

# NextGen<sup>®</sup> Practice Management 5.9 Upgrade Training

## Reports, Tasking, and BBP Enhancements

**5.9/8.4**

# Topics to be Reviewed

- › PM Reporting enhancements
- › Worklog / Tasking enhancements
- › BBP enhancements



# PM Reporting Enhancements



# PM Reporting Enhancements



- › Preferred Language added to multiple reports
- › Encounter Service Type added to multiple reports
- › Encounter Creator, Create Date added to CPS report
- › Enhanced 'Reports Ran By User' Significant Event
- › Suspend Effective Date added to FM Provider report
- › PM Enhanced Reporting option

# Preferred Language

- › Preferred Language data helps identify if patient interpreters are needed.
- › Preferred Language column added to multiple reports.



# Preferred Language



Pulls from **guarantor** on the following reports:

- › Accounts Receivable > Budget Plans
  - General Budget Plans
  - Pre-Listed Plans
  - Re-establish Plans
- › Accounts Receivable > Collections > Account Summary

# Preferred Language



Pulls from **patient** on the following reports:

- › Accounts Receivable > Collections
  - Insurance Aging Analysis
  - Insurance Aging Analysis - Age Resp Bals Only
  - Insurance Detail
  - Insurance Summary
  - Collections Follow-up

# Preferred Language

Pulls from **patient** on the following reports:

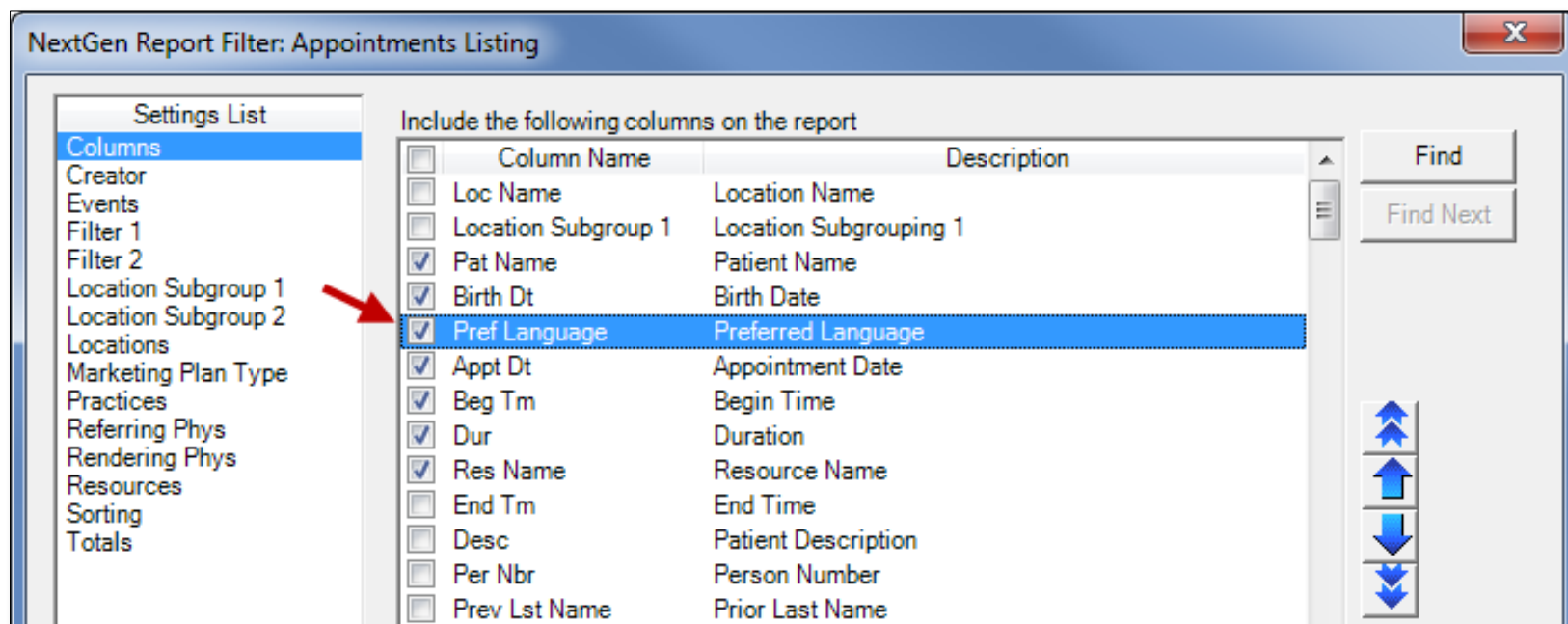
- › Scheduling
  - Appointments Listing
  - Wait List
- › General
  - Patient Recall





# Preferred Language

Appointments Listing report example:

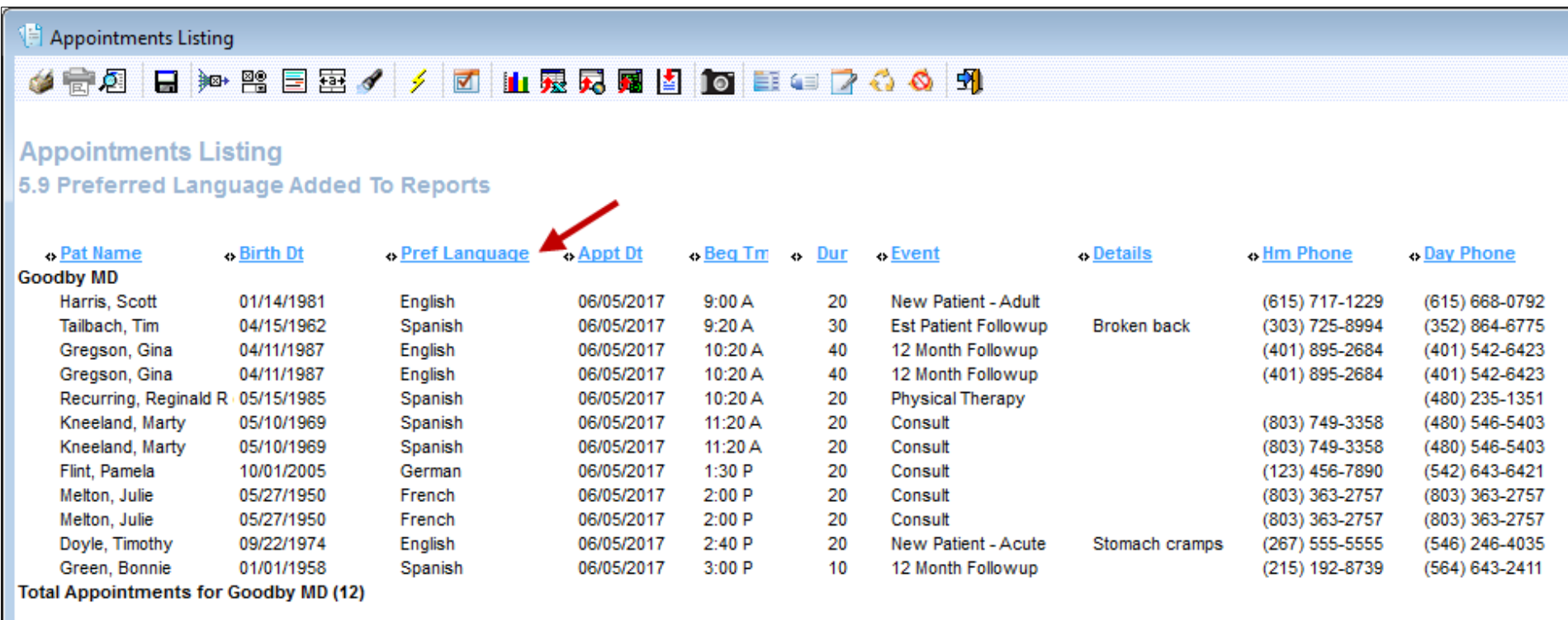


# Preferred Language

Appointments Listing report example:

Appointments Listing

5.9 Preferred Language Added To Reports



Pat Name	Birth Dt	Pref Language	Appt Dt	Req Tr	Dur	Event	Details	Hm Phone	Day Phone
<b>Goodby MD</b>									
Harris, Scott	01/14/1981	English	06/05/2017	9:00 A	20	New Patient - Adult		(615) 717-1229	(615) 668-0792
Tailbach, Tim	04/15/1962	Spanish	06/05/2017	9:20 A	30	Est Patient Followup	Broken back	(303) 725-8994	(352) 864-6775
Gregson, Gina	04/11/1987	English	06/05/2017	10:20 A	40	12 Month Followup		(401) 895-2684	(401) 542-6423
Gregson, Gina	04/11/1987	English	06/05/2017	10:20 A	40	12 Month Followup		(401) 895-2684	(401) 542-6423
Recurring, Reginald R	05/15/1985	Spanish	06/05/2017	10:20 A	20	Physical Therapy			(480) 235-1351
Kneeland, Marty	05/10/1969	Spanish	06/05/2017	11:20 A	20	Consult		(803) 749-3358	(480) 546-5403
Kneeland, Marty	05/10/1969	Spanish	06/05/2017	11:20 A	20	Consult		(803) 749-3358	(480) 546-5403
Flint, Pamela	10/01/2005	German	06/05/2017	1:30 P	20	Consult		(123) 456-7890	(542) 643-6421
Melton, Julie	05/27/1950	French	06/05/2017	2:00 P	20	Consult		(803) 363-2757	(803) 363-2757
Melton, Julie	05/27/1950	French	06/05/2017	2:00 P	20	Consult		(803) 363-2757	(803) 363-2757
Doyle, Timothy	09/22/1974	English	06/05/2017	2:40 P	20	New Patient - Acute	Stomach cramps	(267) 555-5555	(546) 246-4035
Green, Bonnie	01/01/1958	Spanish	06/05/2017	3:00 P	10	12 Month Followup		(215) 192-8739	(564) 643-2411
<b>Total Appointments for Goodby MD (12)</b>									

# Encounter Service Type

- › Service Type tracked in Encounter Maintenance.
- › Encounter Service Type column added to multiple reports.



