

IN-DEPTH GUIDE

NextGen[®] Closed Loop[™] Patient & Practice Experience

A seamless experience for patients,
providers, and staff



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Introduction

The NextGen® Closed Loop™ Patient & Practice Experience is an integrated, end-to-end solution that creates a seamless experience for patients, providers, and staff. Curated with the goal of enabling practices to establish better healthcare outcomes for all, this platform focuses on the entire care journey. The stages of this interconnected platform include access, intake, the visit, care coordination, and care management.

The integrated solutions within the Closed Loop™ Experience work together to benefit patients and practices alike. This platform contributes to higher patient care participation, more efficient practice operations, improved provider satisfaction, and higher revenue integrity.

The Closed Loop Experience aims to strengthen the care journey for patients and encourages them to play an active, long-term role in their healthcare. **By giving them the tools they need to do so, practices can empower their patients to take on more of their care journey.** This alleviates some of the burden from physicians and office staff while optimizing practice operations.

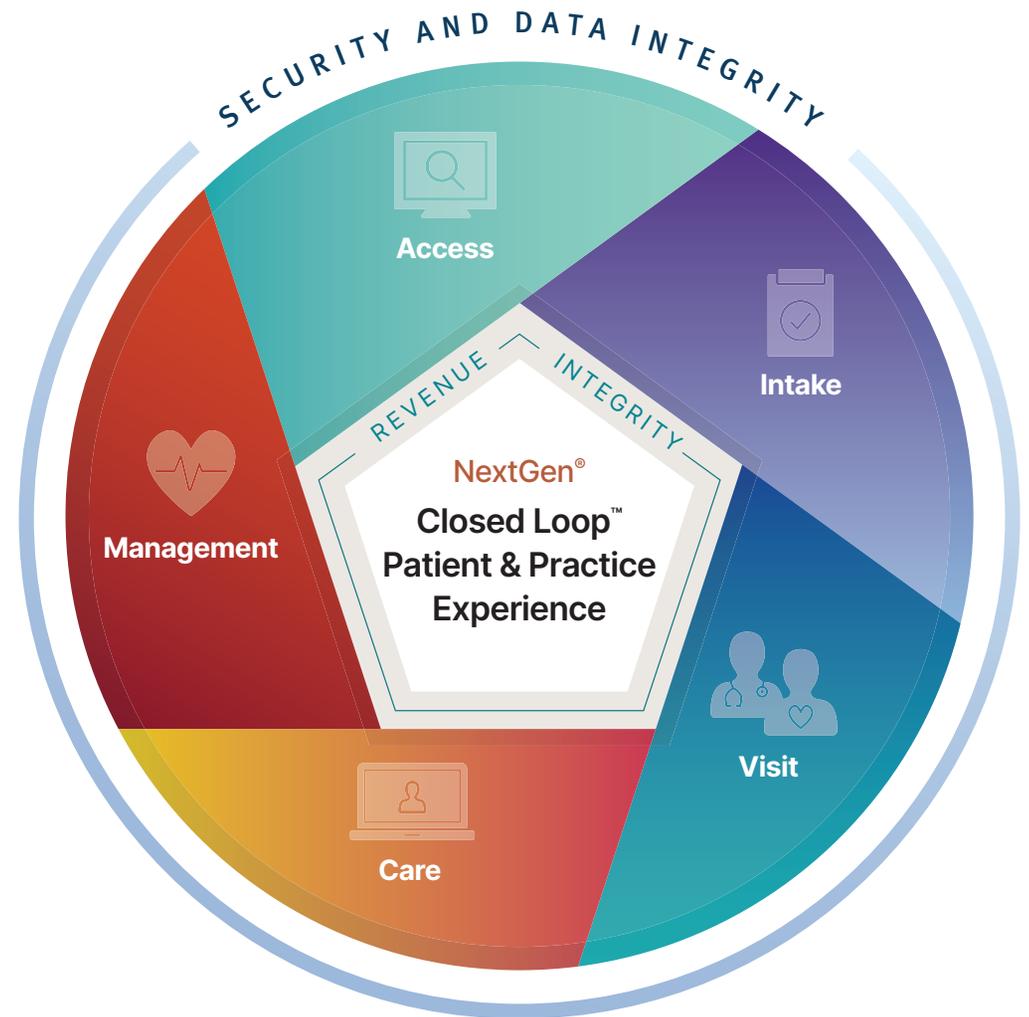
THE PATIENT JOURNEY

Quality care goes far beyond a practice visit; it even goes beyond follow-ups or referrals. Providing quality care is all about the patient journey—connecting with the patient and guiding them through the stages of the entire healthcare experience.

The Closed Loop Patient & Practice Experience embodies the importance and interconnectedness of the patient's entire journey, from before they step into the office, and continuing long after they leave.

Beginning with access, the patient journey starts as a patient finds a practice, through to the visit, and onto post-visit care coordination and management.

With the Closed Loop Experience, quality care is ongoing, supported by thoughtfully curated steps, tools, and resources to ensure it.



