



NextGen® Practice Management 5.9 Upgrade Training

Reports, Tasking, and BBP Enhancements

5.9/8.4

PM Reporting Enhancements



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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 Run By User' Significant Event
- › Suspend Effective Date added to FM Provider report
- › PM Enhanced Reporting option

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Preferred Language

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



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Preferred Language



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

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

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Preferred Language



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

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

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Preferred Language

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

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

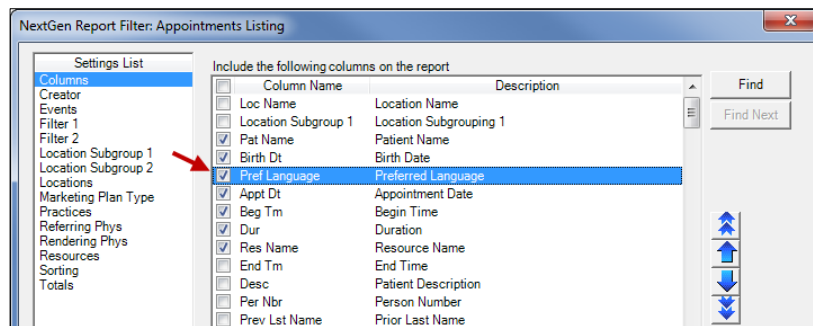


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Preferred Language

Appointments Listing report example:



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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
Goodby MD									
Harris, Scott	01/14/1981	English	06/05/2017	9:00 A	20	New Patient - Adult		(615) 717-1229	(615) 668-0792
Talbach, 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) 843-8421
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
Total Appointments for Goodby MD (12)									

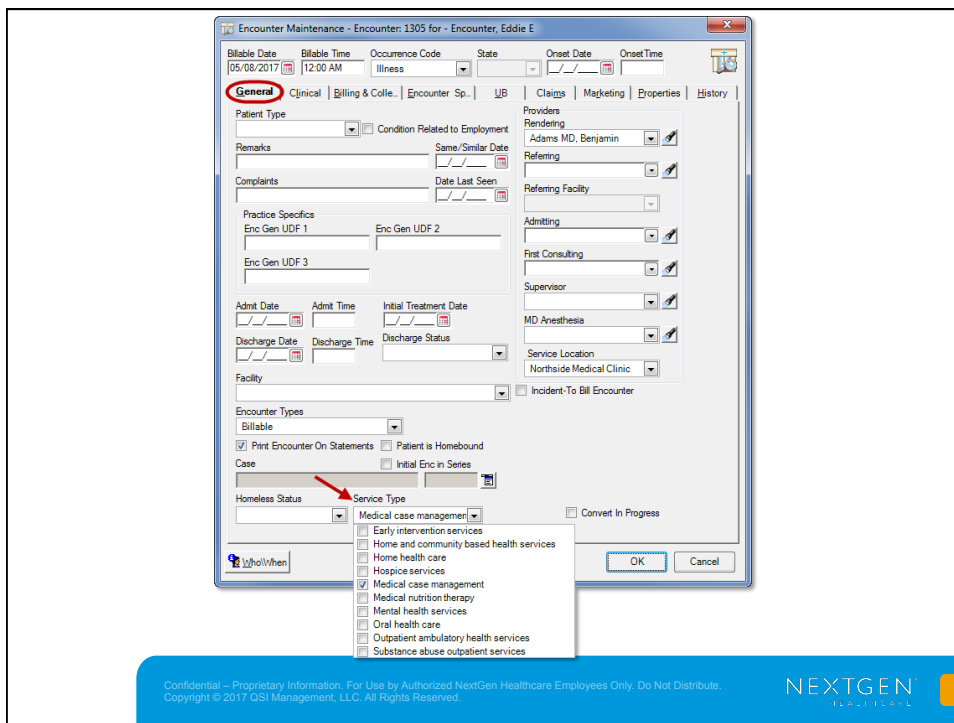
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Encounter Service Type