Encounter Maintenance - Encounter: 1305 for - Encounter, Eddie E

Billable Date: 05/08/2017 | Billable Time: 12:00 AM | Occurrence Code: Illness | State: | Onset Date: | Onset Time: |

**General** | Clinical | Billing & Colle... | Encounter Sp... | UB | Claims | Marketing | Properties | History

Patient Type: |  Condition Related to Employment

Remarks: | Same/Similar Date: |

Complaints: | Date Last Seen: |

Practice Specifics  
 Enc Gen UDF 1: | Enc Gen UDF 2: |  
 Enc Gen UDF 3: |

Admit Date: | Admit Time: | Initial Treatment Date: |

Discharge Date: | Discharge Time: | Discharge Status: |

Facility: |  Incident-To Bill Encounter

Encounter Types: Billable

Print Encounter On Statements |  Patient is Homebound

Case: |  Initial Enc in Series

Homeless Status: | Service Type: Medical case management

Early intervention services  
 Home and community based health services  
 Home health care  
 Hospice services  
 Medical case management  
 Medical nutrition therapy  
 Mental health services  
 Oral health care  
 Outpatient ambulatory health services  
 Substance abuse outpatient services

Convert In Progress

WhoWhen | OK | Cancel

# Encounter Service Type

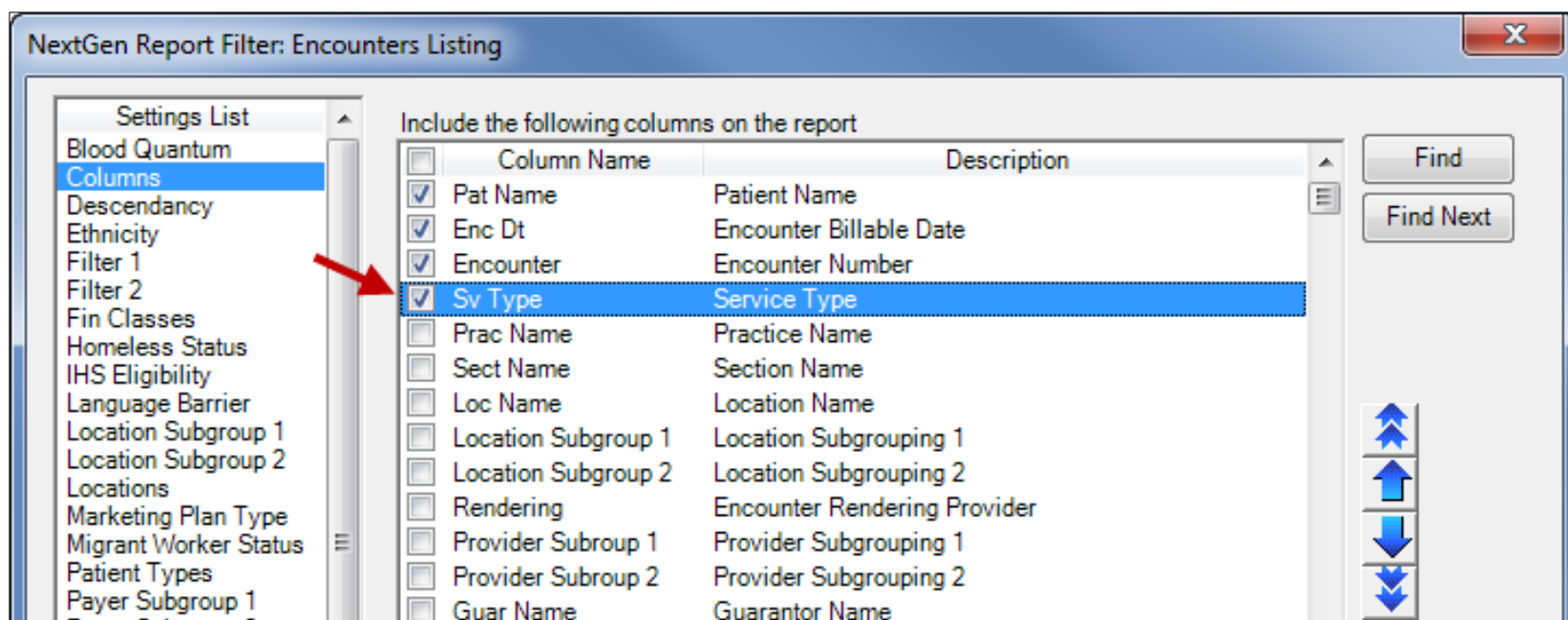
Added to the following reports:

- › Daily > Encounters
- › Monthly > Service Item Summary
  - Extended Amounts and Transactions
  - Transaction Source
- › Health Center > Qualifying Encounter



# Encounter Service Type

Encounters Listing report example:



# Encounter Service Type

Encounters Listing report example:



Encounters Listing  
From 1/1/2017 to 12/31/2017  
5.9 Encounter Service Type Added To Reports

<u>Pat Name</u>	<u>Enc Dt</u>	<u>Encounter</u>	<u>Rendering</u>	<u>Loc Name</u>	<u>Sv Type</u>
Carter, Dave	04/12/2017	1307	Anderson MD, Barry	Sunnydale Medical Office	Oral health care
Demographics, Daisy D	04/19/2017	1289	Anderson MD, Barry	Eastside Medical Clinic	Mental health services
Fallon, Felix	04/26/2017	1309	Goodby MD, James	Shady Pines Nursing Home	Hospice services
Encounter, Eddie E	05/08/2017	1305	Adams MD, Benjamin	Northside Medical Clinic	Medical case management
Harkins, Holly	05/09/2017	1308	Goodby MD, James	Samaritan Nursing Home	Hospice services
Glass, Ian	05/15/2017	1306	Baker DO, Michael	Willow Grove Hospital Outpatient	Outpatient ambulatory health services

# Claim Production Status Report

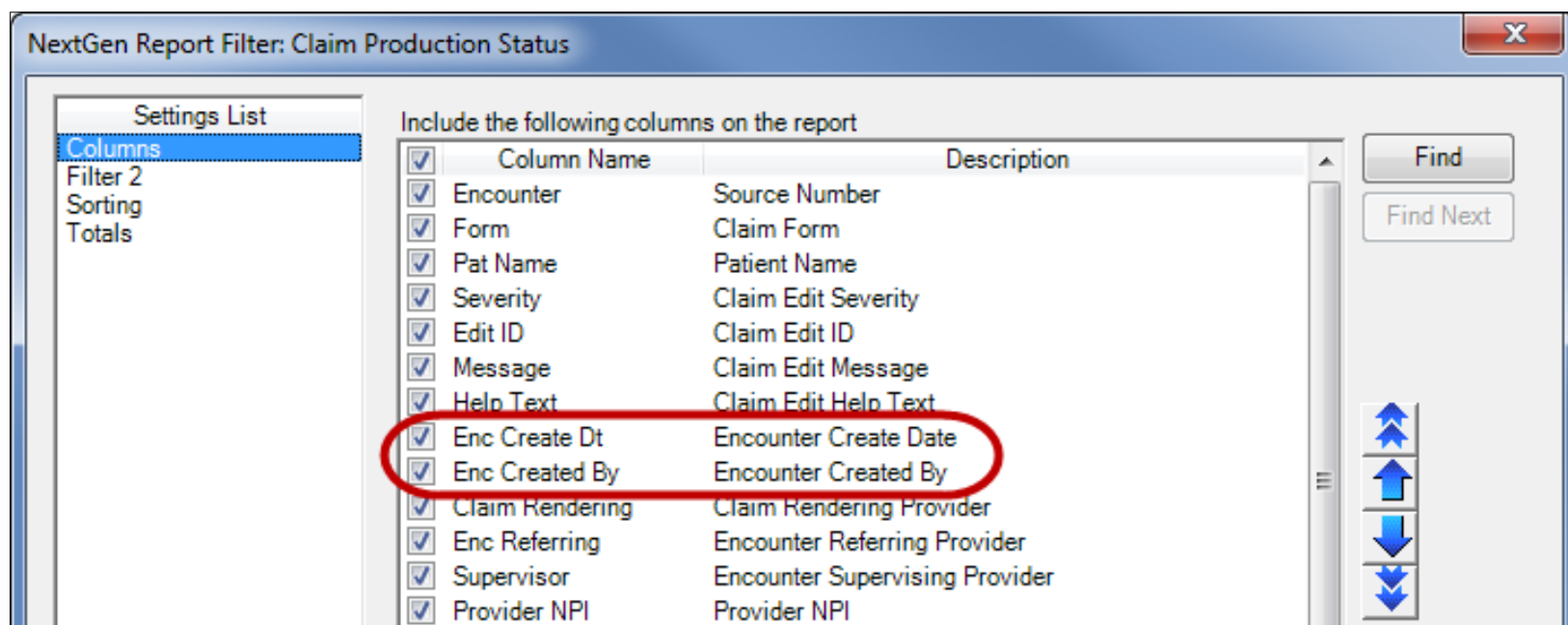
- › Tracking who created the encounter and when helps identify training opportunities.
- › Encounter creator and create date columns added to the Claims Production Status report.





