about all of the online

# Pulling it all together







Address: NextGen Healthcare 795 H...  
Horsham, PA 19044  
Contact: clutz@nextgen.com

Insurance: BCBS  
NextMD: Yes

PCP:  
Referring:  
Rendering:

Alerts

Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

UGM PortalHistory

Patient Demographics

Patinet Portal Historical Infomation

Patient History

Patient Dem

Insurance

Renewals

Practice	Category	Provider	Request Date	Response Date
Viva Las Vegas Family Practice	Medication Renewal Request	Eigenvalue MD, Sophia	Oct 20 2015 2:25PM	

Account History

Timestamp	Event
Oct 20 2015 2:24PM	Christopher Lutz~ Logged into their patient portal account
Oct 20 2015 1:19PM	Christopher Lutz~ Sent message to practice on behalf of Christopher Lutz
Oct 20 2015 1:19PM	Christopher Lutz~ Logged into their patient portal account

Account History

Timestamp	Event
Oct 20 2015 2:24PM	Christopher Lutz~ Logged into their patient portal account
Oct 20 2015 1:19PM	Christopher Lutz~ Sent message to practice on behalf of Christopher Lutz
Oct 20 2015 1:19PM	Christopher Lutz~ Logged into their patient portal account

- PP Portal Sexual Hx M Sp
- Retired - CARD\_MasterDemo
- RHE Drug Study
- UGM PortalHistory
- Uro Cancer Summary

menstrual F Sp  
reg Hx F  
reg Hx F Sp  
os1 F  
os1 F Sp  
os1 M  
os1 M Sp  
os2 F  
os2 F Sp  
os2 M  
os2 M Sp  
os3 F  
os3 F Sp  
screen Test F  
screen Test F Sp  
PP Portal Sexual Hx  
PP Portal Sexual Hx Sp  
PP Portal Surgical Hx F  
PP Portal Surgical Hx F Sp  
PP Portal Surgical Hx M  
PP Portal Surgical Hx M Sp  
Retired - CARD\_MasterDemo  
RHE Drug Study  
UGM PortalHistory  
Uro Cancer Summary

# Available Crystal Reports

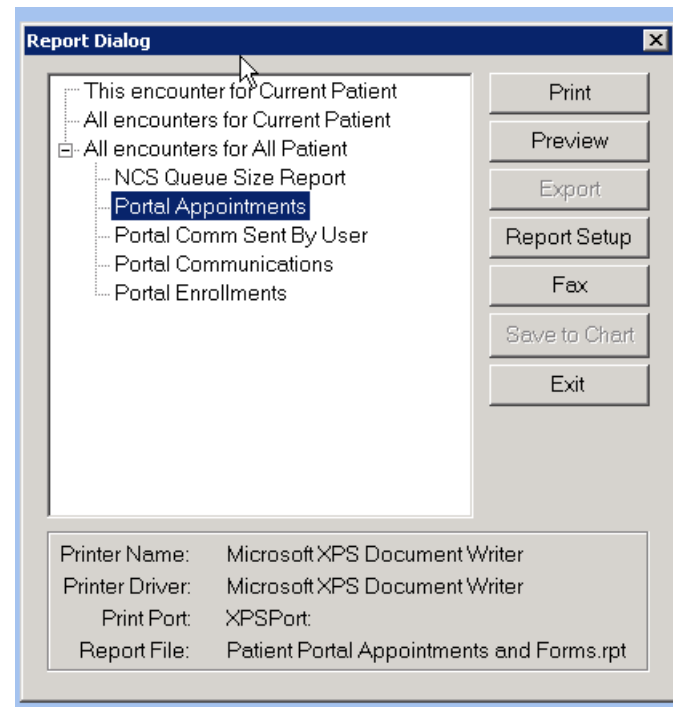
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ONE  
USER GROUP MEETING

# Crystal reports

There are a number of crystal reports that are distributed  
With the patient portal