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





Encounter Service Type

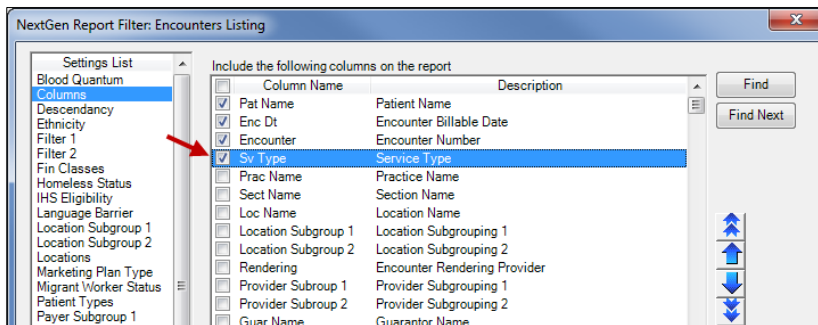
Added to the following reports:

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



Encounter Service Type

Encounters Listing report example:

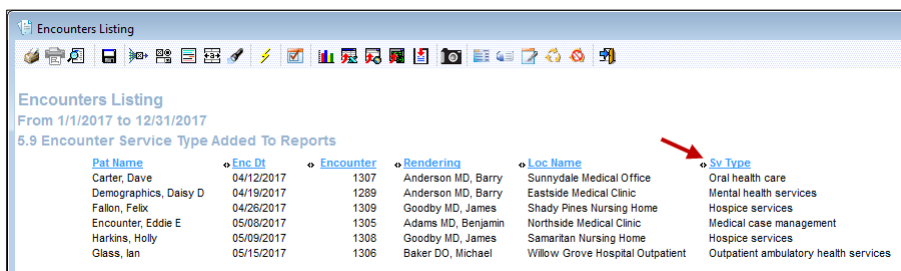


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Encounter Service Type

Encounters Listing report example:



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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.

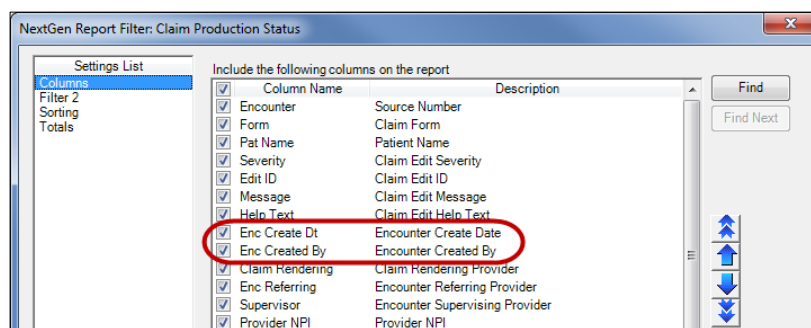


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Claim Production Status Report

Claims Production Status report:



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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

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'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.

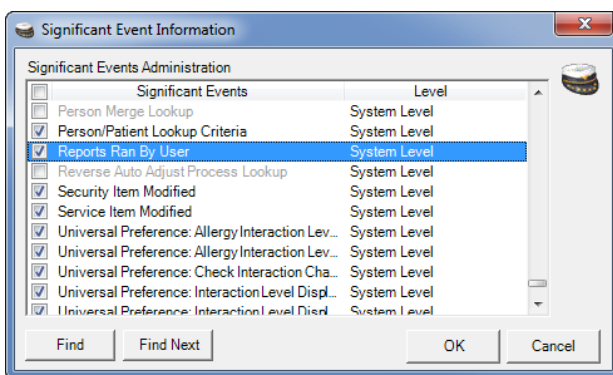


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'Reports Ran By User' Significant Event

'Reports Ran By User' Significant Event:



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Significant Events report example:

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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.



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Provider Master File > Practice tab > Group Information:

Modify Provider Information - Jones, Harrison MD

Demograp | System | Notes | Elig/Ref | CRedegial | Provider T. | **Practice** | Categories | External | EHR | Cbart Trac. | ePrescrib. | Order Mod.