# Claim Production Status Report

Claims Production Status report:



# Claim Production Status Report

## Claims Production Status report:

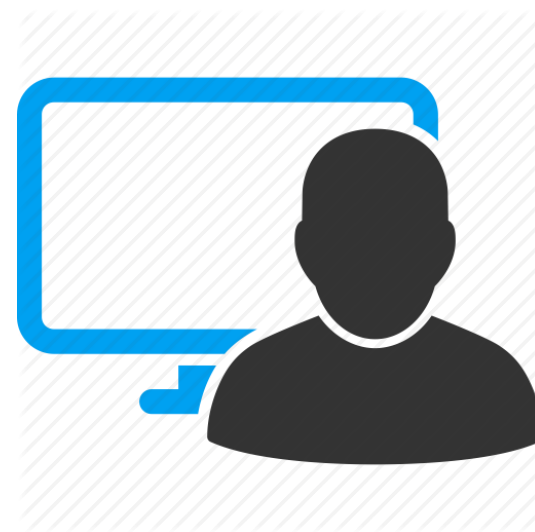
Claim Production Status

5.9 Enc Creator & Create Date Added To CPS Report

Encounter	Form	Pat Name	Severity	Edit ID	Enc Created By	Enc Create Dt	Message
1304	1500	UBClaim, Unice U	Informational		Stenger, Stacy	05/18/17	Claim successfully created.
1294	ADA	Charges, Charlie C	Informational		Stenger, Stacy	05/10/17	Claim successfully created.
1250		ProcessDate, Percy P	Informational		Stenger, Stacy	02/02/17	Self-Pay Encounter Billed.
1247	1500	Charges, Charlie C	Build		Stenger, Stacy	01/31/17	Billing a Physician Assistant with this payer requires the encounter to have a Supervisor Physician.
1244	1500	Aetna, Andrew	Informational		Stenger, Stacy	12/16/16	Claim successfully created.
1188	1500	Demographics, Daisy D	Informational		Stenger, Stacy	09/13/16	Claim successfully created.
1063	1500	Tax, Tabitha T	Required	115	Stenger, Stacy	12/07/15	Duplicate charges: CPT4, Mod 1, Mod 2, service dates are identical

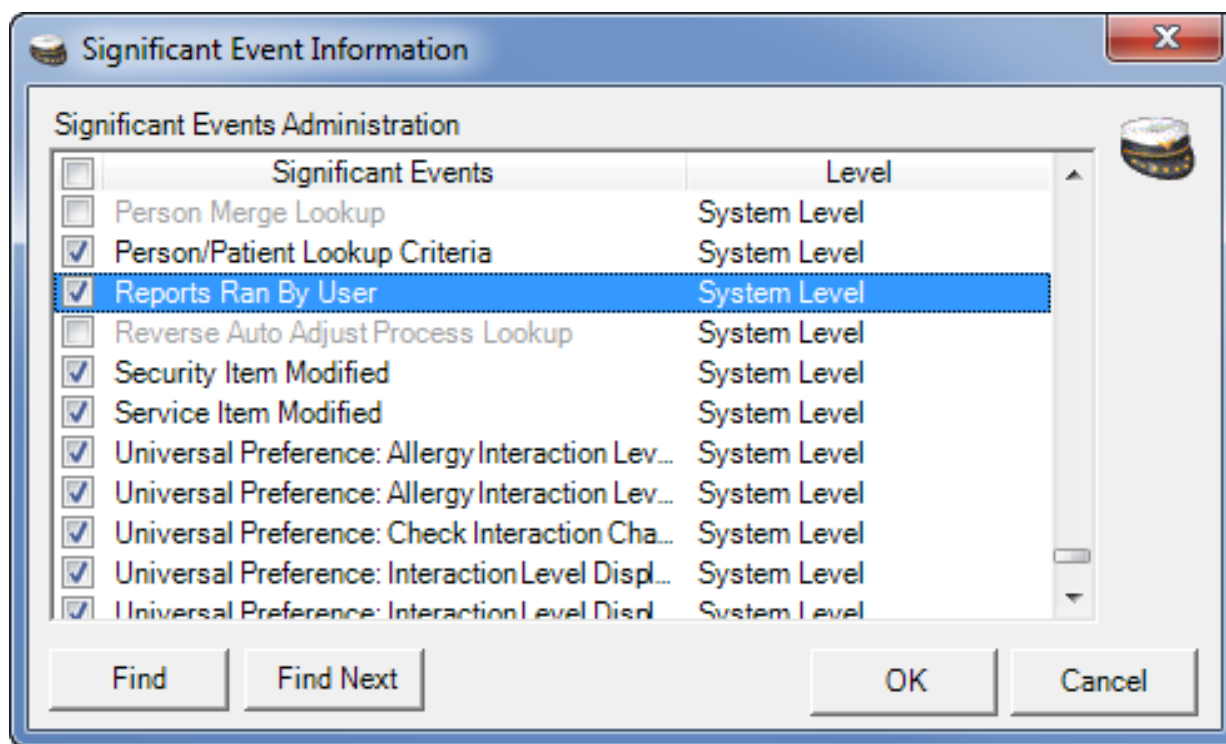
# 'Reports Ran By User' Significant Event

- › Track columns included on the report within the 'Reports Ran By User' Significant Event.
- › Helpful in tracking which columns were included when user(s) ran a report.
- › Identify potential breaches in PHI.
- › Advanced Audit also enhanced to track columns included.



# 'Reports Ran By User' Significant Event

'Reports Ran By User' Significant Event:



# Significant Events report example:

Significant Events

From 5/22/2017 to 5/22/2017

Reports Ran By User Sig Event Tracks Report Columns

Sig Msg	Post Mod	Created By	Crt Dt	Modified By	Mod Dt
Report (Appointments Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Appt Statuses): Expected, (Confirmed): Include All, (Deleted) Stenger, Stacy	Stenger, Stacy	05/22/17 9:56:39 A	Stenger, Stacy	05/22/17 9:56:39 A
Report (Appointments Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Appt Statuses): Expected, (Confirmed): Include All, (Deleted) Stenger, Stacy	Stenger, Stacy	05/22/17 10:07:38 A	Stenger, Stacy	05/22/17 10:07:38 A
Report (Appointments Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Appt Statuses): Expected, (Confirmed): Include All, (Deleted) Stenger, Stacy	Stenger, Stacy	05/22/17 10:07:52 A	Stenger, Stacy	05/22/17 10:07:52 A
Report (Appointments Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Appt Statuses): Expected, (Confirmed): Include All, (Deleted) Stenger, Stacy	Stenger, Stacy	05/22/17 10:08:14 A	Stenger, Stacy	05/22/17 10:08:14 A
Report (Claim Production Status) Ran By User	[Columns]: Encounter, Form, Pat Name, Severity, Edit ID, Message, Help Text, 0	Stenger, Stacy	05/22/17 9:42:35 A	Stenger, Stacy	05/22/17 9:42:35 A
Report (Claim Production Status) Ran By User	[Columns]: Encounter, Form, Pat Name, Severity, Edit ID, Message, Help Text, 0	Stenger, Stacy	05/22/17 9:45:13 A	Stenger, Stacy	05/22/17 9:45:13 A
Report (Encounter Service Type) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Enc Date): 01/01/01	Stenger, Stacy	05/22/17 10:33:47 A	Stenger, Stacy	05/22/17 10:33:47 A
Report (Encounters Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Enc Date): 01/01/01	Stenger, Stacy	05/22/17 9:02:21 A	Stenger, Stacy	05/22/17 9:02:21 A
Report (Encounters Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Enc Date): 01/01/01	Stenger, Stacy	05/22/17 9:03:08 A	Stenger, Stacy	05/22/17 9:03:08 A
Report (Encounters Listing) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Enc Date): 01/01/01	Stenger, Stacy	05/22/17 9:04:06 A	Stenger, Stacy	05/22/17 9:04:06 A
Report (Patient Chart Demographics) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Columns]: Prac Name, Pa	Stenger, Stacy	05/22/17 10:44:51 A	Stenger, Stacy	05/22/17 10:44:51 A
Report (Patient Chart Demographics) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Expired): Include All, (No Encounter for): Days, [Columns]: Pat	Stenger, Stacy	05/22/17 10:45:14 A	Stenger, Stacy	05/22/17 10:45:14 A
Report (Preferred Language) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Appt Date): 06/01/01	Stenger, Stacy	05/22/17 10:28:51 A	Stenger, Stacy	05/22/17 10:28:51 A
Report (Significant Events) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Creator]: Stacy Stenger, [Sig Events Msgs]: Report	Stenger, Stacy	05/22/17 10:46:25 A	Stenger, Stacy	05/22/17 10:46:25 A
Report (Significant Events) Ran By User	[Practices]: .NEXTGEN Medical Practice (Horsham), [Sig Events Msgs]: Report	Stenger, Stacy	05/22/17 10:43:30 A	Stenger, Stacy	05/22/17 10:43:30 A

