



## NextGen® Practice Management 5.9 Upgrade Training Charges, Transactions

5.9/8.4

### Topics to be Reviewed



- › Enhanced PM Charge Diagnosis functionality
- › Charge Discount functionality
- › Quantity & Extended Amount in Charge Entry
- › Claim Edits for Line Item Authorizations/Referrals

## Topics to be Reviewed



- › NDC updates
- › Balance Control updates
- › Transaction enhancements

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## Enhancements to Charge Entry



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## Enhanced PM Charge Diagnosis Functionality

- PM Charge Posting screen allows up to 12 diagnoses
- All charge-level diagnoses are visible in charge entry via reorder link.
- Easily reorder diagnosis codes.
- Enhanced diagnosis reporting.



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### Charge Entry > Reorder Dx:

Charge Posting - Aksoy, Melissa

Patient: Aksoy, Melissa

Encounter: 862 04/24/2017 Billed Process Dt: / /

Process Dt: / /

Diagnosis:  Diagnosis  COB1 Alt Dx  COB2 Alt Dx  COB3 Alt Dx **Reorder Dx**

Svc Dates: 04/24/2017 04/24/2017

Svc Item: 99214 Office/outpatient visit, est. deta...  
CPT4: 99214

Quantity: 1

Unit/Override: 200.00 200.00

Extended: 200.00

Tooth/surface: /

Rendering: Abbott MD (IM), Matthew IM

Diag: 1 M15.0 Primary Generalized (osteo)arthritis  
2 M46.1 Sacroiliitis, Not Elsewhere Classified  
3 M51.15 Intvrt Disc Disorders W Radiculopathy, Thoracolumbar Region  
4 G56.01 Carpal Tunnel Syndrome, Right Upper Limb

Reorder Diagnoses

Code	Dx Order	Description
M15.0	1	Primary Generalized (osteo)arthritis
M46.1	2	Sacroiliitis, Not Elsewhere Classified
M51.15	3	Intvrt Disc Disorders W Radiculopathy, Thoracolumbar Region
G56.01	4	Carpal Tunnel Syndrome, Right Upper Limb
R00.8	5	Other Abnormalities Of Heart Beat
S00.01xD	6	Abrasion Of Scalp, Subsequent Encounter
A01.03	7	Typhoid Pneumonia
B00.51	8	Herpesviral Iridocyclitis
S78.129A	9	Partial Traumatic Amp At Level Betw Unsp Hip And Knee, Init
A88.4	10	Ebola Virus Disease
B00.50	11	Herpesviral Ocular Disease, Unspecified
K00.0	12	Anodontia

Charge Table:

Date	Svc Item	S	Charge
04/24/2017	99214 Office/outpatient visit, est. deta...	B	200.00
04/24/2017	36415 Collect venous blood, venipunc...	B	50.00

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Process Pending Charges screen:

Columns can be added, removed, reordered, and sorted

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12 diagnoses added to reports:

Column Name	Description
<input checked="" type="checkbox"/> Diag 1	Diagnosis Code 1
<input checked="" type="checkbox"/> Diag 2	Diagnosis Code 2
<input checked="" type="checkbox"/> Diag 3	Diagnosis Code 3
<input checked="" type="checkbox"/> Diag 4	Diagnosis Code 4
<input checked="" type="checkbox"/> Diag 5	Diagnosis Code 5
<input checked="" type="checkbox"/> Diag 6	Diagnosis Code 6
<input checked="" type="checkbox"/> Diag 7	Diagnosis Code 7
<input checked="" type="checkbox"/> Diag 8	Diagnosis Code 8
<input checked="" type="checkbox"/> Diag 9	Diagnosis Code 9
<input checked="" type="checkbox"/> Diag 10	Diagnosis Code 10
<input checked="" type="checkbox"/> Diag 11	Diagnosis Code 11
<input checked="" type="checkbox"/> Diag 12	Diagnosis Code 12
<input checked="" type="checkbox"/> Diag 1 Desc	Diagnosis 1 Description
<input checked="" type="checkbox"/> Diag 2 Desc	Diagnosis 2 Description
<input checked="" type="checkbox"/> Diag 3 Desc	Diagnosis 3 Description
<input checked="" type="checkbox"/> Diag 4 Desc	Diagnosis 4 Description
<input checked="" type="checkbox"/> Diag 5 Desc	Diagnosis 5 Description
<input checked="" type="checkbox"/> Diag 6 Desc	Diagnosis 6 Description
<input checked="" type="checkbox"/> Diag 7 Desc	Diagnosis 7 Description
<input checked="" type="checkbox"/> Diag 8 Desc	Diagnosis 8 Description
<input checked="" type="checkbox"/> Diag 9 Desc	Diagnosis 9 Description
<input checked="" type="checkbox"/> Diag 10 Desc	Diagnosis 10 Description

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## Charge Discount Functionality

- › Charge Discounts were based on the total charge amount, regardless of discount source, preventing it from being used for patient balances.
- › New setting defines whether to discount the patient balance, or continue to calculate based on the full charge amount.