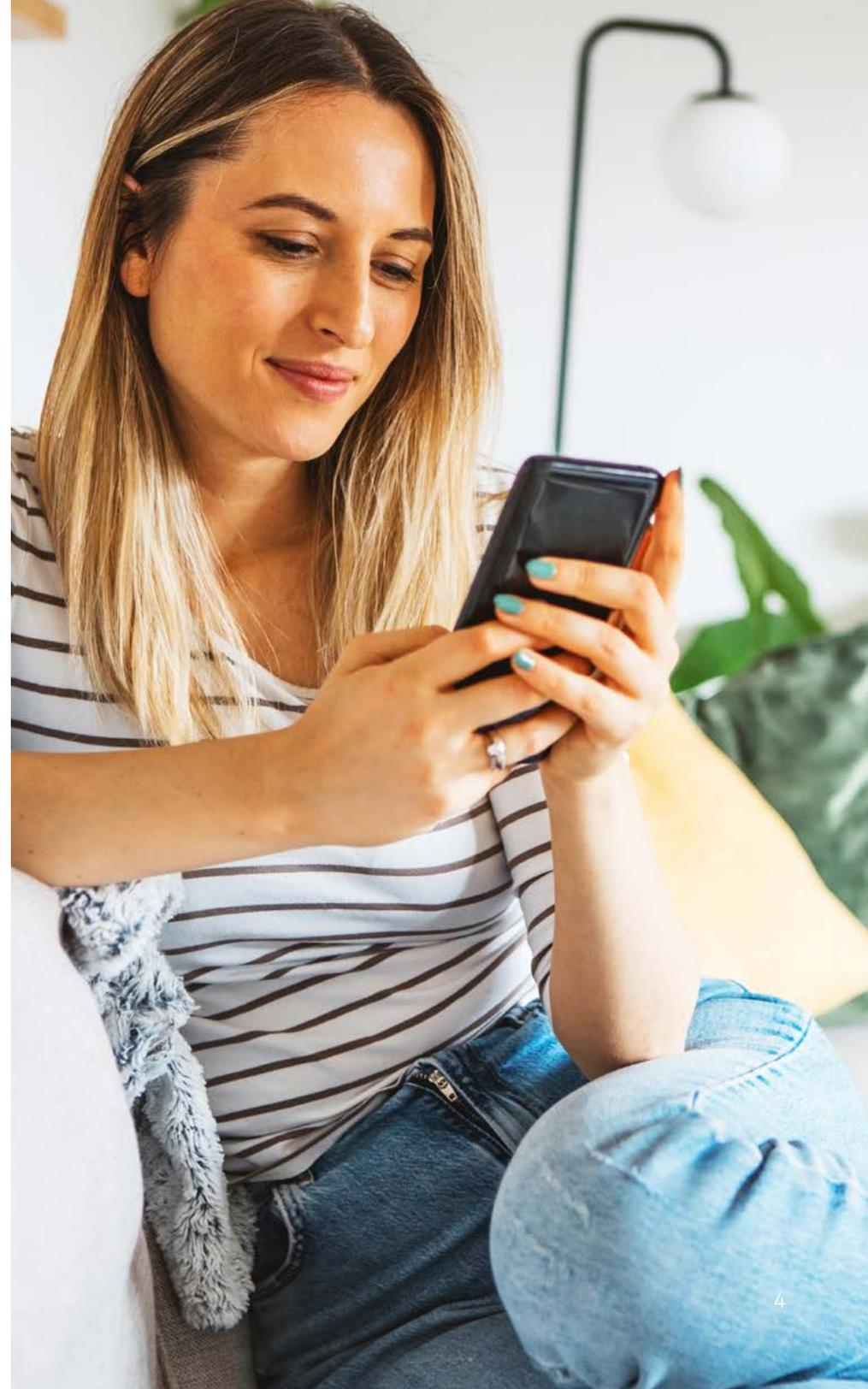
THE IMPORTANCE OF INTEGRATION

True integration is the difference maker when it comes to the Closed Loop Experience. When these solutions are all combined into one unified platform, they not only elevate the patient experience, but they elevate each other as well.

This integration doesn't stop at the patient experience, either. While other platforms are comprised of various disparate plug-and-play APIs, the Closed Loop Experience is fully integrated into every aspect of your NextGen® Enterprise EHR and Practice Management (PM) platform.

Strengthening revenue integrity

One distinct benefit of combining all of these solutions with a truly integrated framework is that they can now more reliably help bolster a practice's revenue cycle. From preventing patients from seeking care elsewhere to optimizing eligibility checks in the intake process, the Closed Loop Experience provides the structure and means to establish secure revenue integrity.



THE FIRST STEP TO CARE

For patients and providers, bridging access to care relies on creating a clear, easy path into a practice. Finding and seeing a provider is more convenient with multiple avenues of omnichannel access, electronic referrals, and scheduling.

Provider access

Practices thrive when patients, new and returning, can readily make appointments and book time with their practice.

By optimizing access, practices are able to boost the discovery, engagement, and accessibility of their practice. Online reputation and visibility management tools help practices effectively showcase important information and positive reviews, boosting discovery and encouraging patients to schedule appointments. Then, advanced scheduling platforms and reminders for follow-up appointments help to execute appointment bookings and keep patients engaged.



Nia, 44 | Photographer, Mom of 2
Establishing care with a new pediatrician.

GOOD



BETTER



BEST



For your staff

When a patient cancels an appointment, it's automatically removed from the schedule. When a patient confirms, they automatically receive the correct intake forms, and their responses are sent to NextGen Enterprise EHR & PM automatically.



Josiah, 22 | College athlete
Experiences knee pain after soccer practice.

1 **Automated outreach before appointments**

2 **Easy way for patients to complete paperwork**

3 **EHR pushback**
based on discrete EHR integration

4 **Zero-contact check-in**

Josiah, your appointment with Dr. Basu is Tuesday 12/2 at 9AM. Respond YES to confirm or NO to cancel.