History

Subject  
Report (Patient Chart Demographics) Ran By User

Note Entry

Before: N/A  
After: [Practices]: .NEXTGEN Medical Practice (Horsham), [Filter 1]: (Expired): Include All, (No Encounter for): Days, [Columns]: Pat Name, SSN, Birth Dt, Pat Age, Sex, Mar, Addr 1, City, State, Zip, Lst Enc, Imm Reg, Imm Sts, Gender Identity, Sexual Orientation, Preferred Pronoun

Created  
By: Stenger, Stacy  
Date: 05/22/2017  
Time: 10:45 A

Close

# Suspended Effective Date for Providers

- › Suspended Effective Date is helpful in identifying payers to which providers cannot bill.
- › Suspended Effective Date column added to 'Providers with Provider Numbers' report in File Maintenance.



# Provider Master File > Practice tab > Group Information:

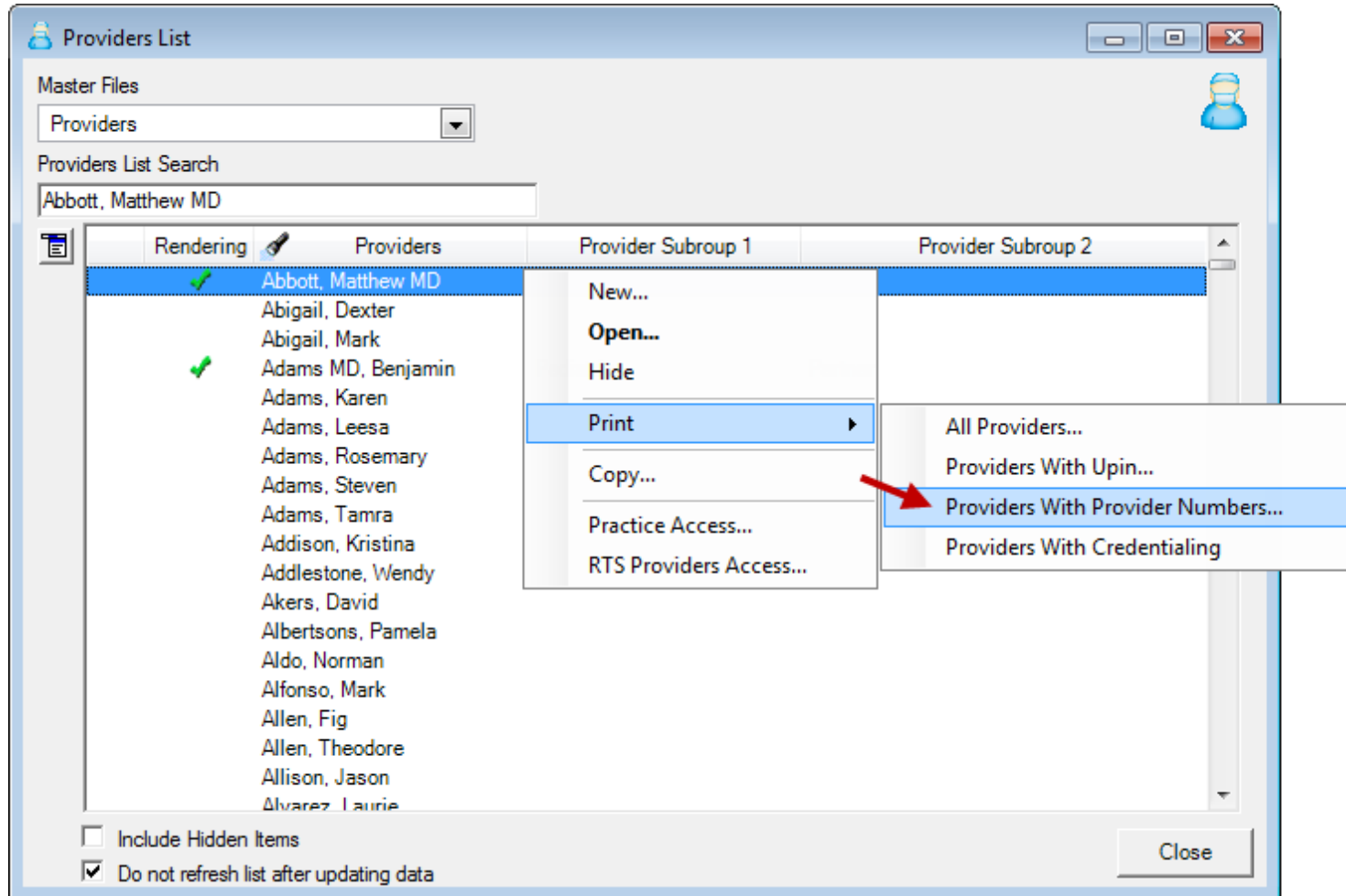
The image shows a software interface for managing provider information. The main window is titled "Modify Provider Information - Jones, Harrison MD" and has a "Practice" tab selected. Below the tabs, there are several sections:

- Practice Provider Information:** Includes checkboxes for "Rendering provider at this practice" (checked), "Supervising provider at this practice", "Signature on File" (checked), and "Supervisor Required". It also contains fields for "DEA Number" (BJ2892265), "State License Number" (AZ875272587), "Tax ID Number/SSN" (84111111), "Provider Type" (Pediatricians), and "Specialty".
- Group Information:** A table with columns: Payer Name, Provider Nbr, Eff Date, Exp Date, Group Name, Name/Org, Address. The "Medicaid" row is highlighted in blue.

A red arrow points from the "Medicaid" row in the "Group Information" table to a smaller window titled "Modify Provider Practice Payer". This window contains the following fields:

- Payer Name:** Medicaid
- Name/Organization:** (empty)
- Suspended Eff Dt:** 09/30/2017 (circled in red)
- Provider Number:** 841111111
- Street:** (empty)
- Effective Date:** 01/01/2014
- Expiration Date:** 11/25/2114
- City:** (empty)
- State:** (empty)
- Zip:** (empty)
- Group Name:** NextGen Medical Group
- Country:** (empty)
- County:** (empty)
- CLIA Number:** (empty)
- SIM Exception:** (empty)
- Contract Exception:** (empty)
- CPT4 Provider Nbrs:** (empty)
- Taxonomy Code:** (empty)
- Claim Value 1:** (empty)
- Claim Value 2:** (empty)
- Submitter Group:** (empty)
- Enable Supervisor Billing:** (unchecked)
- RTA Enabled:** (unchecked)
- Bill SSN with SY secondary reference:** (unchecked)

