



NextGen® Practice Management 5.9 Upgrade Training

Statements and Budget Plans Enhancements

5.9/8.4

Topics to be Reviewed

- › Enhancements to PM Statements
- › Budget Plans Enhancements



Enhancements to PM Statements



Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Statements Enhancements

- › Statement archive processes and preferences
- › Filter statements by Provider and Location Subgrouping
- › Enhanced filter options in Account Profile and Chart to accommodate itemized statements.



Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Archiving Statements



- › Enhanced statement archiving options and performance.
- › Option to archive Budget Statements.
- › Full statement archive (header, body, and footer).
- › Allow reprint of an archived statement.
- › Bad Debt encounters may be included on statements.
- › Option to include all line items on statements.
- › Redesigned Practice Preferences > Statements tab.

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Archiving Statements

- › Enterprise Preferences > General tab:

The screenshot shows the 'Enterprise Preferences' dialog box with the 'General' tab selected. The 'Archive Statements' section is highlighted with a red circle, showing the following options:

- Budget Statement:Statement
- Budget Statement
- Statement
- Create tasks during claim edits
- Create tasks during billing process

The 'Archive Letters' dropdown menu is also highlighted with a red circle, showing the following options:

- Print Reminders Budget(all type)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Archived Statement prior to 5.9:

Statement Archive - (Guarantor)

Page 1 of 1

DATE	DESCRIPTION OF SERVICE	AMOUNT	INSUR BALANCE	PATIENT BALANCE	BALANCE
11/20/14	ENCOUNTER 837 FOR STATEMENT, SUSIE WITH SMITH MD, JOHN				
11/20/14	99395 - Preventive checkup, est, 18-39 yrs	\$180.00		\$180.00	\$180.00
		ENCOUNTER TOTAL	\$180.00	\$0.00	\$180.00
01/14/15	ENCOUNTER 890 FOR STATEMENT, SUSIE WITH BAKER DO, MICHAEL				
01/14/15	89212 - Office/outpatient visit, est, prob foc (Insurance Had Denied This Service)	\$120.00		\$120.00	
01/14/15	80061 - Lipid panel	\$30.00		\$30.00	
01/14/15	36415 - Collect venous blood, venipuncture	\$50.00		\$50.00	
		ENCOUNTER TOTAL	\$200.00	\$0.00	\$200.00

Prac Prefs Default Body Message - 40

ACCOUNT NBR	CURRENT	30 DAYS	60 DAYS	90 DAYS	120 DAYS	TOTAL ACCOUNT BALANCE
000100000000183	\$0.00	\$0.00	\$0.00	\$0.00	\$380.00	\$380.00

MESSAGE:
Prac Prefs Default Footer Message - 255

PLEASE PAY THIS AMOUNT: \$380.00

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Archived Statement as of 5.9:

Make Checks Payable To:
NEXTGEN Medical Practice (Horsham)
56214 Remittance Road
Darby, PA 19023

STATEMENT

ADDRESSSEE:
Miss Susie S. Statement
1522 N Stalament St
Glenosok, AZ 85302

IF PAYING BY CREDIT CARD, FILL OUT BELOW

CHECK CARD USING FOR PAYMENT

American Express Discover MasterCard Visa

CARD NUMBER: 000100000000183

SIGNATURE: [Signature]

STATEMENT DATE: 05/24/2017

PAY THIS AMOUNT: \$380.00

ACCOUNT NBR: 000100000000183

SHOW AMOUNT PAID HERE \$

REMIT TO:
NEXTGEN Medical Practice (Horsham)
56214 Remittance Road
Darby, PA 19023
(215) 657-7010

PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT
Prac Prefs Default Header Message - 40

Please check box if above address is incorrect or insurance information has changed and indicate change(s) on reverse side.