- Enrollments
- Communications
- Appointments



# Enrollments

Crystal Reports Viewer

SAP CRYSTAL REPORTS

Las Vegas Family Practice

Completed Enrollments

Person Name	Token Date	Date Enrolled	Email Address	PCP
Lovett, Mike	09/30/2015	09/30/2015	clutz@nextgen.com	
Luoni, Maria	09/30/2015	09/30/2015	clutz@nextgen.com	
Lutz, Christopher	09/30/2015	09/30/2015	clutz@nextgen.com	
M A, Srinivas	09/30/2015	09/30/2015	clutz@nextgen.com	
Maddirala, David	09/30/2015	09/30/2015	clutz@nextgen.com	
Maguire, Kevin	09/30/2015	09/30/2015	clutz@nextgen.com	
Magyar, Benjamin	09/30/2015	09/30/2015	clutz@nextgen.com	
Mahoney, Janet	09/30/2015	09/30/2015	clutz@nextgen.com	
Malaugh, Conor	09/30/2015	09/30/2015	clutz@nextgen.com	
Marano, Carmine	09/30/2015	09/30/2015	clutz@nextgen.com	
Marrone, Marla	09/30/2015	09/30/2015	clutz@nextgen.com	
Martin, Don	09/30/2015	09/30/2015	clutz@nextgen.com	
Martin, Kalli	09/30/2015	09/30/2015	clutz@nextgen.com	
Mathias MD, Menen	09/30/2015	09/30/2015	clutz@nextgen.com	
Matt, Sarah	09/30/2015	09/30/2015	clutz@nextgen.com	
Mauldin-Brown, Shiela	09/30/2015	09/30/2015	clutz@nextgen.com	
Maupin, Laura	09/30/2015	09/30/2015	clutz@nextgen.com	
Mayhew, William	09/30/2015	09/30/2015	clutz@nextgen.com	
McCain, Ted	09/30/2015	09/30/2015	clutz@nextgen.com	
McCrum, Rachael	09/30/2015	09/30/2015	clutz@nextgen.com	
McGee, Kelly	09/30/2015	09/30/2015	clutz@nextgen.com	
McKenna, Laurie	09/30/2015	09/30/2015	clutz@nextgen.com	
McNamara, Debbie	09/30/2015	09/30/2015	clutz@nextgen.com	
Mehta, Amit	09/30/2015	09/30/2015	clutz@nextgen.com	

Current Page No.: 5 Total Page No.: 7+ Zoom Factor: 100%

# Appointments

## Patient Portal Appointment Request and Forms

Data from 10/21/2011 to 10/21/2015

This report shows the number of appointments requests received and patient forms imported from the patient portal

Las Vegas Family Practice		Count
Number of appointment requests received		13
Number of patient forms imported		0

# Communications

## Patient Portal Communications Report

Data from 10/19/2006 to 10/21/2015

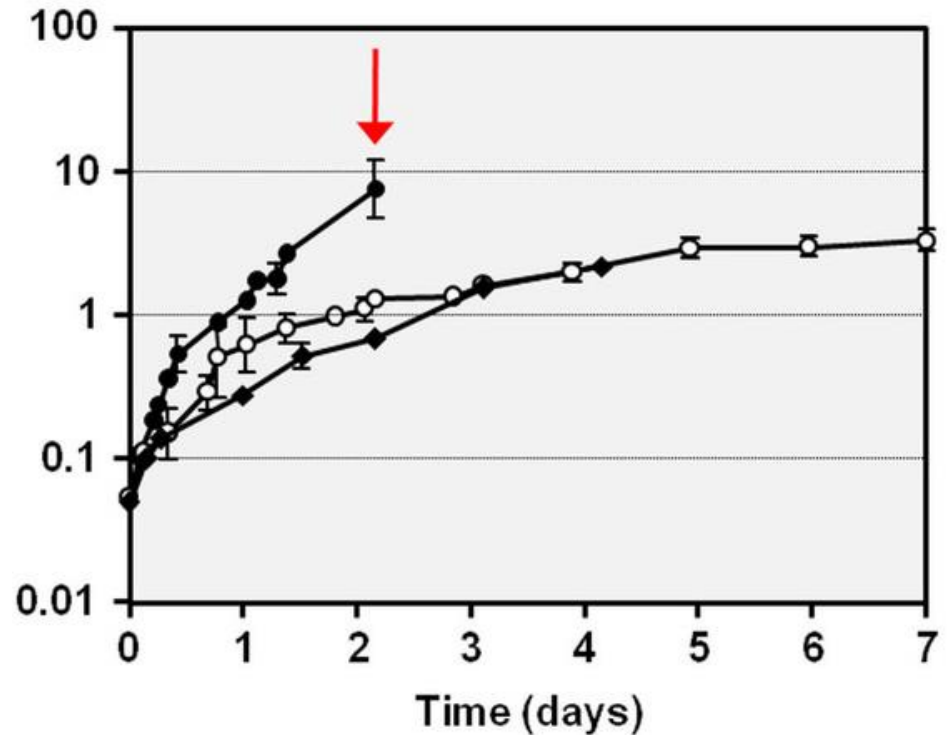
This report shows the number of patient portal communication messages received by provider