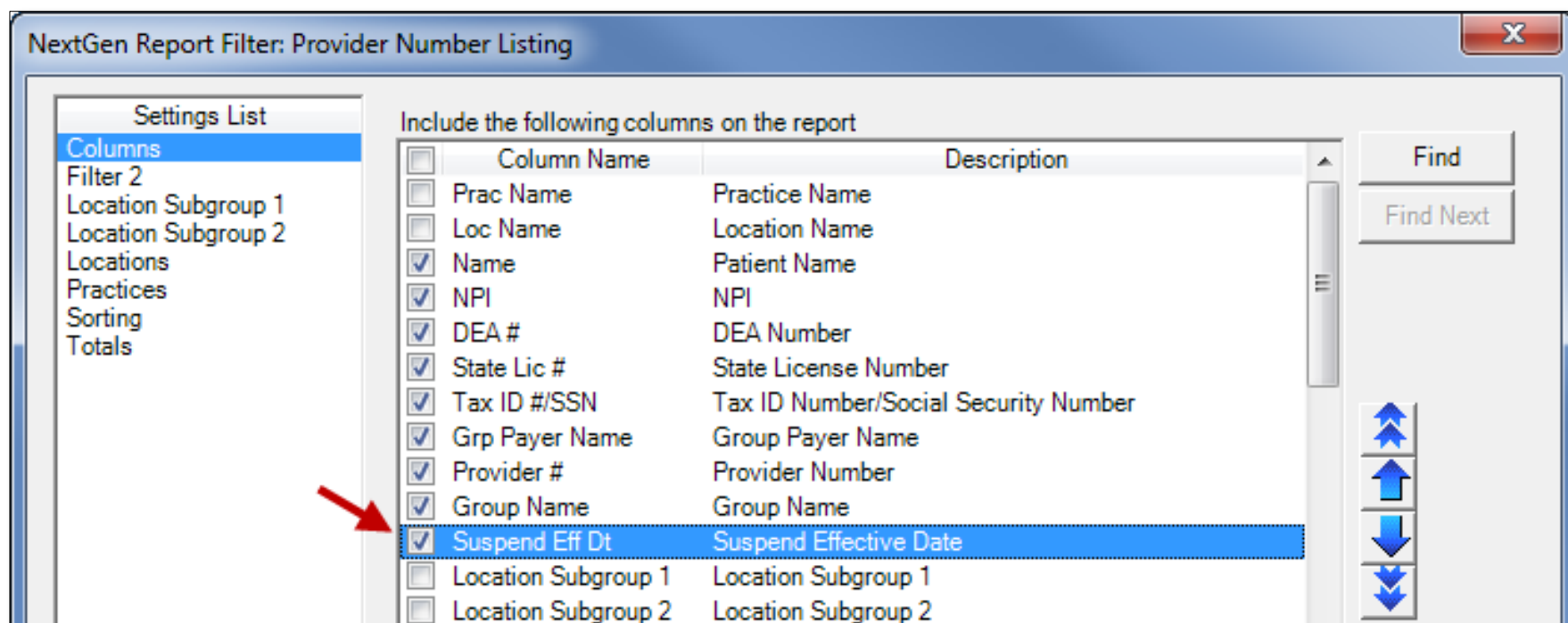
# Providers With Provider Number report (File Maintenance):





# Suspended Effective Date for Providers

Provider Number Listing report example:



# Suspended Effective Date for Providers

Provider Number Listing report example:

Suspend Effective Date

Master File  
Provider Number Listing  
Suspend Effective Date

DEA #	State Lic #	Tax ID #/SSN	Specialty	Grp Payer Name	Provider #	Group Name	Suspend Eff Dt
<b>Abbott, Matthew MD</b>							
BA7983580	12357	87654322	Internal Med	Default	87654322	NextGen Medical Group	
				Medicaid	76543	NextGen Medical Group	
				Medicare	87654	NextGen Medical Group	
				Medicare Part A - Split Billing	23564744	NextGen Medical Group	
BA7983580	12357	87654322	Internal Med	BCBS Contract	2734343	NextGen Medical Group	05/26/2017

# Enhanced Reports

- › Improved performance of database intensive reports by restructuring key reporting components.



# Enhanced Reports



- › Activity Detail
- › Aging Analysis By Encounter / By Line Item
- › Insurance Aging Analysis / Age Resp Bals Only
- › Daily > By Line Item / By Transaction / By Encounter > Payments
- › Change in Accounts Receivable / W/o Enc Rate
- › Service Item Summary with Ext Amt / Trans Source
- › Significant Events

**Practice Preferences**

Preference List

- Alerts
- Appt Scheduling
- AutoFlow
- Budget Accounts
- Charge Entry
- Chart
- Claims
- Contract Edits
- Data\Fee Ticket
- EHR
- Encounters
- External
- Forms
- General
- Holidays
- Imaging
- Invoices
- Itemized Bills
- Libraries
- Medication
- NextGen Share
- NextGenEDI Uploading
- Orders Module
- Patient Information Bar
- Patient Notifications
- Patient Pay
- Payment Processing
- Printing
- Provider
- Reports**
- Resources
- RTS
- Sliding Fee
- Statements
- Tasks
- Taxes
- Tran Codes
- Transactions
- Wait List

**Report Server**  
Check report type to run from Report Server. The Report Server uses replicated data. Any new data entered today will not appear on reports run from the Report Server.

- General
- Accounts Receivable
- Aging Analysis
- Collections
- Scheduling
- Daily
- Monthly
- System
- Tasks
- Document Management

Generate from Report Server

When report Filter 1 exceeds 61 day(s)

**Report Paging**

Use Enhanced Reporting with Paging' activates a new report paging mechanism used to improve the performance of data intensive reports.

Use enhanced reporting with paging

Maximum records to display on screen 10

**Enhanced Reports Selection**

Aging Analysis by Encounter;Aging

- Activity Detail
- Aging Analysis by Encounter
- Aging Analysis by Line Item
- Change in A/R by Encounter w/o Enc Rate
- Insurance Aging Analysis
- Insurance Aging-Age Responsible Balances Only
- Payments
- Payments With Reason Code By Transaction
- Payments - Primary Payer

**Report Options**  
Default External Charge Import Agent

**Report Header/Footer Defaults**

- Line Wrap Text
- Show Practice Title

**Large Report Options**

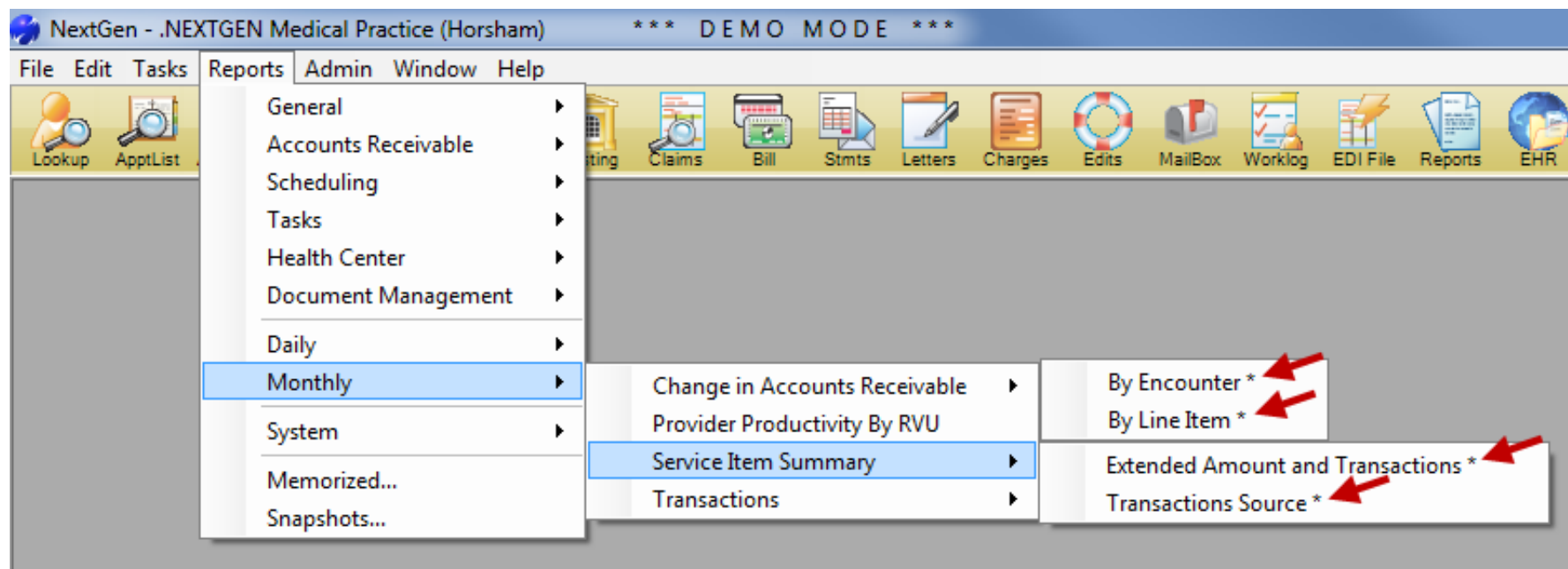
- Large Report Bypass To CSV File

Report Limit Before Bypass

- Apply report type security to reports menu only
- Prompt when report limited by preferred locations

# Enhanced Reports

- › Reports selected as enhanced display with an asterisk next to their name



### .NEXTGEN Medical Practice (Horsham) Monthly Changes in A/R - Primary Payer From 5/1/2017 to 5/31/2017

Configuration Options

- Columns
- Department
- Diagnosis Category
- Diagnosis Codes
- Diagnosis SubGroup 1
- Diagnosis SubGroup 2
- Filter 1
- Filter 2
- Fin Classes
- Location Subgroup 1
- Location Subgroup 2
- Locations
- Mid-Level Phys
- Payer Subgroup 1
- Payer Subgroup 2
- Practices
- Payers
- Provider Subroup 1
- Provider Subroup 2
- Referring Phys
- Rendering Phys

Rendering	Beg A/R	Chg Amt	Adj Amt	Pay Amt	Ref Amt	Ending A/R
[Empty table body]						



- Configuration Options
- Columns
- Department
- Diagnosis Category
- Diagnosis Codes
- Diagnosis SubGroup 1
- Diagnosis SubGroup 2
- Filter 1
- Filter 2
- Fin Classes
- Location Subgroup 1
- Location Subgroup 2
- Locations
- Mid-Level Phys
- Payer Subgroup 1
- Payer Subgroup 2
- Practices
- Payers
- Provider Subgroup 1
- Provider Subgroup 2
- Referring Phys
- Rendering Phys