Date	Description Of Service	Amount	Insurance Balance	Patient Balance	Balance
11/20/14	ENCOUNTER 837 FOR STATEMENT, SUSIE WITH SMITH MD, JOHN				
11/20/14	99395 - Preventive checkup, est, 18-39 yrs	\$180.00		\$180.00	\$180.00
		ENCOUNTER TOTAL	\$180.00	\$0.00	\$180.00
01/14/15	ENCOUNTER 890 FOR STATEMENT, SUSIE WITH BAKER DO, MICHAEL				
01/14/15	89212 - Office/outpatient visit, est, prob foc (Insurance Had Denied This	\$120.00		\$120.00	
01/14/15	80061 - Lipid panel	\$30.00		\$30.00	
01/14/15	36415 - Collect venous blood, venipuncture	\$50.00		\$50.00	
		ENCOUNTER TOTAL	\$200.00	\$0.00	\$200.00

Prac Prefs Default Body Message - 40
Your patient balance is more than 120 days past due! Please pay within 10 days or you will go to collections.

Account Number	Current	30 Days	60 Days	90 Days	120 Days	Total Account Balance
000100000000183	\$0.00	\$0.00	\$0.00	\$0.00	\$380.00	\$380.00

Reprinting Archived Statements

Account Profile - Statement, Susie B
Statement, Susie B Account Number: 183

Properties | Encounters Detail | Acct Summary | Credit Card on File | Budget | **Notes**

Account Notes

Folder	Date	Insurance Balance	Patient Balance	Print/Export/Electronic	Creator
Account Notes	05/12/2017 3:00 P	\$0.00	\$380.00	Export	BBP
Alerts	02/08/2017 2:25 P	\$0.00	\$380.00	Export	Stenger, Stacy
Forms	10/25/2016 7:40 A	\$0.00	\$380.00	Export	Stenger, Stacy
History (34)	12/15/2015 3:07 P	\$0.00	\$380.00	Export	Stenger, Stacy
Letters	10/21/2015 1:44 P	\$0.00	\$380.00	Export	Stenger, Stacy
Notes	02/12/2015 10:56 A	\$0.00	\$380.00	Export	Stenger, Stacy
Statements (10)	11/20/2014 11:51 A	\$0.00	\$30.00	Print	Stenger, Stacy
Budget Statements	11/12/2014 2:30 P	\$0.00	\$30.00	Export	Stenger, Stacy
Tasks (31)	07/15/2014 2:13 P	\$0.00	\$30.00	Export	Stenger, Stacy
	03/04/2014 2:40 P	\$0.00	\$30.00	Print	Stenger, Stacy

Reprint...
Open...

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Reprinting Archived Statements

Account Profile - Statement, Susie B
Statement, Susie B Account Number: 183

Properties | Encounters Detail | Acct Summary | Credit Card on File | Budget | **Notes**

Account Notes

Folder	Date/Time	Creator	Description
Account Notes	05/24/2017 9:59 A	Stenger, Stacy	Account accessed
Alerts	05/24/2017 9:59 A	Stenger, Stacy	Statements Reprinted - Account Nbr: 183 Stenger, Stacy reprinted the statement - Date/Time: 5/24/2017 9:59:28 AM Patient
Forms	05/24/2017 9:59 A	Stenger, Stacy	Account accessed
History (38)	05/24/2017 9:45 A	Stenger, Stacy	Account accessed
Letters	05/24/2017 9:11 A	Stenger, Stacy	Account accessed
Notes	05/12/2017 3:00 P	BBP	Statements Exported - Account N
Statements (10)	04/06/2017 1:44 P	Stenger, Stacy	Account accessed
Budget Statements	02/08/2017 2:28 P	Stenger, Stacy	Statement Print Date Reset
Tasks (31)	02/08/2017 2:25 P	Stenger, Stacy	Statements Exported - Account N
	10/25/2016 7:40 A	Stenger, Stacy	Statements Exported - Account N
	06/30/2016 10:58 A	Stenger, Stacy	Account accessed
	06/30/2016 10:53 A	Stenger, Stacy	Account accessed
	06/30/2016 10:39 A	Stenger, Stacy	Account accessed
	06/30/2016 10:25 A	Stenger, Stacy	Account accessed