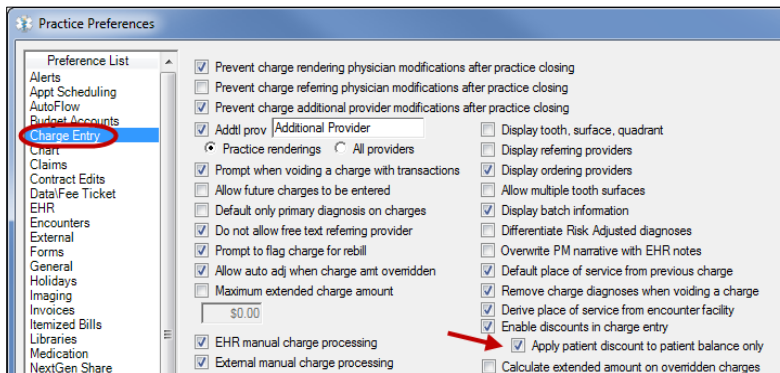


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## Charge Discount Functionality

Practice Preferences > Charge Entry tab:



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## Charge Discount Functionality

The screenshot displays the 'Charge Posting - Patient, Test' window. At the top, patient information is shown: Test Patient (M), DOB: 05/21/1967 (56 years), Person Number: 175, Medical Record Number: 111, Other ID Number: . Below this, contact and guarantor details are provided. The main area contains a form for entering charge details, including Svc Dates (10/18/2017 to 10/18/2017), Svc Item (99213 OFFICE/OUTPATIENT), CPT4 (99213), Quantity (1), and Extended amount (96.00). A 'Discounted!' label is prominently displayed in red. The Encounter Information section shows Enc Insurance (Self Pay), Rendering (Smith, John), and Guarantor (Test Patient). At the bottom, a table shows the charge details:

Date	Svc Item	S	Charge	Payment	Adjustment	Ins 1	R	Ins 2	R	Ins 3	R	Pat Amt	Line Item Balance
10/18/2017	99213 OFFICE/OUTPATIENT	U	96.00		13.00							7.00	

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## Quantity & Extended Amount in Charge Entry

- Prior to 5.9 if the charge Quantity is greater than 1 and the charge amount is overridden, the Extended amount must be manually entered.
- New setting allows the extended amount to be calculated correctly on overridden charges.

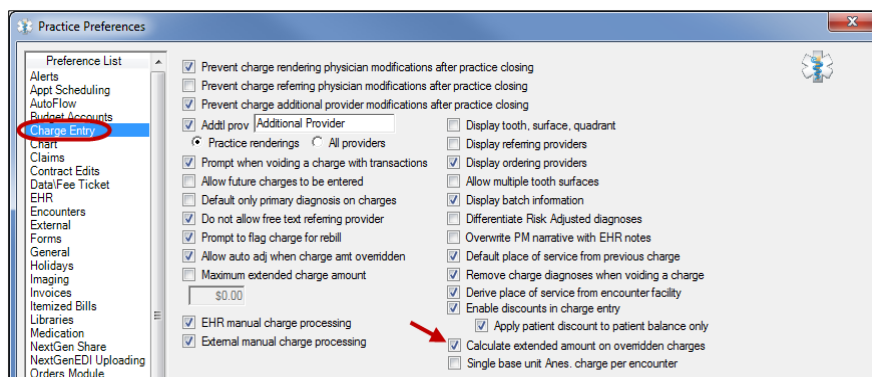


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## Quantity & Extended Amount in Charge Entry

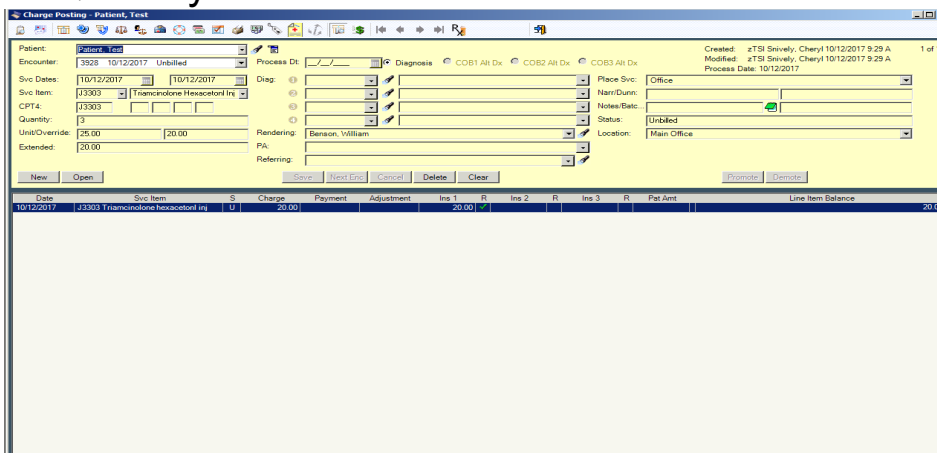
Practice Preferences > Charge Entry tab:



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## Quantity & Extended Prior to 5.9



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## Quantity & Extended Amount in Charge Entry

Patient: Patient, Test  
 Encounter: 3291 09/21/2017 Unbilled Process Dt: / / Diagnosis: COB1 Alt Dx COB2 Alt Dx COB3 Alt Dx Reorder Dx  
 Svc Dates: 09/21/2017 09/21/2017 Diag: 1 M00.029 Staphylococcal Arthritis, Unspecified Elbow  
 Svc Item: J3303 Triamcinolone Hexacetonl Inj  
 CPT4: J3303  
 Quantity: 3  
 Unit Override: 25.00 20.00 Rendering: Benson, William  
 Extended: 60.00 PA:

Date	Svc Item	S	Charge	Payment	Adjustment	Ins 1	R	Ins 2	R	Ins 3	R	Pat Amt
09/21/2017	J3303 Triamcinolone hexacetonl inj	U	60.00			60.00	✓					
Totals:			60.00	0.00	0.00	60.00		0.00		0.00		0.00

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## Claim Edits for Line Item Authorizations/Referrals

- › Claim Edits 281 and 282 enhanced to allow a range of CPT4 codes.
- › New Claim Edits (297 and 298) can be configured based on payers that require line item authorizations/referrals for all CPTs



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## Claim Edits for Line Item Authorizations/Referrals

### Claim Edits Library:

Active	ID	Claim Edit	Help Text	Applicable To	Severity	Claim Field	Task Type
	280	NG Real time edits - Other	NG Real time edits engine - Other.	Charge Entry	Warning	SV1	
✓	281	CPT4(s) requires line item authorization	Add line item Authorization	Patient Insurance Vi	Warning	REFG1	
✓	282	CPT4(s) requires line item referral	Add line item Referral	Patient Insurance Vi	Warning	REF9F	
	283	Remaining units on Payer Authorization are less than the billed quantity	Add additional units to authorization for CPT	Patient Insurance Vi	Warning	Generic	
	284	Remaining units on Payer Referral are less than the billed quantity	Add additional units to referral for CPT	Patient Insurance Vi	Warning	Generic	
	286	Test Results are required for the CPT	Add test results to CPT code	Charge Entry	Warning	2400MEA	
	287	Test Date is required for the CPT	Add test date to CPT code	Charge Entry	Warning	2400MEA	
	288	Prior Payer ICN/Resubmission Nbr required when Prior Payer	Enter ICN / Resubmission Number for Prior Pay	Claim Data	Warning	REF02	
	289	ICD and/or Modifiers require a Demonstration Project ID	ICD and/or Modifier requires Demonstration Pro	Encounter Maintena	Warning	REF-P4	
	290	NDC associated with CPT4(s) requires valid Drug Unit Count	Drug Unit Count cannot be blank	Charge Entry	Critical	SV1	
	291	NDC associated with CPT4(s) requires valid Basis of Measure	Basis of Measure cannot be blank	Charge Entry	Critical	SV1	
	292	Claim charges must all be for the same date of service	Set all encounter charges to the same date of s	Claim Data	Warning	SV1	
	293	Missing value code <Unknown> required when payer <Unkno	Enter Value Code on Encounter Maintenance >	Encounter Maintena	Warning	HPBE	
	294	Multiple CPT4 within range exist across encounters. CPT4(s)	Add modifier to one of the duplicate charge line	Charge Entry	Warning	SV1	
	295	Payer row expired in CSC Library or CSC Library is not attach	Create a valid payer row in the CSC Library att	Billing	Warning	Generic	
	296	Date of Service for CPT4(s) does not match encounter date	Change Encounter Date.	Billing	Warning	DTP	
✓	297	The payer requires a line item authorization for all CPT4 codes	Add line item authorization to the encounter	Patient Insurance Vi	Warning	REFG1	
✓	298	The payer requires a line item referral for all CPT4 codes	Add line item referral to the encounter	Patient Insurance Vi	Warning	REF9F	
	299	Admission time is required	Add the Admit Time	Encounter Maintena	Warning	DTP03	

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## NDC Updates

- Added service date validation, security access rights for 'on-the-fly' NDC entries.
- NDC Library 'Delete' option and hidden NDC behaviors.
- NDC reporting and Significant Event enhancements.



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## NDC Updates

NDC cannot be added since it was expired on the DOS:

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## NDC Updates

System Administrator > Modules > File Maintenance:

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## NDC Updates

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## NDC Updates

Deleted NDCs will instead be hidden:

NDC List Maintenance

NDC List Name: NDC Library

Filter Criteria: Type the first number(s) of the NDCs you want to locate. Search for keyphrase anywhere.