Yes

Please complete your intake paperwork before you arrive:
<http://hayesvalley.link.com>

Hi Josiah, we're looking forward to seeing you for your appointment at 9AM. When you arrive, reply HERE and wait in your car while we check you in or give us a call at [+\(415\)555-4522](tel:+(415)555-4522) to schedule your appointment. We look forward to seeing you soon!

Patient access

For patients, barrier-free access is the objective. If a patient finds a practice they like, but can only schedule an appointment over the phone during their own typical working hours, they may struggle to prioritize making their appointment.

With scheduling options that boost accessibility and utilize automation, both patients and practices are set up for success.

1500

PATIENTS PER MONTH

Online scheduling has helped practices see more patients, some reporting an addition of up to 1500 patients per month.

For your patients

Before an appointment, patients receive reminders to confirm or cancel. After confirming, patients are sent forms tailored to their visit, such as digital HIPAA, consents, and clinical questionnaires. They can also upload insurance information, make payments, and complete other tasks.

Upon arrival, contactless check-in lets them head right to the visit room.



Scheduling options

Self-scheduling

Patients can choose the appointment date and time that is best for them via an online platform. They will automatically receive reminders of their appointment via SMS messaging. In addition, **self-scheduling** eliminates extra work for practice staff who no longer need to juggle scheduling calls.

IVR, call deflections, chatbots

These intermediary platforms propel scheduling after-hours. Interactive voice response (IVR) systems, call deflection, and chatbots are other ways that automation helps complete the scheduling process in a way that is convenient for both the practice and the patients.

Appointment reminders

Automated text message reminders decrease no-shows and increase engagement between practice and patient.

Automated waitlist

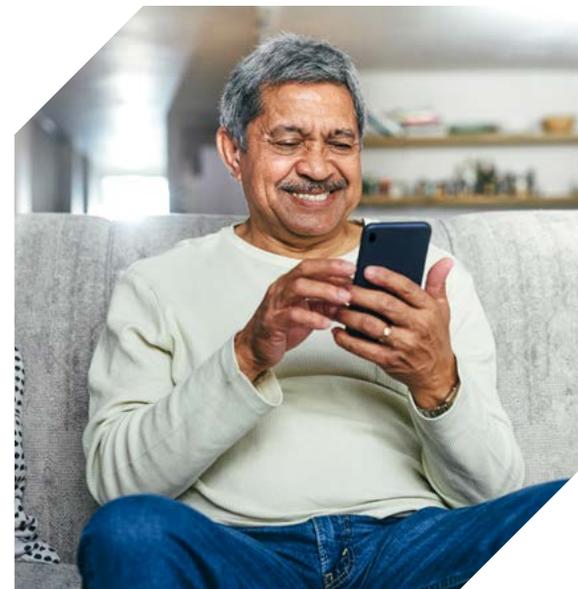
An **automated waitlist** helps eliminate vacant appointments that were created by cancellations. Patients who want earlier appointment times can sign up for the waitlist. When someone cancels their appointment, that slot is made available to those on the waitlist. This means timelier care is delivered with minimal gaps in practices' schedules.

Recall

NextGen® Recall contributes to improving staff efficiency and minimizing the manual burden of scheduling care and follow-up visits. With recall, practices can automatically message prospective and current patients via SMS or email to schedule visits.

Without an automated recall solution, staff members have to manually run a report and see who is on a recall plan. They then must reach out to the patient over the phone or by mail, encouraging patients to call and schedule their visit.

However, when your practice automatically reaches out to referred patients, they can easily self-schedule their own appointments from their devices, and the scheduling experience is simpler and more streamlined for both patients and practices.



Navigator powered by Luma

Build upon the entire existing patient engagement platform with AI-powered customer service agents. Navigator brings contextual understanding to voice conversations by intelligently routing inbound patient calls for self-serve tasks such as scheduling or canceling appointments, suggesting SMS workflows, and switching languages.

INTAKE

GREET PATIENTS WITH CARE, NOT FORMS

After finding a practice, intake is a patient's first engagement with the practice. Creating a system that focuses on streamlined data collection, clear communication, seamless interoperability, and efficient insurance processing enacts strong practice operations and boosts patient involvement.

The effect of intake on patients and providers

A simplified patient intake process strengthens patient & provider communications and streamlines the patient journey from the start. By efficiently refining their intake process, a practice can fill their schedules, optimize patient visits, and build better overall relationships with their patients.

When practices establish systems that leverage these goals, patients are able to engage in their care with ease in a way that values their time. Patients can stay in contact with practice staff and complete requested tasks through easy-to-access channels at times that are convenient to them.





Digital intake

Eliminate cumbersome and time-consuming clipboards and paper forms in the waiting room in favor of streamlined digital intake solutions. Digital Intake allows you to collect United States Core Data for Interoperability (USCDI), demographics info, and other administrative and clinical info your practice needs for successful patient intake.

With Digital Intake you can greet patients with a digital alternative that simplifies the intake process. This streamlined process allows patients to fill out intake forms ahead of their visit, enables staff to further streamline the visit process, and reduces the total time required for visits, allowing practices to see more patients.

Features:

- Online intake forms & questionnaires
- Password-less intake through secure messaging
- Diagnostic screening tools
- 50+ specialty-specific forms for primary care, orthopedics, OBGYN, behavioral health, and more with English & Spanish versions included (50 forms)

Secure text

Patient & Practice communications bridge an important channel for patients and staff to stay connected. Secure text messaging offers an easier way for patients to chat with staff and exchange information. These messages between practice and patient give patients the freedom to provide information on their own time. Instead of logging into a patient portal to provide or update information, patients can securely respond to text or email messages from their practice. This eliminates the need to navigate lengthy logins or call the practice.

