



ABOUT THIS GUIDE

This Guide provides a high-level overview of patient lists using the Reports feature in NextGen and how they can be used to help identify clinically appropriate patients who may be candidates for therapy. The overview is meant to provide guidance for you, your practice electronic health record (EHR) champion, or IT staff.

Experienced users are the main focus of this Guide; not every step is included in the instructions, and this is not a replacement for training from NextGen. There are several ways to approach each workflow in NextGen. This Guide highlights one workflow; however, you may be familiar with an alternative approach. Please note that this Guide was created based upon NextGen version 5.8.3. Screens and features may change as new software versions are released.



USING PATIENT LISTS

The Patient List can be helpful to identify patients meeting certain criteria, including diagnosis, current medications, and other clinical or patient demographic information. When used effectively, this report provides an opportunity to identify patients who are clinically appropriate for therapy based upon clinician decision to treat.

A Patient List can be used to identify a gap in care and to contact patients who may be considered for treatment.



PATIENT LIST CRITERIA

Patient lists can be created from multiple criteria such as medications, patient diagnoses or other clinical or patient demographic information. For example, EHR criteria could include patients with opioid dependence, taking buprenorphine medications such as Subutex or Suboxone.

See the appendix for a detailed list of criteria which may be appropriate to identify opioid dependent patients who may benefit from treatment.



FACTORS THAT MAY IMPACT QUERY RESULTS

The number of patients appearing on report results may be impacted by the clinical data available in the EHR. For example, clinical data stored only in PDF documents or free text fields rather than discrete fields may not be included. These information gaps can reduce the number of patients on a patient list.

REPORTING: CREATING A PATIENT LIST

The following steps illustrate how to run a Patient List Report using the Reports feature in NextGen to help identify examples of appropriate patients who may be candidates for treatment.

- From **File** menu, select **Reports > Generate Report > By Practice**
- Select **Patient** from the Settings List, select **Age**. Set the parameter to **≥16 years of age**
- Select **Diagnosis** from the Settings List
- From the **Diagnosis Search** tab, select **Include**, and then select the **ellipsis** to search for appropriate diagnosis codes. Use the **> (right arrow)** to include each desired code

NextGen Report Filter: Patient

Settings List: Allergy, Columns, **Diagnosis**, Logical Group, Medication, Orders, Patient, Patient Chart, Problems

Diagnosis Search

Library: [Dropdown] Search
 Category: [Dropdown] Clear
 Diagnosis: [Text Box] Clear
 CD Code Dx Code: F11.1

F11.1 Opioid Abuse >> F11.1 Opioid Abuse
 > < << >>

Search 1 items OK Cancel

Diagnosis Filter

Include Exclude
 Who Have Never Had
 Who Have Ever Had
 Who Have Not Had Since
 Year: 0 Month: 0 Day: 0
 ... Clear

agnosis: <-none> 0 Clear Diagnosis
 Report List Add Sub Report
 OK Cancel

- Repeat to select additional codes. Select **OK** when complete. (See Appendix for a complete list of diagnosis codes)
- Select the **OR** operator, then select **Add** from the Diagnosis Search tab to add the criterion to the query

Diagnosis Search

OR

Diagnosis Filter

AND OR
 Include Exclude
 Who Have Never Had
 Who Have Ever Had
 Who Have Not Had Since
 Year: 0 Month: 0 Day: 0
 ... Clear

Add Remove

- Select **Medication** from the Settings List
- From the **Medication Search** tab, select the **(...)** **ellipsis**, and enter a medication name in the text box, then select **Search**
- Select the medication(s) and use the **right arrow** button to add each criterion. Repeat to select and add medications from each type. (See Appendix for a complete list of medications)
- Select **OK** to complete the list

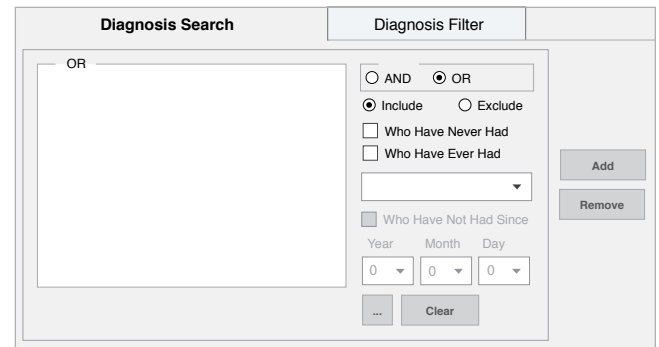
Medication Search

DEA [Dropdown] [Text Box] Include Generics Search
 Class [Dropdown] Include Retired Clear
 Name Buprenorphine Active Medication

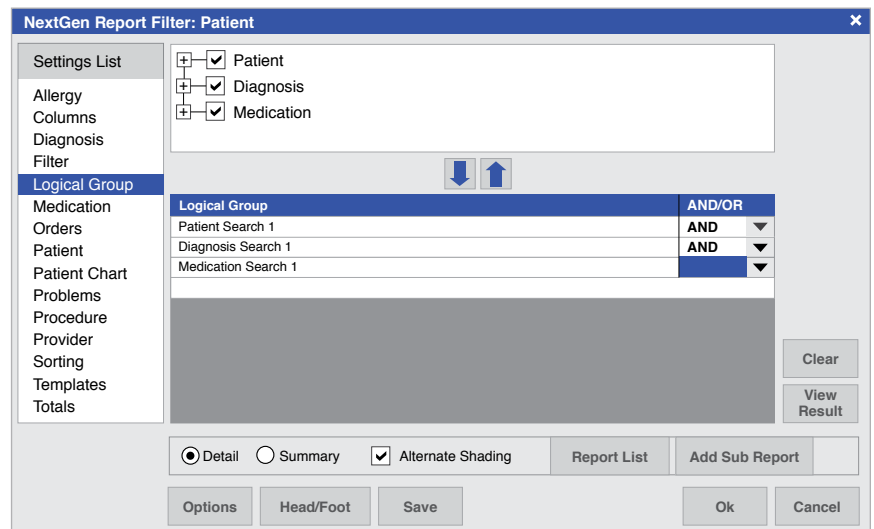
+ Buprenorphine >> Description
 Buprenorphine HCl Sublingual Tablet Sublingual 2 MG
 > < << >>