Practice Provider Information

Rendering provider at this practice Supervising provider at this practice Signature on File Supervisor Required

DEA Number State License Number Tax ID Number/SSN Provider Type Specialty

BU2892265 AZ875272587 841111111 Pediatrists

Zone 1 Zone 2 Zone 3 Enable Supervisor Billing

Service Location Contract Subgrouping Bill as Non-Person

Group Information

Payer Name	Provider Nbr	Eff Date	Exp Date	Group Name	Name/Org	Address
<default>	841111111	01/01/2014	11/25/2114	NextGen Medical Group		
Medicaid	841111111	01/01/2014	11/25/2114	NextGen Medical Group		

Modify Provider Practice Payer

Payer Name Name/Organization **Suspended Eff Date**

Medicaid

Provider Number Street

841111111

Effective Date Expiration Date City State Zip

01/01/2014 11/25/2114

Group Name Country County CLIA Number

NextGen Medical Group

SIM Exception Contract Exception CPT4 Provider Nbrs

Taxonomy Code

Claim Value 1 Claim Value 2 Submitter Group Enable Supervisor Billing RTA Enabled

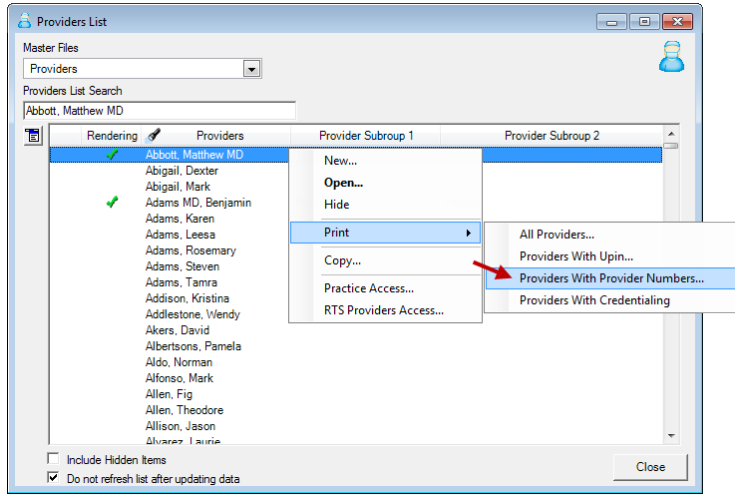
Bill SSN with SY secondary reference

OK Cancel

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Providers With Provider Number report (File Maintenance):

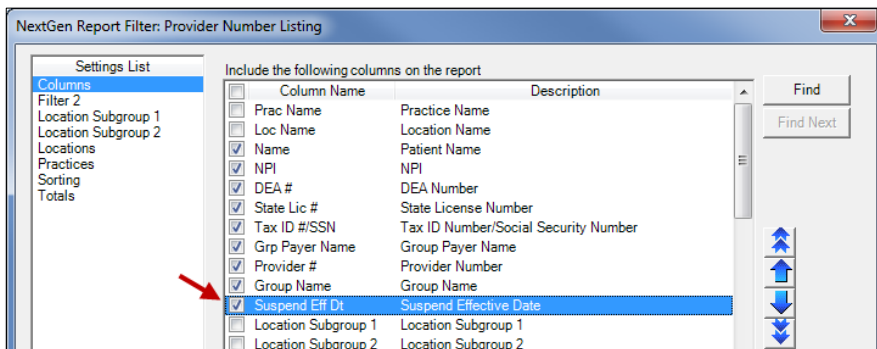


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Suspended Effective Date for Providers

Provider Number Listing report example:



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Suspended Effective Date for Providers

Provider Number Listing report example:

DFA #	State Lic #	Tax ID #/SSN	Specialty	Grp Payer Name	Provider #	Group Name	Suspend Eff Dt
Abbott, Matthew MD							
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

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Enhanced Reports

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



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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

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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
- Resources**
- RTS
- Sliding Fee
- Statements
- Tasks
- Taxes
- Train 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 51 day(s)

Report Paging

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 AR by Encounter w/o Enc Rate
- Insurance Aging Analysis
- Insurance Aging-Age Responsible Balances Only
- Payments
- Payments With Reason Code By Transaction
- Payments - Primary Player