Find:

Include the following columns on the report:

<input type="checkbox"/> Column Name	Description
<input checked="" type="checkbox"/> Prac Name	Practice Name
<input type="checkbox"/> Sect Name	Section Name
<input checked="" type="checkbox"/> Loc Name	Location Name
<input type="checkbox"/> Location Subgroup 1	Location Subgrouping 1
<input type="checkbox"/> Location Subgroup 2	Location Subgrouping 2
<input checked="" type="checkbox"/> Rendering	Charge Rendering Provider
<input type="checkbox"/> Enc Rendering	Encounter Rendering Provider
<input type="checkbox"/> Provider Subgroup 1	Provider Subgrouping 1
<input type="checkbox"/> Provider Subgroup 2	Provider Subgrouping 2
<input type="checkbox"/> Admitting	Admitting Provider
<input type="checkbox"/> Fst Consult	First Consulting Provider
<input type="checkbox"/> Sec Consult	Second Consulting Provider
<input type="checkbox"/> Enc Referring	Encounter Referring Provider
<input type="checkbox"/> Chg Referring	Charge Referring Provider
<input type="checkbox"/> Mid-Level	Addtl Provider
<input type="checkbox"/> Supervisor	Supervising Provider
<input type="checkbox"/> Facility	Facility
<input type="checkbox"/> Qual Enc	Qualifying Encounter Indicator
<input type="checkbox"/> Pat Name	Patient Name
<input type="checkbox"/> Per Nbr	Person Number
<input type="checkbox"/> Addr 1	Address 1
<input type="checkbox"/> Addr 2	Address 2

Save Report Options    Refresh Report    Close

Practice (Horsham)  
- Primary Payer  
3/1/2017

Adj Amt    Pay Amt    Ref Amt    Ending A/R



- Configuration Options
- Filter 2
- Fin Classes
- Location Subgroup 1
- Location Subgroup 2
- Locations
- Mid-Level Phys
- Payer Subgroup 1
- Payer Subgroup 2
- Practices
- Payers
- Provider Subgroup 1
- Provider Subgroup 2
- Referring Phys
- Rendering Phys
- Secondary Payers
- Sorting
- Tertiary Payers
- Totals
- Options
- HeaderFooter
- Info

Find:

Include the following sorting options in the report:

COLUMN	ASCENDING	DESCENDING	GROUP BY
Prac Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Loc Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Rendering	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sect Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Subgroup 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Subgroup 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enc Rendering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider Subgroup 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provider Subgroup 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fst Consult	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sec Consult	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enc Referring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chg Referring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mid-Level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qual Enc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pat Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Per Nbr	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addr 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addr 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Report Options   Refresh Report   Close

Practice (Horsham)  
- Primary Payer  
31/2017

Adj Amt	Pay Amt	Ref Amt	Ending A/R

**.NEXTGEN Medical Practice (Horsham)**  
**Monthly Changes in A/R - Primary Payer**  
 From 5/1/2017 to 5/31/2017

- Configuration Options
- Filter 2
- Fin Classes
- Location Subgroup 1
- Location Subgroup 2
- Locations
- Mid-Level Phys
- Payer Subgroup 1
- Payer Subgroup 2
- Practices
- Payers
- Provider Subgroup 1
- Provider Subgroup 2
- Referring Phys
- Rendering Phys
- Secondary Payers
- Sorting
- Tertiary Payers
- Totals
- Options
- HeaderFooter
- Info

5/22/2017 2:12 PM

	Rendering	Beg A/R	Chg Amt	Adj Amt	Pay Amt	Ref Amt	Ending A/R
<b>&lt;unknown&gt;</b>							
	<No Rendering>	<u>-\$1,011.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>-\$1,011.00</u>
<b>Totals For &lt;unknown&gt;</b>		<b><u>-\$1,011.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>-\$1,011.00</u></b>
<b>Ambulatory Surgery Center</b>							
	Fisher, Steven	\$393.00	\$0.00	\$0.00	\$0.00	\$0.00	\$393.00
	NextGen, Ambulatory Su	<u>\$650.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$650.00</u>
<b>Totals For Ambulatory Surgery Center</b>		<b><u>\$1,043.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$1,043.00</u></b>
<b>Cardiology Specialty Clinic</b>							
	Adams MD, Ben Peds	\$15.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15.00
	Baker DO, Michael FP	\$111.00	\$0.00	\$0.00	\$0.00	\$0.00	\$111.00
	Goodby MD, James	<u>\$215.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$215.00</u>
<b>Totals For Cardiology Specialty Clinic</b>		<b><u>\$341.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$341.00</u></b>
<b>CHC Medical Clinic</b>							
	Smith, John	<u>\$110.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$110.00</u>
<b>Totals For CHC Medical Clinic</b>		<b><u>\$110.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$110.00</u></b>
<b>Dermatology Specilaty Clinic</b>							
	<No Rendering>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Abbott, Matthew	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$120.00
	Adams MD, Ben Peds	<u>\$343.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$343.00</u>
<b>Totals For Dermatology Specilaty Clinic</b>		<b><u>\$463.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$463.00</u></b>
<b>TOTAL</b>		<b><u>\$946.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$946.00</u></b>

# PM Tasking Enhancements



# PM Tasking Enhancements

- › Updates to existing small balance write off Auto Worker actions.
- › New credit balance write off functionality (account and encounter level).
- › Tasks for system level claim edits



# Small Balance Write Off Auto Worker

- › Limit Transaction Code selection to appropriate codes only (negative sign type or positive sign type with 'Allow sign over ride' enabled).
- › Auto Worker small balance write off action for both Account and Encounter Source Types.



**Task Types**

Task Type:  Note:

Source Type:  Task Value:  Task Subgrouping 1:  Task Subgrouping 2:

Practice Parameters:  Options  Auto Creation  Auto Create Location  Auto Create Rendering  Auto Create Payer/Fin...  Auto Completion  **Auto Worker**  Required

Activate	Action
	Add collection letter of <Unknown> to the account. Send collection letter in next run <Y/N>
	Add collection letter of <Unknown> to the account. Send collection letter in next run <Y/N>. Pre-list all encounters on the account for bad debt under agency code: <Unknown>, effective date: 0 days from today, and bad debt status: <Unknown>. Move all encounter balances to gua
	Bad debt pre-list all encounters in budget using collection agency <Unknown>
	Create account alert with subject <Unknown>, expiration date <_/_/___>, description <Unknown>
	Pre-list all encounters on the account for bad debt under agency code: <Unknown>, effective date: 0 days from today, and bad debt status: <Unknown>. Move all encounter balances to guarantor responsibility <Y/N>.
<input checked="" type="checkbox"/>	Small balance write-off using transaction code <Small Balance Write Off - Acct Level> for guarantor balance
	Small credit balance write-off using transaction code <Unknown> for guarantor balance

- Clear
- Open...
- Auto Create Actions

**Task Type Options**

Small balance write-off using transaction code <Small Balance Write Off - Acct Level> for guarantor balance

Parameter 1:

- Small Balance Write Off - Acct Level
- Courtesy Adjustment
- Employee Discount
- Gift Certificate Used Toward Balance
- Invoice Adjustment
- Optical Adjustment
- Sales On Retail Items
- Sliding Fee Adjustment
- Small Balance Write Off - Acct Level

**Modify Transaction Code Information**

Transaction Description:

Note:

Type:

Source:

Sign Type:  Positive (+)  Negative (-)

Bad Debt Only  Optical transaction

Allow sign over ride  Do Not Use in Payment Entry

Exclude from in progress encounter

Options limited to Transactions set to a Negative Sign Type and/or Positive Transactions with 'Allow sign over ride' enabled.

# Credit Balance Write Offs

- › Enhance tasking functionality to perform credit balance write offs.
- › Available for both Account and Encounter Source Types.







**Task Types**

Task Type: Credit Bal W/O - Acct Level

Source Type: Account | Task Value: 0 | Task Subgrouping 1: <none> | Task Subgrouping 2: <none>

Practice Parameters: Options | Auto Creation | Auto Create Location | Auto Create Rendering | Auto Create Payer/Fin... | Auto Completion | **Auto Worker** | Required

Activate	Action
	Add collection letter of <Unknown> to the account. Send collection letter in next run <Y/N>
	Add collection letter of <Unknown> to the account. Send collection letter in next run <Y/N>. Pre-list all encounters on the account for bad debt under agency code: <Unknown>, effective date: 0 days from today, and bad debt status: <Unknown>. Move all encounter balances to gua
	Bad debt pre-list all encounters in budget using collection agency <Unknown>
	Create account alert with subject <Unknown>, expiration date <_/_/___>, description <Unknown>
	Pre-list all encounters on the account for bad debt under agency code: <Unknown>, effective date: 0 days from today, and bad debt status: <Unknown>. Move all encounter balances to guarantor responsibility <Y/N>.
	Small balance write-off using transaction code <Unknown> for guarantor balance
<input checked="" type="checkbox"/>	Small credit balance write-off using transaction code <Credit Balance Write Off> for guarantor balance

Context Menu: Clear, Open..., Auto Create Actions

Task Type Options Dialog:

Small credit balance write-off using transaction code <Credit Balance Write Off> for guarantor balance

Parameter 1:

- Credit Balance Write Off
- Credit Balance Write Off
- Employee Discount
- Gift Certificate Used Toward Balance
- Invoice Adjustment
- Optical Adjustment
- Sales On Retail Items
- Sliding Fee Adjustment
- Small Balance Write Off - Acct Level

Options limited to Transactions set to a Positive Sign Type and/or Negative Transactions with 'Allow sign over ride' enabled.

