

NextGen 6.2021.1 PM Enhancements Overview



This Enhancements Overview document describes the new and updated PM features for NextGen 6.2021.1.

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General Application Enhancements

Sensitive Encounter Indicator

The sensitive encounter indicator for each encounter marked as sensitive from EHR now displays on the PM side. This indicator helps the user differentiate between sensitive and non-sensitive encounters and maintain the confidentiality of sensitive information.

The General tab of the Encounters tab in the patient chart now displays the following for an encounter marked as sensitive:

- Sensitive encounter icon (red exclamation point) on left side of encounter number with encounter number and date in bold font
- Sensitive Enc: Yes label in the Encounter Information section in red and bold font

The Sensitive Enc column has been added to the Daily Encounters (Encounters Listing), Billed Encounters, and UnBilled Encounters reports. This column displays Y to indicate the sensitive encounters.

Patient Contact Preferences Notification Icons

In the Contact Information section of the patient demographics, the notification icons now correspond with the preferences set for patient notifications and Electronic Data Interchange (EDI) reminders. A revised tooltip text that provides more clarity about the function of an icon appears when the user points to the icon.

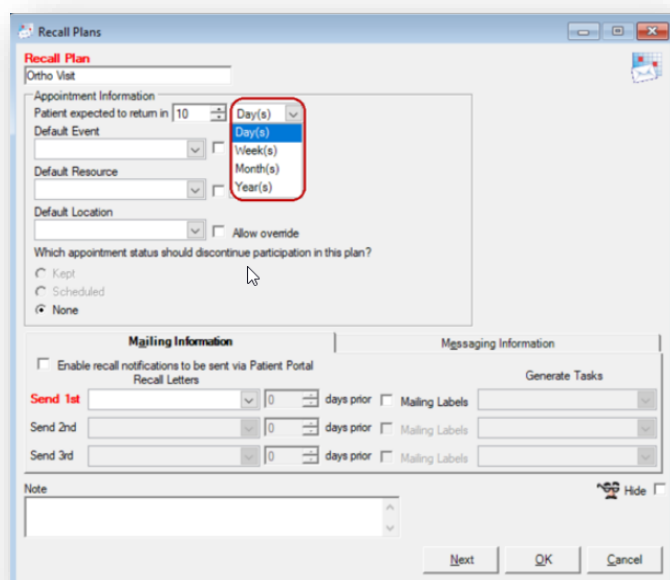
The screenshot shows the 'Contact Information' section of a patient demographics form. At the top, there are tabs for 'Pat Notification' (selected) and 'EDI Notification'. Below the tabs is a table with columns for 'Contact Method', 'Number/Address', and 'Notifications'. The table lists six contact methods: Home Phone, Alternate Phone, Secondary Phone, Cell Phone, E-Mail, and Day Phone. Each row has a checkbox for 'N/A' and a notification icon. A 'Preferred Contact' dropdown is located below the table. A 'Notifications' dropdown menu is open, showing a list of notification preferences: Opt out, Email, Phone Call, Portal, SMS(Text), and Voice reminders. The 'Pat Notification' tab and the 'Notifications' dropdown menu are highlighted with red boxes.

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Recall Period in Recall Plan

In File Maintenance, while defining the recall plan, users can now specify the recall period. In the Recall Plans window, there is a new field beside the Patient expected to return in field, where users can choose from days, weeks, months, or years. If days are selected, the value cannot exceed 5000 in the counter. If weeks, months, or years are selected, the value should not exceed 99 in the counter.



Recall Plan Messaging Information

Users can now send recall plan messaging information from PM through email and voice and text messages. Users can open the Edit Recall Plan window to view the messaging information of the recall plan.

Account Receipt Improvements

The account receipt now includes:

- Standard remittance header and footer sections
- Standard header and footer for the multi-page account receipts configured in Practice Preferences > Forms
- ENC/INV field added to include the invoice number
- The date of the transaction and the main transaction in the first row
- The date of service for the invoice numbers and the service sequence followed by the encounter numbers and the service sequence in the remaining rows
- Any unapplied amount and the transaction date in the last row

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Nickname Updated to Preferred Name

The term Nickname has been renamed as Preferred Name for every occurrence within PM, such as lookup windows (ex. People Lookup, Patient Lookup, etc.), demographic information windows, Patient Information Bar, tooltips (ex. Appointment tooltip), printed information (ex. forms, fee tickets, etc.), and column names. The new **Use Preferred Name on Correspondence** check box in PM enables you to opt for the preferred name to be printed on statements. This new checkbox can be accessed from the patient's chart from either Chart Details or the Privacy section of the Modify Patient Information window.

Name	Preferred Name	Address	Birth Dt	Home Phone	Sex	Patient Portal
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Female	N
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Male	N
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Male	N

Address History Updates

To accommodate the new data element as part of Patient Demographics Data class for Us Core Data for Interoperability (USCDI) in the Cure Cares Act, the Address History panel on the Patient Demographics template has been updated.

- Users can no longer free text in the County and Country fields.
- The new Patient Safety Report, Address History County or Country fields not mapped to File Maintenance, enables users to review incorrect county or country values originally recorded as free text in the Address History panel. The record can be modified from the Address History panel to display the correct county and country details.
- Instructional text has been added in the panel to let users know that the application automatically fills the City, State, County and Country fields when the Zip Code is populated.

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Hidden Insurance Information in Patient Demographics

In the Insurance Listing section of the Demographics tab, users can select the **Show Hidden** check box to display the hidden payers.

Claim Edits for Payers Based on Financial Class and Locations

The Claim Edits library in File Maintenance has been updated with the valid payer(s) for financial class and service location(s) claim edit. Users can access this claim edit from the Claim Edit Library Maintenance window. This claim edit enables users to set up a unique combination of service location and financial class for the applicable payers. When the user activates the valid payer(s) for financial class and service location(s) claim edit, the application validates whether the correct payer has been attached to the billed encounters during the claim validation process.

Unknown added as an Option to the Current Gender list

To assist in meeting the **US Core Data for Interoperability (CDA) requirement**, **UNKNOWN** has been added as an option to the **current gender** list for selection in the Patient Demographic screen.

BBP Statements with Exceptions

When printing or exporting your patient statements there is an option to review unapplied money as an exception report prior to sending them out. When using the BBP to print or export statements, the job will run when the exceptions box is checked so statements print or export successfully.