Search In:  NDC  Description  CPT4

NDC Id	CPT4	Eff Date	Exp Date	NDC Description	Drug Unit Price	Basis of Measure	Drug Unit Count
89408-4000-08	J1055	01/01/2016	12/31/2099	Depo Provera		ME	1
56000-0546-42	J0133	01/01/2016	12/31/2017	Acyclovir Injection		ME	1
85698-2214-52	J0133	01/01/2016	12/31/2017	Acyclovir Injection	3.75	ME	250
98653-2148-84	J7506	01/01/2016	08/30/2017	Prednisone	10.00	ME	20
77777-6666-55	90658	01/01/2016	12/31/2099	Flu Vaccine	5.00	ML	1
11111-2222-33	J0150	01/01/2015	12/31/2099	Adenosine Injection	0.00	ML	20
56789-2345-23	J0170	01/01/2015	12/31/2099	Adrenalin Epinephrin Injection	0.89	ML	10
45678-9185-46	J0170	01/01/2015	12/31/2099	Adrenalin Epinephrin Injection	0.09	ME	12
12345-6789-00	J0170	01/01/2003	12/31/2099	ADRENALIN EPINEPHRIN INJEC	0.00	UN	1

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## NDC Updates

**NDC List Maintenance**

NDC List Name: \_\_\_\_\_  
 NDC Library: \_\_\_\_\_

**General**

Filter Criteria  
 Type the first number(s) of the NDCs you want to locate  
 Search for keyphrase anywhere

Search In:  
 NDC  Description  CPT4

NDC Id	CPT4	Eff Date	Exp Date	NDC Description	Drug Unit Price	Basis of Measure	Drug Unit Count
08408-4000-06	J1055	01/01/2016	12/31/2029	Diapo Provera	70.00	ME	1
56000-0546-42	J0133	01/01/2016	12/31/2017	Acyclovir Injection	3.75	ME	250
85698-2214-52	J0133	01/01/2016	12/31/2017	Acyclovir Injection	10.00	ME	20
98653-2148-84					5.00	ML	1
77777-6666-55					0.00	ML	20
11111-2222-33					0.89	ML	10
56789-2345-23					0.09	ME	12
45678-9854-46					0.00	UN	1
12345-6789-00							

**NextGen**

**Warning:** Pending charge(s) were found for the selected NDC code.  
 Number of pending charge(s): 1

Do you want to delete the NDC from the procedure(s)?

Yes No

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## NDC Updates

File Maintenance > NDC report:

**NextGen Report Filter: NDC Listing**

Settings List

- Columns
- Filter 2
- Sorting
- Totals

Include the following columns on the report

Column Name	Description
<input checked="" type="checkbox"/> Lib Name	Library Name
<input checked="" type="checkbox"/> NDC Id	
<input checked="" type="checkbox"/> NDC Desc	NDC Description
<input checked="" type="checkbox"/> CPT4	To CPT4 Code
<input checked="" type="checkbox"/> DrugPrice	
<input checked="" type="checkbox"/> BasisOfMeasure	
<input checked="" type="checkbox"/> DrugCount	
<input checked="" type="checkbox"/> Eff Dt	Effective Date
<input checked="" type="checkbox"/> Exp Dt	Expiration Date
<input checked="" type="checkbox"/> Created By	Created By
<input checked="" type="checkbox"/> Crt Dt	Create Date
<input checked="" type="checkbox"/> Modified By	Last Modified By
<input checked="" type="checkbox"/> Mod Dt	Last Modified Date
<input checked="" type="checkbox"/> Deleted	Delete Indicator

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## NDC Updates

File Maintenance > NDC report:

NDC Id	NDC Desc	Eff Dt	Exp Dt	Deleted
98656565656	Depo Provera	09/01/2016	10/31/2017	Y
06408400008	Depo Provera	01/01/2016	12/31/2099	Y

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## Charge CPT added to Significant Event:

Patient Chart - NDC, Nadine N (NDC Library)

Ms. Nadine N, NDC (F) DOB: 07/07/1944 (72 years) Person Number: 1716 Medical Record Number: 549 Other ID Number:

Contact: (408) 986-5362 (D) Gender Identity: Sexual Orientation: Preferred Pronoun: Email: Current Gen: Female Language:

Alerts

Patient Information Financial Clinical History Notes Encounters

Clinical History/Chart Notes

Topic	Date/Time	Creator	Description
Clinical History	05/30/2017 2:36 P	Stenger, Stacy	Charge entry accessed - Encounter: 1336
Allergies (4)	05/30/2017 2:34 P	Stenger, Stacy	New Encounter Created - Encounter Nbr: 1336
Diagnosis (4)	05/30/2017 2:32 P	Stenger, Stacy	Encounter charge deleted: SIM J1055 Price: \$65.00 Rendering: Baker DO, Michael Enc...
Immunizations	05/30/2017 2:32 P	Stenger, Stacy	Charge NDC BOM Changed - Encounter: 1335 - CPT4: J1055
Medications	05/30/2017 2:32 P	Stenger, Stacy	Charge NDC BOM Changed - Encounter: 1335 - CPT4: J1055
Orders	05/30/2017 2:32 P	Stenger, Stacy	Charge NDC BOM Changed - Encounter: 1335 - CPT4: J1055
Problems	05/30/2017 2:31 P	Stenger, Stacy	Encounter charge deleted: SIM J1055
Procedures (9)	05/30/2017 2:31 P	Stenger, Stacy	Encounter charge deleted: SIM J1055
Results	05/30/2017 2:30 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Therapies	05/30/2017 2:27 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Vitals	05/30/2017 2:27 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Chart Notes	05/30/2017 2:27 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Alerts	05/30/2017 2:23 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Appointments	05/30/2017 2:08 P	Stenger, Stacy	Encounter charge deleted: SIM J0280
Collections	05/30/2017 2:08 P	Stenger, Stacy	Encounter charge deleted: SIM J0280
Eligibility Results	05/30/2017 2:04 P	Stenger, Stacy	Charge NDC ID Changed - Encounter: 1335
Forms	05/30/2017 2:03 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
Medical Necessity	05/30/2017 2:02 P	Stenger, Stacy	Encounter charge deleted: SIM J1055
History (220)	05/30/2017 2:02 P	Stenger, Stacy	Charge NDC BOM Changed - Encounter: 1335
Encounters	05/30/2017 2:02 P	Stenger, Stacy	Charge NDC ID Changed - Encounter: 1335
Chart	05/30/2017 2:02 P	Stenger, Stacy	Charge NDC DUC Changed - Encounter: 1335
Document Management	05/30/2017 1:23 P	Stenger, Stacy	Charge entry accessed - Encounter: 1335
	05/30/2017 1:23 P	Stenger, Stacy	Charge NDC BOM Changed - Encounter: 1335 - CPT4: J0133

History

Subject: Charge NDC ID Changed - Encounter: 1335 - CPT4: J1055

Note Entry: Before: 08706-8408-60 After: 00040-3840-84

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### Charge CPT added to Significant Event:

Sig Msg	Name	Pre Mod	Post Mod	Created By	Crt Dt
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	ME	Stenger, Stacy	05/30/17 1:19:13 P
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	ME	<none>	Stenger, Stacy	05/30/17 1:21:48 P
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	ME	Stenger, Stacy	05/30/17 1:23:08 P
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	ME	<none>	Stenger, Stacy	05/30/17 1:23:25 P
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	ME	<none>	Stenger, Stacy	05/30/17 2:02:28 P
Charge NDC BOM Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	ME	<none>	Stenger, Stacy	05/30/17 2:32:10 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	250	<none>	Stenger, Stacy	05/30/17 1:23:25 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	250	Stenger, Stacy	05/30/17 1:23:08 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	250	<none>	Stenger, Stacy	05/30/17 1:21:48 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	250	Stenger, Stacy	05/30/17 1:19:13 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	150	<none>	Stenger, Stacy	05/30/17 2:02:28 P
Charge NDC DUC Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	1	<none>	Stenger, Stacy	05/30/17 2:32:10 P
Charge NDC DUC Changed - Encounter: 791 - CPT4: J7506	NDC, Nadine N	20	10	Stenger, Stacy	05/10/17 10:33:21 A
Charge NDC D Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	85698-2214-52	Stenger, Stacy	05/30/17 1:19:13 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	85698-2214-52	<none>	Stenger, Stacy	05/30/17 1:21:48 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	<none>	85698-2214-52	Stenger, Stacy	05/30/17 1:23:08 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J0133	NDC, Nadine N	85698-2214-52	<none>	Stenger, Stacy	05/30/17 1:23:25 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J0280	NDC, Nadine N	<none>	86284-0870-87	Stenger, Stacy	05/30/17 2:04:30 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	86284-0870-87	80806-8486-48	Stenger, Stacy	05/30/17 2:08:07 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	08706-8408-80	00040-3840-84	Stenger, Stacy	05/30/17 2:32:10 P
Charge NDC D Changed - Encounter: 1335 - CPT4: J1055	NDC, Nadine N	98856-5656-56	98897-4327-93	Stenger, Stacy	05/30/17 2:02:28 P
Charge NDC D Changed - Encounter: 791 - CPT4: J7506	NDC, Nadine N	98853-2148-84	80603-5338-21	Stenger, Stacy	05/10/17 10:33:21 A

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### Balance Control Enhancements

- Significant Events section relocated to bottom.
- Added 'Service Date' column to line items section.
- Enlarged screen; expandable.
- Add/Update/Remove insurance options.
- Right-click options for moving balances.
- Updated message when moving balances.