History

Subject
Statements Reprinted - Account Nbr: 183 Stenger, Stacy Reprinted Th

Note Entry

Before: N/A
After: Stenger, Stacy reprinted the statement - Date/Time: 5/24/2017 9:59:28 AM Patient Balance: \$380.00 Insurance Balance: \$0.00 Credit Balance: \$0.00 Original Statement Print: 5/12/2017 3:00:27 PM Mode: Demand

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Archived Budget Statements

Account Profile - Budget, Betty B Account Number: 218

Properties | Encounters Detail | Acct Summary | Credit Card on File | **Budget** | Notes

Active	Type	Start Date	Due Date	Payment Amt	Num of Payment	Last Letter Date	Delinquent Date	Prelist Date
Y	Perpetual	11/21/2016	11/28/2016	\$300.00	3	05/24/2017	05/24/2017	
N	Non-Perp...	09/07/2016	10/27/2016	\$50.00	3	11/21/2016		
N	Perpetual	08/14/2014	08/19/2014	\$200.00	0	12/17/2015	03/23/2015	12/17/2015

History

Date/Time	Creator	Description
05/24/2017 9:47 A	Stenger, Stacy	Budget Statement Printed: Delinquent - For - Betty Budget - Due Date changed from 20161128 to 20161128
11/30/2016 2:36 P	Stenger, Stacy	Budget Letters Printed: (Name) First Budget Letter - Non-Perpetual
11/21/2016 11:31 A	Stenger, Stacy	Budget Plan Established: Budget Type:Perpetual - Start Date:11/21/2016 - Due Date:11/28/2016 - Payment Cycle:Every 30 Days - Beg Bal: \$...
11/21/2016 11:31 A	Stenger, Stacy	Budget Plan Dis...
11/21/2016 10:59 A	Stenger, Stacy	Budget Letters Printed
09/07/2016 2:26 P	Stenger, Stacy	Budget Plan Establis...
12/17/2015 2:03 P	Stenger, Stacy	Budget Letters Export...
02/23/2015 7:54 A	Stenger, Stacy	Budget Letters Print...

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute. Copyright © 2017 QSI Management, LLC. All Rights Reserved. **NEXTGEN** HEALTHCARE

Archived Budget Statements

Account Profile - Budget, Betty B Account Number: 218

Properties | Encounters Detail | Acct Summary | Credit Card on File | Budget | **Notes**

Account Notes

Date	Insurance Balance	Patient Balance	Print/Export/Electronic	Creator
05/24/2017 9:47 A	\$0.00	\$0,310.00	Export	Stenger, Stacy

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute. Copyright © 2017 QSI Management, LLC. All Rights Reserved. **NEXTGEN** HEALTHCARE

Practice Preferences > Statements tab (prior to 5.9)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Practice Preferences > Statements tab (as of 5.9)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Bad Debt Encounters on Statements

> Practice Preferences > Statements tab:

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Make Checks Payable To:

.NEXTGEN Medical Practice (Horsham)
56214 Remittance Road
Darby, PA 19023

STATEMENT

ADDRESSEE:

Miss Susie B Statement
1822 N Statement St
Glendale, AZ 85302

Please check box if above address is incorrect or insurance information has changed and indicate change(s) on reverse side.

IF PAYING BY CREDIT CARD, FILL OUT BELOW

CHECK CARD USING FOR PAYMENT

American Express Discover Mastercard Visa

CARD NUMBER _____ CVV _____ AMOUNT _____

SIGNATURE _____ EXP. DATE _____

STATEMENT DATE	PAY THIS AMOUNT	ACCOUNT NBR
05/24/2017	\$380.00	0001000000000183

SHOW AMOUNT PAID HERE \$

REMIT TO:

.NEXTGEN Medical Practice (Horsham)
56214 Remittance Road
Darby, PA 19023

(215) 657-7010

PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT
Prac Prefs Default Header Message - 40

