

NextGen® Office Data Extraction

(Effective June 2020)

The following instructions outline how you can extract your data prior to termination of the NextGen® Office solution. It is your regulatory obligation to retain your patient and practice data.

Upon termination or expiration of the agreement under which you obtained access and use of the NextGen Office solution:

- (A) Your right to access and use the NextGen® Office solution and all related functionality therein immediately terminates; and,
- (B) You must, at your expense, remove and delete all copies of any Plug-In Software, if any, previously loaded onto your systems.

YOU MUST EXTRACT YOUR DATA PRIOR TO YOUR TERMINATION DATE. After termination, we do not store your data for your future reference, nor do we offer a post-termination “read-only access” arrangement. Please note, if your account is disabled, there is a \$500 reactivation fee if Company needs to turn your account back on.

Access to your data, and the ability to extract a copy thereof, is available to you throughout the Term. Currently the NextGen Office solution provides two methods, within the solution itself, for you to extract your data on your own, at no additional charge:

Option 1 - C-CDA Export: The easiest, and free, option is to export ONC compliant C-CDA files. This can be done in bulk, for all patients, directly from the Admin section of the PM system. This will produce a Patient Health Record (PHR) XML format file formatting to C-CDA standards for ALL patients in the system. The C-CDA files meet ONC specifications in providing a portable format with clinical history (problems, allergies, medications, vitals, care plans, etc.) that can be viewed in an ONC compliant EMR system. However, it does NOT include encounter notes or any documents/attachments.

Option 2 - Print Chart Wizard: Also free, but more labor intensive, is the "Print Chart" wizard. This will produce a single PDF containing the entire contents of that patient's chart - not just the PHR but all encounter notes, documents/attachments etc. It essentially gives you everything that is associated with that patient chart, including copies of all attachments, PDF's, scanned images etc. and outputs it as a single comprehensive PDF file. It can only be done one patient at a time.

In addition to the two self-managed methodologies outlined above, Company offers a third option for data extraction in which Company will perform, at an additional charge, the data extraction as follows:

Option 3 - Download my Patient Records: For a fee, Company can provide the *Download My Patient Records* service, which produces a backup to a secure Amazon cloud service. The site will contain not only the PHR C-CDA file for each patient, but also read-only copies of all encounters, as well as all documents/attachments in their original format. Once the extraction has been completed you will promptly receive instructions and credentials to access the data. You must move your data from the temporary cloud site. Your account executive will discuss pricing if you wish to learn more.

If you would like to utilize Option 3, then prior to any termination/expiration of the Agreement, you must:

- Create an ASR (accounting) case in Company's Success Community (contact support at 858-523-212, option 6, if need help).
- The case will be sent directly to accounting, who will reference your signed contract on file and make the appropriate adjustments. They can also notify you via your case with the last charge/access dates for that account.

Below, are instructions for Options 1 and 2. If you have any questions about the two screen shot instructions below please feel free to call customer support at: [\(877\) 523.2120](tel:8775232120), option 6. In addition to the above, we have also included are instructions from running the Patient Demographics Report.

Instructions

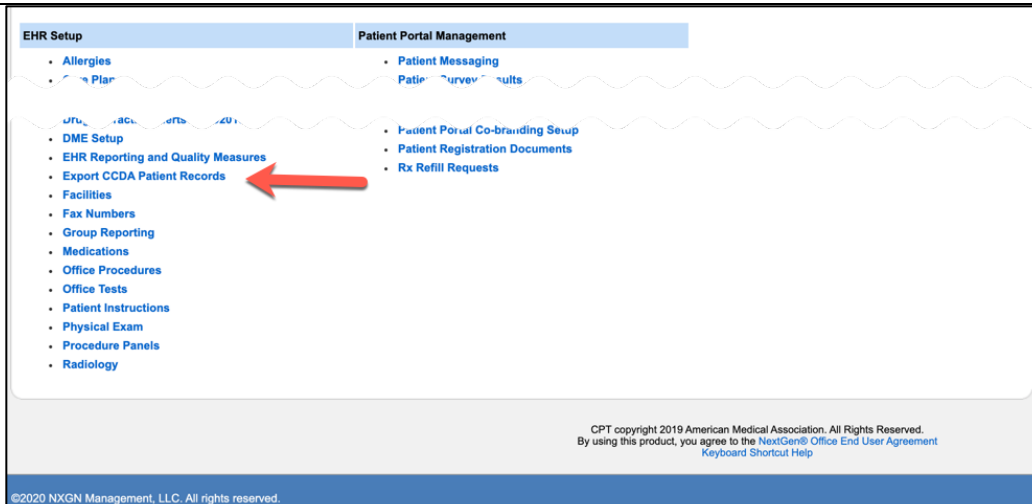
Option 1 - C-CDA Export:

Export CCDA Patient Records

The Export CCDA Patient Records feature allows users to generate Export CCDA patient record files, to view files that have already been generated, and to delete files.

