NextGen® KBM
Ngkbm Assessment Customize
Version 8.3 UD11

Introduction

This quick reference guide helps you to perform one or more related tasks.

For more information, go to NextGen Healthcare Success Community (https://www.community.nextgen.com/) and download the latest user guide for your specialty.

Ngkbm Assessment Customize

The **Ngkbm Assessment Customize** is a practice level template that is used to configure order sets and order set db picklists in **Ngkbm Assessment Customize** template.

Specialties

The **NgKbm Assessment Customize** template is used in *all* specialties.

Access Ngkbm Assessment Customize

1. Access NextGen® Ambulatory EHR.
2. From the **File** menu, select **System\Practice Templates**.
3. Click the **Practice** tab to display a list of practice templates.
4. In the **Show** section, select **All**.
5. Scroll down to highlight **Ngkbm Assessment Customize**. and then click **OK**.

    Note: You can double-click **Ngkbm Assessment Customize** option to access the **Ngkbm Assessment Customize** template.

Modify Order Sets

You can modify the standard order sets that are shipped with NextGen KBM. You can modify the order sets to meet the specific needs of a practice or provider.

Add a New Order set

1. From the **Order Sets (My Plan / Custom Plan)** grid, right-click and select **Add New**.
2. In the **Ngkbm Provider Plans** window, enter the applicable details.
3. Click **Save**.
4. Click **Close**.

    The newly added data appears in the **Order Sets (My Plan/Custom Plan)** grid.

Update an Order Set

1. Select one of the following option available above the **Order Sets (My Plan / Custom Plan)** grid:
    - › **Current provider**: to filter the order sets.
    - › **All providers**: to display the order sets.
2. Double-click an order set to configure in the **Order Sets (My Plan / Custom Plan)** grid.
3. In the **Ngkbm Provider Plans** window, make the required changes.
4. Click **Save**.
5. Click **Close**.

    The updated data appears in the **Order Sets (My Plan / Custom Plan)** grid.

Remove an Order set

1. Select one of the following option available above the **Order Sets (My Plan / Custom Plan)** grid:
    - › **Current provider**: to filter the order sets.
    - › **All providers**: to display the order sets.
2. In the **Order Sets (My Plan / Custom Plan)** grid, highlight the order set to be deleted.
3. Click **Remove**.

    The order set is removed from the **Order Sets (My Plan / Custom Plan)** grid.

Modify Order Set List

You can modify the items that appear in the lists users choose from for order sets.

Add Service Items to an Order Sets Lists

1. From the **Ngkbm Assessment Customize** practice template, click the **Full List** option above the **Order Sets (My Plan/Custom Plan) DBPicklists** grid.
2. Right-click on the grid and select **Add New**.
3. In the **ngkbm_treatmnet_plan_dbp** window, enter the pertinent information in the fields.

    Note: When you select an option from the **Category Description** field, the associated short description is displayed in the **Category** field.
4. Click **Save** and then click **Close**.

    The newly added data appears in the grid.

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To add service items to the Specialty List:

1. In **Ngkbm Assessment Customize** practice template, click the **Specialty List** option above the **Order Sets (My Plan/Custom Plan) DBPicklists** grid.

2. Right-click on the grid and select **Add New**.

3. In the **ngkbm_fc_orders** window, enter the pertinent information in the fields.

   Note: When you select an option from the **Description** field, the associated code is displayed in the **Code** field.

4. Click **Save** and then click **Close**.

   The newly added service items appear in the **Order Sets (My Plan/Custom Plan) DBPicklists** grid.

Update an Order Sets DB Picklists

1. Click the **Full List** option.

2. Double-click an order type in the grid.

3. In the **ngkbm_treatment_plan_dbp** window, make the changes to the order set.

4. Click **Save** and then click **Close**.

To update order sets DB picklists for specialty service items:

1. Click the **Specialty List** option.

2. Double-click a specialty in the grid.

3. The **ngkbm_fc_orders** window, make the changes to the order set.

4. Click **Save** and then click **Close**.

Remove an Order Sets DB Picklists

1. Select the **Full List** or **Specialty List** option.

2. Select a row in the grid to delete.

3. Click **Remove**.

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The examples contained within this publication are to show functionality of the software and are not intended to guide medical decisions or clinical approaches.

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