Selected 0 items OK Cancel

- On the Medication Search, select **OR** to include patients with **any** of the appropriate medications in their chart
- Select **Add** to create a single medication group

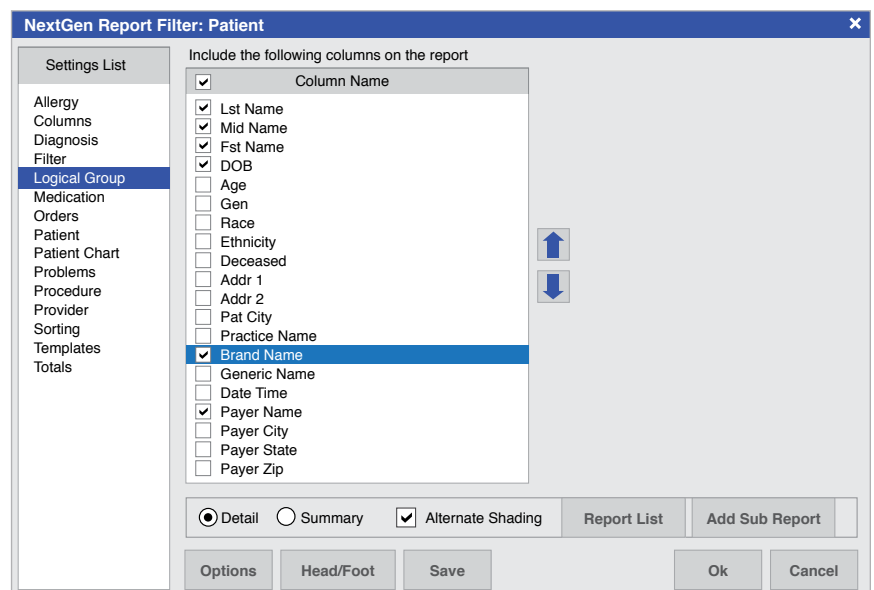


- Select **Logical Group** from the **Settings List** to set the logic for the criteria



Logical Group	AND/OR
Patient Search 1	AND
Diagnosis Search 1	AND
Medication Search 1	

- Select **Columns** and choose the columns to be displayed on the report
- Save the report for reuse
- Select **OK** to run the report
- The resulting patient list can be displayed on the screen, or actions executed. Navigate to desired patient charts from the results. Reports can be also be exported to a spreadsheet to enable strategic data sorting and filtering.



Column Name
<input checked="" type="checkbox"/> Lst Name
<input checked="" type="checkbox"/> Mid Name
<input checked="" type="checkbox"/> Fst Name
<input checked="" type="checkbox"/> DOB
<input type="checkbox"/> Age
<input type="checkbox"/> Gen
<input type="checkbox"/> Race
<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Deceased
<input type="checkbox"/> Addr 1
<input type="checkbox"/> Addr 2
<input type="checkbox"/> Pat City
<input type="checkbox"/> Practice Name
<input checked="" type="checkbox"/> Brand Name
<input type="checkbox"/> Generic Name
<input type="checkbox"/> Date Time
<input checked="" type="checkbox"/> Payer Name
<input type="checkbox"/> Payer City
<input type="checkbox"/> Payer State
<input type="checkbox"/> Payer Zip

APPENDIX PATIENT IDENTIFICATION CRITERIA

1. Patient age, and

- ≥ 16

2. ICD-10 Diagnosis Codes: and,

ICD-10-CM Code	Code Description
F11	Opioid related disorders
F11.1	Opioid abuse
F11.10	Opioid abuse uncomplicated
F11.2	Opioid dependence
F11.20	Opioid dependence uncomplicated
F11.21	Opioid dependence in remission
F11.24	Opioid dependence with opioid-induced mood disorder
F11.25	Opioid dependence with opioid-induced psychotic disorder
F11.29	Opioid dependence with other opioid-induced disorder with unspecified opioid-induced disorder
F11.9	Opioid use, unspecified
F11.90	Opioid use, unspecified uncomplicated
F11.99	Opioid use, unspecified with unspecified opioid-induced disorder

3. Medication history contains any of these medications based on drug name, strength and form:

- Buprenorphine HCl Sublingual Tablet Sublingual 2 MG
- Buprenorphine HCl Sublingual Tablet Sublingual 8 MG
- Suboxone Sublingual Film 2-0.5 MG
- Suboxone Sublingual Film 4-1 MG
- Suboxone Sublingual Film 8-2 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 2-0.5 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 8-2 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 2-0.5 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 4-1 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 8-2 MG
- Bunavail Buccal Film 2.1-0.3 MG
- Bunavail Buccal Film 4.2-0.7 MG
- Zubsolv Sublingual Tablet Sublingual 0.7-0.18 MG
- Zubsolv Sublingual Tablet Sublingual 1.4-0.36 MG
- Zubsolv Sublingual Tablet Sublingual 2.9-0.71 MG
- Zubsolv Sublingual Tablet Sublingual 5.7-1.4 MG