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Prior to 5.9:

Balance Control - BalanceControl, Barbara

Encounter ID: 1270      Patient Name: BalanceControl, Barbara  
 Encounter Date: 02/10/2017      Guarantor Name: BalanceControl, Barbara  
 Enc Status: Billed

Insurance	Insured	Policy Nbr	CoPay	Deductible
Cigna Healthcare	BalanceControl, Barb..	8896587411	\$0.00	\$0.00
Medicaid	BalanceControl, Barb..	342473652735	\$0.00	\$0.00

Date/Time	Creator	Significant Event Description
02/13/2017 3:35	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1270 from: U to: B

Charge Information

Order#	SIM	SIM Desc	Amount	Ins1 Amt	R	Ins2 Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
99214		Office/outpatient visit, est. detailed	190.00	150.00		20.00		0.00		20.00	190.00
Rebill Encounter				\$150.00		\$20.00		\$0.00		\$20.00	\$190.00

Prorate    OK    Cancel

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As of 5.9:

Balance Control - BalanceControl, Barbara

Encounter ID: 1295      Patient Name: BalanceControl, Barbara  
 Encounter Date: 05/05/2017      Guarantor Name: BalanceControl, Barbara  
 Enc Status: Rebill

Insurance	Insured	Policy Nbr	CoPay	Deductible
Medicare	BalanceControl, Barbara	986532147A	\$0.00	\$0.00
AARP	BalanceControl, Barbara	4654654654	\$0.00	\$0.00

Charge Information

Service Date	Order#	SIM	SIM Desc	Amount	Ins1 Amt	R	Ins2 Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
05/05/2017		99212	Office/outpatient visit, est. prob foc	106.00	106.00		0.00		0.00		0.00	106.00
05/05/2017		70150	Xray exam, facial bones complete, 3+ views	150.00	150.00		0.00		0.00		0.00	150.00
Encounter				\$256.00		\$0.00		\$0.00		\$0.00	\$256.00	

Date/Time	Creator	Significant Event Description
05/10/2017 11:17 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295
05/10/2017 11:17 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change from: Billed to: Rebill
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: R to: B
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: Billed to: Rebill
05/10/2017 11:17 A	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 70150 - Ins1: \$150.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00.
05/10/2017 11:17 A	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 99212 - Ins1: \$106.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00.
05/10/2017 11:15 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: U to: B
05/10/2017 11:14 A	Stenger, Stacy	Encounter charge deleted: SIM: 70134TC Price: \$150.00 Rendering: Goodby MD, James Encounter: 1295
05/10/2017 11:13 A	Stenger, Stacy	Encounter charge deleted: SIM: 99202 Price: \$140.00 Rendering: Goodby MD, James Encounter: 1295
05/10/2017 11:13 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295

Prorate    OK    Cancel

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Add, update, or remove insurance:

Encounter ID: 1295 Patient Name: BalanceControl, Barbara  
 Encounter Date: 05/05/2017 Guarantor Name: BalanceControl, Barbara  
 Enc Status: Rebill

Insurance	Insured	Policy Nbr	CoPay	Deductible
New...	BalanceControl, Barbara	896937411	\$0.00	\$0.00
Open...	BalanceControl, Barbara	4654654654	\$0.00	\$0.00
Delete				

Available Insurance

Payer	Policy Nbr	Card	Detail-2	Benefit Info	Auth	Refer	Elig	Note
Bricklayers Welfare Fund	46347597345							
Medical	342473652736							
Cigna Healthcare	896937411							
Medicare	986532147A							
AARP	4654654654							

Selected Insurance

Payer Name	Insured Name	Relationship
Medicare	BalanceControl...	Patient
AARP	BalanceControl...	Patient

Significant Event Description

Date/Time	Creator	Significant Event Description
05/10/2017 11:17	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 99212 - Ins1: \$106.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00 Rebill N Pat: \$0.00 to: 99212 - Ins1: \$8.
05/10/2017 11:17	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 70150 - Ins1: \$150.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00 Rebill N Pat: \$0.00 to: 70150 - Ins1: \$1.
05/10/2017 11:17	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: Billed to: Rebill
05/10/2017 11:17	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: R to: B
05/10/2017 11:17	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: Billed to: Rebill

Buttons: Last Encounter, OK, Cancel

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Right-click to move balances:

Encounter ID: 1295 Patient Name: BalanceControl, Barbara  
 Encounter Date: 05/05/2017 Guarantor Name: BalanceControl, Barbara  
 Enc Status: Rebill

Insurance	Insured	Policy Nbr	CoPay	Deductible
Medicare	BalanceControl, Barbara	986532147A	\$0.00	\$0.00
AARP	BalanceControl, Barbara	4654654654	\$0.00	\$0.00