Broadcast messaging

Broadcast messaging is an alert system that practices can use to communicate with all their patients or with a specific subset of patients. Sent via text or email, these messages typically include notification of changes in practice hours, practice emergencies, or other broadly relevant updates. By keeping their patients up to date with changes or other pertinent information, the practice can build trust and demonstrate transparency with their entire patient population.

Info and data upload

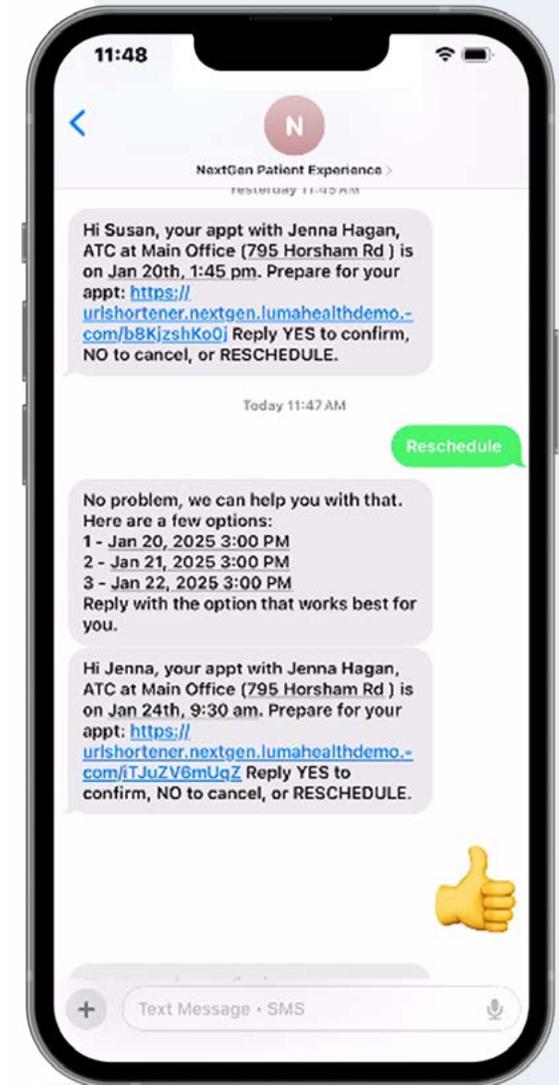
The entirety of an optimized intake process goes to waste if this data is not properly transferred into the patient's chart. Luckily, Instant Medical History (IMH) supplies the automation required to bring the intake process full circle.

Integrate clinical discrete data

With IMH, clinical information from forms automatically flows directly into the patient's chart in the EHR. No input from office staff is required. This means from the beginning to the end of the intake process there is a drastic overall reduction in manual input. That's the benefit of a Closed Loop Experience.

73%
DECREASE IN MINUTES

Digital intake has helped clients decrease patient intake from as much as 15 minutes to 4 minutes on average.





NextGen Eligibility & Waystar Coverage Detection

NextGen® Eligibility Verification and Waystar Clearinghouse and Coverage Detection contribute to improving and simplifying insurance and payment processes.

NextGen® Eligibility Verification

NextGen® Eligibility Verification provides an electronic connection to several insurance companies and medical plans. This enables practices to submit or automate submissions of eligibility verification and referral requests, helping to implement a consistent, accurate verification process.

Eligibility verification itself verifies a patient's insurance coverage and processes the information given before an appointment is even scheduled. Once the inquiry is processed, the results flow directly into the patient's chart.

Later, if a patient is referred to another physician or specialist, the primary care physician can generate a referral number so the patient can seamlessly be sent to an authorized specialist. A patient's referral history can also be reviewed.

Waystar Coverage Detection

Through Waystar, the Closed Loop Experience offers coverage detection that helps patients determine if their insurance may fully or partially cover a visit. In the instance of patients thinking they must self-pay or a missed notification of Medicaid status, Waystar coverage detection helps practices automatically determine if they can retroactively collect payment in a way that is fast, easy, and cost-effective.



VISIT

HEALTHIER COMMUNITIES AND STRONGER PRACTICES

The effect of the visit on patients and providers

Patient visits not only make up a significant portion of the entire patient care journey, but their success can also impact the overall effectiveness of the rest of the patient experience.

Because of this, it is crucial that practices receive the support they need to optimize visits and take the patient experience to the next level. When both the patient and provider experience are elevated in this way, health outcomes are improved and given long-term stability, leading to healthier communities and stronger practices.

The Closed Loop Experience approaches this by improving the environment in which care is delivered and allowing providers to allocate much more of their focus toward patients.



NextGen Mobile

The first step in creating a comfortable and effective visit for the patient is breaking away from a desktop for documentation and switching to a mobile extension of the EHR.