# Considerations – Account Level



- Account will be **disqualified** from task creation if any of the following exist:
  - Unallocated unapplied credits (Encounter or Account)
  - Unposted Transactions
  - Any Encounters fail to meet date criteria
- Ignores excluded encounters based on encounter status
- Account disqualified if any remaining encounters contain values in insurance buckets; pt balance greater than \$0

# Considerations – Account Level



- › If the auto worker batch is deleted, the corresponding task will also be deleted.
- › If an *individual* transaction is deleted, the corresponding task will not be deleted, if there are multiple encounters with write offs.

**Task Types**

Task Type: \*Credit W/O - Enc - Patient

Source Type: Encounter | Task Value: 0 | Task Subgrouping 1: <none> | Task Subgrouping 2: <none>

Practice Parameters

Options: **Auto Creation** | Auto Create Location | Auto Create Rendering | Auto Create Payer/Fin...

Default Assigned To for all selected actions: Stenger, Stacy;TaskWorker, Terry T

Activate	Action
<input checked="" type="checkbox"/>	Encounter is greater than 60 days old from <Encounter Date> and patient balance is a credit between \$-10.00 and \$-0.01 and third party balance = \$0.00 for <financial class> <Self Pay,Behavioral Health,Work Comp,Self Pay,Dental,MVA,Medicaid,Commercial,Patent Pay,Medicare,BCBS> where <financial class> is <COB 1> and encounter status in <Billed,Rebill,Unbilled>
<input type="checkbox"/>	Encounter is greater than 0 days old from <Unknown> and patient balance is between \$0.00 and \$0.00 for <financial class/payer> <Unknown> where <financial class/payer> is <Unknown> and encounter status in <Unknown>
<input type="checkbox"/>	Encounter is greater than 0 days old from <Unknown> and patient balance is less than \$0.00 for <financial class/payer> <Unknown> where <financial class/payer> is <Unknown> and encounter status in <Unknown>
<input type="checkbox"/>	Encounter is greater than 0 days old from <Unknown> and total balance is between \$0.00 and \$0.00 for <financial class/payer> <Unknown> where <financial class/payer> is <Unknown> and

Who/When

**Task Type Options**

Encounter is greater than 60 days old from <Encounter Date> and patient balance is a credit between \$-10.00 and \$-0.01 and

Parameter 1: 60

Parameter 2: Encounter Date

Parameter 3: -10.00

Parameter 4: -0.01

Parameter 5: Financial Class/Payer  
 Financial Class  Payer

Parameter 6: Financial Class  
 BCBS  
 Behavioral Health  
 Commercial  
 Dental  
 Medicaid

Parameter 7: COB 1

Parameter 8: Billed;Rebill;Unbilled

OK Cancel

Parameter 3 & 4 must be negative numbers;  
 Parameter 3 must be smaller than Parameter 4

**Task Types**

Task Type: \*Credit W/O - Enc - Patient

Source Type: Encounter | Task Value: 0 | Task Subgrouping 1: <none> | Task Subgrouping 2: <none>

Practice Parameters: Options | Auto Creation | Auto Create Location | Auto Create Rendering | Auto Create Payer/Fin... | Auto Completion | **Auto Worker** | Required

Activate	Action
	Add collection letter of <Unknown> to the encounter. Send collection letter in next run <Y/N>
	Create chart alert with subject <Unknown>, expiration date <_/_/___>, description <Unknown>
	Move balance from <Unknown> to <Unknown>
	Pre-list encounter for bad debt under agency code: <Unknown>, effective date: <_/_/___>, and bad debt status: <Unknown>
	Small balance write-off using transaction code <Unknown> for patient balance
	Small balance write-off using transaction code <Unknown> for patient balance, transaction code <Unknown> for 3rd party balance
	Small credit balance write-off using transaction code <Unknown> for 3rd party balance
<input checked="" type="checkbox"/>	Small credit balance write-off using transaction code <Credit Balance Write Off - Patient> for patient balance

The auto worker will perform the action specified for this task type (right click and perform the action).

Who/When

Task Type Options

Small credit balance write-off using transaction code <Credit Balance Write Off - Patient> for patient balance

Parameter 1:

- Credit Balance Write Off - Patient
- Credit Balance Write Off - Patient
- Employee Discount
- Gift Certificate Used Toward Balance
- Invoice Adjustment
- Optical Adjustment
- Sales On Retail Items
- Sliding Fee Adjustment
- Small Balance Write Off - Acct Level

Clear | Open... | Auto Create Actions

Hide  | OK | Cancel

Options limited to Transactions set to a Positive Sign Type and/or Negative Transactions with 'Allow sign over ride' enabled.

# Considerations – Encounter Level



- Encounter will be disqualified from task creation if any of the following exist:
  - Unallocated unapplied credits (Encounter or Account)
  - Unposted Transactions
  - Third party balance for patient credits;  
    patient balance for third party credit write offs
  - Encounter carries both a debit and a credit
  - Charges fail to meet date criteria

# Tasks for System Level Claim Edits

- New auto create action provides the ability to generate tasks during either the claim edit or billing process for claim edits that aren't in the Claim Edit Library (system edits).



[www.PSDgraphics.com](http://www.PSDgraphics.com)



**Task Types**

Task Type: Claim Edits - System Edit

Source Type: Encounter | Task Value: 0 | Task Subgrouping 1: <none> | Task Subgrouping 2: <none>

Practice Parameters: **Auto Creation** | Auto Create Location | Auto Create Rendering | Auto Create Payer/Fin... | Auto Completion | Auto Worker | Required

Default Assigned To for all selected actions: Stenger, Stacy;TaskWorker, Terry T

Activate	Action	Override assigned to	Approval Pro
	Payment received for <financial class/payer> <Unknown> where <financial class/payer> is <Unknown>, rendering <Unknown>, SIM department <Unknown> where a contract is setup and the CPT4 does not exist in the contract		
	Payment received for <financial class/payer> <Unknown> where <financial class/payer> is <Unknown>, SIM department <Unknown> where a contract is setup and the CPT4 does not exist in the contract		
	Payment received for rendering <Unknown>, SIM department <Unknown> where a contract is setup the CPT4 does not exist in the contract		
	Print statements indicator turned off for more than 0 days		
<input checked="" type="checkbox"/>	System edit of severity <Build,Critical,Tech,Custom,Warning> encountered during <Billing> process		

Buttons: Clear, Open..., Hide, OK, Cancel

**Task Type Options**

System edit of severity <Build,Critical,Tech,Custom,Warning> encountered during <Billing> process

Parameter 1: Build;Critical;Tech;Custom;Warning

Parameter 2: Billing

Claim Edit: Billing

Buttons: OK, Cancel



# Tasks for System Level Claim Edits

Claim Production Status

.NEXTGEN Medical Practice (Horsham)  
Claim Production Status

Encounter	Form	Pat Name	Severity	Edit ID	Enc Created By	Enc Create Dt	Message
628	1500	ClaimEdit, Chloe C	Build		Stenger, Stacy	12/27/13	Billing a Physician Assistant with this payer requires the encounter to have a Supervisor Physician.

Edit Task - ClaimEdit, Chloe C

Source Name: ClaimEdit, Chloe C  
Source Number: 628  
Source Type: Encounter

Task Info | Alerts | Notes | Instructions | **Auto Crea...** | Properties | History

Origin

This task was created as a result of the following task action set up:  
System edit of severity <Build,Critical,Tech,Custom> encountered during <Billing> process

-----

The following criteria for this source type initiated this task being assigned:

System edit severity : Build  
Message description : Billing a Physician Assistant with this payer requires the encounter to have a Supervisor Physician.  
Form Type : 1500  
Occurred during : Billing process

# Tasking Enhancements Covered in Other Sessions

## Tasks for Transactions Applied to Voided Line Items

- › Generate a task when a payment or adjustment is posted against a voided charge.
- › Applies to both manual and ERA posted payments.
- › Covered in ***PM 5.9 ERA and Real Time Services Enhancements***

# Tasking Enhancements Covered in Other Sessions

## New 'Eligibility' Task Type

- › New Eligibility task type provides more tasking options for clients utilizing RTS eligibility functionality.
- › Tasks triggered based on RTS transactions – not appointments or encounters.
- › Covered in ***PM 5.9 ERA and Real Time Services Enhancements***

# BBP Enhancements



# BBP Enhancements




- › Redesigned BBP Console
- › New BBP Job Types:
  - Process Pending Charges
  - Unapplied Encounter Credits
- › Bill Encounters by Primary Payer
- › Generate Forms, Labels, and Letters from Memorized Reports



