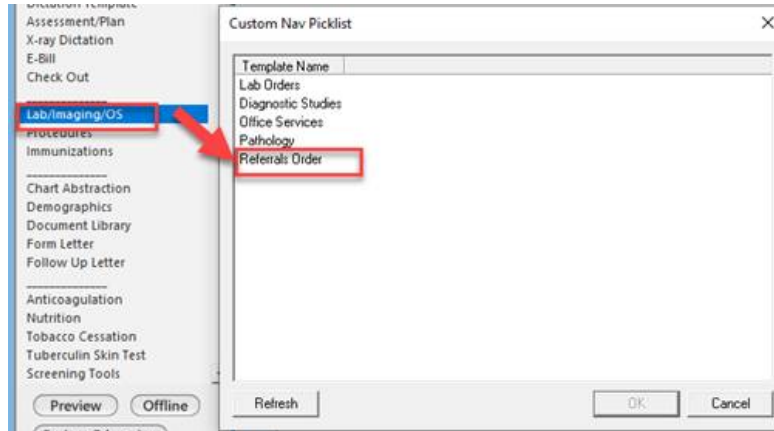


**Non-Minutes of the Halted Weekly Provider Luncheon Meeting**  
**Non-Held: Monday, January 25<sup>th</sup>, 2021**  
**(Per COVID-19 group gatherings restriction)**

Note: While we have NOT been gathering for Monday meetings and therefore getting information out only as-needed, there is a sense of non-connection. To resolve that, Monday meeting ‘non-minutes’ will go out weekly with whatever items there are to communicate.

- 1. Update on Referral Process Changes** –We are close to launching a streamlining of internal patient referrals. Yet pending some final review by selected specialists. This comes in response to PCP concern that “everyone wants it differently” and some end up referring externally as it is sometimes easier than internally. With use of the “Referral Template” (can be accessed from various locations in the EMR – see screenshot below, Becky’s appointment team will pick it up, contact the patient and get them in the schedule of the specialist and let the referring provider know of the appointment. Specialists are always encouraged to also provide feedback to referring provider after the visit to close the referral loop and keep all caring parties informed. For the few providers who need pre-review on their referrals, Becky’s team will work with them until a more streamlined process can be put in place there as well. Training will be launched as soon as process is ready for use.



- 2. Sign Off Labs in PAQ** - There is always much patient desire to see lab results in their patient portal. For any lab signed off in PAQ, labs are immediately and automatically pushed to portal for any patient who has one. That, obviously and except for those calls a provider would want to have made, saves a ton of phone calls the MA would have to make and also receive from patients who are awaiting results and haven’t received them. Portal use by patients and providers is always encouraged. We find that about half of providers are ‘signing off’ in the In-box, which is more a notification than a sign-off. Official signing off is only done in PAQ. Please see attached for how this is done. The EMR team will work with any provider to empty their PAQ if filled from lack of past attention.
- 3. Update on Old-vs. New Patient Portal** – The previous “NextMD” patient portal was discontinued with us back in December when NextGen’s new patient portal, MedFusion, was launched. The old was still accessible for a while as patients got used to navigating the new one. The exposure time has come to an end and access to the old one (NextMD) has been cut off. Due to the confusion and many offices still sending things to NextMD, we have had NextGen deactivate NextMD for Tanner Clinic. From a Tanner Clinic user standpoint, the following will no longer show (once they have logged out and back in):

- The Patient Portal enrollment options in EMR and EPM will no longer be active

- The Patient Portal tab in the Inbox will no longer be available
- The enrollment status indicators in the patient information bar, the status bar at the bottom and in the patient search will no longer show

Attached is a document sent by NextGen outlining the differences that include screenshots. We hope this will avoid confusion for our staff. There are no changes from the patient standpoint. Users can access multiple practices from within one account (i.e., Tanner Clinic and Utah Cardiology), thus there is not a move to deactivate logins, though this will come in the future when NextMD is sunset by NextGen. **Please also be aware there is training on this in URTC at the following location:**



- 4. More On Online Scheduling** - We now have 36 providers allowing patients to schedule some of their appointments on-line and have had over 500 appointments successfully scheduled since we launched this on December 14, 2020. We are ready to take on any other provider who also wishes to give it a shot. REMEMBER – on-line scheduling is usually never all-or-nothing. You can designate which types of appointments and which slots per day you are comfortable with patients scheduling their own. The rest can be managed through current processes. Jump on and see how it works. It is a great patient satisfier and lessens the load on our scheduling phones, satisfying those patients as well. In the end, the patient ends up on your schedule – which is the goal.
- 5. Stress Tests and ABI Test Scheduling** – Dr. Darin Checketts is asking that providers schedule all stress and ABI tests through the scheduling line instead of sending a referral through his office. The appointment line can schedule them and eliminate one step in the process.
- 6. NextGen Down a Few Hours this Sunday, Jan 31** – NextGen will be down this coming Sunday from about 12:00 to approximately 6:00 p.m. They will be applying a patch update (bug fix), which is a common step after an upgrade. Slight chance for remote access in later afternoon hours, but not expected.
- 7. Tax Appointments** - It is time to schedule tax appointments again. Since we are not currently holding Monday Physician meetings, Brandi has created a survey that will be sent to each physician and scheduling can be done from that link. Appointments begin on Thursday, February 18<sup>th</sup>. Watch for that link to come later in the week.