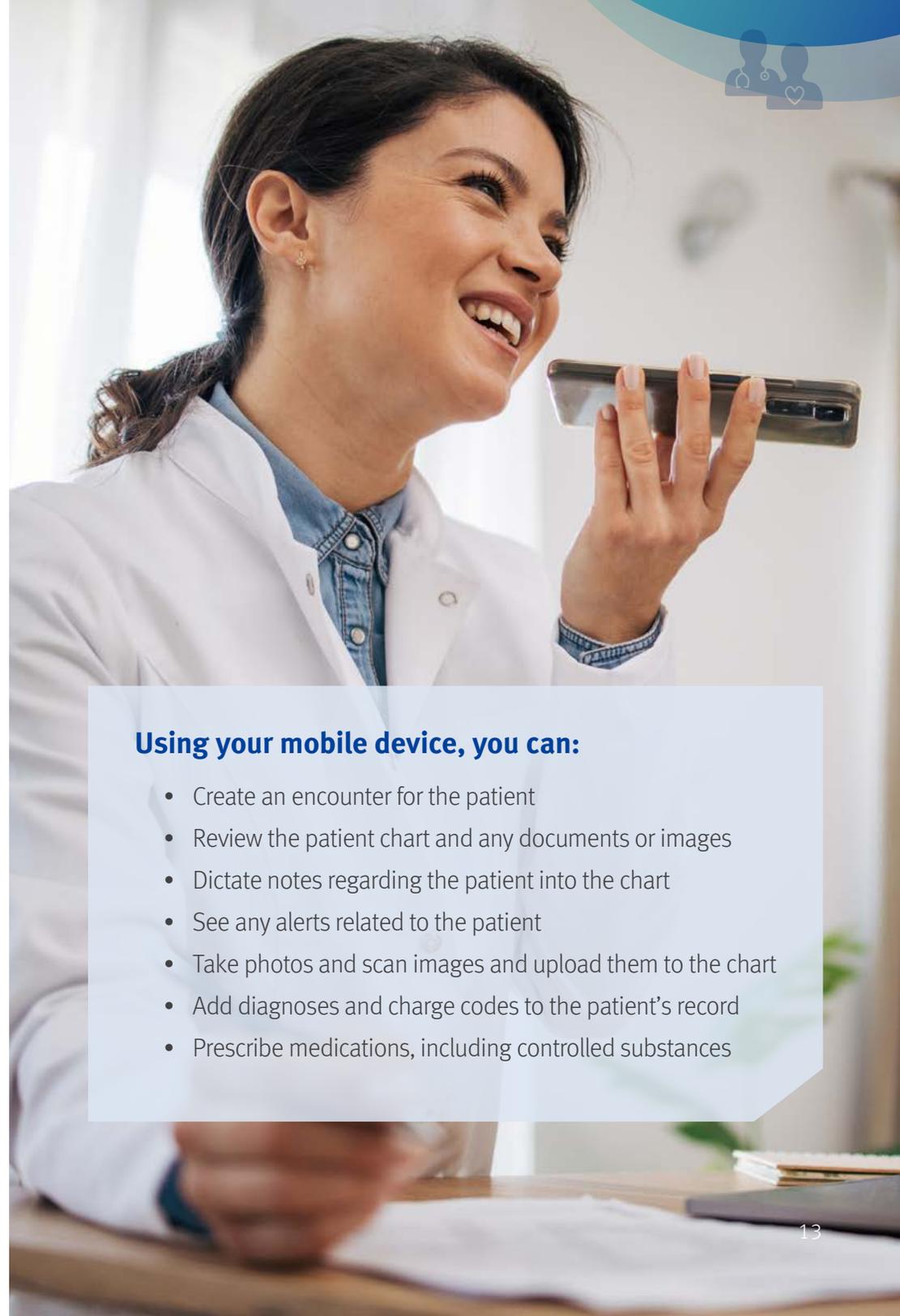
NextGen Direct-to-Desktop

NextGen® Direct-to-Desktop allows physicians to dictate clinical narratives for all text-based fields in the EHR. These narratives are seamlessly transferred into the EHR in 3 easy steps:

1. The physician selects any text entry box in the NextGen® Mobile EHR and dictates the narrative.
2. Automatic voice-to-text technology captures the dictation and populates the text box.
3. This entry is automatically synced with your EHR, no manual efforts required!

E-prescribing

NextGen Mobile allows physicians to manage patient medication directly in-app. This includes items such as approvals for refills and renewals from the pharmacy. These tasks are separated from other clinical tasks in NextGen Mobile, allowing providers to have more intuitive access to this aspect of their workflow.



Using your mobile device, you can:

- Create an encounter for the patient
- Review the patient chart and any documents or images
- Dictate notes regarding the patient into the chart
- See any alerts related to the patient
- Take photos and scan images and upload them to the chart
- Add diagnoses and charge codes to the patient's record
- Prescribe medications, including controlled substances



NextGen® Mobile Ambient Assist

AI-powered documentation significantly reduces post-visit note completion time, as SOAP notes are generated instantly upon the visit's end and can be reviewed within seconds:

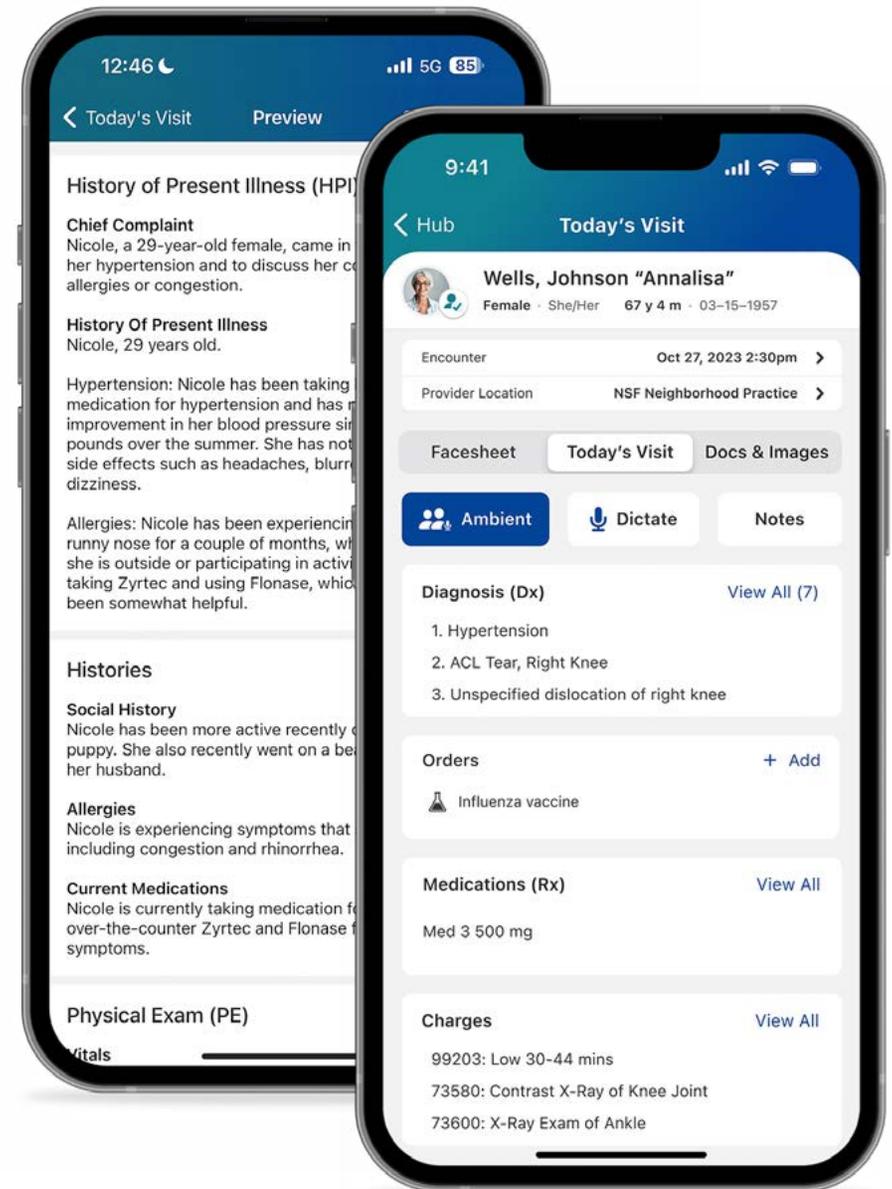
- Seamlessly and automatically integrates the note into the EHR
- Saves providers up to 2 hours of documentation time per day
- Provides relevant suggestions for ICD-10s, medications, lab/imaging orders, and diagnosis codes
- Supports English & Spanish language patient-provider conversations
- Powerful macros launch physician documentation favorites with simple phrases or words

Returning the focus to patients

Once the encounter is started on NextGen Mobile, Ambient Assist dictates and analyzes the patient-provider conversation with no manual input required until after the provider ends the encounter and reviews the note.

This means that the physician no longer has to substantially focus on documenting manually, drastically reducing the physician's cognitive load and the resulting burnout that follows. This change of focus can allow the physician to pick up on cues that they otherwise may have missed. This in turn elevates the patient experience as patients feel more seen as their concerns are being listened to more.

Not only does this lead to better care outcomes, it leads to a stronger patient-provider relationship and increases the loyalty a patient might feel for the practice.



“ At the end of the day, I also get to go home a little bit less stressed out, a little bit less behind, and enjoy my life outside of work a little bit more.”

Dr. Christopher Cefalu
Urology Clinics of North Texas



Virtual visits

The power of virtual visits integrated with NextGen Enterprise supports a smooth user experience tailored to your workflow. As a result, you can easily connect with your patients on any supported device while providing a consistent experience, whether they see you in the office or via video.

Balancing in-person and virtual care

Virtual visits allow practices to properly analyze the needs of their patients and allocate their resources accordingly to maximize their care delivery. Just as no patient's needs are identical, the method of caring for those needs is unique.

Some visits don't need to be addressed in the office and virtual visits are a perfect way of providing care for those patients, without losing the personal touch that comes with face-to-face interactions.

Additionally, this frees up in-office time and resources that can be used to see patients with more in-person needs.

“Virtual visits provide the synchronous audio and visual component that doctors rely on to interact with patients effectively. They enable providers to pick up on nonverbal cues that they would not be able to perceive from a phone call.”

Damon Hou, MD

Medical Director, Health Informatics
Capital Women's Care

CARE COORDINATION

SUPPORTING THE ENTIRE PATIENT JOURNEY

Post-care coordination

A successful care journey must be extended beyond the initial visit and enable the patient to remain engaged with their care long-term. This means practices must remain engaged with patients in more ways than just scheduling visits and following-up traditionally.

The Closed Loop Experience enables this care coordination with a three-pronged approach:

- Communication and follow-up automation
- Streamlined patient payment systems and material delivery
- Reducing the burden of staff, freeing them to better facilitate care

These three directions improve the ability of provider, patient, and staff to effectively coordinate the patient care journey, thus improving the patient's care outcomes during this time.





Greenwood Clinic

Absolutely love this clinic.



Mountain View Medical Center

My healthcare provider truly listens and cares.



Remaining connected

To deliver ongoing care, patients and providers must have modes to remain engaged with one another. Specifically for patients, having resources and tools that allow them to play a more active role in their care is essential. The Closed Loop Experience accomplishes this by helping practices effectively disperse education materials and automatically gather feedback from patients through surveys.