Category	Routing Rule	Messages Received
<b>Viva Las Vegas Family Practice</b>		
<b>Billing Questions</b>	Billing Department	2
<b>Referral Requests</b>	Eigenvalue MD, Sophia	12
<b>Test Results</b>	Eigenvalue MD, Sophia	2
	Hamilton MD, James	20
<b>Total for Test Results :</b>		22
<b>Total for Viva Las Vegas Family Practice:</b>		36

# Archiving Data

# Archiving Rules

Over time records begin to accumulate in the patient portal inbox





# Records Eligible For Archival

- Records flagged as deleted
  - Records flagged as “Completed”
  - Records from Un-enrolled patients
  - Records that reached a particular “age”
- 
- Data still needs to be retained in some fashion for at least 7 years

# Tables to Target For Archival

- nxmd\_med\_renewals
- ngweb\_communications
- ngweb\_comm\_recpts
- ngweb\_appointment\_req
- ngweb\_appointment\_resp
- nxmd\_template\_set\_assignments

# Archival Stored Procedure

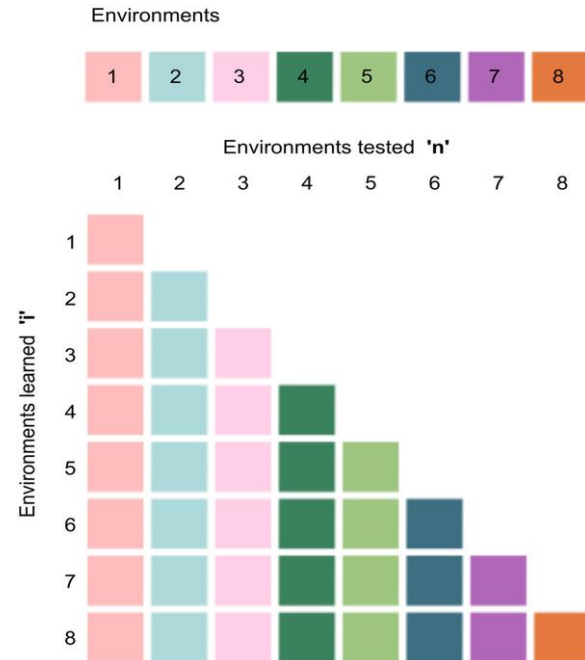
- Sp\_UGMPortal\_ArchiveData
  - Age in days to archive