# BBP Console

- › Redesigned BBP Console reduces clicks, open windows
- › Provides the ability to chart Packages and Jobs by date
- › Review server and package capacity



-  Package List
-  History List
-  Server List

Practice	Package Name	Enabled?	Status	Last	Next Run Time
.NEXTGEN Medical Practice (Horsham)	Bad Debt Process	No	Not Running	5/12/2017 2:49 PM	
.NEXTGEN Medical Practice (Horsham)	Billing & Claims	Yes	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	Daily Appt List For Dr Abbott	No	Not Running	3/3/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	Daily Batch Posting	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	Demand Encounter Letters	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	EHR Pending Charges	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	EHR Tasks From EHR BBP Reports	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	EPM Tasks From EHR BBP Reports	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	ERA Directory Import	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	ERA Patient Pay Import	No	Not Running	5/12/2017 2:50 PM	
.NEXTGEN Medical Practice (Horsham)	ICS Automated Directory	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	ICS OCR Engine	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	Missing Insurance Cards Report/Tasks	No	Not Running	5/12/2017 2:50 PM	
.NEXTGEN Medical Practice (Horsham)	Person Merge	No	Not Running	5/12/2017 2:50 PM	
.NEXTGEN Medical Practice (Horsham)	Recall Plan Letters	No	Not Running	7/16/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	Report Snapshot	No	Not Running	12/1/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	RTS Eligibility Requests	No	Not Running	5/2/2017 12:00 AM	
.NEXTGEN Medical Practice (Horsham)	SIM Library Listing Report	No	Not Running	5/12/2017 2:50 PM	



- New...
- Open...
- Delete
- Copy...
- Copy To Practice
- Enable
- Disable
- Job Chart
- Queue Now
- Kill
- Refresh

View

NextGen Medical Enterprise

Result

<all results>

Server

<< all servers >>

From: 5/12/2017 15 To: 5/12/2017 15 Package: Bad Debt Process

12-May	14:00	14:05	14:10	14:15	14:20	14:25	14:30	14:35	14:40	14:45	14:50	14:55	15:00
Bad Debt Process													

**Bad Debt Process**

**Job Info**

Name: Bad Debt Process




Start: 5/12/2017 2:49 PM

End: 5/12/2017 2:50 PM

Run Time: 00:01:05

NextGen - Background Business Processor Manager - .NEXTGEN Medical Practice (Horsham)

File Packages History Servers Engine Help

 Package List  
 History List  
 Server List

View  
 NextGen Medical Enterprise · ▾

Result  
 <all results> ▾

Server  
 << all servers >> ▾

Show Last  Days

Package Name	Job #	Job Name	Server
Billing & Claims	1	Bill Encounters	CLINITECWG8614
Billing & Claims	0	Billing & Claims	CLINITECWG8614
Statements	0	Statements	CLINITECWG8614
Missing Insurance Cards Report/Tasks	1	Missing Insurance Cards Report/Tasks	CLINITECWG8614
Missing Insurance Cards Report/Tasks	0	Missing Insurance Cards Report/Tasks	CLINITECWG8614
Statements	1	Statements	CLINITECWG8614
Statements	0	Statements	CLINITECWG8614
Statements	1	Statements	CLINITECWG8614
Statements	0	Statements	CLINITECWG8614
Bad Debt Process	1	Bad Debt Process	CLINITECWG8614
Bad Debt Process	0	Bad Debt Process	CLINITECWG8614
Bad Debt Process	0	Bad Debt Process	CLINITECWG8614
Bad Debt Process	0	Bad Debt Process	CLINITECWG8614
SIM Library Listing Report	1	SIM Library Listing Report	CLINITECWG8614
SIM Library Listing Report	0	SIM Library Listing Report	CLINITECWG8614
ERA Patient Pay Import	1	ERA Patient Pay Import	CLINITECWG8614
ERA Patient Pay Import	0	ERA Patient Pay Import	CLINITECWG8614
ERA Patient Pay Import	1	ERA Patient Pay Import	CLINITECWG8614
ERA Patient Pay Import	0	ERA Patient Pay Import	CLINITECWG8614



NextGen - Background Business Processor Manager - .NEXTGEN Medical Practice (Horsham)

File Packages History Servers Engine Help

PM

Package List  
History List  
Server List

View  
NextGen Medical Enterprise  
Result  
<all results>  
Server  
<< all servers >>

Server	Available?	Running?	Last Service Start Time
CLINITECWG8614	Yes	Yes	5/23/2017 3:49:52 PM

Open...  
Make Available  
Make Unavailable  
Package Chart  
Delete  
Refresh

From: 5/5/2017 15 To: 5/12/2017 15 All Servers

12-May

	12:00	12:20	12:40	13:00	13:20	13:40	14:00	14:20	14:40	15:00	15:20	15:40	16:00
NG8614													

# Bill Encounters by Primary Payer

**Job Properties**

Job number:  Enabled?

Job name:

Job type:  Bill Encounters


Run as practice:

Upon completion:

Notification e-mail:   
(separated by commas)

Available NextGen Users and Groups:   
[<Click to select Mail Recipient\(s\)>](#)

**Settings**

Setting Name	Value
Bill Status	Rebill; Unbilled
Financial Class	
<span style="border: 2px solid red; border-radius: 50%; padding: 2px;">Primary Payer</span>	<input type="text" value=""/> 
Billable Date From/To	Aetna Us Healthcare - PO Box 3915 Allentown, PA 18106
Rendering Physician	Aflac Ins - 1932 Wyrnton Road Columbus, GA 31999
Patient Type	AMA Insurance Agency Inc - Medicare Supplement Claim Unit 200 N Lasalie St
Service Location	American Community Ins - 6901 Seven Mile Road Livonia, MI 48152
Include Records in a Billing Hold?	American Family Ins - PO Box 6000 Madison, WI 53783
Include Records Without Charges?	Anesthesia Payer - PO Box 0546 Easton, PA 18044 USA
	Anthem Ins Co - P O Box 6199 Indianapolis, IN 46206
	Bankers Life And Casualty - PO Box 66927 Chicago, IL 60666

# Generate Forms, Labels, Letters from Memorized Reports

**Job Properties**

Job number:

Job name:

Job type:

Run as practice:

Run using:

Upon completion:

Notification e-mail:

Available NextGen Users and Groups: [Click to select Mail Recipient\(s\)](#)

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled?

Settings

Setting Name	Value
Foms	
Foms Printer Name	Canon MF4320-4350
Labels	Lab Label
Labels Printer Name	Canon MF4320-4350
Letters	*Appointment Reminder - Appointment Reminder
Letters Action	Print to Canon MF4320-4350
Upload Export File To NextGenEDI?	No
Task Type	Confirm Appts For Tomorrow

Run this job in debug mode (PM-related jobs only)

Log all SQL for this job (PM-related jobs only)

**Form Template Lookup**

Please select one or more Forms Enhanced

Foms | Forms Enhanced

- Billing Forms
  - Payer Form
- Consent Forms
  - Credit Card on File Consent
  - Return to Work Letter
- Fee Tickets
  - Fee Ticket
- Patient Data Sheets
  - SOGI Fields, Mask SSN

Select All Clear All OK Cancel

# New Job Type: Process Pending Charges

Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:   
(separated by commas)

Available NextGen Users and Groups:   
[<Click to select Mail Recipient\(s\)>](#)

On success / failure flow

Enabled?

If job succeeds, then:

If job fails, then:

Settings

Setting Name	Value
Service Location	
Rendering Physician	
Service Date From/To	From -> Earliest Possible Date; To -> Yesterday
Pending Action	Process
Job runtime alert setting (minutes):	
Job runtime alert email:	

# New Job Type: Unapplied Encounter Credits

Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:   
(separated by commas)

Available NextGen Users and Groups:   
[<Click to select Mail Recipient\(s\)>](#)

On success / failure flow

Enabled?

If job succeeds, then:

If job fails, then:

Settings

Setting Name	Value
Encounter Location	
Encounter Rendering	
Transaction Codes	Copay Cash; Copay Check; Copay Credit Card; Patient Payment Cash; Patient ...
Encounter Date From/To	From -> Earliest Possible Date; To -> Yesterday
Process Options	Process Encounters Where Pat Amt = Unapplied Amt
BBP Post Batch	No
Job runtime alert setting (minutes):	
Job runtime alert email:	

# BBP Enhancements Covered in Other Sessions

## **New Job Type: Electronic Patient Pay**

- New 'Electronic Patient Pay' Job Type has been added to the BBP.
- Helps automate Patient Pay import workflows in PM.
- Covered in ***PM 5.9 ERA and Real Time Services Enhancements***

# BBP Enhancements Covered in Other Sessions

## Filter Statements by Location/Provider Subgrouping

- › ‘Statements’ Job Type allows for filtering by Location and/or Provider Subgrouping.
- › Allows statements to be generated for multiple providers and/or locations at once.
- › Covered in ***PM 5.9 Statements and Budget Plans Enhancements***



**Thankyou**