Date	Description Of Service	Amount	Insurance Balance	Patient Balance	Balance
11/20/14	ENCOUNTER 837 FOR STATEMENT, SUSIE WITH SMITH MD, JOHN				
11/20/14	89395 - Preventive checkup, est, 18-39 yrs	\$180.00		\$180.00	
05/24/17	ZBad Debt Credit	-180.00			
05/24/17	ZBad Debt Debit	\$180.00			
	ENCOUNTER TOTAL	\$180.00	\$0.00	\$180.00	\$180.00
01/14/15	ENCOUNTER 890 FOR STATEMENT, SUSIE WITH BAKER DO, MICHAEL				
01/14/15	89212 - Office/outpatient visit, est, prob foc (insurance Had Denied This ...	\$120.00		\$120.00	
01/14/15	80061 - Lipid panel	\$30.00		\$30.00	
01/14/15	36415 - Collect venous blood, venipuncture	\$50.00		\$50.00	
	ENCOUNTER TOTAL	\$200.00	\$0.00	\$200.00	\$200.00

Prac Prefs Default Body Message - 40

Your patient balance is more than 120 days past due! Please pay within 10 days or you will go to collections.

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Include all Line Items on Statements

› Practice Preferences > Statements tab:

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

Acct Minimum Statement Amt
From To
 Acct Patient balance only
 Acct Patient + insurance balance

Show only encounters with patient balance
 Insurance payments generate statements
 Display credit balances on statement
 Include outsourced charges
 Include bad debt encounters
 Include all line items
 Exclude last/history payment
 Exclude void charge/transaction activity

Detail Statement Options
 Display detail information on statement
 Display encounter nbr on detail info stmt
 Display full patient name on detail info stmt

Print One Statement
For Each Practice Statement Sort By

Default header message
Prac Prefs Default Header Message - 40

Default body message
Prac Prefs Default Body Message - 40

Default footer message
Prac Prefs Default Footer Message - 255

Acceptable Payment Parameters
 Minimum flat dollar payment amount
 Acceptable % of self-pay balance

Statement History Options
 Update last statement dates
 Update dates on forced statements
 Upload export file to NextGenEDI
 Upload APC file to NextGenEDI

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Filter Statements by Subgrouping

- › Statements can be generated for multiple provider and/or location groupings at once.
- › Also available via the BBP.



Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Statement Options

General | Enterprise | Practice | **Location** | Provider

Location

- Memorial Hospital Inpatient
- Willow Grove Hospital Inpatient
- Willow Grove Hospital Outpatient

Include ALL records of this type

Filtering on location will affect the statement date for any encounters with multiple location charges.

Location Subgroup 1

Available

Hospital
Location Subgroup 1
Clinic East
Northeast
Northwest
Other Facility
South

Included

Location	SubGrp 1
Memorial Hospital Inpatient	Hospital
Willow Grove Hospital Inpatient	Hospital
Willow Grove Hospital Outpatient	Hospital

Options

Location Location Subgroup 1 Location Subgroup 2

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute. Copyright © 2017 QSI Management, LLC. All Rights Reserved. NEXTGEN HEALTHCARE

Statement Options

General | Enterprise | Practice | Location | **Provider**

Last Name	First	Middle
Peters	Rita	Gen Surg
Richards	Tina	Ortho
Warren	David	Ortho

Include ALL records of this type

Filtering on provider will affect the statement date for any encounters with multiple provider charges.

Provider Subgroup 1

Available

Orthopaedics
Provider Subgroup 1
Dermatology
Family Practice
Internal Medicine
Mid-Level
OB/GYN
Ophthalmology
Pediatrics

Included

Last Name	First	Middle	SubGrp 1
Peters	Rita	Gen Surg	General Surgery
Richards	Tina	Ortho	Orthopaedics
Warren	David	Ortho	Orthopaedics