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

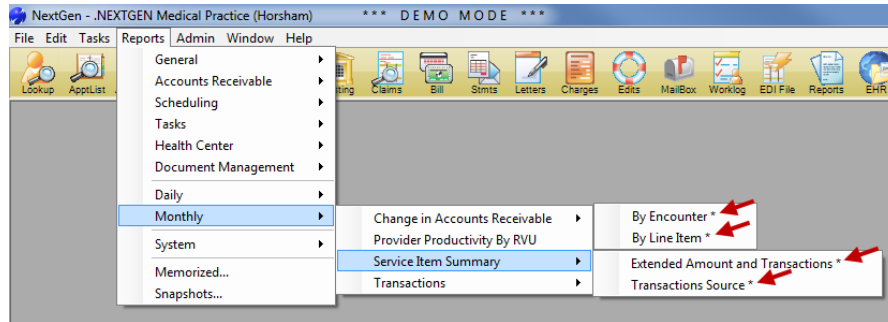
- Apply report type security to reports menu only
- Prompt when report limited by preferred locations

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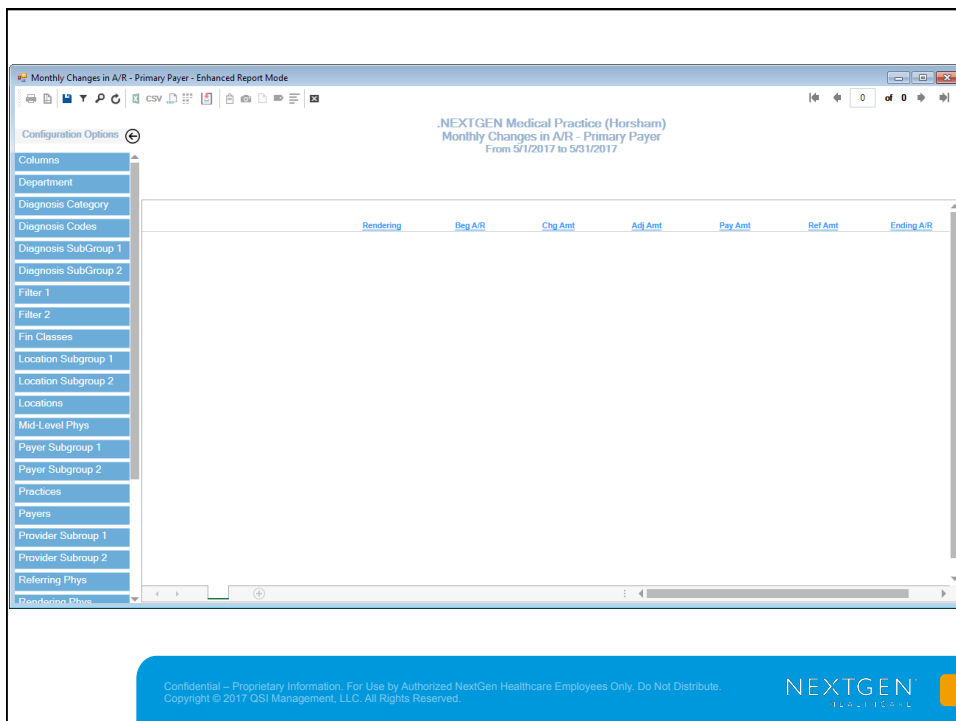
Enhanced Reports

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



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Monthly Changes in A/R - Primary Payer - Enhanced Report Mode

Find: []

Configuration Options

Include the following columns on the report:

Column Name	Description
<input type="checkbox"/>	Column Name
<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
---------	---------	---------	------------

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Monthly Changes in A/R - Primary Payer - Enhanced Report Mode

Find: []

Configuration Options

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
3/1/2017

Adj Amt	Pay Amt	Ref Amt	Ending A/R
---------	---------	---------	------------

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Monthly Changes in A/R - Primary Payer - Enhanced Report Mode