Charge Information

Service Date	Order#	SIM	SIM Desc	Amount	Insl Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
05/05/2017		99212	Office/outpatient visit, est. prob foc	106.00	106.00		0.00		0.00	106.00
05/05/2017		70150	X-ray exam, facial bones,complete, 3+ views	150.00	150.00		0.00		0.00	150.00
				<b>\$256.00</b>						

Rebill Encounter

Significant Event Description

Date/Time	Creator	Significant Event Description
05/10/2017 11:17 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295
05/10/2017 11:17 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change from: Billed to: Rebill
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: R to: B
05/10/2017 11:17 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: Billed to: Rebill
05/10/2017 11:17 A	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 70150 - Ins1: \$150.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00.
05/10/2017 11:17 A	Stenger, Stacy	Balance Control Change - Encounter Nbr: 1295 from: 99212 - Ins1: \$106.00 Rebill N Ins2: \$0.00 Rebill N Ins3: \$0.00.
05/10/2017 11:15 A	Stenger, Stacy	Encounter Status Change - Encounter Nbr: 1295 from: U to: B
05/10/2017 11:14 A	Stenger, Stacy	Encounter charge deleted: SIM: 70134TC Price: \$150.00 Rendering: Goodby MD, James Encounter: 1295
05/10/2017 11:13 A	Stenger, Stacy	Encounter charge deleted: SIM: 99202 Price: \$140.00 Rendering: Goodby MD, James Encounter: 1295
05/10/2017 11:13 A	Stenger, Stacy	Encounter Insurance Re-Ordered - 1295

Buttons: Prorate, OK, Cancel

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Re-worded message prompt when re-ordering insurances:

Balance Control - BalanceControl, Barbara

Encounter ID: 1295 Patient Name: BalanceControl, Barbara  
 Encounter Date: 05/05/2017 Guarantor Name: BalanceControl, Barbara  
 Enc Status: Rebill

Insurance	Insured	Policy Nbr	CoPay	Deductible
AARP	BalanceControl, Barbara	4654654654	\$0.00	\$0.00
Medicare	BalanceControl, Barbara	986532147A	\$0.00	\$0.00

Charge Information

Service Date	Order#	SIM	SIM Desc	Amount	Ins 1 Amt	R	Ins2 Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
05/05/2017	99212		Office/outpatient visit, est. prob foc	106.00	106.00	✓	0.00		0.00		0.00	106.00
05/05/2017	70150		X-ray exam, facial bones,complete, 3+ views	150.00	150.00	✓	0.00		0.00		0.00	150.00
				\$256.00	\$0.00		\$0.00		\$0.00		\$0.00	\$256.00

Rebill Encounter

Date/Time	Creator
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy
05/10/2017 11:1..	Stenger, Stacy

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Would you like the insurance amounts to follow AARP payer to next Selected bucket ?

Yes No

Prorate OK Cancel

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# Transaction Enhancements



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## Transaction Enhancements

- › Bounding boxes in Practice Preferences > Transactions
- › Transaction Notes in Account Profile
- › Batch Posting updates



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## Practice Preferences > Transactions (prior to 5.9):

The screenshot displays the 'Practice Preferences' window with the 'Transactions' section selected. The interface includes a 'Preference List' on the left and a main configuration area on the right.

**Default Transaction Spreading**

- Transaction Source: Patient
- Radio buttons:
  - First In / First Out
  - First In / First Out - Pat Resp Date
  - Weighted distribution

**Reason Codes Options**

- Default Reason Code Library: HIPAA X12 Standard Reason
- Write Off Remaining Payer Balance: Z/Write Off Remaining Payer
- Patient Reason Code Library: Standard Reason Codes
- Write Off Remaining Patient Balance: Z/Write Off Remaining Patient

**Payment Entry Defaults**

- Utilize unapplied credit as payment
- Show bad debt charges (Account Level)
- Use settled up status
- Free text line item reason codes
- Show all line items
- Use settled up status with ERA
- Use payer default bad debt tran codes
- Enable Transaction Notes
- Default contract amounts when payer selected
- Warn on COB imbalance with allowed amount
- Prevent Bad Debt encounters from going to history status
- Warn on COB imbalance with billed amount
- Create EOB for manual payments

**Batch Posting Defaults**

- Enable batch sub-batches
- Require the number of payments when balancing sub-batches
- Enable batch balancing with Adjustments

**Enterprise Transactions**

- Enable Enterprise Batch Groupings

**Unapplied credits encounterer limit:** 100

Practice Preferences > Transactions (as of 5.9):

The screenshot shows the 'Practice Preferences' window with the 'Transactions' category selected in the left-hand menu. The main area contains several configuration sections:

- Default Transaction Spreading:** Transaction Source is set to 'Patient'. Radio buttons for 'First In / First Out', 'First In / First Out - Pat Resp Date', and 'Weighted distribution' are present.
- Reason Codes Options:** Includes 'Default Reason Code Library' (HIPAA X12 Standard Reason), 'Patient Reason Code Library' (Standard Reason Codes), and 'Write Off Remaining Payer/Balance' options.
- COB Window Options:** Checkboxes for 'Warn on COB imbalance with allowed amount' and 'Create EOB for manual payments' are checked.
- Payment Entry Defaults:** Includes checkboxes for 'Free text line item reason codes', 'Show all line items', 'Enable Transaction Notes', 'Use settled up status', and 'Use settled up status with ERA'.
- Bad Debt Options:** Checkboxes for 'Prevent Bad Debt encounters from going to history status' and 'Use payer default bad debt tran codes' are checked.
- Contract Defaults in Payment Posting:** Radio buttons for 'Default contract Allowed for CPTs in Fee Schedule' and 'Default contract Allowed for CPTs Not in Fee Schedule' are present.
- Batch Posting Defaults:** Checkboxes for 'Enable batch sub-batches', 'Require the number of payments when balancing sub-batches', and 'Enable batch balancing with Adjustments' are present.
- Enterprise Transactions:** 'Enable Enterprise Batch Groupings' is checked.

Account Profile > Encounters Detail tab:

The screenshot displays the 'Encounters Detail' tab for 'Tommy T'. It features a table with the following columns: Name/Enc Nbr, Date, Description, CPT, Qty, DX, and Transaction Notes. The table lists several encounters, including:

- Encounter 1257 (01/19/2017): Office/outpatient visit, est, detailed. CPT: 99214, Qty: 1, DX: 250.01. Transaction Note: This is the payment from United Healthcare (Primary Payer).
- Encounter 741 (08/20/2014): Commercial Payment. CPT: 80061, Qty: 1, DX: 250.01. Transaction Note: This is the payment from United Healthcare (Primary Payer).
- Encounter 630 (08/20/2014): Collect venous blood, venipuncture. CPT: 36415, Qty: 1, DX: 250.01. Transaction Note: This is the payment from Medicaid (Secondary Payer).
- Encounter 1272 (12/12/2013): Removal of thyroid lesion. CPT: 60200, Qty: 1, DX: 506.3.

A blue pushpin icon is located in the top right corner of the window. The bottom of the screen contains a footer with 'NEXTGEN' branding and copyright information.

## Enhancements to the Batch Posting Window

- › Ability to search for batches and perform a ledger lookup
- › Added columns to the Batch Posting window
- › Ability to expand the Batch Posting Screen Horizontally



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The screenshot displays the 'Batch Posting' window with a table of existing batches. A 'Batch Lookup' dialog box is open, showing search criteria and a list of results.

BBP	Date	ID	Description	Members	Status	Secured To	Total Paid	Total Adjusted
05/10/2017		0002	Refunds	0	Out of balance		\$0.00	\$0.00
05/10/2017		0001	Deposits	New...	0	Out of balance	\$0.00	\$0.00
05/10/2017		0003	Third Party	Delete	0	Out of balance	\$0.00	\$0.00
05/10/2017		0004	Front Desk		0	Out of balance	\$0.00	\$0.00
04/19/2017		0002	Corrections		0	Out of balance	\$0.00	\$0.00

BBP	Date	ID	Description	Members	Status	Secured To	Total Paid	Total Adjusted
05/10/2017		0001	Deposits	0	Out of balan...		\$0.00	\$0.00
05/10/2017		0002	Refunds	0	Out of balan...	Stenger, Stacy	\$0.00	\$0.00
05/10/2017		0003	Third Party Payments	0	Out of balan...		\$0.00	\$0.00
05/10/2017		0004	Front Desk Copays	0	Out of balan...	Jones, Alexis	\$0.00	\$0.00

Records Found: 4

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The screenshot shows two overlapping software windows. The background window is titled "Transaction Ledger" and contains a table with columns: Nbr, Source, Filter, Tran Dat, Billed, Name, Tran Code, Allowed, Payment, Adjustmen, and Tracking Desc. The foreground window is titled "Ledger Lookup" and contains search criteria fields for Source ID, Source Type, Trans Date, Billed, Allowed, Payment, and Adjustment/Refund. It also has checkboxes for "Include Reconciled" and "Include UnPosted", and a table with columns: N, Source, Filter, Tran Dat, Billed, Allowed, Payment, Adjustme, Tran Code, Tracking Desc, Name, R, and Post. A "Records Found: 3" indicator is visible at the bottom right of the Ledger Lookup window.

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A large blue rectangular graphic with a yellow circle in the center. Inside the yellow circle, the word "Thankyou" is written in a white, sans-serif font. At the bottom of the blue rectangle, there is a white footer containing the text: "Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute. Copyright © 2017 QSI Management, LLC. All Rights Reserved." and the "NEXTGEN HEALTHCARE" logo.

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