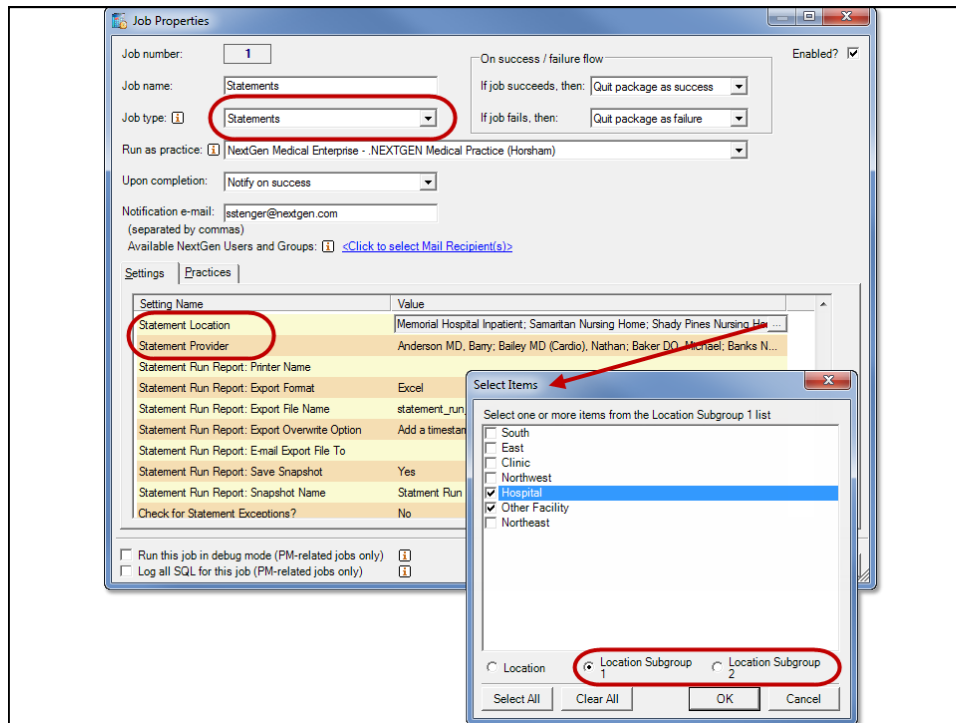
Search Method

All Providers Rendering Practice Related

Options

Provider Provider Subgroup 1 Provider Subgroup 2

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute. Copyright © 2017 QSI Management, LLC. All Rights Reserved. NEXTGEN HEALTHCARE



Itemized Statements

- › Enhanced filter options in Account Profile > Encounters Detail tab and in the Patient Chart > Financial tab.
- › Print an itemized statement based on the filtered results.
- › Advanced Audit tracking for printed itemized statements.



Patient Chart > Financial tab > Filter button:

Patient Chart - Statement, Susie B (Statements)

Miss Susie B, Statement (F) DOB: 02/02/1982 (35 years) Person Number: 1724 Medical Record Number: 555 Other ID Number:

Contact: (623) 889-8889 (D) Patient Status: Email: Privacy Dt: 04/09/2017
 Contact Preference: Preferred Language: Language:
 Primary Care Provide... Primary Care Provide...

Financial Information

Date	Encounter Nb	Charges	Payments	Adj/Refund	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Case	Pa
01/14/2015	890	\$30.00	-\$50.00					\$150.00			
11/20/2014	837	\$180.00							\$180.00		
01/20/2014	640	\$307.00	-\$217.50	-\$89.50							

Filter Print Encounters: 3

Summary Information

Charges	Unapplied	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Chart Bal
\$687.00	\$0.00	-\$267.50	-\$89.50	\$0.00	\$0.00	\$0.00	\$150.00	\$180.00	\$330.00

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
 Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
 HEALTHCARE

Account Profile > Encounters Detail tab > Filter button:

Account Profile - Statement, Susie B

Statement, Susie B Account Number: 183

Encounters Detail

Summary Information

Total Balance	Charges	Payments	Adj/Refunds	Ins 1	Ins 2	Ins 3	Self	Bad Debt	Account Unapplied Credit	Encounter Unapplied Credit
\$330.00	\$380.00	-\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$180.00	\$0.00	\$0.00

Guarantor Information

Name/Enc Nbr	Date	Description	CPT	Qty	DX
Statement, Susie B					
890	01/14/2015				
837	11/20/2014				

Filter Print Patients: 1

Exclude Encounters in History

Confidential - Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
 Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
 HEALTHCARE

Patient Chart Filter button options:

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Account Profile Filter button options:

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Employees Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Plans Enhancements



- › Budget Details include additional information regarding budget dates and correspondence sent.
- › Ability to send the first budget correspondence on demand (print agreement).
- › Ability to select which transaction sources will apply towards the budget plan.

