

# Creating Order Sets to include patient education in NextGen EHR



## Order Sets including patient education

**Order Sets** in NextGen EHR provide simultaneous ordering of all necessary components associated with effective clinical care such as lab tests, x-rays, and medications. **Order Sets** are efficient for the provider and can lead to better care.

**Order Sets** can be used for immunizations to help ensure patients receive all appropriate recommended immunizations, complete the series for multi-dose immunizations, and receive the appropriate patient education information such as the Vaccine Information Statement (VIS) and information on why series completion is important.

### Benefits of patient education as an Order Set component

**Order Sets** can help providers to remember to order all of the necessary components of an immunization, including related patient education.

#### Consideration:

User privileges to create **Order Sets** may be limited to select users with specific security privileges or subject to practice business policies.

*If you have further technical questions, consult your internal or external Electronic Health Record (EHR) support resources.*

*This guide provides a high-level overview of how to create an Order Set, complete with patient education, within NextGen EHR. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.*

*Please note that this guide was created based upon NextGen EHR version 5.8 UD3. Screens and features may change as new software versions are released.*

*This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.*

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## Order Sets for immunizations and patient education

Orders for immunizations, prescriptions and patient education can only be fulfilled in specific areas designated for those types of orders in the NextGen EHR. As a result, users cannot add these orders to **Order Sets** as orderable items. Users can, however, add them under **Additional Orders** in the **My Plan** template as instructions to staff for ordering their designated areas.

### To add an immunization to an Order Set

To add instructions for staff to order an immunization, or a prescription for an immunization, and the related patient education, document it in the **My Plan Order Set** template.

The clinic would create an item in the **NextGen Knowledge Base Module (NKBM) Assessment Customize** template. This item would instruct users to order the immunization, prescription, or patient education for the patient. The order would then be fulfilled elsewhere in NextGen EHR.

Once the item or items have been created in the **NKBM Assessment Customize** template, the user can choose and save it for future use under **Additional Orders**. Changes to the **NKBM Assessment Customize** template are completed by the practice's IT team or by NextGen EHR.

The screenshot displays the 'My Plan' interface with the following sections:

- Unspecified:** A table with columns 'Diagnosis' and 'Code'. The first row contains 'Uncomplicated'.
- Reference System:** A text input field containing 'custom\_impression\_plan'.
- Category:** A text input field.
- Use order set from:** Radio buttons for 'My saved' (selected) and 'Others saved'.
- Display:** Radio buttons for 'Order sets' (selected) and 'Protocols'.
- Protocols due in:** A text input field.
- Buttons:** 'Save Order Set', 'Add or Update Assess', 'Procedure/Test Instru', 'Record Request', and 'Counseling Details'.
- Perform:** A dropdown menu set to '- Today'.
- Lab Orders:** A 'Clear' button and a list of three items: 'CMP', 'Urinalysis', and 'Lipid Panel'.
- Office Procedures:** A 'Clear' button and a list of one item: 'Electrocardiogram, complete (ECG)'.
- Instructions:** A 'Clear' button, 'Add' and 'Delete' buttons, and a list of three items: 'Activity counseling provided', 'Smoking cessation counseling provided', and 'Dietary counseling provided'.
- Diagnostics:** A 'Clear' button, an 'MRI/MRA Information' icon, and a list of three items: 'Chest X-ray; AP/Last (2 weeks)', 'Abdomen MR Angiogram WITH or WITHOUT Contrast', and 'ECG, transthoracic, heart, complete'.
- Office Medications:** A 'Clear' button.
- Office Labs:** A 'Clear' button and a list of two items: 'Urinalysis, non-automated, w/ scope' and 'Lipid profile'.
- Additional Orders:** A dropdown menu labeled 'Select type (Required)'.
- Follow-up Visit/Referral:** A list of three items: 'He is to schedule a follow-up visit today', 'He will be referred to today', and 'Disposition'.
- Auto Tasking On:** A checkbox and a note: '(Labs / meds / diagnostics ordered here do not upload to modules.)' with a link to 'Lab / Diagnostics / Radiology Order Module Processing'.
- Buttons:** 'Task', 'Place Order', 'Save & Close', and 'Cancel'.

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For a complete overview of the original **My Plan**, go to the *NextGen Healthcare Success Community* and download the *Family Practice User Guide for NextGen KBM*, Version 8.3. Instructions for using the original template are found in the **Orders Panel** section.

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