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

5/22/2017 2:12 PM

Configuration Options


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

	Rendering	Beg A/R	Chg Amt	Adj Amt	Pay Amt	Ref Amt	Ending A/R
<unknown>	<No Rendering>	-\$1,011.00	\$0.00	\$0.00	\$0.00	\$0.00	-\$1,011.00
Totals For <unknown>		-\$1,011.00	\$0.00	\$0.00	\$0.00	\$0.00	-\$1,011.00
Ambulatory Surgery Center	Fisher, Steven	\$393.00	\$0.00	\$0.00	\$0.00	\$0.00	\$393.00
	NextGen, Ambulatory S	\$650.00	\$0.00	\$0.00	\$0.00	\$0.00	\$650.00
Totals For Ambulatory Surgery Center		\$1,043.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,043.00
Cardiology Specialty Clinic	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	\$215.00	\$0.00	\$0.00	\$0.00	\$0.00	\$215.00
Totals For Cardiology Specialty Clinic		\$341.00	\$0.00	\$0.00	\$0.00	\$0.00	\$341.00
CHC Medical Clinic	Smith, John	\$110.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00
Totals For CHC Medical Clinic		\$110.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00
Dermatology Specialty Clinic	<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	\$343.00	\$0.00	\$0.00	\$0.00	\$0.00	\$343.00
Totals For Dermatology Specialty Clinic		\$463.00	\$0.00	\$0.00	\$0.00	\$0.00	\$463.00
TOTAL		\$946.00	\$0.00	\$0.00	\$0.00	\$0.00	\$946.00

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PM Tasking Enhancements



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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



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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.



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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: **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; Task Worker, Terry T

Exclude encounter status for applicable auto create actions: [] Exclude encounters in budget status for applicable auto create actions: []

Activate	Action	Override assigned to	Processed
<input checked="" type="checkbox"/>	Guarantor balance is greater than 90 days old from <Encounter Date> and is a credit balance between \$-20.00 and \$-0.01, third party balance of \$0.00	Clear	Nightly
<input type="checkbox"/>	Guarantor balance less than \$0.00	Open...	Nightly

Task Type Options

Guarantor balance is greater than 90 days old from <Encounter Date> and is a credit balance between \$-20.00 and \$-0.01, third party balance of \$0.00

Parameter 1: \$0

Parameter 2: Encounter Date

Parameter 3: -20.00

Parameter 4: -0.01

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

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

Activate

Activate	Action
<input checked="" type="checkbox"/>	Small credit balance write-off using transaction code <Credit Balance Write Off> for guarantor balance

Task Type Options

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

Parameter 1: Credit Balance Write Off

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

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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

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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.

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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
 Parameter 6: BCBS
 Parameter 7: COB 1
 Parameter 8: Billed;Rebill;Unbilled

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

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Task Type Options

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

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

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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

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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).



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

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

Buttons: OK, Cancel

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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 Creation** | 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

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BBP Enhancements



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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

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BBP Console

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



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Practice	Package Name	Enabled?	Status	Last	Next Run Time
NEXTGEN Medical Practice (Horsham)	Bad Debt Process	No	Not Running	5/11/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Billing & Claims	Yes	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Daily Appt List For Dr Abbott	No	Not Running	3/3/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Daily Batch Posting	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Demand Encounter Letters	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	EHR Pending Charges	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	EHR Tasks From EHR BBP Reports	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	EPM Tasks From EHR BBP Reports	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	ERA Directory Import	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	ERA Patient Pay Import	No	Not Running	5/11/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	ICS Automated Directory	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	ICS OCR Engine	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Missing Insurance Cards Report/Tasks	No	Not Running	5/11/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Person Merge	No	Not Running	5/11/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Recall Plan Letters	No	Not Running	7/11/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	Report Snapshot	No	Not Running	12/1/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	RTS Eligibility Requests	No	Not Running	5/2/2017 12:05 PM	
NEXTGEN Medical Practice (Horsham)	SIM Jobs and Jobs Report	No	Not Running	5/11/2017 12:05 PM	

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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 14 Days