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Details

- › Budget Details window prior to 5.9:

Budget Details - Adaleer, Grace

Budget Type: Recurring Non-Perpetual Budget Status: **NORMAL**

Budget Start Date: 05/17/2016 Payment Cycle: Every 30 Days

Budget Due Date: 05/17/2016 Total # Payments: 4

Payment Amount: 71.25

Last Letter Sent On: 07/26/2016

Beginning Budget Amount: \$285.00
Remaining Budget Amount: \$283.00

Balance From Encounter: \$283.00
Charges Covered by Ins: \$0.00
Total Patient Balance: **\$283.00**

Encounter Information

Enc/Inv Nbr	Encounter Date	Prelisted	Patient Name	Ins Bal	Pat Bal
120	10/23/2007	N	Adaleer, Grace	\$0.00	\$133.00
123	10/26/2007	N	Adaleer, Grace	\$0.00	\$100.00
319	01/17/2007	N	Adaleer, Grace	\$0.00	\$50.00

Who/When

Re-establish Apply Close

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Details

- › Budget Details window as of 5.9:

Budget Details - Budget, Betty B

Budget Type: **C** Perpetual Budget Status: **DELINQUENT**

Budget Create Date: 11/21/2016 Payment Cycle: Every 30 Days

Next Payment Due Date: 11/28/2016 Total # Payments: 3 Balance From Encounter: \$4,155.00

Payment Amount: 300 -- Charges Covered by Ins: \$ 0.00

= Total Patient Balance: **\$4,155.00**

Last Letter Type: Delinquent

Last Letter Sent On: 05/24/2017 Beginning Budget Amount: \$1,277.00

Last Delinquent Date: 05/24/2017 Remaining Budget Amount: \$4,155.00

Encounter Information

Enc/Inv Nbr	Encounter Date	Prelisted	Patient Name	Ins Bal	Pat Bal
731	03/10/2014	N	Budget, Betty	\$ 0.00	\$877.00
732	05/21/2014	N	Budget, Betty	\$ 0.00	\$274.00
733	05/25/2014	N	Budget, Betty	\$ 0.00	\$126.00
1218	11/21/2016	N	Budget, Betty	\$ 0.00	\$2,878.00

Who/When Print Agreement Re-establish Apply Close

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Dates

Budget Date columns updated on the following reports:

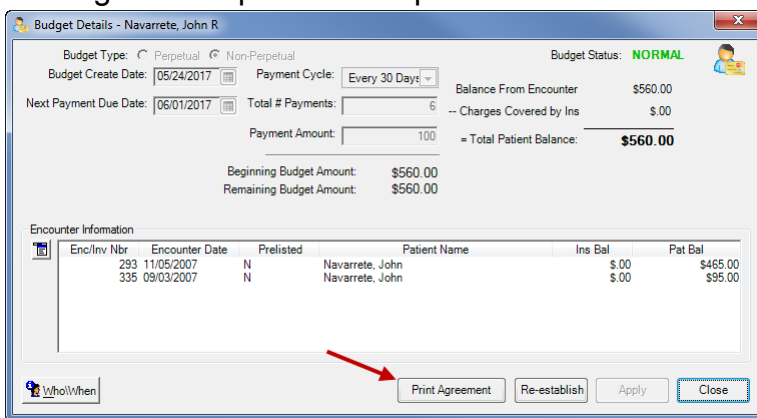
- › Accounts Receivable > Collections > Account Summary
- › Accounts Receivable > Budget Letter Analysis
(By Pre-List Status, By Delinquent Status, By Missed Payment Status, By Underpayment Status)
- › Accounts Receivable > Budget Plans (General Budget Plans, Pre-Listed Plans, Re-establish Plans)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Print Agreement

