Physician Best Practices -
Using the Generic Procedure
Template in NextGen® KBM,
Version 8.3

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Working with the Generic Procedure Template

The Generic Procedure template was designed to be used for all procedures for which there is no specific procedure template. In addition, some providers may wish to use it for procedures for which the specific procedure templates do not meet their needs.

To work with the Generic Procedure template

1. At the bottom of the SOAP tab, in the Assessment/Plan panel, click the Procedures icon.
A list of procedures displays.

2. This list of procedures, by specialty, can be modified by the practice.
3. Alternatively, click the Procedures link from the left-side navigation.
The following template displays.

This is a full list of all available procedure templates divided up by specialty. Some procedure templates, although listed under a particular specialty, might be utilized by another specialty. For instance, many specialties might excise a skin lesion. Under the Other category is a link to the Generic Procedure template.
Below is a screen shot of the Generic procedure dialog box.

The Indication and procedure, with their codes, must be entered. In the upper right hand corner of the template are icons to allow the user to Quick-save the entries and recall them in the future. When using the Quick save function, only those fields not particular to a specific patient are saved.
Generic Procedure Template Example

To configure a Generic Procedure template

1. Click in the Indication description box to display the Diagnosis search dialog box.
2 Type a word in the search pane.
3 Click Search or press Enter.

4 Highlight the desired diagnosis and click the Select button, or double-click the desired diagnosis.
The selected diagnosis displays in the Indication Description text box, along with its ICD-9 code.

5 If Status is required, click in the Status text box and select a status from the list.
6 Click in the ‘Procedure’ description box.

7 Type ‘bio’ to move down the Service Item Mstr list to the items that start with ‘bio’.
8 Highlight Biopsy of vulva/perineum, one lesion and click OK, or double-click the desired entry.
The Procedure description and code text boxes are now populated.

To the right of the Indication/Procedure fields is a section called Pre-Procedure care.

9 Select the following check boxes to add these items to the procedure note:

- Consent was obtained
- Procedures/risks were explained
- Questions were answered
- Prepped and draped

To the right of the check boxes is a link to a consent form.

10 Click the Consent link to display the Consent-Procedures dialog box.
Here, a consent form may be designed and even Quick-saved for use in the future. The procedure previously noted on the Generic Procedure template (Biopsy of vulva) populates this dialog box.

11 Click in the text box under the word Provider to open a list of providers.
12 Select a name from the list.

13 Alternatively, the list can be closed and a free-text name entered in the Provider text box.

The next field is labeled Consent by.
14 Click in the text box to display a list of possible people who might be giving consent.

There is a blank line at the top of the list.

15 Select the blank line to be able to enter in free-text who is giving consent.
The Type of procedure has been populated but can be manually changed. There are 2 other text boxes to enter additional types of procedures, as needed.

16 Select the blank line at the top of the list to enter in free-text the name of a procedure.

17 Enter the procedure date.

Note: If you intend to Quick Save this dialog box it is better to skip entering a procedure date before saving the consent form.
Below, the check boxes for Procedure, treatment alternatives, risks and benefits were explained, specific risks discussed, Bleeding, and Infection were selected. In addition, in the Other text box Chronic pain was entered.

18 Check the next several check boxes, as relevant.

At this point, you can Quick Save the entries so far.
19 Click the floppy disk icon in the right upper corner of the dialog box.

The following Save Template Defaults dialog box displays.

This dialog box enables you to name the set of items that you have just selected.
20 Type in a title that will be understandable in the future.

This will enable you to recall these settings. Above, Dr. B’s consent for vulvar biopsy was entered.

21 Click the Add button to save these settings under this Default Set Name.

Below, the quick-saved consent is seen in the Proc Quick Saves grid.
22 To delete this quick-save, left-click the quick-save in the grid and click the Remove button.

23 Click Save & Close when done.

24 In the future, when the Consent-Procedure dialog box is displayed, click on the blue star icon in the right upper corner.
A list of saved items displays.

By selecting Dr. B’s consent for vulvar biopsy and clicking the OK button in the right lower corner, items saved in the Quick Save populate the appropriate places. For a particular patient, the procedure date can be entered, other boxes can be checked, or comments can be added.

The consent can be saved and Closed or sent as a task for another staff member to formally obtain it.

To generate a consent document, click the Consent button at the bottom of the Assessment/Plan panel.
Or, click the Consent button on the Procedures template.

A consent document opens.

The consent function is optional. Many providers choose to use a pre-printed consent they have in their office.

Have the patient sign the consent then scan the signed consent into the computer.
After clicking ‘Save and close’, the consent dialog box is closed and you will return to the Generic Procedure template.

**Note:** The blue paw print icon that was previously to the left of the word ‘Consent’ is now a solid purple diamond. This indicates there is information in this link.

Now you can set up the portion of this procedure note that is the usual way of doing this sort of procedure.
Below, some items have been entered in selected fields.

The Findings and the Units of lidocaine were intentionally left blank. This is very individual. At this point you can quick save these entries.
28 Click the floppy disk icon in the right upper corner of the template.
29 Under Default Set Name, enter a descriptive name that explains exactly what has been saved.

![Image of Save Template Defaults dialog box]

30 Click the ‘Add’ button to add this quick-save to the grid below.

31 Click the ‘Save and Close’ button on the bottom right of the dialog box.

In the future, opening the Generic Procedure template, clicking on the blue star icon in the upper right corner opens a list of saved items.

![Image of Generic Procedure template]

32 Select ‘Dr. B’s excision of single vulvar lesion probably benign’ and click OK.
This populates the Generic Procedure template with the saved values. It might be necessary to edit some of the quick-saved information for a particular patient.

For example, the units of lidocaine and the findings always need to be entered. In addition, there might be other differences from patient to patient. An indication or procedure type can certainly be changed for an individual patient as well.

33 When done, click the Submit to Superbill button.

34 Click the Save & Close button in the bottom right corner.

If the template is Saved & Closed without submitting a bill to the Superbill, a dialog box opens alerting the provider.

35 Click ‘OK’ and return to the Generic Procedure template to complete the template, if needed, and submit a bill.

When the charge has been submitted to the Superbill, a notation to this effect is seen in the right lower corner of the template:
A Generic procedure note can be saved for many types of procedures. The only limitation is that the size of the Procedure field is 1000 characters and the size of the Findings field is 500 characters.
This procedure information is included in the master document when it is generated. In addition, a separate procedure note can be generated if desired.

At the bottom of the Procedures template is a button labeled Preview Proc Note, click this button to generate a separate procedure note.
Alternatively, a procedure note can be generated from the Assessment/Plan panel. Click the Generate Note icon and select Procedures note.