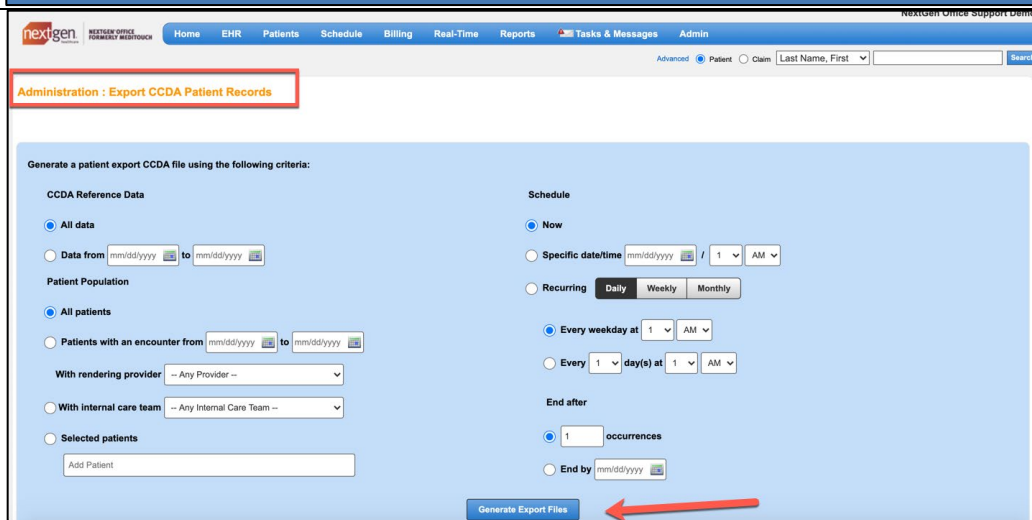
1. Select "Export CCDA Patient Records" from the "Admin" page.

***Note: You must sign off on all encounters that you wish to be included in the C-CDA**

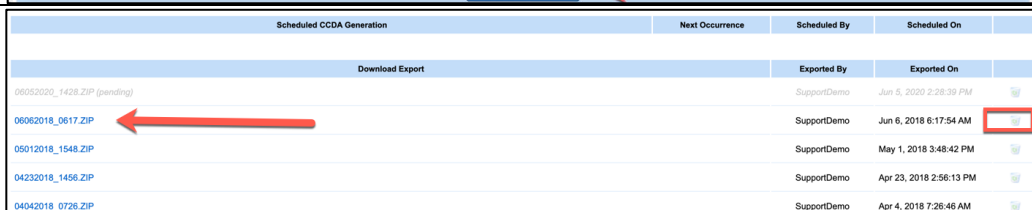


You have two options here

- A. Click "Generate Export CCDA File" to create a new Export CCDA file.
- B. Select "All Patients" or "Patients with an Encounter From," select the date range by manually entering the dates or selecting them from the calendar icons and select the rendering provider.



- A. Click the file name below to download the Export CCDA file.
- B. Click the trash icon to permanently delete the file and click "OK" in the popup to confirm.