Not only does this give patients the opportunity to be reminded of the excellent care you've given them, but it also increases your visibility with a larger online presence when these surveys convert into a robust source of reviews.

Further education

Online resources bolster patient accessibility to their provider. Continuous access to online educational resources gives patients a platform to be more involved in their care.

Consistent feedback

Surveys give patients a place to share positive experiences and feedback. When patients feel they are heard by their provider, it strengthens the connection between patient & provider, and therefore overall trust and ownership of care.



Katie, 35 | Business Analyst

Referred to a fertility specialist for an IVF consultation.

1 **Outreach to referred patients with scheduling instructions**

2 **Automated reminders until patient schedules**

3 **Follow-up to keep patient coming back**

Hi Katie! Your doctor, Nadiya Basu, has referred you to Hayes Valley Fertility to see Maria Hernandez. Call us at [608-555-0100](tel:608-555-0100) to schedule.

Hi Katie, this is a reminder to schedule your appointment at Hayes Valley Fertility with Maria Hernandez.

Katie, it's time for your follow-up appointment with Maria Hernandez. Click here to schedule: <http://hayesvalley.schedule>.

Referral management

When a patient gets referred to a specialist or to another practice, successful scheduling is essential so patients do not get lost in the process. **Automated referral** messaging allows practices to reach out to referred patients and follow-up with them until their appointment is scheduled, ensuring patients complete the entire referral process.

25%
**INCREASE IN REFERRAL
CONVERSION RATES**

Referral management has helped practices increase referral conversion rates by as much as 25%.

For your patients

- Automated outreach to referred patients for scheduling
- Convenient in-message scheduling options
- Robust reporting to track patients through your entire referral funnel



Population health

Population health analytics are another way providers can further coordinate care for not only an individual patient, but to their entire community. With the help of the population health dashboard, providers and staff can more accurately identify and manage the healthcare needs of their patients.

On a broader scale, providers can also identify gaps in care and examine care performance on an individual, team, practice, or community level. These analytics have helped practices identify and treat high-risk patients in their area. Additionally, proactive care on the community level helps deter negative health outcomes, which ultimately results in organizational savings.

Population health analytics aids in coordinating and participating in value-based care programs that propel disease prevention, care delivery, and overall patient engagement. This approach to care has a direct impact on creating better overall healthcare outcomes.

Our partnership with Luma Health gives users access to Luma Bedrock™.

ACCESS INSIGHTS

700+ MILLION

Bedrock uses 700M+ data points from 650+ leading healthcare organizations to bring actionable best practices to your organization.

“ The way payment plans are set up with NextGen Pay offers our patients the flexibility to pay the amount they can at the cadence most comfortable for them.

The new payment channels have been a major benefit and have even reduced the number of physical statements we're sending out, which has been a significant cost savings.”

Nicole Rigo
Wilmington Health



EXTENDING CARE BEYOND THE PRACTICE

Ongoing care management

Care management consists of the platforms and systems that ensure quality care continues to be delivered. Ongoing care management improves health outcomes and prevents unnecessary lapses in care. By establishing a stronger, longer-lasting patient-provider relationship, care management plays a key role in creating better long-term health outcomes.



Remote patient monitoring

Instead of constant follow-ups and appointments for routine monitoring, remote patient monitoring (RPM) allows providers to stay informed of their patients' real-time health status via remote monitoring technology and tools. RPM is both efficient and effective, as patients' conditions can be observed and treated before they escalate. Over time, this helps minimize hospital visits which is financially advantageous for both patients and providers. RPM also allows for the continuity of care. Patients can be constantly monitored, which is especially beneficial to those with chronic illness or those who struggle to attend regular in-person appointments.

Device connectivity

Remote patient monitoring programs provide patients with the devices and tools they need to practice care remotely. RPM can be customized to the needs of the patient, helping them integrate their devices in a way that optimizes their care. Patients are taught to independently utilize their devices so they can achieve the best outcomes.

Resources remain the largest roadblock that practices face in providing RPM to patients. NextGen Remote Patient Monitoring eliminates this barrier by giving practices the devices and support they need to deliver this care, without any of the additional staff required by other RPM solutions.

The combination of connectedness, engagement, and device implementation helps patients locally prioritize their care.



Automated statements & payment reminders

Patients become more empowered to play an active role in their health when they stay connected through convenient automated reminders. These reminders are delivered straight to a patient's mobile device via SMS when it comes time to book appointments, follow-up visits, or make a payment.

These secure and convenient messages allow patients to easily follow a link to access their account, without the need for a password or lengthy log-in. Once in their account, patients can accomplish their desired task, whether it's booking an appointment or paying a statement. This fully integrated solution connects patients to their care plan with ease, straight from their device.

NextGen Digital First Statements

Transform patient billing statements with a solution that increases electronic statement delivery and reduces billing costs. This partnership with InstaMed provides a patient-centric, digital billing experience that simplifies the payment process so that practices can drive eStatement adoption, boost efficiency and accuracy, and support patients with simple payment options.





NextGen Healthcare x Waystar

Waystar Clearinghouse

Waystar is NextGen Healthcare's preferred clearinghouse partner, and this partnership focuses on using leading technology to help simplify healthcare payments. Waystar and NextGen® Enterprise also support single sign-on to streamline the process of accessing claims management, billing tools, and remittance data.

Overall, the Waystar Clearinghouse contributes to automating workflows, empowering clinicians and staff, and securing more revenue.