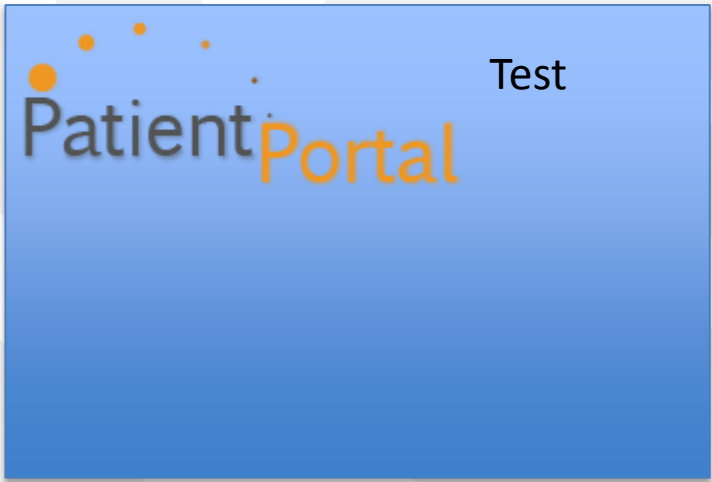


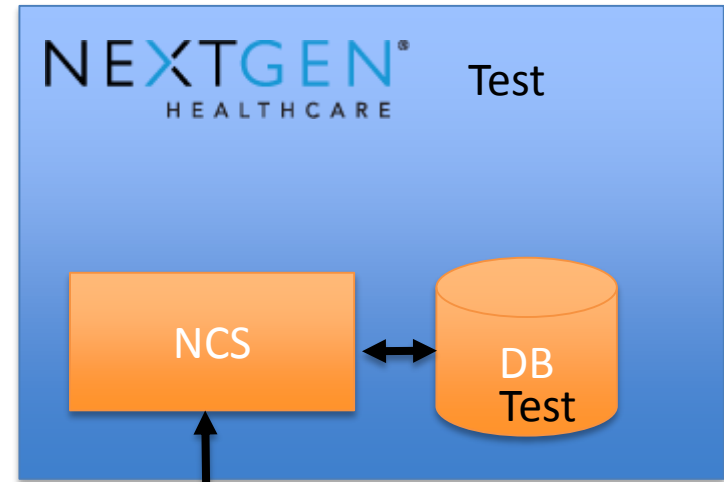
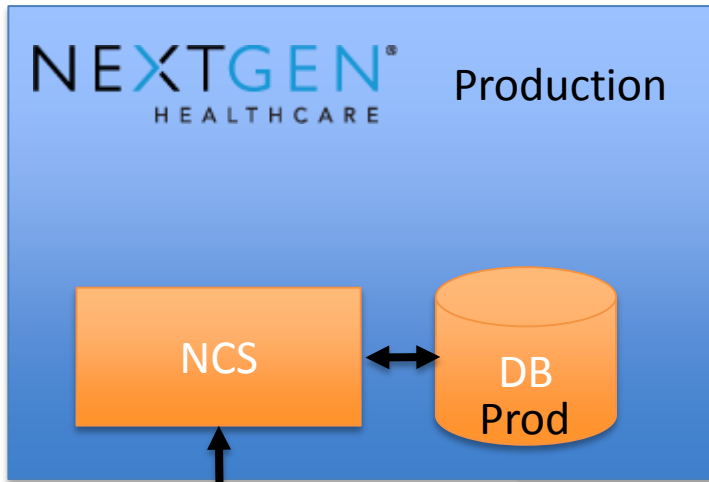
# Copying Prod to Test

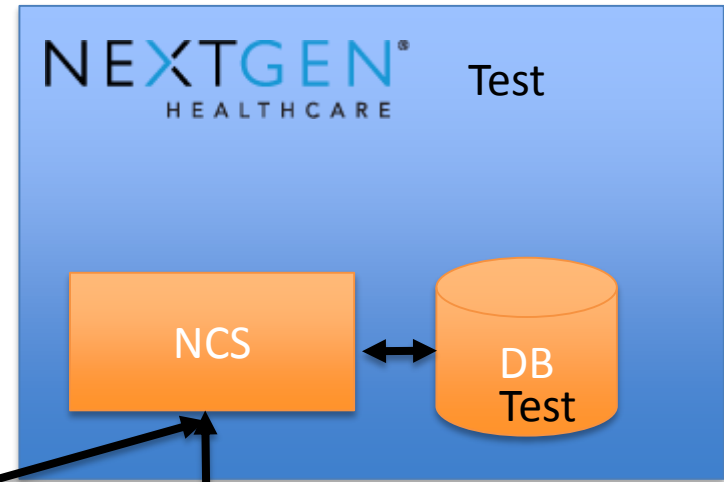
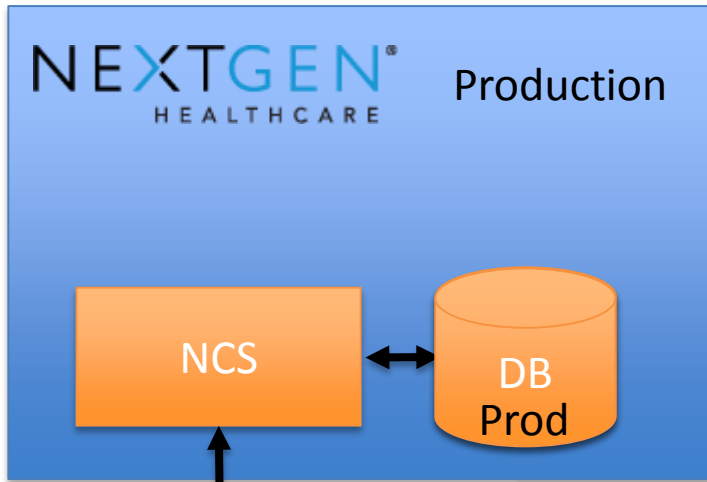
# Test Environment Management

It is possible to run portal in a test environment, but care must be taken when setting up the environment.