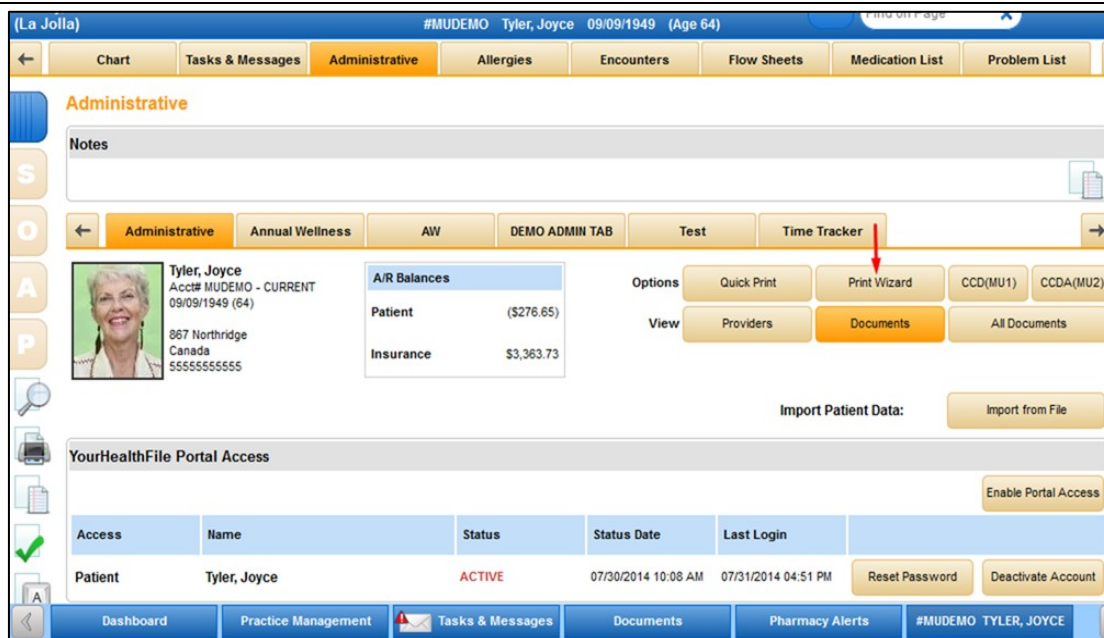


Option 2 - Print Chart Wizard:

Patient Chart: Print Wizard

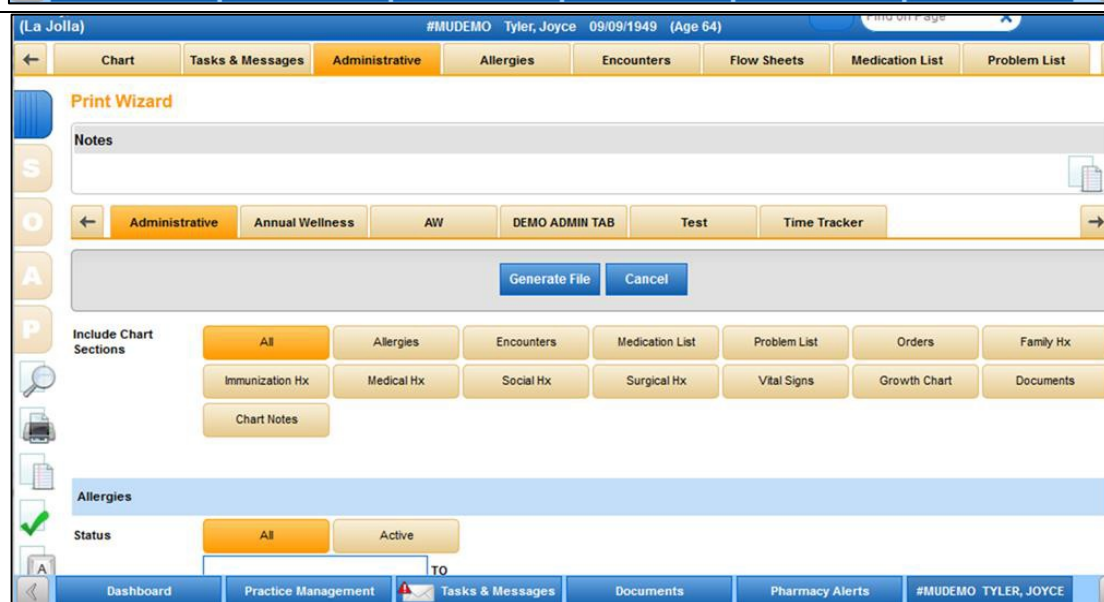
1. Search your patient name
2. Select the patient chart
 - a. Select the "Administrative tab"
 - b. Choose "Print Wizard"

***Note: The "Print Wizard" is an extremely helpful tool that allows users to generate a PDF file containing a variety of information documented from the patient's chart.**



3. Enter information and select date ranges or choose "All".
4. Select "Generate File"

***Note: The file is located in "Documents," located within the "Administrative" tab, where the user is able to download, or preview. It may take several minutes to see the file after you've selected "Generate File".**



Patient Demographics Report:

This report will only export the demographics.

1. Under Reports
2. Choose Demographics under Type and Patient under Report.
3. Choose Generate Report and it will download the report.

nextgen NextGen Office Reports NextGen Office Support Demo

Dashboard Select a Report View Bookmarks Help Feedback Log Out

Select a Report

Reports (required)

Report Type: Demographics Analyze patient, insurance, and guarantor demographic information.

Report Name: Patient, Insurance, Guarantor - Analysis Demographic report used to review patient, insurance, and guarantor information.

+ Templates

+ Reporting Period

+ Patient

+ User

+ Internal Care Team

Template Name: User Practice Save Template Generate Report

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