- › Print Agreement prints correspondence on demand

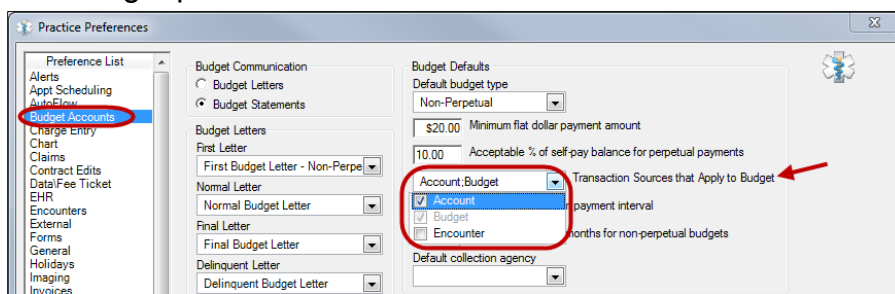


Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Transaction Sources for Budget Payments

- › Practice Preferences > Budget Accounts tab
- › Select which Transaction Source(s) would apply towards budget plans



Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Plan Payment Scenarios

Budget Plan Details	
Budget Create Date	May 15
Total Patient Balance	\$1000.00
Payment Amount	\$100.00
Total # of Payments	10
Payment Cycle	Every 30 days
Next Payment Due Date	June 1
Practice Preferences	
Transaction Sources that Apply to Budget	Account, Budget, Encounter
Days in Advance of Scheduled Due Date to Print Letters	14
Allowable Number of Days to Receive Payment from Due Date	15
Number of Days after Delinquency before Pre-List	15
Number of Days after Pre-List before Termination	7



Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Plan Payment Scenarios

> Scenario # 1: Regular Payment

Date	Action
May 18	First letter/statement prints (14 days before due date)
May 23	Guarantor mails \$100 payment (correct budget payment amount)
May 28	Practice receives and posts \$100 payment as an Account Source transaction to budget encounters
June 1	Budget payment due. System reviews source types enabled within Practice Preferences – Budget Accounts and identifies transactions to budget encounters with matching criteria. Budget is current (payment received May 28 meets criteria)
June 16	End of grace period. Budget is current (payment received May 28)
June 18	Normal letter/statement prints (14 days before due date)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Plan Payment Scenarios

> Scenario # 2: Multiple Source Payments

Date	Action
May 18	First letter/statement prints (14 days before due date)
May 23	Guarantor mails \$50 payment
May 26	Guarantor applies \$50 via Patient Portal (Account source)
May 26	Practice receives and posts \$50 Patient Portal payment as an Account Source transaction to budget encounters
May 28	Practice receives and posts \$50 payment as a Budget Source transaction to budget encounters
June 1	Budget payment due. System reviews source types enabled within Practice Preferences – Budget Accounts and identifies transactions to budget encounters with matching criteria. Budget is current (payments received May 26 Portal Account payment + May 28 Budget payments = correct budget payment amount)
June 16	End of grace period. Budget is current (payments received May 26 th and 28 th)
June 18	Normal letter/statement prints (14 days before due date)

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

Budget Plan Payment Scenarios

> Scenario # 3: Underpayment

Date	Action
May 18	First letter/statement prints (14 days before due date)
May 23	Guarantor remits \$75 (underpayment)
May 28	Practice receives and posts payment as an Encounter source to budget encounters.
June 1	Budget payment due. System reviews source types enabled within Practice Preferences – Budget Accounts and identifies transactions to budget encounters with matching criteria. Budget is NOT current (payment received May 28 does not meet budget criteria)
June 2	Underpayment payment letter/statement prints
June 7	Guarantor remits the remaining budget payment amount of \$25 (becomes current)
June 14	Practice receives and posts the payment before the end of the grace period as a budget payment source transaction to budget encounters.
June 16	End of grace period. Budget is current. (\$75 posted May 28 th as encounter source to budget encounters + \$25 posted June 14 th as budget source = correct budget payment amount.
June 18	Normal payment letter/statement prints

Confidential – Proprietary Information. For Use by Authorized NextGen Healthcare Clients Only. Do Not Distribute.
Copyright © 2017 QSI Management, LLC. All Rights Reserved.

NEXTGEN
HEALTHCARE