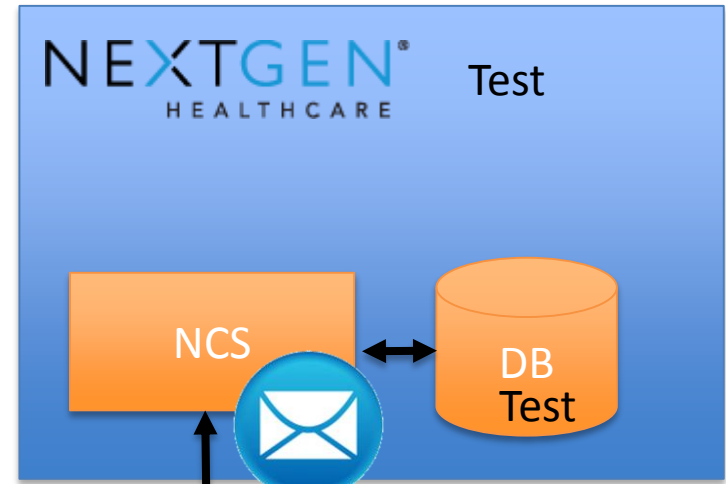
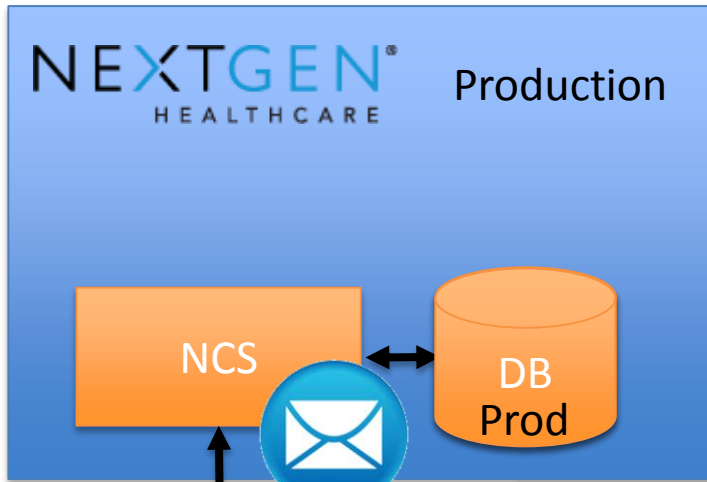












# Protocol

- 1) Back up the production database
- 2) Disable any existing NCS instances on TEST
- 3) Restore the database to TEST
- 4) Re-license the test database
- 5) Redact Patient Data
  - Delete all portal enrollment account and meta data for all patients

# Protocol

## 6) Point the NCS to the test environment

*update configuration\_options*

*set*

*option\_value = 'if-test.nextmd.com'*

*where*

*key\_name = 'EXPORTSERVERADDRESS'*

*and option\_value = 'if.nextmd.com'*

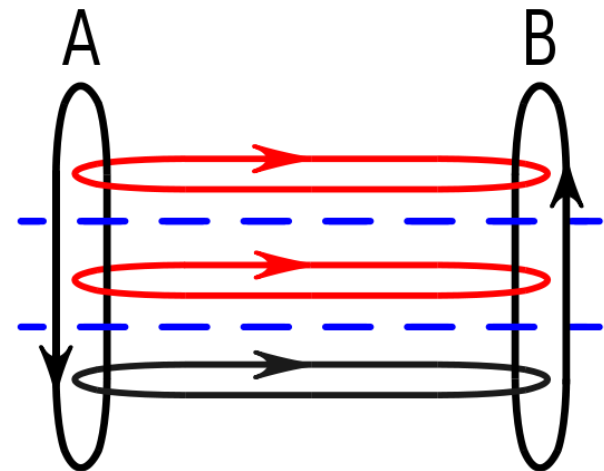
## 7) Bring the test NCS up

# Splitting/Merging Practices

# Splitting a Practice Out

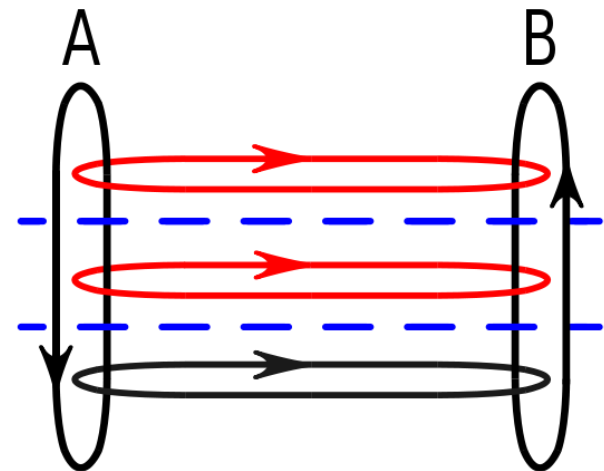
On occasion a provider or practice will leave the organization.