Waystar Claims Management

Processing claims effectively can be the difference between smooth operations and stressful operations. The downside of this is that effectively managing claims processing can be incredibly demanding for staff. The solution to this? A fully integrated claims management solution that integrates automation with EDI connections to relieve your staff of the burden of manually tracking down errors.

Claims Management combines Claims Attachment, Claims Monitoring, and Denials + Appeals Management to supercharge the claims process and enable you to do more with less.

Claims Attachment

Waystar Claims Attachments saves time through automation by removing the uncertainty of paper attachments. This solution enables you to better track, manage, and submit attachments, individually or in batches, to ensure the appropriate claims are efficiently formatted and submitted, ultimately reducing denials.

Claims Monitoring

Waystar Claims Monitoring utilizes remit performance data to status claims at the right time, giving users greater control and insight into high-quality status inquiries. Unique disposition codes allow for seamless and customized workflow integration, reducing manual efforts so your team can operate at peak efficiency.

Denials + Appeals Management

Waystar Denials + Appeals Management routes workable denials to the right person at the right time while simultaneously identifying and closing non-workable denials without review. Additionally, this solution reduces the organization's cost to collect through an automated appeal workflow, appeal wizard, and batch appeal capabilities.

With Claims Management:

- Reduce days in AR with early intervention and increased transparency
- View claim updates + significant reduction in accounts per work list
- Increase efficiency by eliminating effort spent on non-actionable aging claims
- Receive alerts when tasks need to be performed so accounts are never overlooked
- Remedy denials quicker with actionable next-best steps



NextGen® Pay powered by Instamed

Late payments and unpaid bills are all too frequent and can lead to significant losses in revenue. Oftentimes, it's not for a lack of trying on the patient's part, either. Convenient, patient-friendly payment channels are crucial for any successful medical billing process.

NextGen Pay allows you to offer more convenient payment channels such as e-statement enrollment, automatic payment options and plans, and no-login required guest pay options. Leverage full integration with the entire Closed Loop platform to improve the overall patient experience and increase your total amount of collections.

Reduce manual input. Increase staff satisfaction.

Not only does NextGen Pay make the process easier on patients, it also relieves staff of the burden of processing various payment options.

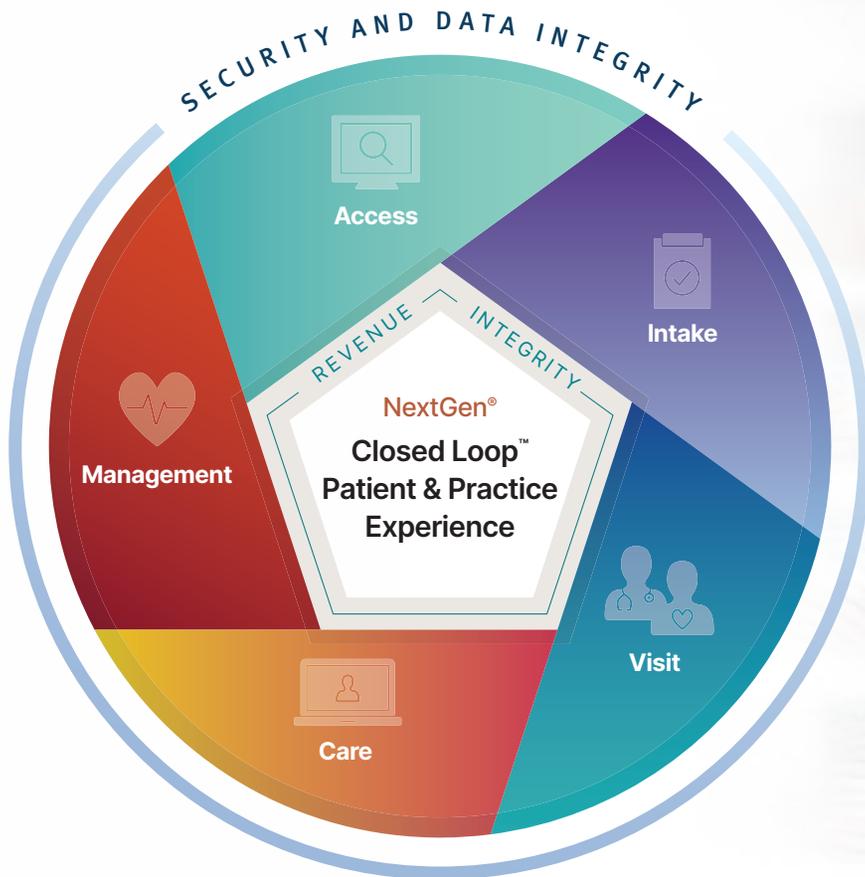
- Streamline payment collections in office, online, and more
- Post to NextGen Enterprise PM automatically
- Real-time automated batching of payments
- Unified payment transaction reporting with a single dashboard
- Spend less time following up with automated statements and payments

Manage, view, and collect all in one place. With NextGen Pay, your practice can consolidate payments, output files with one click, adjust date ranges, configure permissions by role, and switch to different reports instantly.



LASTING, QUALITY CARE

The NextGen Closed Loop Patient & Practice Experience tactically integrates powerful tools and solutions that create lasting, quality care. With an aim to improve patient engagement and practice success, the Closed Loop Experience encompasses the drivers to efficient, focused, and ongoing care. Practices, providers, and patients alike all experience the benefits of a solution that puts their success at the forefront.



HOW CAN WE HELP YOU?

Contact us at 855-510-6398 or results@nextgen.com

If you're interested in the Closed Loop Experience, contact us to find out more about how our innovative, end-to-end solution can help **improve the patient experience within your practice.**