Package Name	Job #	Job Name	Server
Billing & Claims	1	Bill Encounters	CLINITECNG8614
Billing & Claims	0	Billing & Claims	CLINITECNG8614
Statements	0	Statements	CLINITECNG8614
Missing Insurance Cards Report/Tasks	1	Missing Insurance Cards Report/Tasks	CLINITECNG8614
Missing Insurance Cards Report/Tasks	0	Missing Insurance Cards Report/Tasks	CLINITECNG8614
Statements	1	Statements	CLINITECNG8614
Statements	0	Statements	CLINITECNG8614
Statements	1	Statements	CLINITECNG8614
Statements	0	Statements	CLINITECNG8614
Bad Debt Process	1	Bad Debt Process	CLINITECNG8614
Bad Debt Process	0	Bad Debt Process	CLINITECNG8614
Bad Debt Process	0	Bad Debt Process	CLINITECNG8614
Bad Debt Process	0	Bad Debt Process	CLINITECNG8614
SIM Library Listing Report	1	SIM Library Listing Report	CLINITECNG8614
SIM Library Listing Report	0	SIM Library Listing Report	CLINITECNG8614
ERA Patient Pay Import	1	ERA Patient Pay Import	CLINITECNG8614
ERA Patient Pay Import	0	ERA Patient Pay Import	CLINITECNG8614
ERA Patient Pay Import	1	ERA Patient Pay Import	CLINITECNG8614
ERA Patient Pay Import	0	ERA Patient Pay Import	CLINITECNG8614

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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 >>

Server	Available?	Running?	Last Service Start Time
CLINITECNG8614	Yes	Yes	5/23/2017 3:49:52 PM

Open...

- Make Available
- Make Unavailable
- Package Chart
- Delete
- Refresh

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

12-May

NG8614

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

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Bill Encounters by Primary Payer

The screenshot shows the 'Job Properties' window with the following details:

- Job number: 1
- Job name: Bill Encounters
- Job type: Bill Encounters (circled in red)
- Run as practice: NextGen Medical Enterprise - NEXTGEN Medical Practice (Horsham)
- Upon completion: Do not notify
- Notification e-mail: jstenger@nextgen.com
- Available NextGen Users and Groups: <Click to select Mail Recipient(s)>
- Settings table:

Setting Name	Value
Bill Status	Rebill; Unbilled
Financial Class	
Primary Payer (circled in red)	Aetna Us Healthcare - PO Box 3915 Allentown, PA 18106
Billable Date From/To	Aflac Ins - 1932 Wynnton Road Columbus, GA 31999
Rendering Physician	AMA Insurance Agency Inc - Medicare Supplement Claim Unit 200 N Lasalle St
Patient Type	American Community Ins - 6901 Seven Mile Road Livonia, MI 48152
Service Location	American Family Ins - PO Box 6000 Madison, WI 53763
Include Records in a Billing Hold?	Anesthesia Payer - PO Box 0546 Easton, PA 18044 USA
Include Records Without Charges?	Arthem Ins Co - P O Box 6199 Indianapolis, IN 46206
	Bankers Life And Casualty - PO Box 68927 Chicago, IL 60666

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Generate Forms, Labels, Letters from Memorized Reports

The screenshot shows the 'Job Properties' window with the following details:

- Job number: 1
- Job name: Daily Appts For Abbott MD
- Job type: Memorized Reports (circled in red)
- Run as practice: NextGen Medical Enterprise - NEXTGEN Medical Practice (Horsham)
- Run using: PM/EHR
- Upon completion: Notify on failed
- Notification e-mail: jstenger@nextgen.com
- Available NextGen Users and Groups: <Click to select Mail Recipient(s)>
- Settings table:

Setting Name	Value
Forms	
Forms 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

The 'Form Template Lookup' dialog box is open, showing the following options:

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

New Job Type: Process Pending Charges

The screenshot shows the 'Job Properties' window for a job named 'EHR Pending Charges' with job type 'Process Pending Charges'. The job is enabled and set to run as 'NextGen Medical Enterprise - NEXTGEN Medical Practice (Horsham)'. The 'On success / failure flow' is configured to 'Go to the next job' if successful and 'Quit package as failure' if it fails. The 'Settings' table is as follows:

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:	

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New Job Type: Unapplied Encounter Credits

The screenshot shows the 'Job Properties' window for a job named 'Unapplied Encounter Credits' with job type 'Unapplied Encounter Credits'. The job is enabled and set to run as 'NextGen Medical Enterprise - NEXTGEN Medical Practice (Horsham)'. The 'On success / failure flow' is configured to 'Go to the next job' if successful and 'Quit package as failure' if it fails. The 'Settings' table is as follows:

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:	

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