To prevent communication service issues care must be taken properly  
Partition the portal data out



# Merging Practices

Conversely, a provider or practice will be acquired and brought into the fold of an existing practice. In some cases patients are enrolled in both organizations



# Preparation

## The Preparation Period

- Preliminary steps are performed prior to the actual database merge
- Notification of the patient base

## The “Go Live”

- The actual execution of the database merge.

## The Post Go-Live Monitoring

- Monitoring of the consolidated practices, making adjustments as necessary.

# Protocol

The protocol for merging or splitting practices follows this general process

- Stop the communication services except for the NCS export processor
- When all message have cleared, stop the NCS
- Back up the current prod database
- Restore the new database at the new site



# Protocol

- Stop the communication services except for the NCS export processor
- When all message have cleared, stop the NCS
- Back up the database
- Restore the new database at the new site

# Protocol Continued

- In the source database delete the “leaving” practice and all portal related data
  - In particular the meta data tables nxmd\_practice, nxmd\_enterprise, nxmd\_system
- In the destination database, delete all practice data not related to the moved practice

# Protocol Continued

- Rotate the system, enterprise and practice identifiers for new site.
- Run any necessary scripts on the portal server to move or de-duplicate patient enrollments to the new organization
- Bring up the communication services

# Protocol Continued

In the case of merging two practices that have patients enrolled in each, you will need to decide which enrollment time stamp to use as it will potentially affect MU2 measures

The more you know!

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# Portal Sessions - Wednesday

9AM - Using the Patient Portal to Practice Better Medicine

Presenters: Shishir Khetan and Cara Allen (*Rockville Internal Medicine*)

11:15AM - Engaging Patients, Ensuring Outcomes, Raising  
Social Media Standing - One Stop Solution

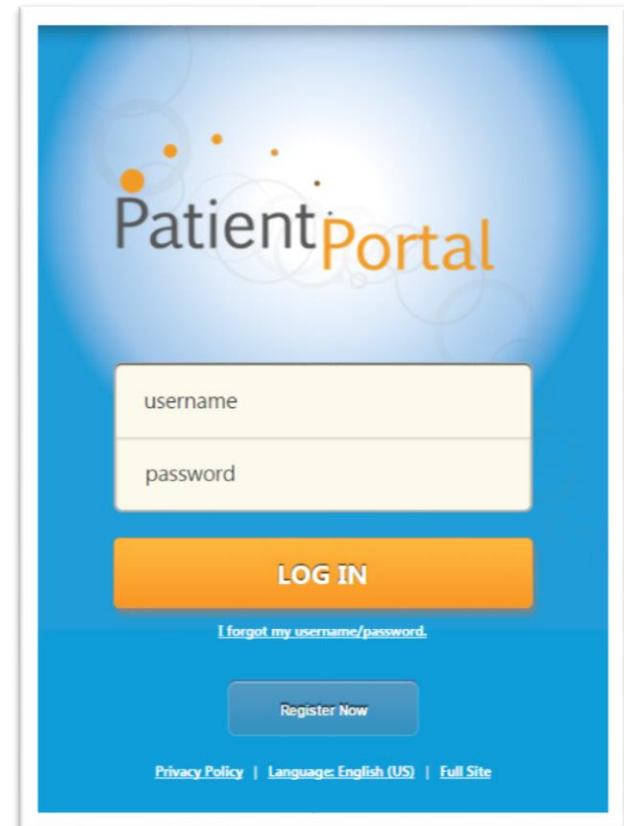
Presenters: John A. Hovanesian, MD (*Harvard Eye Associates*)

# Try it yourself!

Every Attendee has a demo account for patient portal

To Login:

- 1) Goto [HTTPS://one.nextmd.com](https://one.nextmd.com)
- 2) Your user name is your email address  
(in all lower case)
- 3) Password is **password1**
- 4) Security Answer is **ONE**



# Session Survey

Please take a moment to complete a brief survey regarding this session.

1. Open your ONE UGM Mobile App (please note: you must have already logged in and accepted the “Terms of Use” to access this feature)
2. Click the **Navigation Button** at the top left of the screen
3. Select “**Sessions**”
4. **Search** for and select this session
5. From the sessions details screen, select “**Survey**” at the bottom right of the screen
6. Remember to hit “**Save**” at the bottom of the survey once you have answered the questions



Any Questions?

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